
PeopleSoft HCM 9.2: ePay

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PeopleSoft HCM 9.2: ePay
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Preface

Understanding the PeopleSoft Online Help and PeopleBooks

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

PeopleSoft Hosted Documentation

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

Locally Installed Help

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

In addition, if you locally install the PeopleSoft Online Help, you can use any search engine for full-text searching. Your installation documentation includes instructions about how to set up Oracle Secure Enterprise Search for full-text searching.

See *PeopleTools 8.53 Installation* for your database platform, "Installing PeopleSoft Online Help." If you do not use Secure Enterprise Search, see the documentation for your chosen search engine.

Note: Before users can access the search engine on a locally installed help website, you must enable the Search portlet and link. Click the Help link on any page in the PeopleSoft Online Help for instructions.

Downloadable PeopleBook PDF Files

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

Common Help Documentation

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

- Application Fundamentals

- Using PeopleSoft Applications

Most product lines 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 line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, 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: PeopleSoft 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.

<i>Typographical Convention</i>	<i>Description</i>
Bold	Highlights PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Highlights field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. Italics also highlight references to words or letters, as in the following example: Enter the letter <i>O</i> .
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.
Monospace font	Highlights a PeopleCode program or other code example.
... (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.

<i>Typographical Convention</i>	<i>Description</i>
{ } (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.
⇒	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)

Access to Oracle Support

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

Documentation Accessibility

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

Using and Managing the PeopleSoft Online Help

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

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

PeopleSoft HCM Related Links

[PeopleSoft Information Portal on Oracle.com](#)

[My Oracle Support](#)

[PeopleSoft Training from Oracle University](#)

[PeopleSoft Video Feature Overviews on YouTube](#)

[HCM Abbreviations](#)

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Send us your suggestions Please include release numbers for the PeopleTools and applications that you are using.

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Chapter 1

Getting Started with ePay

ePay Overview

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

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

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

ePay Business Processes

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

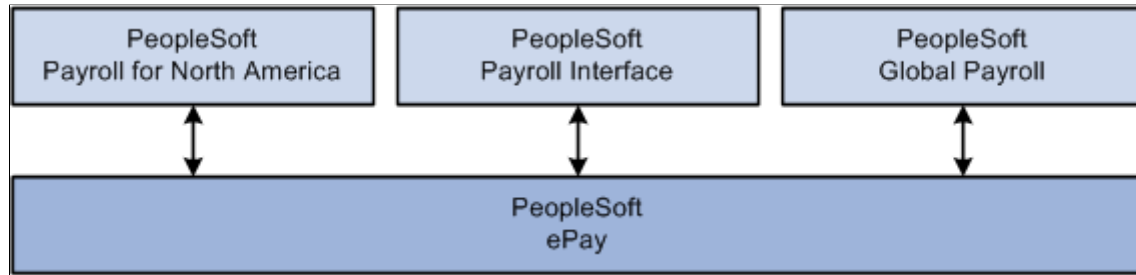
- [Manage pay information for Payroll Interface.](#)
- [Manage pay information for Payroll for North America.](#)
- [Manage pay information for Global Payroll.](#)
- [\(JPN\) Reviewing and Updating YEA Data.](#)

ePay Integrations

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

Image: ePay Integration Flow with Other PeopleSoft Applications

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



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

ePay Navigation

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

ePay Roles and Security

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

Related Links

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

ePay Implementation

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

Other Sources of Information

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

See:

- *PeopleSoft HCM 9.2: Application Fundamentals*
- *PeopleTools: PeopleSoft Setup Manager*

Chapter 2

Managing Pay Information for Payroll Interface

Understanding ePay Transactions for Payroll Interface

You can use these ePay transactions if your organization licenses PeopleSoft Payroll Interface:

- Direct Deposit (PY_IC_DIR_DEP).

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

- 3rd Party Pay Inquiry (PI_IC_CHK_RVW).

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

- W-2 Reissue Request (PY_IC_W2).

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

- W-4 Tax Information (PY_IC_W4).

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

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

- Voluntary Deductions (PY_IC_VOL_DEDS).

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

Managing and Viewing Payroll Information

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

Pages Used to Manage and View Payroll Information

Page Name	Definition Name	Navigation	Usage
Direct Deposit	PY_IC_DD_LIST	Self Service, Payroll and Compensation, Direct Deposit, Direct Deposit	View current direct deposit information.
Add Direct Deposit Change Direct Deposit	PY_IC_DD_DATA	Select the Add Account or Edit button on the Direct Deposit page.	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	EO_DEL_CONFIRM	Select the Delete button on the Direct Deposit page.	Delete direct deposit information.
Pay Statement Print Option	PY_IC_DD_SUPP	Select the Pay Statement Print Option link on the Direct Deposit page.	Employees indicate whether they want a printed copy of the pay statement mailed to their home address. The default is set to yes.
(USA) W-4 Tax Information	PY_IC_W4_DATA	Self Service, Payroll and Compensation, W-4 Tax Information, W-4 Tax Information	<p>Change tax data. If you work for multiple companies, select the employer for whom you want to change tax information. Workflow associated with this page sends an email notification to the employee verifying the W-4 details.</p> <p>The W-4 Tax Information self-service transaction does not work when WWW_AUTHENTICATION is used. With WWW_AUTHENTICATION, users receive a message on the final confirmation page that their password is invalid and are unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.</p>
Pay Inquiry	PI_IC_CHK_DATA	Self Service, Payroll and Compensation, 3rd Party Pay Inquiry, Pay Inquiry	For Payroll Interface users only, employees view paycheck information for any confirmed pay period.
(USA) W-2 Reissue Request	PY_IC_W2_DATA	Self Service, Payroll and Compensation, W-2 Reissue Request, W-2 Reissue Request	<p>Employees request to have a new W-2 form sent to their home or work address. Workflow associated with this page generates an email confirmation to the employee.</p>

Page Name	Definition Name	Navigation	Usage
Voluntary Deductions	PY_IC_DED_LIST	Self Service, Payroll and Compensation, Voluntary Deductions, Voluntary Deductions	View a list of current voluntary deductions.
Add Voluntary Deduction Change Voluntary Deduction	PY_IC_DED_DATA	Select the Add Deduction or Edit button on the Voluntary Deductions page.	Add, change, or stop voluntary deductions.
(USF) Add Distribution Information	W3_GVT_PY_ALOT_IC	Select the Distribution Information link on the Add Voluntary Deduction page or the Change Voluntary Deduction page.	Enter details of the account from which the voluntary deduction is taken.

Chapter 3

Managing Pay Information for Payroll for North America

Understanding ePay Transactions for Payroll for North America

You can use these ePay transactions if your organization licenses PeopleSoft Payroll for North America:

- View Paycheck (PY_IC_PAY_INQ).

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

- Paycheck Modeler USA ()

Employees can simulate a paycheck online to answer their own *what if* scenarios.

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

Employees grant or withdraw consent to receive year-end forms or slips electronically rather than on paper. Workflow sends email confirmation of changes in consent status.

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

Employees view and print year-end forms or slips. Workflow notifies employees by email when the forms are ready for viewing.

- Direct Deposit (PY_IC_DIR_DEP).

Employees display, add, change, or discontinue direct deposit instructions.

- Voluntary Deductions (PY_IC_VOL_DEDS).

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

- W-2 Reissue Request (PY_IC_W2).

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

- W-4 Tax Information (PY_IC_W4).

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

Setting Up and Viewing Self-Service Paychecks

This topic provides an overview of the View Paycheck transaction, lists prerequisites, and lists the pages used to view self-service paychecks.

Pages Used to View Self-Service Paychecks

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Paycheck	PY_IC_PI_LIST	Self Service, Payroll and Compensation, View Paycheck, View Paycheck	<p>View a list of paychecks by check date. Depending on setup options, the page can list PDF paychecks and historical checks that are not in PDF format.</p> <p>By selecting the check date link, employees access PDF paychecks in a new window and view historical paychecks on the View Paycheck page.</p>
View Paycheck	PY_IC_PI_DATA	Select a check date link for a non-PDF paycheck on the View Paycheck page (PY_IC_PI_LIST).	<p>View historical paychecks that are not in PDF format.</p> <p>View paychecks in accessibility mode even if the paycheck would otherwise be available in PDF format.</p>
View Self Service Paycheck	PY_SSP_ADMIN_VIEW PY_SSP_VIEW_DATA	<ul style="list-style-type: none"> Payroll for North America, Payroll Processing USA, Produce Payroll, Review Self Service Paycheck, View Self Service Paycheck Payroll for North America, Payroll Processing USF, Produce Payroll, Review Self Service Paycheck, View Self Service Paycheck 	<p>Replicate and view self-service view of employee paychecks.</p> <p>Payroll Administrators can replicate the employees' self-service paychecks in an online view to resolve questions raised by employees about their paychecks.</p> <p>The page lists both PDF paychecks and historical checks that are not in PDF format. Administrators can view all paychecks, regardless of the availability date specified for employee viewing of PDF checks.</p> <p>Selecting the check date link displays PDF paychecks in a new window and displays historical paychecks on another View Self Service Paycheck page.</p>

Page Name	Definition Name	Navigation	Usage
View Self Service Paycheque	PY_SSP_ADMIN_VIEW PY_SSP_VIEW_DATA	Payroll for North America, Payroll Processing CAN, Produce Payroll, Review Self Service Paycheque, View Self Service Paycheque	<p>Replicate and view self-service view of employee paycheques.</p> <p>Payroll Administrators can replicate the employees' self-service paycheques in an online view to resolve questions raised by employees about their paycheques.</p> <p>The page lists both PDF paycheques and historical checks that are not in PDF format. Administrators can view all paycheques, regardless of the availability date specified for employee viewing of PDF checks.</p> <p>Selecting the check date link displays PDF paycheques in a new window and displays historical paycheques on another View Self Service Paycheque page.</p>

Understanding the View Paycheck Transaction

If you want to display self-service paychecks in PDF, you must use 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 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*

PDF and Historical Paychecks

The ePay View Paycheck transaction displays paychecks and direct deposit advice forms that you create in Payroll for North America release 9.0 and later in PDF only. When you define self-service paycheck options on the Paycheck Options Table page, you must specify whether to display only the PDF paychecks or to display both the PDF paychecks and the historical paychecks.

Paycheck Availability

On the Paycheck Options table, indicate the default timing of when paychecks should be available for viewing in the ePay self-service View Paycheck transaction. Indicate whether paychecks should be available on the check date or specify the number of days before or after the check date. You can override this value on the run control page when you run the check and advice PDF creation processes. You can specify paycheck availability differently for various company and pay group combinations.

Note: If you have enabled viewing of historical paychecks, 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 triggers the paycheck availability option for the PDF paycheck, after which the checks are not viewable until the availability date that you specify. For this reason, we recommend that you run the BI Publisher PDF creation process immediately after confirming the payroll.

Self-Service Paychecks for Accessibility Users

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

Self-Service Paycheck and Advice Templates

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

Related Links

"Setting Up to Print and View Paychecks with BI Publisher (BIP) (*PeopleSoft HCM 9.2: Payroll for North America*)"

Prerequisites

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

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

Note: We recommend running the BI Publisher PDF creation processes immediately after confirming the pay run.

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

Related Links

"Setting Up to Print and View Paychecks with BI Publisher (BIP) (*PeopleSoft HCM 9.2: Payroll for North America*)"

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

Setting Up Paycheck Modeling

This topic provides an overview of Paycheck Modeler, and discusses how to:

- Set up paycheck modeling controls.
- Define paycheck modeling pay group parameters.
- Define earnings to use in Paycheck Modeler.
- Define deductions to use in Paycheck Modeler.

This topic also provides an administrative overview of the employee's self-service paycheck modeling page-by-page process.

Pages Used to Set Up Paycheck Modeling

Page Name	Definition Name	Navigation	Usage
Company Controls	PY_MOD_ADM_COMPANY	Set Up HCM, Product Related, Payroll for North America, Paycheck Modeling USA, Company Controls	Specify specify system performance options for paycheck modeling.
Pay Group Parameters – Access Controls	PY_MOD_ADM_PAYGRP	Set Up HCM, Product Related, Payroll for North America, Paycheck Modeling USA, Pay Group Parameters, Access Controls	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	PY_MOD_ADM_ERNINGS	Set Up HCM, Product Related, Payroll for North America, Paycheck Modeling USA, Pay Group Parameters, Earnings Definition	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	PY_MOD_ADM_DEDCTNS	Set Up HCM, Product Related, Payroll for North America, Paycheck Modeling USA, Pay Group Parameters, Deduction Definition	For each eligible company and pay group, define the deductions that will be presented for selection by employees using the Paycheck Modeler when adding deductions to the model paycheck.

Understanding Paycheck Modeler

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

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

Note: Self-service Paycheck Modeler is not available to USF or CAN employees.

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

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

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

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

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

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

Company Controls Page

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

Navigation

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

Image: Company Controls page

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

The screenshot shows the 'Company Controls' page for 'Global Business Institute'. It features two main sections: 'Control Parameters' and 'Performance Limits'. In the 'Control Parameters' section, the 'BI Publisher Report Definition' is set to 'PYMDLCHK'. The 'Performance Limits' section contains two input fields: 'Maximum Concurrent Processes' set to '100' and 'Maximum Daily Calculations' set to '25'.

Control Parameters

BI Publisher Report Definition

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

Performance Limits

Maximum Concurrent Processes

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

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

Maximum Daily Calculations

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

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

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

Pay Group Parameters - Access Controls Page

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

Navigation

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

Image: Pay Group Parameters - Access Controls page

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

Start Date	Start Time	End Date	End Time

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

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

Disable During Calc or Confirm

Select this check box to prevent all users (administrators and self-service employees in the defined company and pay group) from accessing Paycheck Modeler when regular 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.

Restore Access

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

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

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

Access Options

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

Enable, Disable Fully, or Disable Temporarily

Select the option to control access to Paycheck Modeler:

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

If a user tries to access Paycheck Modeler when it is disabled, they will receive a message indicating the modeler is unavailable and instructing them to contact the Payroll Department if they require information.

- *Disable Temporarily* Disables access to Paycheck Modeler for both payroll administrators and self-service employees for a pre-determined period of time. When this option is selected, the Disabled Periods group box becomes available for data entry. You must enter parameters there to identify the disablement period.

If a user tries to access Paycheck Modeler when the functionality is temporarily disabled, they will receive a

message indicating that the modeler is currently unavailable, and instructing them to try again later:

Disabled Periods

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

Pay Group Parameters - Earnings Definition Page

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

Navigation

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

Image: Pay Group Parameters - Earnings Definition page

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

Company GBI Global Business Institute Pay Group KU1 US Weekly

Load Earnings Program

Paycheck Modeler Earnings Personalize Find First 1-16 of 16 Last

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

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

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

Load Earnings Program

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

Paycheck Modeler Earnings

Earnings Code and Description

Enter the code and description for each earnings code that you want employees in the eligible company and pay group to be able to add to their model paycheck. Only the earnings codes that are attached to the Earnings Program table associated with the specified pay group are available for selection.

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

Pay Group Parameters - Deduction Definition Page

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

Navigation

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

Image: Pay Group Parameters - Deduction Definition page

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

Access Controls | Earnings Definition | **Deduction Definition**

Company: GBI Global Business Institute Pay Group: KU1 US Weekly

Populate From Data Source

Load General Deductions Benefit Program Load Benefit Program

Paycheck Modeler Deductions Personalize | Find | First 1-29 of 29 Last

*Plan Type	Benefit Program	Benefit Plan	Description	*Deduction Code	Description	*Deduction Class	Description
General Dedu				KUCRUN	Credit Union	A	After-Tax
General Dedu				KUHLTH	Health Club Dues	A	After-Tax
General Dedu				KUPARK	Parking Deduction	A	After-Tax
General Dedu				KUUNON	Union Dues	A	After-Tax
General Dedu				KUUNON	United Way	A	After-Tax
Medical	KU1	KUJMO1	Medical HMO Plan 1	KUMED9	Medical HMO Plan 1	B	Before-Tax
Medical	KU1	KUJMO2	Medical HMO Plan 2	KUMED9	Medical HMO Plan 2	B	Before-Tax
Medical	KU1	KUJMO3	Medical HMO Plan 3	KUMED9	Medical HMO Plan 3	B	Before-Tax
Medical	KU1	KUMED	Enhanced Medical Plan	KUMED9	Enhanced Medical Plan	B	Before-Tax
Dental	KU1	KUDEN1	Standard Dental Plan	KUDEN9	Standard Dental Plan	B	Before-Tax
Dental	KU1	KUDEN2	Enhanced Dental Plan	KUDEN9	Enhanced Dental Plan	B	Before-Tax
Vision	KU1	KUVIS1	Standard Vision Plan	KUVIS9	Vision Plan	B	Before-Tax

Populate from Data Source

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

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

Load General Deductions

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

Benefit Program and Load Benefit Program

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

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

Paycheck Modeler Deductions

Plan Type, Benefit Program, and Benefit Plan

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

Deduction Code and Description

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

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

The deduction code descriptions that appear here are from the Deduction Table and are used on the actual paychecks (PAY003), direct deposit advices (DDP003), and in Paycheck Modeler. Overriding a description here overrides it only for Paycheck Modeler. Deduction codes with the same description must be modified to uniquely identify each deduction code. All

deduction codes should be reviewed and updated for clarity and ease of use by self-service employees.

Deduction Class

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

Understanding the Self-Service Paycheck Modeling Process

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

Paycheck Modeling VFO

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



[PeopleSoft Paycheck Modeling](#)

Common Controls

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

Clear All Amounts

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

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

Clear Amounts

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

Edit

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

Next and Previous

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

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

Exit

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

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

for the current pay calendar appear.

Paycheck Modeler - Start Page

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

When the employee selects the Yes, I have reviewed and agree to the terms and conditions above check box, the system determines if the employee has one or multiple jobs. If the employee 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 above 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](#) 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 (*PeopleSoft HCM 9.2: Payroll for North America*) page, 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).

Paycheck Modeler does use the FLSA/Alt OT calculation (*PeopleSoft HCM 9.2: Payroll for North America*) process.

Earnings must be greater than zero to move forward.

Paycheck Modeler - Deduction Page

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

The additional deductions that are available to add to paycheck modeling are based on the deductions defined on the Pay Group Parameters - Deductions 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 (*PeopleSoft HCM 9.2: Payroll for North America*)(garnishment specifications) component.

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

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

Paycheck Modeler - Results Page

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

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

Employees can:

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

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

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

Managing Consent for Electronic Year-End Forms

This topic provides an overview of employee consent and discusses how to:

- Set up self-service viewing.
- Enable self-service consent and year-end forms.
- Set up consent and notification text.
- Monitor employee consent status.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tax Form BI Publisher Options	PY_YE_XMLP_OPTION	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Tax Form BI Publisher Options, Tax Form BI Publisher Options Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Tax Form BI Publisher Options, Tax Form BI Publisher Options 	Specify the tax year, the tax form, the report definitions, and the URL for the table in which the XML data is stored for producing the self-service forms.
Year End Form Options	PY_YE_OPTION_CAN PY_YE_OPTION_USA	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Options, Year End Form Options Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Options, Year End Form Options 	Enable self-service year-end forms or slips. This step is required to enable employees to grant consent to receive electronic forms. Also specify the availability date for each form and tax year.
Year End Form Text	PY_YE_NOTES	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Text, Year End Form Text Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Text, Year End Form Text 	Set up consent and notification text to be used on the consent page or in email notifications sent to employees.
T4/T4A Consent Form W-2/W-2c Consent Form	PY_SS_CONSENT_CAN PY_SS_CONSENT_USA	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, T4/T4A Consent, T4/T4A Consent Form Self Service, Payroll and Compensation, W-2/W-2c Consent, W-2/W-2c Consent Form 	Employees request or withdraw consent to receive electronic year-end slips or forms. Appropriate text appears on the page based on the employee's current status. After saving an update on the page, the employee must enter password verification. After verification, the system displays confirmation of the submit and triggers email confirmation of the change.

Page Name	Definition Name	Navigation	Usage
Review T4/T4A Consent Status Review W-2/W-2c Consent Status	PY_FORM_STAT_CAN PY_FORM_STAT_USA	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Review T4/T4A Consent Status, Review T4/T4A Consent Status 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 	Monitor employee consent status. Review the history of each employee's consent and email notification status.
Year End Consent Status Report	RUNCTL_TAX900CS	Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Year End Consent Status Report, Year End Consent Status Report	Run the TAX900CS report, which lists employees' most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.
Year End Consent Status Report	RUNCTL_CTX900CS	Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Year End Consent Status Report, Year End Consent Status Report	Run the CTX900CS report, which lists employees' most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.
Reset T4/T4A Consent Status Reset W-2 Consent Status	PY_RC_RESCON_CAN PY_RC_RESCON_USA	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Reset T4/T4A Consent Status, Reset T4/T4A Consent Status Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Reset W-2 Consent Status, Reset W-2 Consent Status 	Reset consent status to <i>Reset Consent</i> for all employees, selected companies, or selected employees. Enter run parameters for the Reset Form Consent Application Engine process (PYYE_RESCAN or PYYE_RESUSA).

Understanding Employee Consent

You must secure employee consent before you can substitute self-service viewing and printing of electronic year-end forms or slips in place of printed forms. Among other requirements, you must also provide the opportunity for employees to withdraw their consent. All employees who do not have a valid

consent on file at the time you generate the year-end slips must be provided with their documents in paper format.

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

The Payroll for North America and ePay applications provide:

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

For example, use this process to reset the consent status of terminated employees to ensure the printing of paper year-end forms.

See [Consent Reset Due to Termination](#)

- PDF year-end forms creation processes that generate year-end forms and slips.

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

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

This table describes the availability of year-end forms in each country by employee consent status:

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

Country	Consent Status	Form Availability
Canada	Consented	The PDF year-end form creation process suppresses the printing of the employee's paper T4 or T4A. The employee views and prints the year-end slip through self service.
Canada	No Consent Received Withdrawn Reset by Employer	The PDF year-end form creation process prints the employee's paper T4 or T4A. The employee cannot view or print the year-end slip 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.

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 of each year.

Related Links

[Delivered Workflows for ePay](#)

Tax Form BI Publisher Options Page

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

Navigation

Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Tax Form BI Publisher Options, Tax Form BI Publisher Options or Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Tax Form BI Publisher Options, Tax Form BI Publisher Options

Image: Tax Form BI Publisher Options page

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

Tax Form BI Publisher Options

Tax Year 2012
Last Update Date/Time 08/31/2012 4:02:57PM Updated By PS

Tax Form Options Find | View All First 1 of 9 Last

*Tax Form ID W-2VI

XML Data Files

URL Identifier PY_YE_US_XML_DATA W2W2C XML DATA

Filing Instructions

URL Identifier PY_YEAR_END_ATTACH Year End Filing Instructions

Attached File PYW2VI12_INSTR.pdf

Add Attachment Delete Attachment View Attachment

Report Definitions Personalize | Find | View All First 1-4 of 4 Last

Report Name	Report Description	Template ID	Template Description	Copy Type	Burst?	Batch Size
PYW2VI12N_CO	W2VI Company Print Form 2012	PYW2VI12N_CO_1	W2VI Employer Copy	Company Copy	<input type="checkbox"/>	
PYW2VI12N_EE	W2VI Employee Print Form 2012	PYW2VI12N_EE_1	W2VI Employee Print Copy	Employee Copy	<input type="checkbox"/>	
PYW2VI12N_GV	W2VI Government Form 2012	PYW2VI12N_GV_1	W2VI Employer Copy	Government Copy	<input type="checkbox"/>	
PYW2VI12S_EE	W2VI Employee SS Form 2012	PYW2VI12S_EE_1	W2VI Employee SS Copy	Employee Copy	<input checked="" type="checkbox"/>	

XML Data Files

URL Identifier

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

Report Definitions

Report Name

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

Batch Size

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

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

Year End Form Options Page

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

Navigation

Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Options, Year End Form Options or Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Options, Year End Form Options

Image: Year End Form Options page

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

Year End Form Options

W-2 Reporting Company: GBI Global Business Institute

Self Service Options: Find | View All First 5 of 5 Last

Tax Year: 2011

Last Update Date/Time: 06/12/2012 4:48:17PM Updated By: SAMPLE

Electronic Forms Option

☒ Enable Electronic Year End Forms In Self Service

Tax Form Options: Find | View All First 1 of 1 Last

Tax Form ID: W-2

Self Service Availability

Availability Date: 05/27/2012 Availability Notification

Date Notified

Report Name	Report Description	Template ID	Template Description	W-2/W-2c Type	Burst?	Batch Size
PYW211N_CO	W2 Company Print Form 2011	PYW211N_CO_1	W2 Employer Copy	Company Copy	<input type="checkbox"/>	
PYW211N_EE	W2 Employee Print Form 2011	PYW211N_EE_1	W2 Employee Print Copy	Employee Copy	<input type="checkbox"/>	
PYW211N_GVT	W2 Government Print Form 2011	PYW211N_GVT_1	W2 Employer Copy	Government Copy	<input type="checkbox"/>	
PYW211S_EE	W2 Employee SS Form 2011	PYW211S_EE_1	W2 Employee SS Copy	Employee Copy	<input checked="" type="checkbox"/>	

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

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

Tax Year

Create a new row each tax year.

Enable Electronic Year End Forms in Self Service Select this check box to enable the W-2 company or T4/T4A company to provide BI Publisher PDF forms or slips in the ePay self-service transaction.

If this check box is not selected, employees cannot enter or withdraw consent or view 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 T4/T4A Consent Status process or the Reset W-2 Consent Status process.

Note: (USA) Self-service year-end form functionality is available only for companies set up with tax report type *W-2 or Territories* on the Company Table - Default Settings: Tax Details page.

Tax Form ID Enter all valid tax form IDs for the W-2 company or T4/T4A company.

Availability Date After generating the individual PDF forms, enter an availability date when employees can view the forms in self-service.

Availability Notification After entering an availability date, select this button to trigger workflow to send email notification of form availability to employees who are eligible to receive the electronic form. Set up the email text on the Year End Form Text page.

Note: Before you select this button, verify that the availability date in the email notification is correct.

Date Notified After you select the Availability Notification button and trigger the workflow email notification, the system enters the current date.

Report Definitions Displays a list of valid report definitions based on the tax year and tax form ID entered. This is for information only. Maintain this information on the Tax Form BI Publisher Options page.

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

Year End Form Text Page

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

Navigation

Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Text, Year End Form Text or Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Text, Year End Form Text

Image: Year End Form Text page

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

Text Types

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

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

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

Additional Page Elements

Usage

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

Text

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

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

Consent Instruction Requirements

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

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

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

- Contact information.

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

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

Navigation

Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Review T4/T4A Consent Status, Review T4/T4A Consent Status or Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Review W-2/W-2c Consent Status, Review W-2/W-2c Consent Status.

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

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

The screenshot shows the 'Review W-2/W-2c Consent Status' page for employee Douglas Lewis (Employee ID KU0001). The page displays consent information for an effective date of 11/26/2012, with an effective sequence of 0. The last update date/time is 11/26/2012 6:43:59PM, and it was updated by user. The consent status is set to 'No consent received. Print paper forms.' The email notification status shows 'Consent' as 'Consent Granted' and 'Form' as 'W-2 Form Available' and 'W-2c Form Available'.

Consent Information	
Effective Date	11/26/2012
Effective Sequence	0
Last Update Date/Time	11/26/2012 6:43:59PM
Updated By User	

Consent Status	
<input checked="" type="radio"/> No consent received. Print paper forms. <input type="radio"/> Consent granted. Produce electronic forms. <input type="radio"/> Consent withdrawn. Print paper forms. <input type="radio"/> Consent reset by employer. Print paper forms.	

Email Notification Status	
Consent <input type="checkbox"/> Consent Granted <input type="checkbox"/> Consent Withdrawn <input type="checkbox"/> Consent Reset	Form <input type="checkbox"/> W-2 Form Available <input type="checkbox"/> W-2c Form Available

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

Consent Status

Review the selected employee's consent status for each effective-dated row.

Email Notification Status

Review the email notifications that have been sent to the employee by workflow for each row of consent status.

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

Viewing Year-End Forms

This topic lists prerequisites and lists the pages that employees and administrators use to view year-end forms.

Pages Used to View Year-End Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View T4/T4A Slips	PY_SS_YE_FORM_CAN PY_TAX_LIST_CAN	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, View T4/T4A Slips, View T4/T4A Slips Payroll for North America, Year-End Processing CAN, Create Slip Data, View T4/T4A Slips, View T4/T4A Slips 	<p>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.</p> <p>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.</p> <p>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.</p>

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View W-2/W-2c Forms	PY_SS_YE_FORM_USA PY_TAX_LIST_USA	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, View W-2/W-2c Forms, View W-2/W-2c Forms Payroll for North America, U.S. Annual Processing, Create W-2 Data, View W-2/W-2c Forms, View W-2/W-2c Forms 	<p>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.</p> <p>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.</p> <p>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.</p>

Prerequisites

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

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

See Year-end processing instructions issued with the tax update posted on [My Oracle Support](#) in October of each year.

3. Specify the year-end form options.

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

See Year-end processing instructions issued with the tax update posted on [My Oracle Support](#) in October of each year.

4. Complete the employee consent process.

See [Managing Consent for Electronic Year-End Forms](#).

5. Create year-end form data and then create the forms using the PDF year-end form creation processes.

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

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

For more information, see the product documentation for:

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

Setting Up and Viewing Direct Deposit

This topic provides an overview of the direct deposit transaction and lists the pages used to set up and view direct deposit.

Pages Used to Set Up and View Direct Deposit

Page Name	Definition Name	Navigation	Usage
Direct Deposit	PY_IC_DD_LIST	Self Service, Payroll and Compensation, Direct Deposit, Direct Deposit	Employees view current direct deposit information.
Add Direct Deposit Change Direct Deposit	PY_IC_DD_DATA	Select the Add Account or Edit button on the Direct Deposit page.	Employees add or change direct deposit information.
Delete Confirmation	EO_DEL_CONFIRM	Select the Delete button on the Direct Deposit page.	Employees delete direct deposit information.
Pay Statement Print Option	PY_IC_DD_SUPP	Select the Pay Statement Print Option link on the Direct Deposit page.	Employees indicate whether they want a printed copy of the pay statement mailed to their home. The default is yes.

Understanding the Direct Deposit Transaction

To set up direct deposit, employees enter:

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

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

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

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

Note: (USA and USF) Direct deposit add or edit changes are limited to one transaction per day. You can add or edit information for multiple direct deposit accounts in a single self-service transaction, but once you save the changes and exit the Direct Deposit page, 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.

Viewing and Updating Voluntary Deductions

This topic provides an overview of voluntary deductions, describes the prerequisite, and lists the pages used to set up and view voluntary deductions.

Pages Used to Set Up and View Voluntary Deductions

Page Name	Definition Name	Navigation	Usage
Voluntary Deductions	PY_IC_DED_LIST	Self Service, Payroll and Compensation, Voluntary Deductions, Voluntary Deductions	View a list of current voluntary deductions.
Add Voluntary Deduction Change Voluntary Deduction	PY_IC_DED_DATA	Select the Add Deduction or Edit button on the Voluntary Deductions page.	Add, change, or stop voluntary deductions.
(USF) Distribution Information	W3_GVT_PY_ALOT_IC	Select the Distribution Information link on the Add Voluntary Deduction page or the Change Voluntary Deduction page.	Enter details of the account from which the voluntary deduction is taken.

Understanding Voluntary Deductions

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

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

Prerequisite

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

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

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

This topic provides overviews of the W-4 transaction and the W-2 reissue transactions and lists the pages used to manage W-4 and reissued W-2 forms.

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

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
(USA) W-4 Tax Information	PY_IC_W4_DATA	Self Service, Payroll and Compensation, W-4 Tax Information, W-4 Tax Information	Employees can change tax data.
(USA) W-2 Reissue Request	PY_IC_W2_DATA	Self Service, Payroll and Compensation, W-2 Reissue Request, W-2 Reissue Request	Employees request a new W-2 form and select the delivery address.

Understanding the W-4 Transaction

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

Using the self-service transaction, employees can:

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

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

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

Understanding the W-2 Reissue Transaction

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

Chapter 4

Managing Pay Information for Global Payroll

Understanding ePay Transactions for Global Payroll

You can use these ePay transactions if your organization has licensed PeopleSoft Global Payroll:

- Personal Bank Accounts (GP_SS_EE_BANK).
Employees can enter and maintain their personal bank account information.
- Pay Distribution Instructions (GP_SS_EE_NPD).
Employees can define their net pay distribution requirements.
- View Payslip (GP_SS_EE_PSLP).
Employees can review paycheck information for earnings, taxes, deductions, and net pay distribution.
- (GBR) View Payslip GBR (GPGB_PSLIP_SS_PNLG).
Employees can review payslips (PeopleSoft Global for the United Kingdom only).
- (JPN) Year-End Adjustment (YEA) Data (GPJP_YEA_SSERVICE).
Employees can update their year-end adjustment data for YEA calculations (PeopleSoft Global Payroll for Japan only).

Setting Up Personal Bank Account Information

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

This topic provides an overview of how to define personal bank account information and discusses how to set up banking instructions.

Pages Used to Define Personal Bank Account Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Bank Table	BANK_EC	Set Up HCM, Common Definitions, Banking, Banks, Bank Table	Set up general bank information that is needed to enable employee self-service transactions.

Page Name	Definition Name	Navigation	Usage
Branch Table	BANK_BRANCH_EC	Set Up HCM, Common Definitions, Banking, Banks, Branch Table	Set up general bank branch information that is needed to enable employee self-service transactions.
Banking Instructions	GP_SS_NPD_CNF_INST	Set Up HCM, Product Related, ePay, Payee Bank Acct / Net Pay Dist, Banking Instructions	Create instructions that you want employees to see on pages in the Personal Bank Accounts component. These instructions override any default messages in the Message Catalog.

Understanding How to Define Personal Bank Account Information

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

1. Before employees can use the self-service pages to enter personal bank information, the payroll administrator must set up general bank and bank branch information by using the Bank Table and Branch Table pages in PeopleSoft HCM.
2. If you want to replace default instructions that appear in the Personal Bank Accounts component (GP_SS_EE_BANK) with instructions that are specific to your company, define these instructions on the Banking Instructions page.

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

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

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

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

Related Links

"Understanding Bank and Bank Branch Setup (*PeopleSoft HCM 9.2: Application Fundamentals*)"

"Defining Banks and Branches (*PeopleSoft HCM 9.2: Global Payroll*)"

[Updating Personal Bank Account Information](#)

Banking Instructions Page

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

Navigation

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

Image: Banking Instructions page

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

Bank Instructions

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

Branch Instructions

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

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

(GBR) Building Society Instructions

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

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

Updating Personal Bank Account Information

This topic lists the pages used to update personal bank account information.

Pages Used to Update Personal Bank Account Information

Page Name	Definition Name	Navigation	Usage
Personal Bank Accounts	GP_SS_EE_BANK	Self Service, Payroll and Compensation, Personal Bank Accounts, Personal Bank Accounts	<p>View any previously defined accounts and delete or edit earlier entries.</p> <p>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.</p> <p>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.</p>
Bank Location and Account Type	GP_SS_EE_BANK_CTRY	Select the Add a New Account button on the Personal Bank Accounts page.	Enter the country where the bank is located and select the account type.
(GBR) Select a Building Society	GP_SS_EE_BANK_BRC	On the Bank Location and Account Type page, enter <i>United Kingdom</i> in the Bank Location field and <i>Building Society Roll Number</i> in the Account Type field, then select the Continue button.	<p>(GBR) Select a building society.</p> <p>The system displays this page only when you select <i>GBR</i> in the Bank Location field and <i>Building Society Roll Number</i> in the Account Type field on the Bank Location and Account Type page. Otherwise, the Select a Bank page appears.</p>
Select a Bank	GP_SS_EE_BANK_BNK	Select the Continue button on the Bank Location and Account Type page.	Select a bank.
Select a Branch	GP_SS_EE_BANK_BRC	On the Select a Bank page, select a bank for which branches have been defined.	<p>Select a bank branch.</p> <p>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.</p>

Page Name	Definition Name	Navigation	Usage
Add Account Details	GP_SS_EE_BANK_DET	<ul style="list-style-type: none"> Select a bank for which branches have not been defined on the Select a Bank page. Select a bank branch on the Select a Branch page. Select a building society on the Select a Building Society page. 	<p>Add additional account details, such as the account name, account number, and currency code.</p> <p>(GBR) Enter building society roll name and roll number.</p> <p>(BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Enter the international bank account number.</p> <p>(USA) If the bank is in the United States, indicate whether funds are actually going to a non-US bank.</p>
(USA) Funds going to a non U.S. Bank	GP_SS_EE_BNK_HELP	Select the Help icon next to the Funds going to a non U.S. Bank check box on the Add Account Details page.	Explains the use of the Funds going to a non U.S. Bank field.
Save Confirmation	GP_SS_SAVE_CONFIRM	Select the Save button on the Add Account Details page.	Confirm that the personal bank account information is saved.
Edit Account Details	GP_SS_EE_BANK_DET	Select the Edit button on the Personal Bank Accounts page.	Edit account details, such as the account name, account number, and currency code.
Delete Confirmation	GP_SS_DEL_CONFIRM	Select the Delete button on the Personal Bank Accounts page.	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.

This topic provides an overview of how to set up payment instructions and distribution details and discusses how to define run type information.

Pages Used to Define Payment Instructions and Distribution Details

Page Name	Definition Name	Navigation	Usage
Bank Table	BANK_EC	Set Up HCM, Common Definitions, Banking, Banks, Bank Table	Set up general bank information that is needed to enable employee self-service transactions.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Branch Table	BANK_BRANCH_EC	Set Up HCM, Common Definitions, Banking, Banks, Branch Table	Set up general bank branch information that is needed to enable employee self-service transactions.
Run Types	GP_SS_NPD_CONFIG	Set Up HCM, Product Related, ePay, Payee Bank Acct / Net Pay Dist, Run Types	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, Payee Bank Acct / Net Pay Dist, Run Types

Image: Run Types page

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

Run Type

Select the run type for which you want to allow or prevent employees from entering distribution instructions.

Only run types with a calculation type of payroll are listed. The Global Payroll security settings determine whether you can select run types designated for all countries or only selected countries.

If you do not select run types on this page, employees see the following message when they access the Pay Distribution Instructions component: "There are no payroll types set up in the system which you can access. Please contact your Payroll Administrator."

If you select only one run type, employees do not have to choose a run type before they define their distribution amounts and percentages.

If you select more than one run type, employees must select a run type before they enter distribution instructions.

Default Election

Enables you to define the distribution options that are selected by an employee for a particular run type as a default distribution. The default works as follows: When you run the banking process, the system looks at the run type that is defined on the pay calendar. It then tries to find the net distribution selections that the employee has made for that run type in the Pay Distribution Instructions component. If the current run type does not have distribution instructions defined for it, the system uses the distribution amounts and percentage corresponding to the row marked as default election.

If you choose a default run type, when employees go to the Payment Instruction Details page to enter their distribution amounts and percentages for that run type, the Use Payment Instructions for All Payroll Runs check box is selected. This lets employees know that the distributions that they make for that run type are used as the default election. Employees can override this default and set any other defaults that they want by deselecting the check box.

Net Pay Transaction Locked

Select this check box if you want to temporarily prevent employees from entering distribution instructions for this run type. For example, you might want to select this option while you are running the banking process.

Doing so causes the following message to appear after the name of the run type in the Pay Distribution Instructions component: "Locked by Payroll Administrator – please try later."

Entering Payment Instructions and Distribution Details

This topic provides an overview of how to enter payment instructions and distribution details and lists the pages used to enter payment instructions and distribution details.

Pages Used to Enter Payment Instructions and Distribution Details

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select Job Title	GP_SS_EE_NPD_JOB	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, Pay Distribution Instructions, Select Job Title Self Service, Payroll and Compensation, Personal Bank Accounts, Personal Bank Accounts <p>Select the Pay Distribution Instructions link on the Personal Bank Accounts page.</p>	<p>Select a job for which you want to enter distribution and payment instructions.</p> <p>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.</p>

Page Name	Definition Name	Navigation	Usage
Select Type of Payroll	GP_SS_EE_NPD_RT	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, Pay Distribution Instructions, Select Type of Payroll Select a job title on the Select Job Title page. Self Service, Payroll and Compensation, Personal Bank Accounts, Personal Bank Accounts <p>Select the Pay Distribution Instructions link on the Personal Bank Accounts page.</p>	<p>Select the run type for which you want to enter payment instructions and define distribution amounts and percentages.</p> <p>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.</p>
Pay Distribution Instructions	GP_SS_EE_NPD	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, Pay Distribution Instructions, Pay Distribution Instructions Select a job title on the Select Job Title page. Select a payroll type on the Select Type of Payroll page. Self Service, Payroll and Compensation, Personal Bank Accounts, Personal Bank Accounts <p>Select the Pay Distribution Instructions link on the Personal Bank Accounts page.</p>	View, delete, or edit any previously defined distributions and payment instructions, and add new distributions and payment instructions.
Select Distribution Method	GP_SS_EE_NPD_PAY	Select the Add a Distribution Instruction button on the Pay Distribution Instructions page.	Select a payment method for which you want to distribute amounts or percentages.
Pay Distribution Instructions - Personal Bank Accounts	GP_SS_EE_BANK_SUMM	Select <i>Bank Transfer</i> in the Distribution Methods column on the Select Distribution Method page.	Select a bank account for which you want to distribute amounts or percentages.

Page Name	Definition Name	Navigation	Usage
Distribution Instruction Details	GP_SS_EE_NPD_DET	<ul style="list-style-type: none"> Select <i>Cash</i>, <i>Check</i>, or <i>Postal Order</i> in the Distribution Methods column on the Select Distribution Method page. Select a bank account on the Pay Distribution Instructions - Personal Bank Accounts page. Select the Edit button on the Pay Distribution Instructions page. 	<p>Specify the priority and the amount or percentage of funds to be paid for the selected payment method.</p> <p>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.</p> <p>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.</p>
Delete Confirmation	GP_SS_DEL_CONFIRM	Select the Delete button on the Pay Distribution Instructions page.	Delete a payment instruction.

Understanding How to Enter Payment Instructions and Distribution Details

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

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

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

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

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

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

2. Uses the Pay Distribution Instructions component to:

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

Each user can specify one cash and one check distribution. The priority order determines the order of payment during processing.

- Specifies the priority order for each disbursement.

The priority order determines the order of payment during processing.

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

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

Setting Up View Payslip

To set up View Payslip, use the Self Service Payslip Options (GP_SS_PSLP_OPTIONS_GBL) component.

This topic provides an overview of the View Payslip transaction setup, lists prerequisites, and discusses how to:

- Identify the FTP URL used for storing PDF files.
- Enable online payslip printing.

Pages Used to Set Up View Payslip

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs, URL Maintenance	Stores URL addresses.
Self Service Payslip Options	GP_SS_PSLP_OPTIONS	Set Up HCM, Product Related, ePay, Self Service Payslip Options, Self Service Payslip Options	Enable online payslip printing using the View Payslip self-service transaction.

Understanding the View Payslip Transaction Setup

You can make employees' payslips available in PDF format in the View Payslips transaction (GP_SS_EE_PSLP). The system creates the PDF files when the Create Self Service Payslips Application Engine process (GP_EPAY) runs. This process is included as part of the PS Job process that you run from each country extension's payslip creation page.

As part of the payslip generation process, the system launches a series of processes that:

- Gather information and create a temporary file.
- Create a PDF file that is used to print the payslips.
- Split the PDF file into individual PDF files for each employee.

These individual PDF files are stored on a secure server.

Important! When scheduling a process request for a payslip job, the following values can be used with ePay in the Type and Format fields on the Process Scheduler Request page: *None* and *None* (defaults to Web and PDF), *Web* and *PDF*, or *File* and *PDF*. If using *File* and *PDF*, do *not* use a custom output destination on the Process Scheduler Request page.

To set up the View Payslip transaction:

1. Define the URL identifier for the server that will store the individual PDF files.

The Create Self Service Payslips process (GP_EPAY) uses this URL to identify where the PDF files are to be stored.

You can use the default, GP_SS_PSLP_FTP, or you can create your own URL identifier.

2. Define the parameters for the View Payslip transaction.

Using the Self Service Payslip Options page, you define:

- The default URL identifier.
- Whether to suppress printed payslips as a default.
- When payslip information is available for employees to view.

- Whether to override payslip information availability dates for one or more run types.

Prerequisites

Before you can set up the View Payslips transaction, you must:

1. Set up a secure FTP server to store the individual PDF payslip files.
2. Obtain the FTP URL from your environments engineers.
3. Set up payslips.

Each country extension has instructions on how to set up payslips for that country.

URL Maintenance Page

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

Navigation

PeopleTools, Utilities, Administration, URLs, URL Maintenance

Image: URL Maintenance page

This example illustrates the fields and controls on the URL Maintenance page.

The screenshot shows the 'URL Maintenance' page with the following fields and values:

- URL Identifier:** GP_SS_PSLP_FTP
- Description:** Payslip File attachments
- URLID:** ftp://
- Comments:** URL used to attach Payslip PDF Files for Self Service. Add your ftp location in the URL field. Example: ftp://<userid>:<password>@<machine name>/PAYSLIPS/

At the bottom of the form, there is a link labeled 'URL Properties'.

Important! If you are creating your own URL identifier to use instead of GP_SS_PSLP_FTP, you must update the Self Service Payslip Options page to reflect the new URL identifier.

URL

Enter the address for the location of the stored individual PDF files. Your environments engineers can provide this address.

Note: The format of your URL may not match the format of the example provided in the Comments field. The format of the address is dependent on the operating system you are using. You should contact your system administrator for the exact format of the URL.

Self Service Payslip Options Page

Use the Self Service Payslip Options page (GP_SS_PSLP_OPTIONS) to enable online payslip printing using the View Payslip self-service transaction.

Navigation

Set Up HCM, Product Related, ePay, Self Service Payslip Options, Self Service Payslip Options

Image: Self Service Payslip Options page

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

Default Payslip URL Identifier

Enter the URL identifier that contains the FTP URL where the PDF files for this country are stored.

The default URL identifier is GP_SS_PSLP_FTP. If you created your own URL identifier, you must make sure to enter that URL identifier here.

Default Payslip Print Options

Suppress Payslip Printing

Select this check box if you do not want payslips to be printed.

Note: If your country extension does not support the ability to suppress the printing of payslips, you should leave this check box deselected.

This check box serves as the default selection for your organization. It does not override existing individual payee settings.

ePay Availability Options

Enabled in Self Service

Select this check box if you want employees to control whether they receive a printed copy of their payslip, overriding the default selection that you enter on this page. If selected, the Paper Payslip Instructions group box displays on the View Payslips page.

Note: If your country extension does not support the ability to suppress the printing of payslips on an individual payee basis, you should leave this check box deselected.

Days after Payment Date

Specify when the payslip is available for viewing using View Payslip. The date determined using this information is the earliest date that the payslip is available; once this date has passed, the payslip is always available. You can enter:

- Zero to indicate that the payslips are available on the payment date.
- A number greater than zero to indicate the number of days after the payment date that payslips are available.
- A negative number to indicate the number of days before the payment date that payslips are available.

Payslip Availability By Run Type

Run Type and Days after Payment Date

If you want a run type to have a different payslip availability date than the default that is specified in the ePay Availability Options group box, enter the run type and then specify the number of days before or after the payment date that you want payslips to be available.

Viewing Payslips Online

This topic provides an overview of online payslip views and discusses how to review employee payslips.

Pages Used to View Payslips Online

Page Name	Definition Name	Navigation	Usage
View Payslips	GP_SS_EE_PSLP	Self Service, Payroll and Compensation, View Payslips, View Payslips	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	Global Payroll and Absence Mgmt, Payslips, Review Self Service Payslips, Review Self Service Payslips	The payroll administrator reviews employee payslips to respond to employee questions. Select the employee by name or employee ID on the search page, then select the paycheck date to view the same payslip that the employee views in self service.

Understanding Online Views of Payslips

Employees can view their payslips using the View Payslip transaction. When the employee accesses the View Payslips page, the system displays all payslips available, listed 10 at a time. To display the detailed payslip, the employee selects the date link.

If the Enable Option in Self Service field is selected on the Self Service Payslip Options page, employees also have the option of indicating whether they want to receive a printed copy of their payslip.

To aid in resolving questions raised by employees about their payslips, the payroll administrator can view employees' self-service payslips in an online view that replicates the employees' view.

Reviewing Employee Payslips

Payroll administrators use the Review Self Service Payslips page (GP_SS_PSLP_ADMINVW) to review employee payslips to respond to employee questions. They can select the employee by name or employee ID on the search page, then select the paycheck date to view the same payslip that the employee views in self service.

Navigation

Global Payroll and Absence Mgmt, Payslips, Review Self Service Payslips, Review Self Service Payslips

Image: Review Self Service Payslips page

This example illustrates the fields and controls on the Review Self Service Payslips page.

Review Self Service Payslips

Samuel Brooks Person ID G1EE0001

Selection Criteria

Filter By: Payment Date

From Date: 08/26/2012 31

To Date: 11/26/2012 31

Select with Matching Criteria

Clear

Select Payslip Personalize | Find | First 1 of 1 Last

Payslip Content Details Payslip File Details

Period Begin Date	Period End Date	Net Pay	Description	Status	Payslip ID

Selection Criteria

Filter By

Specify the criteria by which you want to filter payslips. The options are *Payment Date*, *Pay Period Begin Date*, or *Pay Period End Date*.

From Date and To Date

Enter the date range for the payslips that you want to view.

Note: You can specify an open date range by leaving one of the date fields blank.

Select with Matching Criteria

Select to generate a list of payslips based on the selection criteria you specify.

Clear

Select to clear the From Date and To Date fields along with any results listed in the Select Payslip group box.

Select Payslip

Status

Update the status for a payslip. Valid values are:

- *Original*: Indicates that this is the original payslip generated by the system.
- *Modified*: Indicates that the payslip was modified after it was originally generated.
- *Void-Hidden*: Indicates that the payslip has been voided and is not visible to the payee through self-service.

- *Void-Deleted*: Indicates that the payslip was invalid and has been deleted. It is not visible to the payee through self-service.
- *Void-Display*: Indicates that the payslip has been voided and is visible to the payee through self-service.

(GBR) Viewing Payslips Online

For U.K. employers, a separate payslip is provided in ePay. This topic lists the prerequisites and page used to view payslips online.

Page Used to View Payslips Online

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Payslips	GPGB_PSLIP_SS_LIST	Self Service, Payroll and Compensation, View Payslip GBR, Payslips	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 HCM 9.2: Global Payroll for the United Kingdom*.

Before employees can view their payslips, you must run the payslip process, which produces the payslips.

Related Links

"Generating Payslips (*PeopleSoft HCM 9.2: Global Payroll for the United Kingdom*)"

"Viewing Payslips (*PeopleSoft HCM 9.2: Global Payroll for the United Kingdom*)"

Chapter 5

(JPN) Updating Year-End Adjustment Data

(JPN) Understanding the YEA Data Self-Service Transaction

This topic discusses:

- YEA data self-service transaction.
- Status codes.

(JPN) YEA Data Self-Service Transaction

The YEA data self-service transaction provides updated data for the YEA calculations in Global Payroll for Japan. Employees can update YEA data including:

- Their personal information such as name and address (available if PeopleSoft eProfile is licensed).
- Their own and dependents' tax data.
- Deduction data such as insurance deduction, spouse special deduction, dependent deductions, and special deduction for housing loan.

Note: Employees who are eligible for dependent deduction from secondary salaries cannot use the YEA data self-service transaction to enter their own tax data or dependent tax data.

Payroll administrators and employees perform the following tasks in this business process:

1. The payroll administrator specifies the time period during which employees can review and update data through the YEA data self-service transaction.

The payroll administrator also specifies the date on which tax data and deduction data take effect.

2. Employees review and update their data on the YEA data self-service transaction pages.

Employees must review all data before they can successfully submit data.

3. The payroll administrator reviews the employee's YEA data.

Administrators can reject an employee's deduction data and request revision.

Approval of each employee's deduction data before loading is an optional feature.

4. The payroll administrator loads updated deduction data including life and other insurance, spouse, dependent and housing loan deduction information to a Global Payroll for Japan table, where it is available for further review and processing.

For more information, see the product documentation for *PeopleSoft HCM 9.2: Global Payroll for Japan*

Status Codes

The system assigns a status to each employee's YEA data to enforce employees' complete review and to facilitate the administrator's review, optional approval, and data load to payroll. The system displays status codes on the YEA Information page that employees access. Payroll administrators can edit the status codes on the Review/Approve Self Service Data JPN page. The status codes *Submitted* and *Approved* are available as run control parameters when loading the data.

Following is a list of the status codes:

Open	The employee has not reviewed the data. This is the default status for each data section when the employee first accesses the YEA Information page.
Reviewed	The employee has accessed the data page and either selected the Save button for updates or the Return to YEA Information link if data was unchanged. Employees can still access and update pages that have a reviewed status.
Submitted	The employee has successfully submitted deduction data. The employee cannot change deduction data once this status is assigned. This status is available as a run control parameter when loading data to records.
Approved	The payroll administrator sets this status on the Review/Approve Self Service Data JPN page if the organization requires approval of deduction data before loading. The employee cannot update the page once this status is assigned. This status is available as a run control parameter when loading data to records.
Rejected	The payroll administrator sets this status on the Review/Approve Self Service Data JPN page if the employee is required to again review some of the deduction data. The administrator must notify the employee separately to change the data. The system changes the status of all data back to reviewed if one section has the rejected status, so that the employee can review all data again.
Sent to Payroll	The system sets this status after the payroll administrator runs the Load YEA Self Service Application Engine process (GPJP_YEASSLD) to load the deduction data into the corresponding records. The employee cannot access the update page once this status is assigned.

(JPN) Setting Up the YEA Data Self-Service Transaction

To set up the YEA data self-service transaction, use the YEA Self Service Setup JPN (GPJP_YEA_SETUP_GBL) component.

This topic discusses how to specify control dates for YEA data.

Page Used to Set Up the YEA Data Self-Service Transaction

Page Name	Definition Name	Navigation	Usage
Year End Adjustment Self Service Setup	GPJP_YEA_SETUP	Set Up HCM, Common Definitions, Self Service, YEA Self Service Setup JPN, Year End Adjustment Self Service Setup	Specify the period during which the YEA data self-service transaction is available to employees and specify the effective date of tax and deduction data entered through the transaction.

Year End Adjustment Self Service Setup Page

Use the Year End Adjustment Self Service Setup page (GPJP_YEA_SETUP) to specify the period during which the YEA data self-service transaction is available to employees and specify the effective date of tax and deduction data entered through the transaction.

Navigation

Set Up HCM, Common Definitions, Self Service, YEA Self Service Setup JPN, Year End Adjustment Self Service Setup

Image: Year End Adjustment Self Service Setup page

This example illustrates the fields and controls on the Year End Adjustment Self Service Setup page.

Object Year

The year that is being adjusted.

As Of Date

The system uses this date when retrieving current information from effective-dated tables. The system also uses this date as the effective date when loading YEA self-service data into tables.

From and Through

Enter the begin and end dates of the period that employees can access the YEA data self-service transaction.

(JPN) Reviewing and Updating YEA Data

This topic provides an overview of how to review and update YEA data and lists the pages used to review and update YEA data.

Pages Used to Review and Update YEA Data

Page Name	Definition Name	Navigation	Usage
YEA Information	GPJP_YEA_SSERVICE	Self Service, Payroll and Compensation, Year End Adjustment Info JPN, YEA Information	Employees access individual transactions to review and update YEA data.
Employee Tax Information	GPJP_YEA_EETAX	Select the Employee Tax Information link on the YEA Information page.	Employees review and update tax information such as relationship to head of household and disability information.
Personal Information	HR_EE_PERS_INFO	Select the Employee Personal Information link on the YEA Information page.	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	GPJP_YEA_DEPTAX	Select the Dependent Tax Information link on the YEA Information page.	Employees review dependent relationship, type, and disability type information. They also access a page for editing dependent information.
Edit Dependent Tax Information	GPJP_YEA_DEPTX_2	Select the Edit button on the Dependent Tax Information page.	Employees edit dependent information. They cannot add or delete a dependent on this page.
Life Insurance	GPJP_YEA_LIFE	Select the Life Insurance link on the YEA Information page.	Employees review and update life insurance and personal pension insurance information.
Other Insurance	GPJP_YEA_NONLIFE	Select the Other Insurance link on the YEA Information page.	Employees review and update nonlife insurance information, including social insurance and small mutual aid.
Spouse Special Deduction	GPJP_YEA_SPOUSE	Select the Spouse Special Deduction link on the YEA Information page.	Employees review and update spouse special deduction data.
Special Deduction for Housing Loan	GPJP_YEA_HOUSE	Select the Special Deduction for Housing Loan link on the YEA Information page.	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

This topic discusses how to:

- Review and approve employee YEA data.
- Load YEA self-service deduction data.

Pages Used to Review, Approve, and Load Employee YEA Data

Page Name	Definition Name	Navigation	Usage
Review/Approve Self Service Data JPN	GPJP_YEA_PAYADM	Global Payroll & Absence Mgmt, Year-End Processing, Rvw/Appr Self Service Data JPN, Review/Approve Self Service Data JPN	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	GPJP_RC_YEALOAD_SS	Global Payroll & Absence Mgmt, Year-End Processing, Load YEA Self Service Data JPN, Load YEA Self Service Data JPN	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	GPJP_RC_YEA_SEC	Select the Payee List link on the Load YEA Self Service Data JPN page.	Select individual employees to load their data.

Review/Approve Self Service Data JPN Page

Payroll administrators use the Review/Approve Self Service Data JPN page (GPJP_YEA_PAYADM) to view a summary and details of employee YEA data, edit status, and approve if required. Administrators cannot edit employee data.

Navigation

Global Payroll & Absence Mgmt, Year-End Processing, Rvw/Appr Self Service Data JPN, Review/Approve Self Service Data JPN

Image: Review/Approve Self Service Data JPN page

This example illustrates the fields and controls on the Review/Approve Self Service Data JPN page.

Review/Approve Self Service Data JPN

Search ID JPN

Object Year 2009

Tax/Ins Establishment

Pay Entity

Business Unit

Department

Location Code

Empl ID

Get YEA Information

YEA Status

☐ Submitted

☐ Reviewed

☐ Approved

☐ Rejected

☐ Open

☐ Sent to Payroll

YEA Review Status

Personalize | Find | View All | 1 of 1 | First | Last

Tax

Personal

YEA

Empl ID	Name	EE Tax	Dependent Tax	Dep Tax	Life Ins Status	Life Ins	Non Life Ins Status	Non Life Ins	Spouse Spec Ded Stat	Spouse Spec Ded	Housing Loan Status	Housing Loan	Approve
1													

Selection Criteria

Use the fields in this group box to define the group of employees to display in the YEA Review Status group box. Use the optional Pay Entity, Business Unit, Department, Location Code, and EmplID fields to restrict the list as desired.

- YEA Status (year-end adjustment status)**

Select status codes; the system displays employees whose status codes match the selections.
- Get YEA Information (get year-end adjustment information)**

Select to load the data that matches the parameters that you defined in the YEA Status group box.

YEA Review Status - Tax Tab

This grid displays the current status of each employee's YEA data. To view details of the employee's data, select the corresponding button, which takes you to the self-service page on which the employee entered data. Administrators cannot edit employee data on the self-service pages.

You can reject dependent deductions, employee life insurance, nonlife insurance, spouse special deduction, or housing loan special deduction data by changing the status for that data to *Rejected*. If you reject any employee data, notify the employee to correct and resubmit it.

Note: The system changes the status of all data back to *Reviewed* if one section has the *Rejected* status, so that the employee can review all data again. When this happens, the following message appears: "If you change the Status to *Rejected*, all other nonrejected status codes change to *Reviewed*."

Approve

Approval is optional. Select this button for each employee if the organization requires approval before loading the data. The status of all data for the employee becomes *Approved*.

YEA Review Status - Personal Tab

Select the Personal tab to view the employee's home and mailing address, phone, or birthday information.

Related Links

[\(JPN\) Understanding the YEA Data Self-Service Transaction](#)

Load YEA Self Service Data JPN Page

Use the Load YEA Self Service Data JPN page (GPJP_RC_YEALOAD_SS) to run the load YEA Self Service process to load updated self-service employee personal data, dependent deduction data, life and nonlife insurance, and spouse and housing loan deduction information into the Global Payroll for Japan YEA table and the corresponding page (GPJP_YEA_PYEADJ).

Navigation

Global Payroll & Absence Mgmt, Year-End Processing, Load YEA Self Service Data JPN, Load YEA Self Service Data JPN

Image: Load YEA Self Service Data JPN page

This example illustrates the fields and controls on the Load YEA Self Service Data JPN page.

Load YEA Self Service Data JPN

Run Control ID 001 [Report Manager](#) [Process Monitor](#) [Run](#)

Process Request Parameter(s)

*Tax Establishment

*Object Year

Pay Entity

Business Unit

Location Code

Department

Load Year End Adjustment information with status ☐ Submitted ☒

☐ Payee List

Go To [Payee List](#)

Process Request Parameter(s)

Use the optional Pay Entity, Business Unit, Location Code, and Department fields to restrict the load to a group of employees as desired. You can use the fields on the Payee List page to identify individual employees.

Business Unit

This is a required field if you select a location code or department.

Submitted and Approved

Records that meet the other criteria (including the criteria that you indicate on the Payee List page) and that have the selected status are loaded. You can select both check boxes.

Payee List

Select to access the Payee List page, where you can select any number of individual employees for the process run.

When you return to the Load YEA Self Service page, this check box is selected.

Related Links

"Entering Deduction Data for the Year-End Adjustment (YEA) (*PeopleSoft HCM 9.2: Global Payroll for Japan*)"

Appendix A

Delivered Workflows for ePay

Delivered Workflows for ePay

This topic discusses ePay workflows. The workflows are listed alphabetically by workflow name.

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:

<i>Information Type</i>	<i>Description</i>
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 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, or T4A) 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	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
Workflow Action	Automatic

Information Type	Description
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, or T4A) 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	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
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 Consent Reset

This topic discusses the year-end form consent reset workflow.

Description

- *Event Description:* Payroll administrator resets the status of employee consent to receive year-end forms (W-2, W-2c, T4, or T4A) electronically in self service.
- *Action Description:* When the payroll administrator runs the Reset Form Consent Application Engine process, an email notification is sent to each processed employee that confirms 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	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
Workflow Action	Automatic
Role	Payroll administrator
Email Template	Send E-mail to employee; text type Consent Reset Notification
Business Process	NA
Business Activity	NA
Business Event	Notify Employee

Year End Form Available

This topic discusses the year-end form available workflow.

Description

- *Event Description:* Payroll administrator notifies employees that year-end forms (W-2 or T4) 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 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	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
Workflow Action	Manual
Role	Payroll administrator
Email Template	Send E-mail to employee, text type <i>Form Available</i> .
Business Process	Manage Annual Tax Rptg U.S. and Manage Annual Tax Rptg Can
Business Activity	Send W2 Notification and Send T4 Notification
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-2c or T4A) 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	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
Workflow Action	Manual
Role	Payroll administrator
Email Template	Send E-mail to employee; text type Correction Available
Business Process	Manage Annual Tax Rptg U.S. and Manage Annual Tax Rptg Can

<i>Information Type</i>	<i>Description</i>
Business Activity	Send W2 Notification and Send T4 Notification
Business Event	Notify Employee