# Contra Costa County PeopleSoft Training

ePay



# **Training Guide**



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# Using ePay

## ePay

Overview of ePay

#### **Overview of ePay**

The ePay portion of PeopleSoft Employee Self Service enables employees to complete the following tasks online:

	Description
View Paycheck Online	<ul> <li>View current paycheck</li> <li>View past pay checks</li> <li>Print a pay check advice</li> </ul>
Manage Direct Deposits	<ul> <li>Request a direct deposit</li> <li>Modify/edit an existing direct deposit</li> <li>Delete a direct deposit</li> </ul>
Manage Voluntary Deductions	<ul> <li>Add a voluntary deduction</li> <li>Modify/edit an existing voluntary deduction</li> <li>Delete and existing deduction</li> <li>Add additional voluntary deductions</li> </ul>
Manage Tax Withholding Information	<ul> <li>Review existing W-4 Information</li> <li>Modify/edit existing W-4 information</li> <li>Review existing DE-4 information</li> <li>Modify/edit existing DE-4 information</li> </ul>

Each of these tasks is covered in one lessons in the ePay portion of Employee Self Service training:

- Viewing Paychecks
- Managing Direct Deposits



- Managing Voluntary Deductions
- Managing Tax Information

## Viewing Paychecks

#### **Viewing Paychecks Online**

The Employee Self Service feature of PeopleSoft 9.2 allows you to view your paychecks online. You can

- View your current paycheck
- View past checks

The steps involved in viewing paychecks online are covered in the single topic in this lesson:.

• Viewing Paychecks Online

This topic is available for play-back through the UPK player in

- See-It! Mode—allows you to watch a "video" demonstration of the topic
- Try-It! Mode—allows you use your mouse and keyboard to complete transactions in a simulated environment.

Both See-It! And Try-It! Provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Player are also available in two printed documents—A Training Guide and a Job Aid.

Here are some key points to keep in mind about viewing paychecks online

- 1. You can view your current paycheck online
- 2. You can view past paychecks online
- 3. You can print your paycheck advice for current and past paychecks using your browser's Print menu
- 4. You can only view your own paychecks, not those of other employees. Other employees cannot view your paychecks through Employee Self Service
- 5. Paychecks are presented in view-only mode; you cannot edit the information in the checks
- 6. The first time you use Employee Self Service to view your paycheck, the most current pay check will appear in the top row of the Select Paycheck grid.
- 7. You can use the column headers in the Select Paycheck grid to sort in either ascending or descending order the way your paychecks are listed.

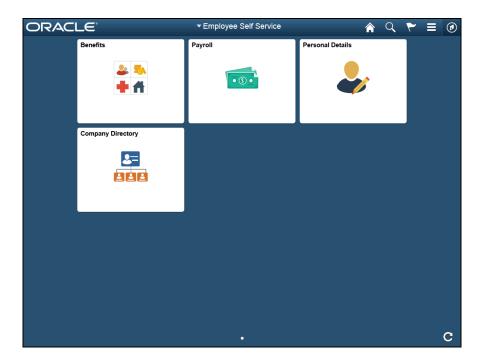
## Viewing Paychecks Online

#### Viewing a Paycheck Online

The basic steps are:

- 1. Click the CCC Payroll Self Service tile on the Employee Self Service page
- 2. Click on the check you want to review in the grid on in the Information panel
- 3. The paycheck will open in a new browser tab as a pdf file
- 4. Review your paycheck information
- 5. Click the **Close Tab** button





Step	Action
1.	Click the Payroll tile.



< My Homepage		Payroll Self Ser	vice	The amount of	<b></b> /
Pay Ch Pay Ch the check was issued	Pay Check	in the che	od covered eck	check—Gross Pa taxes and deduc	ay less,
W-4 Tax Information	Ţ		↓		ŢŢ
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay Paycheck Num PDF Check	ber /
Voluntary Deductions Advance Pav	06/23/2017	Contra Costa County	06/01/2017 06/15/2017	\$1369.84 3306854	>
Advance Pay	06/22/2017	Contra Costa County	06/15/2017 06/29/2017	\$1628.93 865201	>
Filter button	06/09/2017	Centra Costa County	05/01/2017 05/31/2017	\$424.98 3299540	>
	05/25/2017	Contra Costa County	05/01/2017 05/15/2017	\$683.42 3291016	>
Sort Arrows	05/10/2017	Contra Costa County	04/01/2017 04/30/2017	\$2004.27 3282951	>
	04/25/2017	Contra Costa County	04/01/2017 04/15/2017	\$683.42 3274438	>
	04/10/2017	Contra Costa County	03/01/2017 03/31/2017	\$424.99 3266345	>
	03/24/2017	Contra Costa County	03/01/2017 03/15/2017	\$683.42 3257845	>
	<				>

Step	Action
2.	The <b>Pay Check</b> page displays.
	The <b>Paycheck</b> grid lists all of your paychecks that are in the system. This grid lists your paychecks that are currently in the system with the most recent one on top.
	You can use the <b>Filter</b> button to help locate the paycheck you want to view and the <b>Sort</b> arrows to change the order in which the paychecks are displayed.



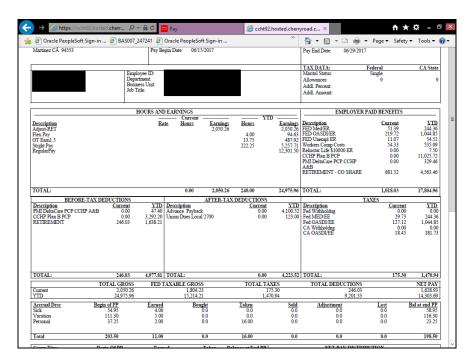
Pay Checks	Using	; the Filter Butto	n and Sort Arrow	/S	
Check Date Company	Pay bigin Date / Pay End Date	Net Pay	Net Pay	Paycheck Numb	er / PDE Check
11/10/2016 Contra Costa	County 10/01/2 16 10/31/2 16	\$3325.36	\$3325.36	3177833	
10/10/2016 Cancel	Filter	Done	\$3244.59	3161167 <sup>3</sup> ervio	
08/10/2016	то 11/10/2016 🗎		\$3256.76	3144587	Check Date
			\$3495.13	3128123	Pay Begin Date
				_	Pay End Date
				Paye	ch Paycheck Number
1. Click	the <b>Filter</b> button			3128	
2. Enter	/select dates in th	ie From			· · · · · · · · · · · · · · · · · · ·
and	ō fields		1	Click the	Sort Arrow button
3. Click	the <b>Done</b> button				Field name
the system th	k will displays all c nat have a Check D ge you selected.		selected. The indicates if the	e symbol i he field is	d, based on the field you next to the field name sorted in ascending or :k again to reverse the

Step	Action
	Use of the Filter Button and Sport Arrows is covered in greater detail in the <i>Navigation Course</i> .

My Homepage		Payroll Self Ser	vice		A Q	۲ =	
vid Smith							
Pay Checks	Pay Check	(S					
Direct Deposit	-						
W-4 Tax Information	Ŧ					↑↓	
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck N PDF Check	umber /	
Voluntary Deductions	06/23/2017	Contra Costa County	06/01/2017 06/15/2017	\$1366.84	3306854	>	
Advance Pay	06/22/2017	Contra Costa County	06/15/2017 06/29/2017	\$1628.93	865201	>	
	06/09/2017	Contra Costa County	05/01/2017 05/31/2017	\$424.98	3299540	>	
	05/25/2017	Contra Costa County	05/01/2017 05/15/2017	\$683.42	3291016	>	
	05/10/2017	Contra Costa County	04/01/2017 04/30/2017	\$2004.27	3282951	>	
	04/25/2017	Contra Costa County	04/01/2017 04/15/2017	\$683.42	3274438	>	
	04/10/2017	Contra Costa County	03/01/2017 03/31/2017	\$424.99	3266345	>	
	03/24/2017	Contra Costa County	03/01/2017 03/15/2017	\$683.42	3257845	>	
	<					>	



Step	Action								
4.	For this example, you will review the paycheck in the second row of the grid.Click the 06/22/2017 link.								
	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number / PDF Check				
	06/23/2017	Contra Costa County	06/01/2017 06/15/2017	\$1366.84	3306854	>			
	06/22/2017	Contra Costa County	06/15/2017 06/29/2017	\$1628.93	865201	>			
5.	· ·	vice or your car		•		<b>rint</b> function to we the file to save			
	Confidentia	l information ha	as been blacked	out.					



Step	Action
6.	Click the Close Tab button.
	×
7.	You can review additional paychecks. For this example, you will not review any additional paychecks.
8.	Click the <b>Home</b> button.



Step	Action
9.	
	End of Procedure.

## **Direct Deposits**

#### **Direct Deposits**

The Employee Self Service feature of PeopleSoft 9.2 allows you to manage your direct deposits. You can

- Add a new direct deposit
- Edit an existing direct deposit
- Cancel/delete an existing direct deposit

The steps involved in adding, editing, and canceling direct deposits are covered in the three topics in this lesson.

- Adding a Direct Deposit
- Editing Direct Deposit Information
- Deleting a Direct Deposit

Each of these topics is available for play-back through the UPK player in

- See-It! Mode—allows you to watch a "video" demonstration of the topic
- Try-It! Mode—allows you use your mouse and keyboard to complete transactions in a simulated environment.

Both See-It! And Try-It! Provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Player are also available in two printed documents—A Training Guide and a Job Aid.

Here are some key points to keep in mind about direct deposits:

- 1. You can only have one direct deposit. The system will not allow you to add additional direct deposits.
- 2. All direct deposits must be for 100% of your net pay.
- 3. Direct deposits can be made to either a savings account or a checking account.
- 4. You can only add direct deposit information once a day. If you delete a direct deposit, for example, on a Monday and later that day realize that you want to add a new direct deposit, you will have to wait until the following day to make the changes. The system will not allow you to add a new direct deposit on the same day as you delete an existing direct deposit.
- 5. The system validates that bank routing number that you enter when adding or editing a direct deposit. It validates that the number is 9 digits long. It must confirm to routing number conventions, and must be for a bank that is in the Contra Costa County PeopleSoft system.
- 6. If you want to use a bank that is not in the system fort your direct deposit, you must contact the payroll staff. They will enter that banks information in the system. Once the bank information has been entered, you will be able to use it for your direct deposit.



- 7. The system will generate error messages if the routing number you entered is invalid and/or not in the system.
- 8. The system does not automatically verify account numbers; verification of account numbers takes place during the pre-notification process. This process sends a small deposit to the bank and account that you have specified to ensure that the bank is able to accept/process your direct deposits. Your direct deposit does not become effective until the pre-notification has successfully completed.

## Adding a Direct Deposit

#### Adding a Direct Deposit

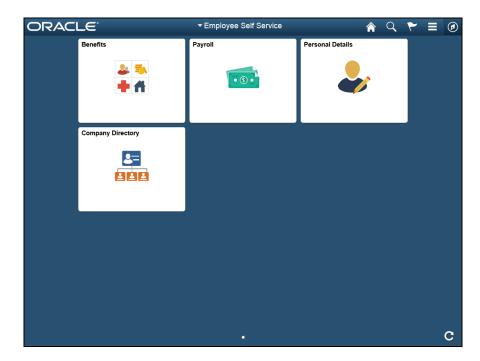
The basic steps are:

- 1. Click the **Payroll** tile on the Employee Self Service page
- 2. Click the **Direct Deposit** link on the Actions panel
- 3. Click the **Add Account** button
- 4. Enter information on the **Direct Deposit Details** page
  - 1. Routing Number
  - 2. Account Number
  - 3. Retype Account Number
  - 4. Account Type
- 5. Click the **Submit** button
- 6. Click the **OK** button on the **Confirm Submit** page

#### Note

You can add only one direct deposit. The system will not allow you to enter multiple direct deposits.





	Action							
1.	Click the <b>Payroll</b> tile.							
	Benefits Payroll Personal Details							
	<mark>≗ ≅</mark> <b>+ 1</b>		<b>\$</b>					



	Payroll Self Ser	vice		🏫 Q 🏲	
Pay Check	s				
Ť					<u>↑</u> ↓
Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Number PDF Check	/
11/10/2016	Contra Costa County	10/31/2016	\$3325.36	3177833	>
10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161167	>
09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	3144587	>
08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	3128123	>
	Pay Check Check Date 11/10/2016 09/09/2016	Pay Checks	Checks         Company         Pay Begin Date / Pay End Date           11/10/2016         Contra Costa County         10/11/2016           10/10/2016         Contra Costa County         09/01/2016           09/09/2016         Contra Costa County         09/01/2016           09/09/2016         Contra Costa County         08/01/2016           08/01/2016         Contra Costa County         08/01/2016           08/01/2016         Contra Costa County         07/01/2016	Check Date         Company         Pay Begin Date / Pay End Date         Net Pay           11/10/2016         Contra Costa County         10/31/2016         \$3325.36           10/10/2016         Contra Costa County         09/01/2016         \$3244.59           09/09/2016         Contra Costa County         08/01/2016         \$3256.76           08/10/2016         Contra Costa County         07/01/2016         \$3495.13	Check Date         Company         Pay Begin Date / Pay End Date         Net Pay         Paycheck Number PDF Check           11/10/2016         Contra Costa County         10/31/2016         \$3325.36         3177833           10/10/2016         Contra Costa County         09/01/2016         \$3244.59         3161167           09/09/2016         Contra Costa County         08/01/2016         \$3256.76         3144587           08/10/2016         Contra Costa County         07/01/2016         \$3495.13         3128123

Step	Action
2.	Click the <b>Direct Deposit</b> link.
	Ray Checks
	Lirect Deposit
	W-4 Tax Information
	DE4 State Tax Information
	S Voluntary Deductions



< My Homepage	Direct Deposit	Â	Q	۲	۲
David Smith Hazardous Material Tech					
Pay Checks	Direct Deposit				
📥 Direct Deposit					
W-4 Tax Information	You have not added any direct deposit account information.				
DE4 State Tax Information	Add Account				
Voluntary Deductions					
Movance Pay					

Step	Action					
3.	The <b>Direct Deposit</b> page displays.					
	You have not yet set up a direct deposit.					
	For this example, you will add direct deposit information.					
	Your direct deposit will be made to a checking account ( <b>Account Number</b> : 123456789) at J.P. Morgan Chase ( <b>Routing Number</b> : 322271627).					
4.	Click the Add Account button.					
	Direct Deposit					
	You have not added any direct deposit account information.					
	Add Account					
5.	The Direct Deposit Details page displays.					
	You will enter information in the following fields to reflect the new direct deposit:					
	- Routing Number					
	- Account Number - Retype Account Number					
	- Account Type					



Step	Action					
6.	If you are not sure of how to locate your bank's routing number and your account number (for a checking account), click the <b>View Check Example</b> link.					
	Direct Deposit					
	Your Bank Information					
	View Check Example					
	Routing Number					
7.	The <b>Check Example</b> page displays. This page explains how to locate your bank's routing number and your account number for a checking account.					
8.	Click the Close button.					
	Check Example					
	9999 					
9.	Click in the <b>Routing Number</b> field.					
	Direct Deposit					
	Your Bank Information					
	View Check Example					
	Routing Number					
10	Distribution Information					
10.	Enter the desired information into the <b>Routing Number</b> field. Enter "322271627".					
	Direct Deposit					
	Your Bank Information					
	View Check Example					
	Routing Number					
11.	Click in the Account Number field.					
	Distribution Instructions					
	Account Number					
	Retype Account Number					



Step	Action					
12.	Enter the desired information into the Account Number field. Enter "123456789".					
	Routing Number 322271627					
	Distribution Instructions					
	Account Number					
	Retype Account Number					
13.	Press <b>[Tab]</b> to move away from the Account Number field. The <b>Retype Account Number</b> field will become active.					
14.	Click in the <b>Retype Account Number</b> field.					
	Distribution Instructions					
	Account Number 123456789					
	Retype Account Number					
	*Account Type					
15.	Enter the desired information into the <b>Retype Account Number</b> field. Enter "123456789".					
	Routing Number 322271627					
	Distribution Instructions					
	Account Number 123456789					
	Retype Account Number       *Account Type					
	*Account Type					
16.	Click the Account Type list.					
	Account Number 123456789					
	Retype Account Number 123456789 ×					
	*Account Type					
	hmit					
17.	Click the <b>Checking</b> list item.					
	*Account Type Checking Savings					



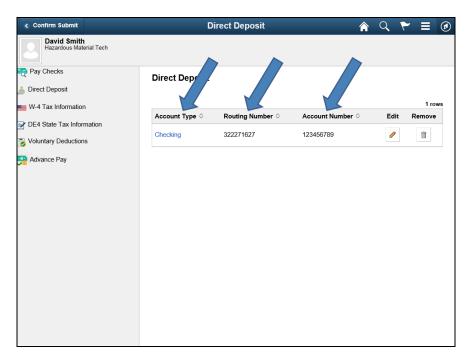
Step	Action				
18.	You have completed entering your direct deposit information.				
	This information must be submitted for further processing by payroll staff.				
	Click the <b>Submit</b> button.				
	*Account Type Checking				
	Submit				

< Direct Deposit Details	Confirm Submit	(	<u> </u>	۲		۲		
Direct Deposit Form Submission Was Successful X								
	ĸ							
Ray Checks	Direct Deposit							
📥 Direct Deposit	OK Submit Success Ba							
W-4 Tax Information	ок Submit Success Ba	anner						
DE4 State Tax Information								
Voluntary Deductions								
Advance Pay	The Submit was successful. Due to timing, your change may	not be reflecte	d on the ne	ext payc	heck.			

Step	Action
19.	Notice a banner appears at the top of the <b>Direct Deposit</b> page indicating that your submission was successful.
	The direct deposit information you just submitted will not take effect until the prenotification process has been completed.
	This process, run by the payroll staff, verifies with your bank that routing number and account number included on the direct deposit are valid and that the bank can receive direct deposits from the County using the routing number and account number you provided.



Step	Action
20.	Click the <b>OK</b> button.
	Direct Deposit
	The Submit was successful. Due to timir



Step	Action
21.	Notice the <b>Direct Deposit</b> page grid now displays the direct deposit information you just entered.
22.	Click the <b>Home</b> button.
23.	End of Procedure.



## **Editing a Direct Deposit**

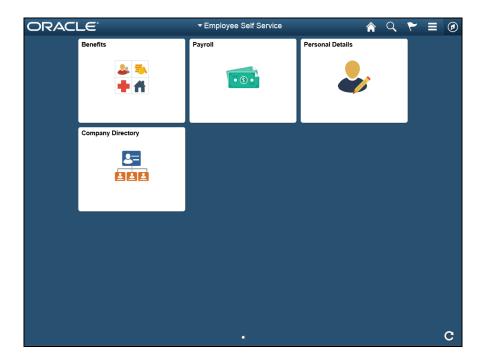
#### **Editing a Direct Deposit**

The basic steps are:

- 1. Click the **Payroll** tile on the Employee Self Service page
- 2. Click the **Direct Deposit** link on the Actions panel
- 3. Click the **Edit** button
- 4. Edit information on the **Direct Deposit Details** page depending on what is changing (see table below)
  - 1. Routing Number
  - 2. Account Number
  - 3. Retype Account Number
  - 4. Account Type
- 5. Click the **Submit** button
- 6. Click the **OK** button on the **Confirm Submit** page

Fielda	What's Changing					
Fields	Bank	Account Only	Account Type			
Routing Number	Х					
Account Number	Х	Х	Х			
<b>Retype Account Number</b>	Х	Х	Х			
Account Type	Х		Х			





Step	Action
1.	Click the <b>Payroll</b> button.
	Benefits Payroll Personal Details
2.	Click the <b>Direct Deposit</b> link.
	Direct Deposit
	<ul> <li>W-4 Tax Information</li> <li>DE4 State Tax Information</li> </ul>
	Voluntary Deductions
	Advance Pay



< My Homepage	D	irect Deposit	Â	9	- ≡ ⊘
David Smith Hazardous Material Tech					
🔁 Pay Checks	Direct Depc .rt				
W-4 Tax Information	Account Type ◇	Routing Number $\Diamond$	Account Number ◇	Edit	1 rows Remove
DE4 State Tax Information     Solution     Voluntary Deductions	Checking	322271627	123456789	/	Î
Advance Pay					

Step	Action
3.	The <b>Direct Deposit</b> page displays.
	You have an existing direct deposit going to a checking account (Account Number 123456789) at J.P. Morgan Chase (Routing Number: 322271627).
	For this example, you will edit the direct deposit information. You will change bank, account type, and account number.
	The new direct deposit will be made to a saving account (Account Number: 321654987) at Wells Fargo Bank in Martinez (Routing Number: 121000248)
4.	You are now ready to edit the direct deposit information.
	Click the <b>Edit</b> button.
	Account Type        Routing Number        Account Number        Edit       Remove
	Checking 322271627 123456789



< Direct Deposit	Direct Deposit Details	Â	Q	۲	≡	۲
David Smith Hazardous Material Tech						
🟹 Pay Checks	Direct Deposit					
🍐 Direct Deposit	Your Bank Information					
W-4 Tax Information	View Check Example					
Model State Tax Information	Routing Number 322271627					
SVoluntary Deductions	Distribution Instructions					
Advance Pay	Account Number 123456789					
	Retype Account Number					
	Account Type Checking					
	Submit					
						ļ

Step	Action
5.	The Direct Deposit Details page displays.
	You will change information in the following fields to reflect the new direct deposit:
	<ul> <li>Routing Number</li> <li>Account Number</li> <li>Retype Account Number</li> <li>Account Type</li> </ul>
6.	Click in the <b>Routing Number</b> field.
	View Check Example
	Routing Number 322271627
	Distribution Instructions
	Account Number 123456789
7.	Enter the desired information into the <b>Routing Number</b> field. Enter "121000248". Your Bank Information
	View Check Example
	Routing Number 322271627 ×



Step	Action
8.	Click in the Account Number field.
	Distribution Instructions
	Account Number 123456789
	Retype Account Number
	*Account Type Checking
9.	Enter the desired information into the Account Number field. Enter "321654987".
	Distribution Instructions
	Account Number 123456789 ×
	Retype Account Number
	*Account Type Checking
10.	Press <b>[Tab]</b> to move away from the Account Number field. The <b>Retype Account Number</b> field will become active.

		Â	-	_	۲
David Smith Hazardous Material Tech					
	rect Deposit ur Bank Information iew Check Example Routing Number 121000248 stribution Instructions Account Number 321654987 Retype Account Number ^Account Type Checking Submit				



Step	Action		
11.	Click in the <b>Retype Account Number</b> field.		
	Distribution Instructions		
	Account Number 321654987		
	Retype Account Number		

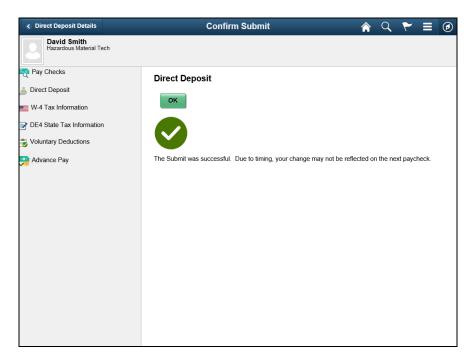
< Direct Deposit	Direct Deposit Details	â	Q	۲	≡	٢
David Smith Hazardous Material Tech						
Pay Checks     Direct Deposit     W-4 Tax Information     DE4 State Tax Information     SVoluntary Deductions	Direct Deposit Your Bank Information View Check Example Routing Number 121000248 Distribution Instructions					
Advance Pay	Account Number 321654987 Retype Account Number *Account Type Checking Submit					

Step	Action	
12.	Enter the desired information into the <b>Retype Account Number</b> field. Enter " <b>321654987</b> ".	
	Distribution Instructions	
	Account Number 321654987	
	Retype Account Number	



Step	Action
13.	Click the Account Type list.
	Distribution Instructions
	Account Number 321654987
	Retype Account Number 321654987 ×
	*Account Type Checking
14.	Click the <b>Savings</b> list item.
	Retype Account Number 321654987
	*Account Type Checking Savings
15.	You have completed entering your direct deposit information.
	This information must be submitted for further processing by payroll staff.
	Click the <b>Submit</b> button.
	Account Number 321654987
	Retype Account Number 321654987
	*Account Type Savings
	Submit





Step	Action	
16.	The direct deposit information you just submitted will not take effect until the prenotification process has been completed.	
	This process, run by the payroll staff, verifies with your bank that routing number and account number included on the direct deposit are valid and that the bank can receive direct deposits from the County using the routing number and account number you provided.	
17.	Click the <b>OK</b> button.	
	Direct Deposit	
	ок	



✓ Confirm Submit	D	irect Deposit	Â	9	- ≡ ⊘
Hazardous Material Tech					
Pay Checks	Direct De sit				1 rows
	Account Type 🗘	Routing Number ◇	Account Number 🗘	Edit	Remove
DE4 State Tax Information	Savings	121000248	321654987	1	Î
Advance Pay					

Step	Action
18.	The <b>Direct Deposit</b> page now displays the information you just entered. This information must be processed by the Payroll department before it takes effect.
19.	Click the <b>Home</b> button.
20.	
	End of Procedure.

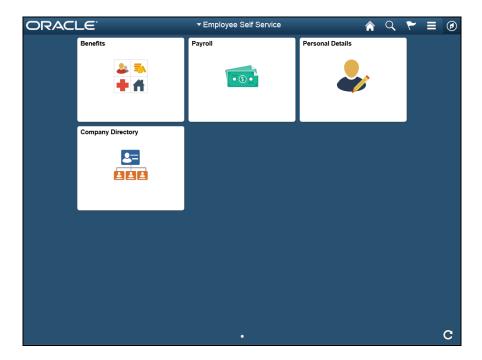
#### **Deleting a Direct Deposit**

#### **Deleting a Direct Deposit**

The basic steps are:

- 1. Click the **Payroll** tile on the Employee Self Service page
- 2. Click the **Direct Deposit** link on the Actions panel
- 3. Click the **Delete** button
- 4. Click the Yes Delete button on the Confirm Delete page
- 5. Click the **OK** button on the **Confirm Submit** page
- 6. The Direct Deposit page displays; you must wait a day before you can add a direct deposit





Step	Action			
1.	Click the <b>Payroll</b> tile.			
	Benefits	Payroll	Personal Details	
	🕹 🤜 🕂 🕂	• 3 •	<b>\$</b>	
2.	Click the <b>Direct Deposit</b>	link		
2.	Pay Checks			
	👗 Direct Deposit			
	W-4 Tax Information			
	DE4 State Tax Information			
	Soluntary Deductions			



< My Homepage	D	irect Deposit	Â	97	- ≡ ⊘
David Smith Hazardous Material Tech					
Pay Checks	Direct Depr				
W-4 Tax Information	Account Type $\diamond$	Routing Number ≎	Account Number ≎	Edit	1 rows Remove
DE4 State Tax Information     Soluntary Deductions	Savings	121000248	321654987	1	Î
Advance Pay					

Step	Action						
3.	The <b>Direct Deposit</b> page displays with your current direct deposit information. Use the button in the <b>Remove</b> column to delete the direct deposit.						
4.	Click the <b>Remove</b> button.						
	Account Type <>/th>         Routing Number <>/th>         Account Number <>/th>         Edit         Remove						
	Savings 121000248 321654987						
5.	The <b>Delete Confirmation</b> page displays. Click the <b>Yes - Delete</b> button to delete your direct deposit. If you change your mind and decide not to delete the direct deposit, Click the <b>No - Do Not Delete</b> button. <b>Yes - Delete</b>						
6.	<ul> <li>Notice the system displays a Submission Success banner.</li> <li>The Submit Confirmation page displays.</li> <li>Note that deletion must be processed by the payroll staff and may not take effect on your next paycheck check.</li> </ul>						



Step	Action
7.	Click the OK button.
8.	The <b>Direct Deposit</b> page displays. You currently have no direct deposits. <b>Note:</b> You cannot add another direct deposit today to replace the one you have deleted. You can only make changes to direct deposit information once a day. If you want to add a new direct deposit, you will have to wait until tomorrow.
9.	Click the Home button.
10.	End of Procedure.

# Voluntary Deductions

#### **Voluntary Deductions**

The Employee Self Service feature of PeopleSoft 9.2 allows you to manage your voluntary deductions online. You can

- Add a voluntary deduction
- Edit a voluntary deduction
- Add additional voluntary deductions
- Cancel a voluntary deduction

The steps involved in managing voluntary deductions online are covered in the three topics in this lesson:

- Adding a Voluntary Deduction
- Editing an Existing Voluntary Deduction and Adding a New Deduction
- Canceling a Voluntary Deduction

These topics are available for play-back through the UPK player in

- See-It! Mode—allows you to watch a "video" demonstration of the topic
- Try-It! Mode—allows you use your mouse and keyboard to complete transactions in a simulated environment.

Both See-It! And Try-It! Provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Player are also available in two printed documents—A Training Guide and a Job Aid.

Here are some key points to keep in mind about managing voluntary deductions online

- 1. You can enter as many voluntary deductions as you like online for any amount.
- 2. You can enter multiple deductions for the same deduction type.
- 3. All voluntary deductions must be for a flat dollar amount; for example, you cannot take a voluntary deduction for a percentage of your gross pay.



- 4. Deductions are taken once a month during the processing of the end of month payroll.
- 5. Deductions may not appear in your next paycheck, depending on where it is in the pay cycle.
- 6. Deductions begin with the first end of the month payroll after the date you indicate as the Start Date for the deduction.
- 7. Deductions will continue until either the amount you specify as the goal amount is reached or the Stop Date you specified is reached
- 8. You must specify a goal amount (and you can edit this amount).
- 9. You do not have to specify a Stop Date.
- 10. The system automatically keeps track of your deduction balance.
- 11. You can cancel a deduction by entering or editing the date in the Enter Deduction Stop Date field or changing the Goal Balance to equal the current Deduction balance.
- 12. After entering/editing a deduction you should complete (offline) the CCYY Contra Costa County Charity Campaign form; You can obtain this form from your departments payroll staff.

## Adding a Voluntary Deduction

#### **Adding a Voluntary Deduction**

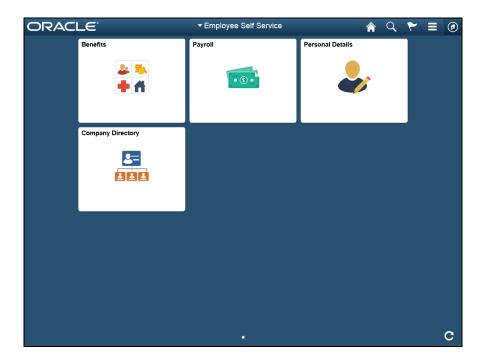
The basic steps are:

- 1. Click the **Payroll** tile on the Employee Self Service page
- 2. Click the Voluntary Deductions link on the Actions panel
- 3. Click the **Add Deduction** button
- 4. Enter information on the Voluntary Deduction page
  - 1. Type of Deduction
  - 2. Enter Amount
  - 3. Take deduction until I reach this Goal Amount
  - 4. Enter Deduction Start Date
  - 5. Enter Deduction End Date (optional)
- 5. Click the **Submit** button
- 6. Click the **OK** button on the **Confirm Submit** page
- 7. Click the **OK** Button on the CCYY Contra Costa County Charity Campaign Form message box

#### Note

You must complete the CCYY Contra Costa County charity contribution form to ensue that your contribution is sent to the charity you selected. Contact your departments' payroll staff for more information and copies of this form.





Step	Action		
1.	Click the <b>Payroll</b> tile.		
	Benefits	Payroll	Personal Details



DE4 State Tax Information     Check Date     Company     Pay Begin Date / Pay End Date     Net Pay     Paycheck Number / PDF Check       Voluntary Deductions     11/10/2016     Contra Costa County     10/31/2016     \$3325.36     3177833     >	Pazardous Material Tech         Pay Checks         Direct Deposit         W.4 Tax Information         DE4 State Tax Information         Voluntary Deductions         Advance Pay         Advance Pay         Op/09/2016       Contra Costa County       09/01/2016 09/09/2016       \$3256.76       3144567         Obj/09/2016       Contra Costa County       07/01/2016 08/01/2016       \$326.76       3142123	omepage		Payroll Self Ser	vice		<b>^ Q</b>	7	≡
Pay Checks           Direct Deposit         Image: Check state Tax Information           Veluntary Deductions         Image: Check state Tax Information           Voluntary Deductions         Image: Check state Company state state Tax Information           Voluntary Deductions         Image: Check state Company state state Tax Information           Image: Voluntary Deductions         Image: Check state Company state	Pay Checks           Direct Deposit         T           W-4 Tax Information         T           Def State Tax Information         Check Date         Company Control Color         Pay End Date / Pay End	Javid Smith Jazardous Material Tech							
W-4 Tax Information         T         Image: Company         Pay End Date         Net Pay         Paycheck Number / PDF Check           Voluntary Deductions         11/10/2016         Contra Costa County         10/31/2016         \$3325.36         3177833         >           Advance Pay         10/10/2016         Contra Costa County         09/01/2016         \$33245.95         3161167         >           09/09/2016         Contra Costa County         08/01/2016         \$3256.76         3144587         >           08/10/2016         Contra Costa County         08/01/2016         \$3256.76         3144587         >	W-4 Tax Information         T           Ve4 Tax Information         Check Date         Company Pay End Date         Net Pay PDF Check Number / PDF Check           Voluntary Deductions         11/10/2016         Contra Costa County         00/12/016         \$3326.36         3177833           Advance Pay         10/10/2016         Contra Costa County         09/01/2016         \$3244.59         3161167           09/09/2016         Contra Costa County         08/01/2016         \$3256.76         3144587           08/01/2016         Contra Costa County         07/01/2016         \$3261.33         3128123		Pay Checks	;					
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Date         Company         Pay End Date         Net Pay         PDF Check           Voluntary Deductions         11/10/2016         Contra Costa County         10/10/2016         \$3325.36         3177833         >           Advance Pay         10/10/2016         Contra Costa County         09/01/2016         \$3244.59         3161167         >           09/09/2016         Contra Costa County         08/01/2016         \$3256.76         3144587         >           08/01/2016         Contra Costa County         07/01/2016         \$3256.76         3144587         >	Date         Company         Pay End Date         Net Pay         PDF Check           Voluntary Deductions         11/10/2016         Contra Costa County         10/31/2016         \$3325.36         3177833           Advance Pay         10/10/2016         Contra Costa County         09/01/2016         \$3244.59         3161167           09/09/2016         Contra Costa County         09/01/2016         \$3256.76         3144587           08/01/2016         Contra Costa County         07/01/2016         \$3295.13         3128123	ax Information							
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09/09/2016 Contra Costa County 08/31/2016 09/31/2016 \$3256.76 3144587 > 08/31/2016 07/01/2016 \$3495.13 3128123	09/09/2016 Contra Costa County 08/31/2016 \$3256.76 3144587 08/31/2016 \$3495.13 3128123	ce Pay	10/10/2016	Contra Costa County		\$3244.59	3161167		>
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			08/10/2016	Contra Costa County		\$3495.13	3128123		>

Step	Action
2.	Click the Voluntary Deductions link.  Pay Checks  Direct Deposit  W-4 Tax Information  DE4 State Tax Information  Voluntary Deductions



< My Homepage	Voluntary Deductions List	<b>ନ</b> ପ୍	♥ ≡ ⊘
David Smith Hazardous Material Tech			
nay Checks	Voluntary Deductions		
📥 Direct Deposit	Review, add or update your voluntary deductions information.		
W-4 Tax Information	Deduction Type Start Date Stop Date Status Deduction G	Goal Amount	1 rows Goal Balance
DE4 State Tax Information		\$	\$
S Voluntary Deductions			
Advance Pay	Add Deduction		

ions page displays. You currently do not have any voluntary
tons page displays. Tou currently do not have any voluntary
vill add a single voluntary deduction to the United Way to ne amount of \$25 with a goal amount of \$500.
tically keep track of the Goal Balance (the amount you have will stop the deduction once the goal amount you specify
on button.
1 rows Stop Date Status Deduction Goal Amount Goal Balance
n t



< Voluntary Deductions	Edit Voluntary Deductions	â	Q	۲	۲
David Smith Hazardous Material Tech					
💐 Pay Checks	Voluntary Deductions				
🍰 Direct Deposit	*Type of Deduction Q				
W-4 Tax Information	Flat Amount Amount				
DE4 State Tax Information	*Enter Amount				
S Voluntary Deductions	Take deduction until I reach this Goal Amount				
🚰 Advance Pay	*Enter Deduction Start Date				
	(example: 12/31/2000)				
	Enter Deduction Stop Date				
	(example: 12/31/2000)				
	Current Balance 0.00				
	* Required Field Submit				

Step	Action
5.	The Edit Voluntary Deduction page displays.
	You can use this page to specify the type of deduction, the amount to be taken out of your pay each month, the total amount you want to give, the date on which the deduction will start, and (optionally) the date ion which you want the deduction to end.
	For this example you will enter/select the following:
	<ul> <li>-Type of Deduction: Charity United Way</li> <li>- Enter Amount: 25</li> <li>- Take deduction until I reach this Goal Amount: 500</li> <li>- Enter Deduction Start Date: 02/15/2017</li> <li>- Enter Deduction Stop Date: leave blank</li> </ul>



< Voluntary Deductions	Edit Voluntary I	Deductions	â	Q	۲	=	۲
David Smith Hazardous Material Tech							
🔁 Pay Checks	Voluntary Deductions						
📥 Direct Deposit	*Type of Deduction	This fi	eld is display	/ only	/.		
W-4 Tax Information	Flat Amount	Amount					
DE4 State Tax Information	*Enter Amount						
S Voluntary Deductions	Take deduction until I reach this Goal Amount						
Advance Pay	*Enter Deduction Start Date						
		(example: 12/31/2000)					
	Enter Deduction Stop Date						
		(example: 12/31/2000)					
	Current Balance	0.00					
	* Required Field Submit						

Step	Action
6.	Note: The <b>Flat Amount</b> field defaults to Amount and is presented in display-only mode. You cannot edit the value in this field.
	All voluntary deductions must be a flat amount. You cannot specify that a deduction represent a percentage of your gross pay.
7.	Click the Look up *Type of Deduction button.
	Voluntary Deductions
	*Type of Deduction



< Voluntary Deduction	s Edit Voluntary Deductions		Ξ	
David Smith	Cancel			)
Hazardous Mater	Search for: *Type of Deduction			
Grid button	Search Criteria     List button			
Ray Checks	✓ Search Results			
Direct Deposit		7 rows		
W-4 Tax Information	Deduction Description $\Diamond$			
📝 DE4 State Tax Inform:	Charity Bay Area Black UnitFD			
Voluntary Deductions	Charity Progressive Way			
Advance Pay	Charity United Way			
	Charity Comb'd Hith Apl			
	Charity Earth Share Calif			
	Charity Loc Independ Charities			
	Charity Pledges-Other			

Step	Action
8.	The <b>Look Up</b> page for Type of Deductions displays. Use this page to select a charity.
	Use the Grid or List button to change how the search results are displayed.

	✓ Search Results
Search Results	
Deduction Description ◇	Deduction Description Charity Bay Area Black UnitFD
Charity Bay Area Black UnitFD	Deduction Description Charity Progressive Way
	Deduction Description Charity United Way
Charity Progressive Way	Deduction Description Charity Comb'd Hlth Apl
Charity United Way	Deduction Description Charity Earth Share Calif
Charity Comb'd Hith Apl	Deduction Description Charity Loc Independ Charities
	Deduction Description Charity Pledges-Other
Charity Earth Share Calif	
Charity Loc Independ Charities	



Step	Action
9.	Using Look up pages is covered more fully in the Navigation course.
10.	Click the Charity United Way object.
11.	Click in the <b>Enter Amount</b> field. Use this field to indicate the amount you want deducted from your pay each month for this deduction.
	Voluntary Deductions
	*Type of Deduction Charity United Way × Q
	Flat Amount Amount
	*Enter Amount
12.	Enter the desired information into the <b>Enter Amount</b> field. Enter "25".
	*Type of Deduction Charity United Way Q
	Flat Amount Amount
	*Enter Amount
13.	Click in the Take deduction until I reach this Goal Amount field.
	Use this field to indicate the total amount you want to contribute as part of this deduction. Voluntary Deductions *Type of Deduction Charity United Way Q
	Flat Amount Amount
	*Enter Amount 25 × Take deduction until I reach this Goal Amount



Step	Action
14.	Enter the desired information into the <b>Take deduction until I reach this Goal</b> <b>Amount</b> field. Enter " <b>500</b> ".
	Voluntary Deductions
	*Type of Deduction Charity United Way Q
	Flat Amount Amount
	*Enter Amount 25
	Take deduction until I reach this Goal Amount
	*Enter Deduction Start Date
15.	Click in the Enter Deduction Start Date field.
	Use this field to indicate the date on which you want the deduction to start.
	Voluntary Deductions
	*Type of Deduction Charity United Way Q
	Flat Amount Amount
	*Enter Amount 25
	Take deduction until I reach this Goal Amount
	"Enter Deduction Start Date
16.	Enter the desired information into the <b>Enter Deduction Start Date</b> field. Enter "2/15/2017".
	Flat Amount Amount
	*Enter Amount 25
	Take deduction until I reach this Goal Amount 500
	*Enter Deduction Start Date



< Voluntary Deductions	Edit Voluntary [	Deductions	Â	Q	۲	Ξ	۲
David Smith Hazardous Material Tech							
🔁 Pay Checks	Voluntary Deductions						
🍰 Direct Deposit	*Type of Deduction	Charity United Way Q					
W-4 Tax Information	Flat Amount	Amount					
DE4 State Tax Information	*Enter Amount	25					
SVoluntary Deductions	Take deduction until I reach this Goal Amount	500					
💬 Advance Pay	*Enter Deduction Start Date	2/15/2017					
		(example: 12/31/2000)					
	Enter Deduction Stop Date	<b></b>					
		(example: 12/31/2000)					
	Current Balance	0.00					
	* Required Field						

Step	Action
17.	The <b>Enter Deduction Stop Date</b> field is optional. Use this field to enter the date on which you want the deduction to stop.
	Deduction are automatically taken each month until either the goal amount is reached or the Deduction Stop Date is reached. You can use this field to cancel a deduction. (This is covered in a separate topic.)
18.	The deduction must be processed by the payroll staff.
	Click the Submit button.
	(example: 12/31/2000) Current Balance 0.00
	* Required Field Submit



Step	Action
19.	Note: because the deduction must be processed by the payroll staff or because the current payroll may already be in process, the deduction may not show up in your net paycheck. Click the OK button.
20.	Click the OK button.  iission was successful. Please contact your departmental payroll personnel to complete 'CCYY' Contracampaign form to ensure deductions are submitted to your charity of choice.  OK Cancel

< My Homepage	Volunta	ary Dedu	ctions	List		Â	9 2	
David Smith Hazardous Material Tech	Voluntary F du	uction						
📥 Direct Deposit	Review, add o odat	e your unt	ary o d	ctions inf	ation.			1 rows
W-4 Tax Information DE4 State Tax Information	Deduction Type ◇	Start Date ⇔	Stop Date ¢	Status ♦	Deduction ⇔	Goal Amount ◊	Goal Balance ⇔	
Voluntary Deductions	Charity United Way	02/15/2017		In Future	\$25.00	500.00	0.00	Edit
Advance Pay	Add Deduction							



Step	Action
21.	Note the <b>Voluntary Deductions</b> grid now displays the deduction information you just entered.
	You can use the <b>Edit</b> button to edit this information. Editing deductions is covered in another topic.
	You can use the <b>Add</b> button to add additional deductions of the same or other types.
	The <b>Status</b> field indicates that this deduction is to take place in the future. For this example the current date is $2/6/2017$ .
22.	Click the <b>Home</b> button.
	A < < ≡ Ø
23.	
	End of Procedure.

### Editing an Existing Voluntary Deduction and Adding a New Deduction

#### **Editing a Voluntary Deduction**

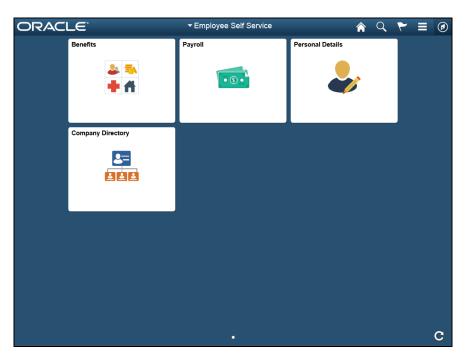
The basic steps are:

- 1. Click the **Payroll** tile on the Employee Self Service page
- 2. Click the Voluntary Deductions link on the Actions panel
- 3. Click the **Edit** button for the deduction you want to edit
- 4. Edit information on the **Voluntary Deduction** page
  - 1. Enter Amount
  - 2. Take deduction until I reach this Goal Amount
  - 3. Enter Deduction End Date (optional)
- 5. Click the **Submit** button
- 6. Click the **OK** button on the **Confirm Submit** page
- 7. Click the **OK** Button on the CCYY Contra Costa County Charity Campaign Form message box

#### Note

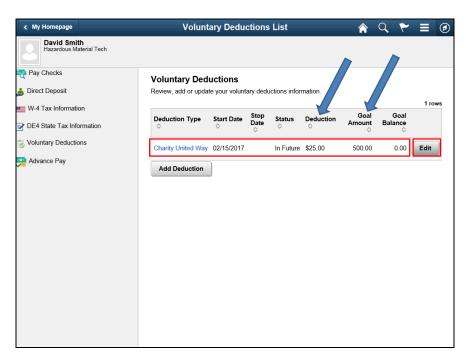
You must complete the CCYY Contra Costa County charity contribution form to ensue that your contribution is sent to the charity you selected. Contact your departments' payroll staff for more information and copies of this form.





Step	Action
1.	Click the <b>Payroll</b> tile.
	Payroll
	• 3 •
2.	Click the Voluntary Deductions link.
	Voluntary Deductions





Step	Action
3.	The <b>Voluntary Deductions</b> page displays. The <b>Voluntary Deductions</b> grid contains information for a single deduction in the amount of \$25 to be given to the United Way with a goal amount of \$500. In this example, you will edit this deduction to increase the goal amount to \$700 and then add an additional voluntary deduction to the Bay Area Black UnitFD in the amount of \$25 to begin on 07/01/2016 with a goal amount of \$1000.
	Begin by editing the existing deduction.
4.	Click the Edit button. Edit



< Voluntary Deductions	Edit Voluntary Deductions	A Q Y	≣ ∅
David Smith Hazardous Material Tech			
nay Checks	Voluntary Deductions		
🍐 Direct Deposit	*Type of Deduction Charity United Way	These fields are	
W-4 Tax Information	Flat Amount Amount	display only.	
DE4 State Tax Information	*Enter Amount 25.00		
S Voluntary Deductions	Take deduction until I reach this Goal Amount 500.00		
Advance Pay	*Enter Deduction Start Date 02/15/2017		
-	(example: 12/31/2000)		
	Enter Deduction Stop Date		
	(example: 12/31/2000)		
	Current Balance 0.00		
	* Required Field Submit		

Step	Action			
5.	The <b>Edit Voluntary Deductions</b> page displays. You can use this page to change the amount of the deduction, the goal amount, and the deduction stop date.			
	You cannot edit the deduction type, the flat amount, or the deduction start date. The <b>Type of Deduction</b> field, the <b>Flat Amount</b> Field, and the <b>Enter Deduction Start Date</b> field are presented in display-only mode.			
	For this example, you will change the value in the <b>Take Deduction until I reach this Goal Amount</b> field from 500 to 1000.			
6.	Click in the Take deduction until I reach this Goal Amount field. Take deduction until I reach this Goal Amount 500.00			
7.	Enter the desired information into the Take deduction until I reach this Goal Amount field. Enter "700". Take deduction until I reach this Goal Amount			
8.	Click the <b>Submit</b> button.  Submit			



Step	Action
9.	<b>Note:</b> the change you just made may not be reflected in your next paycheck depending on whether the current pay period is being currently processed.
	Click the <b>OK</b> button.
	ОК
10.	<b>Note:</b> You may have to submit a new CCYY Contra Costa County charity campaign form to ensure that the change you just made will be correctly administered.
	Click the <b>OK</b> button.
	OK

< My Homepage	Volunt	ary Dedu	ctions	List		Â	9 2	∎ ⊘
David Smith Hazardous Material Tech								
🔁 Pay Checks	Voluntary Dedu Review, add or updat		ary dedu	ictions infor	mation.			1 rows
W-4 Tax Information Tet State Tax Information	Deduction Type ♢	Start Date ⇔	Stop Date ♢	Status ⇔	Deduction ♢	Goal Amount ⊘	Goal Balance ⊘	
Voluntary Deductions	Charity United Way Add Deduction	02/15/2017		In Future	\$25.00	700.00	0.00	Edit

Step	Action
11.	The <b>Voluntary Deductions</b> page displays. The <b>Voluntary Deductions</b> grid now reflects the change you just made. The <b>Goal Amount</b> column displays \$700 rather than the original \$500.
	Next you will add a second deduction. This one to the Bay Area Black UnitFD in the amount of \$25 to start on 07/01/2016 with a goal amount of \$1000.
12.	Click the Add Deduction button. Add Deduction



< Voluntary Deductions	Edit Voluntary [	Deductions	Â	Q	۲	=	ø
David Smith Hazardous Material Tech							
🔁 Pay Checks	Voluntary Deductions						
📥 Direct Deposit	*Type of Deduction	Q					
W-4 Tax Information	Flat Amount	Amount					
PE4 State Tax Information	*Enter Amount						
S Voluntary Deductions	Take deduction until I reach this Goal Amount						
👷 Advance Pay	*Enter Deduction Start Date						
		(example: 12/31/2000)					
	Enter Deduction Stop Date						
		(example: 12/31/2000)					
	Current Balance	0.00					
	* Required Field Submit						

Step	Action
13.	The Edit Voluntary Deduction page displays.
	You will use this page to add information about the additional deduction.
14.	Click the Look up *Type of Deduction button.
15.	Click the Charity Bay Area Black UnitFD object.
	Charity Bay Area Black UnitFD
16.	Click in the Enter Amount field.
	*Enter Amount
17.	Enter the desired information into the <b>Enter Amount</b> field. Enter "25".
	*Enter Amount
18.	Click in the Take deduction until I reach this Goal Amount field.
10.	Take deduction until I reach
	this Goal Amount
19.	Enter the desired information into the Take deduction until I reach this Goal
	Amount field. Enter "1000".
	Take deduction until I reach this Goal Amount



Step	Action					
20.	Click in the Enter Deduction Start Date field.					
	*Enter Deduction Start Date					
21.	Enter the desired information into the <b>Enter Deduction Start Date</b> field. Enter "3/1/2017".					
	*Enter Deduction Start Date					

< Voluntary Deductions	Edit Voluntary Deductions	A < < ≡ Ø
David Smith Hazardous Material Tech		
<ul> <li>Pay Checks</li> <li>Direct Deposit</li> <li>W-4 Tax Information</li> <li>DE4 State Tax Information</li> <li>Voluntary Deductions</li> <li>Advance Pay</li> </ul>	Voluntary Deductions "Type of Deduction Charity Bay Area Black I Flat Amount Amount 25 Take deduction until I reach this Goal Amount "Enter Deduction Start Date 3/1/2017] (example: 12/31/2000) Enter Deduction Stop Date (example: 12/31/2000) Current Balance 0.00 * Required Field Submit	This field is optional.

Step	Action
22.	<ul><li>For this example you will not specify a deduction stop date. The Enter Deduction Stop Date field is optional. You can enter a value in this field on a later date.</li><li>Your deduction will continue until either the goal amount or the deduction stop date is reached.</li></ul>
23.	Click the Submit button. Submit
24.	Note: This deduction may not appear on your next pay check depending on where that check is in the payroll cycle.         Click the OK button.



Step	Action
25.	Note, you must complete a CCYY Contra Costa County charity campaign form to ensure that the charity of your choice receives your contribution. Check with you department's payroll staff for more information and copies of this form. Click the OK button.

< My Homepage	Voluntary Deductions List	A V E Ø
David Smith Hazardous Material Tech		
Pay Checks New Deduc	tion /oluntary Deductions Review, add or update your voluntary deductions informatic	n
W-4 Tax Information		2 rows
DE4 State Tax Information	Deduction Type $\diamond$ Start Date $\diamondsuit$ Start $\diamond$ Start $\diamond$	s Deduction Goal Goal
S Voluntary Deductions	Charity Bay Area Black UnitFD 03/01/2017 In Fu	ture \$25.00 1000.00 0.00 Edit
Advance Pay	Charity United Way 02/15/2017 In Fu	ture \$25.00 700.00 0.00 Edit
	Add Deduction	
	<	

Step	Action
26.	Notice, the new deduction now appears on the grid on the <b>Voluntary Deductions</b> page.
27.	Click the Home button.
28.	End of Procedure.

### **Canceling a Voluntary Deduction**

### **Canceling a Voluntary Deduction**

The basic steps are:

- 1. Click the **Payroll** tile on the Employee Self Service page
- 2. Click the Voluntary Deductions link on the Actions panel

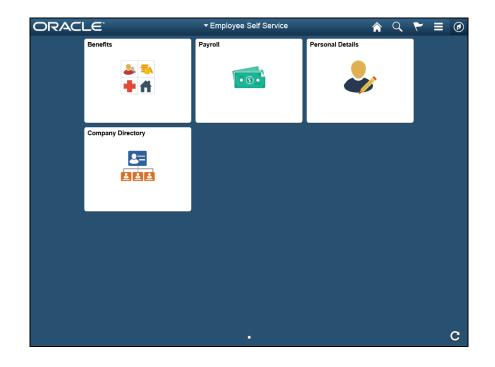


- 3. Click the **Edit** button for the deduction you want to edit
- 4. Enter the date on which you want the deduction to stop in the **Enter Deduction Stop Date** field
- 5. Click the **Submit** button
- 6. Click the **OK** button on the **Confirm Submit** page
- 7. Click the **OK** Button on the CCYY Contra Costa County Charity Campaign Form message box

#### Notes

The deduction will stop once the date you enter in the **Enter Deduction Stop Date** field is reached.

The Stop date for a deduction must be greater than the Start date for the deduction.





Step	Action
1.	Click the <b>Payroll</b> button.
	Payroll
2.	Click the Voluntary Deductions link
2.	Click the Voluntary Deductions link.

< My Homepage	Voluntary Ded	uctions L	ist		1		۲	∎ Ø
David Smith Hazardous Material Tech								
🔁 Pay Checks	Voluntary Deductions Review, add or update your volu	ntary deducti	ons info	ormation.				
W-4 Tax Information								2 row
DE4 State Tax Information	Deduction Type $\diamondsuit$	Start Date ≎	Stop Date ♢	Status ⇔	Deduction ♢	Goal Amount ¢	Goal Balance ⊘	
Voluntary Deductions	Charity Bay Area Black UnitFD	03/01/2017		In Future	\$25.00	1000.00	0.00	Edit
🚆 Advance Pay	Charity United Way	02/15/2017		In Future	\$25.00	700.00	0.00	Edit
	Add Deduction							
	<							>

Step	Action
3.	The <b>Voluntary Deductions</b> page displays. The Voluntary Deductions grid contains two rows. The first for a deduction for Charity Bay Areas Black UnitFD and the second for Charity United Way.
	For this example you will cancel the deduction for the deduction for the United Way.
	To cancel a deduction, enter/edit the date in the <b>Enter Deduction Stop Date</b> field to indicate the date on which you want the deduction to stop. One the date in this field is reached, the deduction will no longer be taken from your gross pay.



Step	Action
4.	Click the <b>Edit</b> button.
	Edit
5.	Click in the Enter Deduction Stop Date field.
	Enter Deduction Stop Date
6.	Enter the desired information into the <b>Enter Deduction Stop Date</b> field. Enter "3/15/2017".
	Note: the Deduction Stop date must be greater than the deduction Start Date.
	Enter Deduction Stop Date
7.	Click the <b>Submit</b> button.
	Submit
8.	<b>Note:</b> the change you just made may or may not show up in your next pay check depending on where that check is in the payroll cycle.
	Click the <b>OK</b> button.
	ок
9.	Click the <b>OK</b> button.
	ок



< My Homepage	Voluntary Ded	uctions List		Â	Q P		۲
David Smith Hazardous Material Tech							
🔁 Pay Checks	Voluntary Deductions	nta deductions information	on.				
W-4 Tax Information	Deduction Type $\diamond$	Start D. Stop Date	Status ≎	Deduction ♢	Goal Amount ≎	Goal Balance ♢	
Voluntary Deductions	Charity Bay Area Black UnitFD	03/01/2017	In Future	\$25.00	1000.00	0.00	F
Advance Pay	Charity United Way	02/15/2017 03/15/2017	In Future	\$25.00	700.00	0.00	F
	Add Deduction						

Step	Action
10.	The <b>Voluntary Deductions</b> page displays. The <b>Stop Date</b> column for the Charity United Way deduction now displays 03/15/2017. The deduction will stop as of that date.
11.	Click the <b>Home</b> button.
12.	End of Procedure.

## Tax Information

#### **Tax Information**

The Employee Self Service feature of PeopleSoft 9.2 allows you to manage your tax withholding information online. You can

- Review and edit your W-4 Federal Tax Withholding information
- Review and edit your DE-4 California State Tax Withholding information

The steps involved in managing your tax withholding information online are covered in the two topics in this lesson:.

- Working with W-4 Tax Information
- Working with DE-4 Tax Information

These topics are available for play-back through the UPK player in

• See-It! Mode—allows you to watch a "video" demonstration of the topic



• Try-It! Mode—allows you use your mouse and keyboard to complete transactions in a simulated environment.

Both See-It! And Try-It! Provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Player are also available in two printed documents—A Training Guide and a Job Aid.

Here are some key points to keep in mind about working with tax information online:

- 1. Your W-4 and DE-4 tax information is brought into the self-service pages from your person, tax, and job records in PeopleSoft.
- 2. You no longer have to complete and submit paper versions of W-4 and DE-4 forms. The online process replaces the paper forms.
- 3. You can review and modify your withholding information at any time.
- 4. You must submit any changes that you make to your withholding information by clicking the Submit button on the **W-4 Tax Information** page and/or the **DE-4 Tax Information** page.
- 5. You must verify your identity on submitting changes to your withholding information on the **W-4 Tax Information** page and the **DE-4 Tax Information** page by entering the password you use to sign into PeopleSoft in the **Password** field on the **Verify Identity** page.
- 6. Changes that you make to your withholding information may not show up in your next paycheck, depending on where that paycheck is in the payroll cycle.
- 7. If you review your withholding information and do not make any changes to it on either the **W-4 Tax Information** page or the **DE-4 Tax Information** page, you do not have to click the submit button. You can just navigate away from the page or sign-out of PeopleSoft when you have finished your review.
- 8. You should rely in IRS and State of California publications to help you determine how many allowances you should take, whether it is advisable for you to request additional withholding, or whether you are eligible for exemption from withholding.

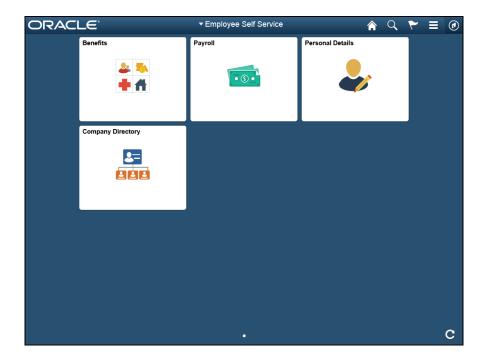
### Working with W-4 Tax Information

#### Working with W-4 Tax Information

The basic steps are:

- 1. Click the **Payroll** tile on the Employee Self Service page
- 2. Click the **W-4 Tax Information** link on the Actions panel
- 3. Review your address information on the W-4 Tax Information page
- 4. Review and make any required changes to your withholding information
  - 1. Number of Allowances
  - 2. Additional Withholding Amount
  - 3. Tax Status
- 5. If you are claiming Exemption
  - 1. Enter the Tax Year
  - 2. Select the Exemption check box
- 6. Click the **Submit** button
- 7. Enter your system password in the Password field on the Verify Identity page
- 8. Click the **OK** button





Step	Action			
1.	Click the <b>Payroll</b> tile.			
	Benefits	Payroll	Personal Details	
	🕹 🏊 🕂 🕂	• 5 •	<b>.</b>	



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David Smith Hazardous Material Tech						
Pay Checks	Pay Check	s				
Direct Deposit						<b>A</b> 1
W-4 Tax Information	T					↑↓
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Nu PDF Check	mber /
Voluntary Deductions	11/10/2016	Contra Costa County	10/31/2016	\$3325.36	3177833	>
Advance Pay	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161167	>
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	3144587	>
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	3128123	>

Step	Action
2.	Click the W-4 Tax Information link.
	Pay Checks
	🍰 Direct Deposit
	W-4 Tax Information
	DE4 State Tax Information
	Voluntary Deductions



< My Homepage	W-4 Tax Information 🛛 🕋 🔍 🏲 🚍	۲
David Smith Hazardous Material Tech		
💐 Pay Checks	W-4 Tax Information	^
📥 Direct Deposit	David Smith	
W-4 Tax Information	Contra Costa County	
DE4 State Tax Information	Social Security Number 123-45-6789	
Voluntary Deductions	You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld. Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.	ļ
	Home Address	
	1000 Pine Drive	
	Concord CA 94518	
	Mailing Address	_
	1000 Pine Drive Concord CA 94518	
	W-4 Tax Data	-
	Enter total number of Allowances you are claiming	~

Step	Action
3.	<ul> <li>The W-4 Tax Information page displays. Review this information and make any necessary changes.</li> <li>Review your address information, If this information is incorrect, you will need to use the eProfile portion of Employee Self Service to make corrections. eProfile is covered in other portions of Self Service training.</li> </ul>
4.	Click the scrollbar.



< My Homepage	W-4 Tax Information 🛛 😭 🔍 🏲 🚍	ø
David Smith Hazardous Material Tech		
🔁 Pay Checks	W-4 Tax Data	~
📥 Direct Deposit	Enter total number of 0	
W-4 Tax Information	Enter Additional Amount, if any, you want withheld from	
DE4 State Tax Information	each paycheck	
Voluntary Deductions	Indicate 1 ax Status Single	
🐏 Advance Pay	Married O	
	Check here and select Single status if married but withholding at single rate. No	4
	Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.	
	Check here if your last name differs from that shown on your social security card. No	
	You must call 1-800-772-1213 for a new card.	
	Claim Exemption	- 1
	I claim exemption from withholding for the year 2017	
	and I certify that I meet	
	BOTH of the following conditions for exemption	- 1
	<ul> <li>Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability.</li> </ul>	
	This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax     liability.	~

Step	Action
5.	Currently, you have not claimed any withholding allowance and have indicated that your marital Status is single. You can change either of these statuses. You can also elect to have addition amounts withheld from your pay check.
	Reference to IRS publications for guidance as to what values you should enter in these fields. The system does not limit the number of allowances you can take or the additional amount you request to be withheld.
	If you change your marital status here, you must also be sure that you have made a similar change to your personal information using eProfile.



< My Homepage	W-4 Tax Information 🛛 🏫 🔍 🏲		٢
David Smith Hazardous Material Tech			
💐 Pay Checks	W-4 Tax Data		~
📥 Direct Deposit	Enter total number of Allowances you are claiming 0		
W-4 Tax Information	Enter Additional Amount, if any, you want withheld from		
DE4 State Tax Information	each pavcheck		
SVoluntary Deductions	Indicate Tax Status Single 💿		
🚰 Advance Pay	Married O		
	Check here and select Single status if married but withholding at single rate. No		
	Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.		
	Check here if your last name differs from that shown on your social security card. No		
	You must call 1-800-772-1213 for a new card.		
	Claim Exemption		
	I claim exemption from vithholding for the year 2017		
	and I certify that I meet		
	BOTH of the following conditions for exemption		- 1
	<ul> <li>Last year I had a right to a refund of ALL Federal income tax withheld because I had NO ta liability.</li> </ul>	×	
	. This year I expect a refund of ALL Federal income tax withheld because I expect to have N	O tax	~

Step	Action
6.	For this example you will claim 1 allowance. You will not ask that any additional amounts be withheld and you will leave you marital status as single.
7.	Click in the Enter total number of Allowances you are claiming field. W-4 Tax Data Enter total number of Allowances you are claiming Enter Additional Amount, if any, you want withheld from each paycheck Indicate Tax Status
8.	Enter the desired information into the Enter total number of Allowances you are claiming field. Enter "1".           W-4 Tax Data           Enter total number of Allowances you are claiming



< My Homepage	W-4 Tax Information 🛛 🏫 🔍 🏲		Ø
David Smith Hazardous Material Tech			
🔁 Pay Checks	W-4 Tax Data		~
🃥 Direct Deposit	Enter total number of Allowances you are claiming 1 ×		
W-4 Tax Information	Enter Additional Amount, if any, you want withheld from		
DE4 State Tax Information	each paycheck		
SVoluntary Deductions	Single		
Advance Pay	Married O		
<b>~</b>	Check here and select Single status if married but withholding at single rate. No		4
	Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status		- 1
	Check here if your last name differs from that shown on your social security card. No		
	You must call 1-800-772-1213 for a new card.		- 1
	Claim Exemption		.
	I claim exemption from withholding for the year 2017		
	and I certify that I meet		- 1
	BOTH of the following conditions for exemption		- 1
	<ul> <li>Last year I had a right to a refund of ALL Federal income tax withheld because I had NO t liability.</li> </ul>	ax	
	This year I expect a refund of ALL Federal income tax withheld because I expect to have liability.	NO tax	~

Step	Action
9.	Select either or both of the options above if you are married but want to withhold at the single rate or if your last name differs from what appears on your Social Security Card. For this example you will not select either check box.
10.	Click the scrollbar.



< My Homepage	W-4 Tax Information 🛛 😭 🔍 🏲 🗏	
David Smith Hazardous Material Tech		
<ul> <li>Pay Checks</li> <li>Direct Deposit</li> <li>W-4 Tax Information</li> <li>DE4 State Tax Information</li> <li>Voluntary Deductions</li> <li>Advance Pay</li> </ul>	Single  Married Married Check here and select Single status if married but withholding at single rate. No Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status. Check here if your last name modeling for the status No You must call 1-800-772-1213 for a new card. Claim Exemption from Ulaim exemption from Ulaim exemption from Ulaim exemption for the year and I certify that I meet DOTH of the following conditions for exemption Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax inability. Check this box if you meet both conditions to claim exempt status. No	
	Submit	

Step	Action
11.	If you met the requirements described in the Claim Exemption section below and wish to have no federal taxes withheld from your pay, select the option in this section.
	For this example, you do not met the conditions outlined in this section. You will not select the check box in the <b>Claim Exemption</b> section.
12.	Click the <b>Submit</b> button to submit the changes that you made.
	<b>Note</b> : if you did not make any changes to your W-4 information, you do not have to use the Submit button. After reviewing your information, you can navigate away from this page or sign out of the system.
	exempt status. None
	Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.
	Submit



Step	Action
13.	Notice the system asks for you to verify your identity. Enter the Password you used to sign in the system in the <b>Current Password</b> field. Click in the <b>Current Password</b> field.
	Click in the Current Password held.
	Remember you should never share your User ID and password with another person.
	Cancel Verify Your Done nor Password to Submit Changes Verify your identity by typing your password User ID DREYN1 Current Password
14.	Enter the desired information into the <b>Current Password</b> field. Enter " <b>password1</b> ".
	Verify your identity by typing your password User ID_DREYN1
	Current Password
15.	Click the <b>Done</b> button.
	e. I Cancel Verify Your Done no Password to Submit y Changes uverify your identity by typing your password User ID DREYN1 Current Password ••••••••••••••••••••••••••••••••••••
16.	Click the <b>OK</b> button.
	W-4 Tax Information
	ок



< My Homepage	W-4 Tax Information 🛛 🕋 🔍 🏲	
David Smith Hazardous Material Tech		
😋 Pay Checks	W-4 Tax Information	^
📥 Direct Deposit	David Smith	
W-4 Tax Information	Contra Costa County	
ST DE4 State Tax Information	Social Security Number 123-45-6789	- 1
SVoluntary Deductions	These fields are locked because you recently made changes to your tax witholding. If you wish	to
Advance Pay	make changes try again tomorrow.	
	Home Address	_
	1000 Pine Drive	
	Concord CA 94518	
	Mailing Address	
	1000 Pine Drive	
	Concord CA 94518	
	W-4 Tax Data	
	Enter total number of Allowances you are claiming	
	Enter Additional Amount, if any, you want withheld from each paycheck	
	Indicate Tax Status	~

Step	Action
17.	The <b>W-4 Tax Information</b> page presents in display-only mode The changes that you made are reflected on this page.
	You can not make changes to any of the field on this page today. To make changes to you W-4 information you must navigate back to this page and then make any required changes after one day has passed.
18.	Click the <b>Home</b> button.
	Q ₹ ≡ Ø
19.	
	End of Procedure.

### Working with DE-4 Tax Information

#### Working with DE-4 Tax Information

#### The basic steps to enter/edit DE-4 tax information online are:

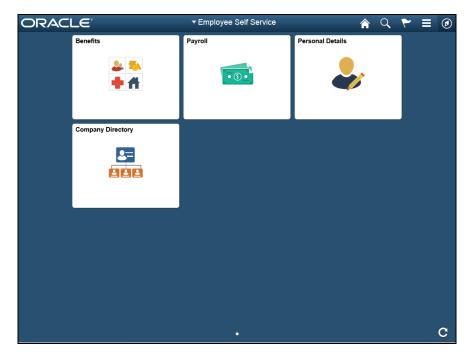
- 1. Navigate to the DE-4 Tax Information page
- 2. Review your existing DE-4 tax information
- 3. Make any changes necessary, e.g.,
  - 1. Change the number of allowances claimed
  - 2. Add/change any additional amounts you want withheld
  - 3. Change your marital status
  - 4. Claim exemption from State taxes



- 4. Click the Submit button
- 5. The Verify Identity page displays
- 6. Enter the password you use when signing in to PeopleSoft in the Password field
- 7. Click the continue button
- 8. The Submit Confirmation page displays
- 9. Click the OK button
- 10. The DE-4 Tax Information page displays

#### Note:

This form only relates to State taxes. You must also complete the W-4 Tax Information form to set your exemptions/withholdings for Federal taxes.



Step	Action
1.	Click the <b>Payroll</b> Tile.
	Payroll



Step	Action
2.	Click the DE-4 State Tax Information link.
	Pay Checks
	🍰 Direct Deposit
	W-4 Tax Information
	DE4 State Tax Information
	S Voluntary Deductions
	Advance Pay
3.	The <b>DE-4 State Tax Information</b> page displays. Review this information and make any necessary changes.
	Review your address information. If this information is incorrect, you will need to use the eProfile portion of Employee Self Service to make corrections. eProfile is covered in other portions of Self Service training.
4.	Currently, you have not claimed any withholding allowance and have indicated that your marital Status is single. You can change either of these statuses. You can also elect to have addition amounts withheld from your pay check.
	Reference to California Employment Development publications for guidance as to what values you should enter in these fields. The system does not limit the number of allowances you can take or the additional amount you request to be withheld.
5.	For this example you will claim 1 allowance. You will not ask that any additional amounts be withheld and you will leave you marital status as single.
6.	Click in the Enter total number of Allowances you are claiming field.
	DE-4 Tax Data
	Enter total number of Allowances you are claiming
	Enter Additional Amount, if any, you want withheld from each paycheck
7.	Enter the desired information into the <b>Enter total number of Allowances you are claiming</b> field. Enter "1".
	DE-4 Tax Data
	Enter total number of Allowances you are claiming ×
	Enter Additional Amount, if any, you want withheld from each paycheck
8.	Click the scrollbar.



Step	Action
9.	Review the information in the <b>Requirements for Exempt Status</b> .
	If you believe you are meet the requirements for exempt status, click the Check this box if you meet both conditions to claim exempt status to change the value from None to Exempt.
	The two requirements are:
	Last year you had a right to a refund of all federal income tax withheld This year you expect to receive a refund of all federal income tax withheld
	Remember you must claim exempt status on the W-4 form in order to claim exempt status for state taxes.
	For this example, you will not claim exempt status.
10.	Click the <b>Submit</b> button to submit the changes that you made.
	<b>Note</b> : if you did not make any changes to your DE-4 information, you do not have to use the <b>Submit</b> button. After reviewing your information, you can navigate away from this page or sign out of the system.
	Spouses Residency Relief Act. Notes: 1. This form will not change your federal withholding allowances. 2. If you wish to claim state taxes exempt, complete W-4 Federal Tax Information. Check this box if you meet both conditions to claim exempt status. None Under penalties of perjury, I declare that I have examined this certificate and to the best of m Submit
11.	Notice the system asks for you to verify your identity. Enter the Password you used to sign in the system in the <b>Current Password f</b> ield.
	Click in the <b>Password</b> field.
	Remember you should never share your UserID and password with another person.



Step	Action
12.	Enter the desired information into the Current Password field. Enter "password1".
13.	Click the Done button.
14.	Click the OK button.
15.	<ul><li>The <b>DE-4 Tax Information</b> page presents in display-only mode The changes that you made are reflected on this page.</li><li>You can not make changes to any of the fields on this page. To make changes to you DE-4 information you must wait one day.</li></ul>
16.	Click the <b>Home</b> button.
17.	End of Procedure.

# Advance Pay

The Employee Self Service feature of PeopleSoft 9.2 allows you to manage your advance pay online. You can

- Request advance pay
- Edit an advance pay request
- Cancel an advance pay request

The steps involved in managing adavance pay requests online are covered in the two topics in this lesson:

• Requesting Advance Pay



- Editing an Advance Pay Request
- Cancelling an advance payrequest

Simulations of how to manage advance pay are available for viewing and practice through the UPK player in two playback modes:

- The See-It! Mode—this mode allows you to watch a "video" demonstration of the topic
- The Try-It! Mode—this allows you use your mouse and keyboard to complete transactions in a simulated environment.

Both See-It! And Try-It! Provide guided instructions and explanations of important features of PeopleSoft transactions. The full text of the instructions and explanations included in the UPK Player are also available in two printed documents—A Training Guide and a Job Aid.

Here are some key points to keep in mind:

- 1. The online process replaces the paper form previously used to request advance pay
- 2. Requests for advance pay become effective on the date you make the request
- 3. In order to receive advance pay, you must initiate a request in ePay—the default value of the EE Advance Status field is N (or none)
- 4. You can request up to 1/3 of your monthly salary as advance pay
- 5. You can request a flat dollar amount but that amount cannot exceed 1/3 of your monthly salary
- 6. Only salaried employees can request advance pay
- 7. Advance pay requests remain active until you select N (or none) in the EE Advance Status field
- 8. You will be asked to verify your identify by entering the password you use to sign

### Requesting Advance Pay

#### **Requesting Advance Pay**

The basic steps to request advance pay are:

- 1. Navigate to the **Employee Self Service** home page
- 2. Click the **Payroll** tile
- 3. Click Advance pay in the Action panel
- 4. Click the **EE Advance Status** field
- 5. Either click in the **Percentage Selected** field or enter an amount up to 1/3 of your compensation in the **Advance Amount** field
- 6. Click the **Submit** button
- 7. Enter your system password in the Current Password field on the Verification page and click the **Done** button
- 8. Click **OK** on the **Submit confirmation** page



ORACLE	▼Employee Self Service	<u>ନ</u> ପ୍	ی 🗧 ۶
Benefits	Payroll	Personal Details	
2 <b>*</b> <b>+ f</b>	• 6 •	<b>\$</b>	
Company Directory			_
			C

Step	Action
1.	Click the <b>Payroll</b> tile.
	Payroll



< My Homepage		Payroll Self Ser	vice		<b>^ </b>	₹ ا
Bavid Smith Hazardous Material Tech						
Pay Checks	Pay Check	s				
Direct Deposit						
W-4 Tax Information	T					
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck Nu PDF Check	umber /
SVoluntary Deductions	11/10/2016	Contra Costa County	10/31/2016	\$3325.36	3177833	>
Advance Pay	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161167	>
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	3144587	>
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	3128123	>

Step	Action
2.	Click the Advance Pay link.
	new Pay Checks
	👗 Direct Deposit
	W-4 Tax Information
	DE4 State Tax Information
	S Voluntary Deductions
	Advance Pay



< My Homepage	Advance Pay Selection	🎓 🤇 🏲 🗏 🙆
David Smith Hazardous Material Tech		
Pay Checks	Advance Pay	
🍰 Direct Deposit	Compensation Rate \$6,305.35	These fields are
W-4 Tax Information	EE Advance Status None	currently inactive.
DE4 State Tax Information	Percentage Selected None	
S Voluntary Deductions	Advance Amount	
Para Advance Pay	Submit	-

Step	Action
3.	The Advance Pay page displays.
	The Compensation Rate field displays your current base monthly salary.
	Your can request up to one-third of this be paid as advance pay.
	Notice, the <b>Percentage Selected</b> field and the <b>Advance Amount</b> field are current inactive. You cannot select or enter any values in this fields. These fields will not become active until you use the <b>EE Advance Status</b> field to indicate that you want to request advance pay.



< My Homepage	Advance Pay Selection	Â	Q	۲	٢
David Smith Hazardous Material Tech					
🔁 Pay Checks	Advance Pay				
📥 Direct Deposit	Compensation Rate \$6,305.35				
W-4 Tax Information	EE Advance Status None				
DE4 State Tax Information	Percentage Selected None				
Voluntary Deductions	Advance Amount				
🕦 Advance Pay	Submit				

Step	Action
4.	The <b>EE Advance Status</b> defaults to None.
	You can use this field to request advance or to cancel an advance pay request.
	To request advance pay, click in this field to change the None to Advance.
	To cancel a request, click in the field to change the value from Advance to None.
	For this example, you will submit a request for advance pay.
5.	Click the <b>EE Advance Status</b> option.
	Advance Pay
	Compensation Rate \$6,305.35
	EE Advance Status None
	Advance Amount
	Submit



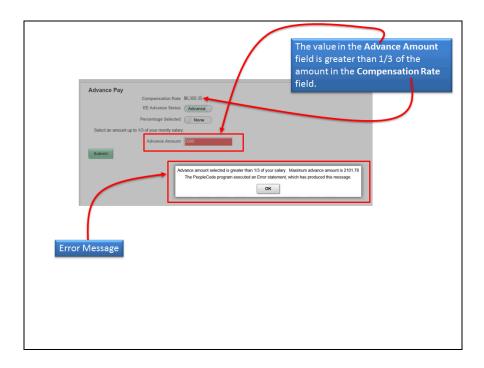
< My Homepage	Advance Pay Selection	A < < ≡ Ø
David Smith Hazardous Material Tech		These fields are now active, because the EE
<ul> <li>Pay Checks</li> <li>Direct Deposit</li> <li>W-4 Tax Information</li> <li>DE4 State Tax Information</li> <li>Voluntary Deductions</li> <li>Advance Pay</li> </ul>	Advance Pay Compensation Rate \$6,305.35 EE Advance Status Advance Percentage Selected None Select an amount up to 1/3 of your monthy salary. Advance Amount Submit	Advance Status field is set to Advance

Step	Action
6.	Notice, both the <b>Percentage Selected</b> field and the <b>Advance Amount</b> field are now active.
	You can use one or the other of these fields to indicate how much of your base monthly salary you want paid as advance pay. You can not select/enter values in both fields. Once you enter/select a value in one of these fields, the other field becomes inactive.
	These fields will revert to being inactive and any values you entered/select in them will be remove if you change the value selected in the <b>EE Advance Status</b> field from Advance to None.
7.	You can use the <b>Percentage Selected field</b> to indicate that you want one-thirds of your monthly base salary as advance pay. Your choices for this field are None (the default) or One Third.



< My Homepage	Advance Pay Selection	â	Q	۲	=	٦
David Smith Hazardous Material Tech						
nay Checks	Advance Pay					
📥 Direct Deposit	Compensation Rate \$6,305.35					
W-4 Tax Information	EE Advance Status Advance					
PE4 State Tax Information	Percentage Selected None					
SVoluntary Deductions	Select an amount up to 1/3 of your montly salary.					
🛒 Advance Pay	Advance Amount					
	Submit					

Step	Action
8.	You can use the Advance Amount field to enter an amount up to but not greater than one-third of your base monthly salary be paid as advance pay.
	Note: the system will generate an error message if you attempt to submit an amount that id greater than one third of your base monthly salary.





Step	Action
9.	If you enter a value in the <b>Advance Amount</b> field that is greater than one-third of your compensation and click the <b>Submit</b> button, the field will turn red and the system will generate and error message and will not allow you to submit your request. If you receive an error message, you should adjust the amount in the <b>Advance Amount</b> field to an amount that is less than one-third of your compensation and then click the <b>Submit</b> button.

< My Homepage	Advance Pay Selection	Â	Q	۲	۲
David Smith Hazardous Material Tech					
🟹 Pay Checks	Advance Pay				
📥 Direct Deposit	Compensation Rate \$6,305.35				
W-4 Tax Information	EE Advance Status Advance				
Mathematics DE4 State Tax Information	Percentage Selected None				
S Voluntary Deductions	Select an amount up to 1/3 of your montly salary.				
💭 Advance Pay	Advance Amount				

Step	Action
10.	For this example you will use the <b>Percentage Selected</b> field. In the next topic, you will use the <b>Advance Amount</b> field to indicate the amount you want as advance pay.
11.	Click the Percentage Selected option.
	Advance Pay Compensation Rate \$6,305.35 EE Advance Status Advance Percentage Selected None Select an amount up to 1/3 of your monthy salary. Advance Amount Submit



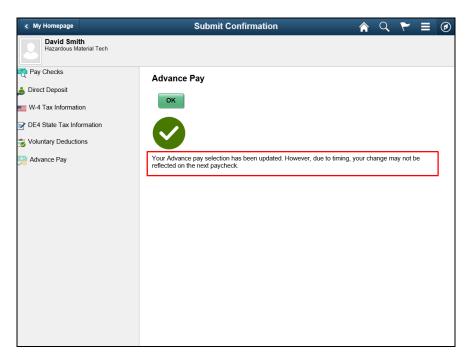
< My Homepage	Advance Pay Selection	
David Smith Hazardous Material Tech		ted Amount equals 1/3 compensation Rate
nay Checks	Advance Pay	
🍐 Direct Deposit	Compensation Rate \$6,305.35	
W-4 Tax Information	EE Advance Status Advance	
DE4 State Tax Information	Percentage Selected One-third	This field is inactive.
SVoluntary Deductions	Calculated Amount \$2,101.78	
💓 Advance Pay	Advance Amount	
	Submit	

Step	Action
12.	Notice the <b>Advance Amount</b> field is now inactive. You cannot enter a value in this field.
	Also notice that a <b>Calculated Amount</b> field now displays. Thee system automatically calculated the amount that is equal to one third of your salary and populated that value in this field. You cannot edit this value. This field is display only.
13.	Click the Submit button. Submit



Step	Action
14.	A verification page displays requesting that you verify your identity by entering my password—the password you use to sign in to PeopleSoft—into the <b>Current</b> <b>Password</b> field. Remember, you should not share your password with any one.
15.	Click in the Current Password field.
16.	Enter the desired information into the <b>Current Password</b> field. Enter "password1". Current Password
17.	Click the Done button.





Step	Action
18.	A <b>Submit Confirmation</b> page displays indicated that my advance pay information has been updated. This page also provides a reminder that the information you just submitted my not be reflected in your next paycheck, depending on where that check is in the pay cycle.
19.	Click the OK button.
20.	The Advance Pay page displays. The fields on this page are locked. You cannot edit them. They reflect the values You just submitted. Note: If you were to return to the advance pay page today and wanted to edit my advance pay information, You would not be able to edit this information. The system will provide a message that indicates that you will have to wait until tomorrow to make edits to this information.
21.	Sample page.



Step	Action
22.	Click the <b>Home</b> button.
	A < < ≡
23.	
	End of Procedure.

#### Editing an Advance Pay Request

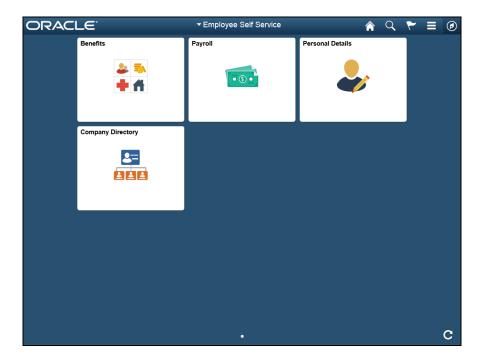
#### **Editing and Advance Pay Request**

The basic steps to edit an advance pay request are

- 1. Navigate to the Employee Self Service home page
- 2. Click the Payroll tile
- 3. Click Advance pay in the Action panel
- 4. If the Percentage Selected field displays one third, click in that field to change it to None and then enter an amount in the Advance amount field.
- 5. Or If there is a value in the Advance Amount field either edit that value or click the Percentage Selected field to change it from None to One Third.
- 6. Click the Submit button
- 7. Enter your system password in the Current Password field on the Verification page and Click the Done button
- 8. Click OK on the Submit confirmation page.

#### Procedure





Step	Action
1.	Click the <b>Payroll</b> button.
2.	Click the Advance Pay link.  Click the Advance Pay link.  Pay Checks  Direct Deposit  W-4 Tax Information  Click the Advance Pay



< My Homepage	Advance Pay Selection	A 9 F = Ø
David Smith Hazardous Material Tech		
Pay Checks	Current request	
📥 Direct Deposit	Compensation Rate \$6,305.35	
W-4 Tax Information	EE Advance Status Advance	This field is currently
DE4 State Tax Information	Percentage Selected One-third	inactive.
S Voluntary Deductions	Calculated Amount \$2,101.78	
殚 Advance Pay	Advance Amount	
	Submit	

Step	Action
3.	The <b>Advance Pay</b> page displays with your current request. You have requested that exactly one third of your monthly salary be taken as advance pay, \$2101.78
	For this example, you will reduce that amount to \$1000.
	Current the <b>Advance Amount</b> field is inactive. You cannot enter any value in that field. To change the amount to something less than one third of your monthly salary, you must first change the selection in the <b>Percentage Selected</b> field from One-third to None.
4.	Click the Percentage Selected option.
	Advance Pay Compensation Rate \$6,305.35 EE Advance Status Advance Percentage Selected One-third Calculated Amount \$2,101.78



< My Homepage	Advance Pay Selection	Â	Q	۲	۲
David Smith Hazardous Material Tech					
nay Checks	Advance Pay				
🍰 Direct Deposit	Compensation Rate \$6,305.35				
W-4 Tax Information	EE Advance Status Advance				
Z DE4 State Tax Information	Percentage Selected None				
SVoluntary Deductions	Select an amount up to 1/3 of your montly salary.				
🛒 Advance Pay	Advance Amount				
	Submit				

Step	Action
5.	The <b>Advance Amount</b> field is now active and the Calculated Amount field no longer displays.
	You can now use the <b>Advance Amount</b> field to indicate how much of your monthly salary you want paid as advance pay.
	Remember you cannot request that more than onethird of your monthly salary be paid as advance pay. The system will generate an error message if you attempt to request more than one-thirds of your salary as advance pay.
	For this example, you will request that \$1000 be paid as advance pay. This is less than one-third of your monthly salary of \$6305.35.
6.	If you enter a value in the <b>Advance Amount</b> field that is greater than one-third of your compensation and click the <b>Submit</b> button, the field will turn red and the system will generate and error message and will not allow you to submit your request. If you receive an error message, you should adjust the amount in the <b>Advance Amount</b> field to an amount that is less than one-third of your compensation and then click the <b>Submit</b> button.
7.	Click in the Advance Amount field.
	Advance Pay Compensation Rate \$6,305.35 EE Advance Percentage Selected None Select an amount up to 1/3 of your monthy salary. Advance Amount Submit



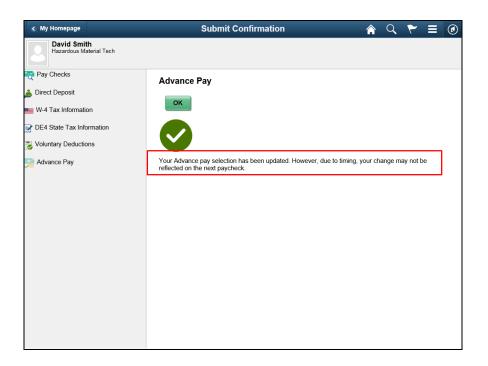
Step	Action
8.	Enter the desired information into the Advance Amount field. Enter "1000".
	Advance Pay Compensation Rate \$6,305.35
	EE Advance Advance
	Percentage Selected None
	Select an amount up to 1/3 of your monthy safary. Advance Amount
9.	Click the <b>Submit</b> button.
	Submit

< My Homepage	Advance Pay Selection	Â	Q	۲	٢
David Smith Hazardous Material Tech					
🔁 Pay Checks	Advance Pay				
🍰 Direct Deposit	Compensation Rate \$6,305.35				
W-4 Tax Information	EE Advance Status Advance				
Mathematics DE4 State Tax Information	Cancel Verify Your Done				
SVoluntary Deductions	Sele Password to Submit				
Advance Pay	Changes				
v	Verify your identity by typing your password				
	User ID DREYN1				
	Current Password				

Step	Action
10.	A verification page displays requesting that you verify your identity by entering my password—the password you use to sign in to PeopleSoft—into the <b>Current Password</b> field.
	Remember, you should not share your password with any one.



Step	Action
11.	Click in the Current Password field.
12.	Enter the desired information into the Current Password field. Enter "password1".
13.	Click the Done button.





Step	Action
14.	A <b>Submit Confirmation</b> page displays indicated that my advance pay information has been updated.
	This page also provides a reminder that the information you just submitted my not be reflected in your next paycheck, depending on where that check is in the pay cycle.
15.	Click the <b>OK</b> button.
	Advance Pay
	ок

< My Homepage	Advance Pay Selection	A < ♥ ≡ Ø
David Smith Hazardous Material Tech		
nay Checks	Advance Pay	
📥 Direct Deposit	Compensation Rate \$6,305.35	These fields are now
W-4 Tax Information	EE Advance Status Advance	inactive. You cannot not
Z DE4 State Tax Information	Percentage Selected None	edit them today.
local Contract Deductions	Select an amount up to 1/3 of your monthy salary.	
💬 Advance Pay	Advance Amount 1000.0000	

Step	Action
16.	The <b>Advance Pay</b> page displays. The fields on this page are locked. You cannot edit them. They reflect the values you just submitted.
	<b>Note:</b> If you were to return to the advance pay page today and wanted to edit my advance pay information, you would not be able to edit this information. The system will provide a message that indicates that I will have to wait until tomorrow to make edits to this information.



	ause you recently mae	de changes. If you wish to make changes try again tomorrow.
	Compensation Rate	
	EE Advance Status	Advance
F	Percentage Selected	One-third
	Advance Amount	

Step	Action
17.	Sample page
18.	Click the Home button.
19.	End of Procedure.

#### Canceling an Advance Pay Request

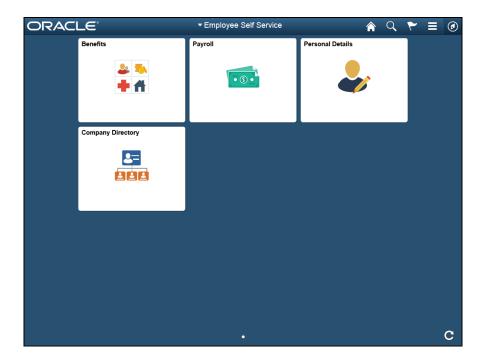
#### **Canceling an Advance Pay Request**

The basic steps to cancel an advance pay request are

- 1. Navigate to the Employee Self Service home page
- 2. Click the Payroll tile
- 3. Click Advance pay in the Action panel
- 4. Click in the EE Advance Status field to change the value in it from Advance to None.
- 5. Click the Submit button
- 6. Enter your system password in the Current Password field on the Verification page and Click the Done button
- 7. Click OK on the Submit confirmation page.



#### Procedure



Step	Action
1.	Click the <b>Payroll</b> tile.
	Payroll



< My Homepage		Payroll Self Ser	vice			₹ =
David Smith Hazardous Material Tech						
Pay Checks	Pay Check	s				
Direct Deposit						
W-4 Tax Information	T					<u>↑</u> ↓
DE4 State Tax Information	Check Date	Company	Pay Begin Date / Pay End Date	Net Pay	Paycheck N PDF Check	umber /
Voluntary Deductions	11/10/2016	Contra Costa County	10/31/2016	\$3325.36	3177833	>
Advance Pay	10/10/2016	Contra Costa County	09/01/2016 09/30/2016	\$3244.59	3161167	>
	09/09/2016	Contra Costa County	08/01/2016 08/31/2016	\$3256.76	3144587	>
	08/10/2016	Contra Costa County	07/01/2016 07/31/2016	\$3495.13	3128123	>

Step	Action
2.	Click the Advance Pay link.
	Ray Checks
	👗 Direct Deposit
	W-4 Tax Information
	DE4 State Tax Information
	👸 Voluntary Deductions
	😂 Advance Pay



< My Homepage	Advance Pay Selection	Â	Q	۲	۲
David Smith Hazardous Material Tech					
nay Checks	Advance Pay				
🍐 Direct Deposit	Compensation Rate \$6,305.35				
W-4 Tax Information	EE Advance Status Advance				
DE4 State Tax Information	Percentage Selected None				
S Voluntary Deductions	Select an amount up to 1/3 of your monthy salary.				
Advance Pay	Advance Amount 1000.00				
	Submit				

Step	Action
3.	The <b>Advance Pay</b> page displays your current advance pay request. You have requested that \$1000 of my salary be paid as advance pay.
	For this example, you want to cancel this request. You no longer want to receive advance pay.

< My Homepage	Advance Pay Selection	Â	Q	۲	≡	٢
David Smith Hazardous Material Tech						
🟹 Pay Checks	Advance Pay					
📥 Direct Deposit	Compensation Rate \$6,305.35					
W-4 Tax Information	EE Advance Status Advance					
DE4 State Tax Information	Percentage Selected None					
S Voluntary Deductions	Select an amount up to 1/3 of your monthy salary.					
Advance Pay	Advance Amount 1000.00					
	Submit					



Step	Action
4.	To cancel an advance pay request, change the value in the <b>EE Advance Status</b> field from Advance to None.
5.	Click the EE Advance Status option. Advance Pay Compensation Rate \$6.305.35 EE Advance Status Advance Percentage Selected None Select an amount up to 1/3 of your monthy salary. Advance Amount 1000.00 Submit

< My Homepage	Advance Pay Selection	A < ▼ ≡ Ø
David Smith Hazardous Material Tech		
Ray Checks	Advance Pay	
🍰 Direct Deposit	Compensation Rate \$6,305.35	These fields are now inactive.
W-4 Tax Information	EE Advance Status None	now mactive.
PE4 State Tax Information	Percentage Selected None	
SVoluntary Deductions	Advance Amount	
Advance Pay	Submit	

Step	Action
6.	Notice, the <b>Percentage Selected</b> field now displays None and the <b>Advance Amount</b> field is empty. Both fields are inactive. You cannot select or enter any values in either field.
7.	Click the Submit button.  Advance Pay Compensation Rate \$6,305.35 EE Advance Status None Percentage Selected None Advance Amount Submit

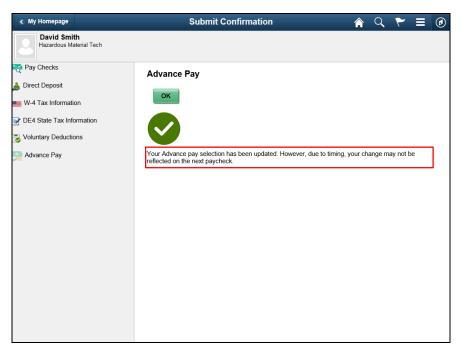


< My Homepage	Advance Pay Selection	Q	~	Ξ	۲
David Smith Hazardous Material Tech					
Pay Checks	Advance Pay				
🍰 Direct Deposit	Compensation Rate \$6,305.35				
W-4 Tax Information	EE Advance Status None				
MDE4 State Tax Information	Cancel Verify Your Done				
Voluntary Deductions	Password to Submit				
Advance Pay	Sub Changes				
	Verify your identity by typing your password				
	User ID DREYN1				
	Password				

Step	Action	
8.	The verification page displays requesting that you verify your identity by entering your password—the password I use to sign in to PeopleSoft—into the Current Password field. Remember, never share your password.	
9.	Click in the Current Password field.	
10.	Enter the desired information into the <b>Current Password</b> field. Enter "password1". Current Password	



Step	Action
11.	Click the <b>Done</b> button.
	Cancel Verify Your Done Password to Submit Changes Verify your identity by typing your password User ID DREYN1 Current Password



Step	Action
12.	The <b>Submit Confirmation</b> page displays. This page indicates that your advance pay information has been updated.
	This page also provided a reminder that the information you just submitted may not be reflected in your next paycheck, depending on where that check is in the pay cycle.
13.	Click the <b>OK</b> button.
	Advance Pay
	ок



< My Homepage	Advance Pay Selection	🏫 Q 🏲 🗏 🖉
David Smith Hazardous Material Tech	These fields are locked. You can same day that you submitted/c request. You will have to wait u Advance Pa these fields.	ancelled an advance pay
👗 Direct Deposit	Compensation Rate \$6,305,35	
W-4 Tax Information	EE Advance Status None	
DE4 State Tax Information	Percentage Selected None	
Voluntary Deductions	Advance Amount	
Advance Pay		

Step	Action	
14.	The <b>Advance Pay</b> page displays. The fields on this page are locked. You cannot edit them. They reflect the request you just submitted.	
	You have successfully cancelled your advance pay request.	
	Remember, You cannot make any furthers edits to your advance pay request today. If you want to change this request, You will have to wait until tomorrow.	



Advance Pay	cked because you recently made changes. If you wish to make changes try again tomorrow.
These lields are lo	Compensation Rate \$6,305.35
	EE Advance Status Advance
	Percentage Selected One-third
	Advance Amount

Step	Action
15.	Sample page
16.	Click the <b>Home</b> button. $\mathbf{R} \ \mathbf{Q} \ \mathbf{r} \equiv \mathbf{O}$
17.	End of Procedure.