Contra Costa County PeopleSoft Training

ePay

Training Guide

Contra Costa County
PeopleSoft Training

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

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 employers 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.

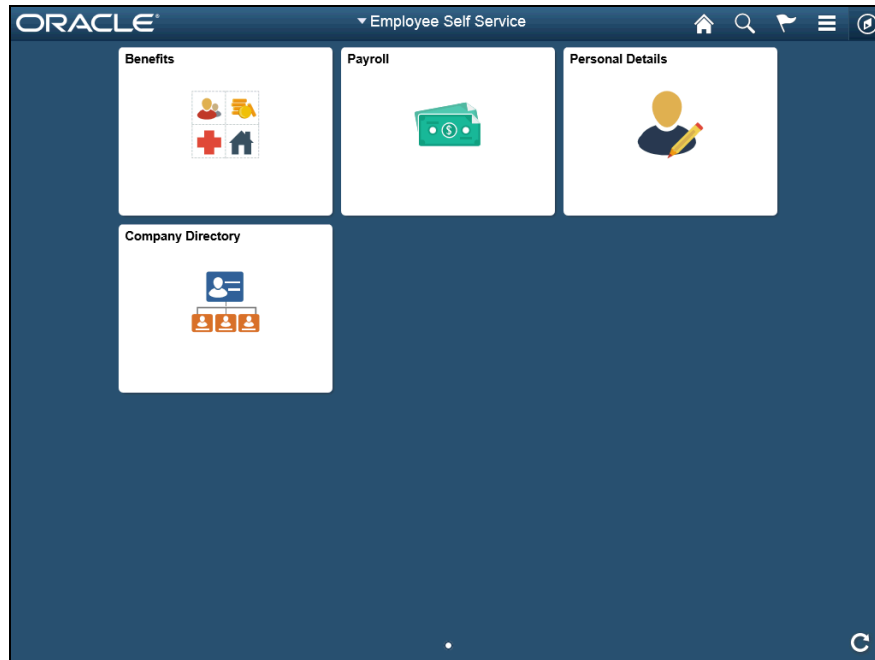## Viewing Paychecks Online

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

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Procedure

Step	Action
1.	Click the Payroll tile.

Step	Action
2.	The **Pay Check** page displays.

The **Paycheck** 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 **Filter** button to help locate the paycheck you want to view and the **Sort** arrows to change the order in which the paychecks are displayed. |

Step	Action
3.	Use of the Filter Button and Sport Arrows is covered in greater detail in the *Navigation Course*.

Step	Action
4.	For this example, you will review the paycheck in the second row of the grid. Click the **06/22/2017** link. <table><tr><th>Check Date</th><th>Company</th><th>Pay Begin Date / Pay End Date</th><th>Net Pay</th><th>Paycheck Number / PDF Check</th></tr><tr><td>06/23/2017</td><td>Contra Costa County</td><td>06/01/2017 06/15/2017</td><td>$1366.84</td><td>3306854 ›</td></tr><tr><td>06/22/2017</td><td>Contra Costa County</td><td>06/15/2017 06/29/2017</td><td>$1628.93</td><td>865201 ›</td></tr></table>
5.	The paycheck displays as a PDF file. You can use your browser's **Print** function to print this advice or your can use your browser's **Save** function to save the file to save a copy of the advice. Confidential information has 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 **Home** 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
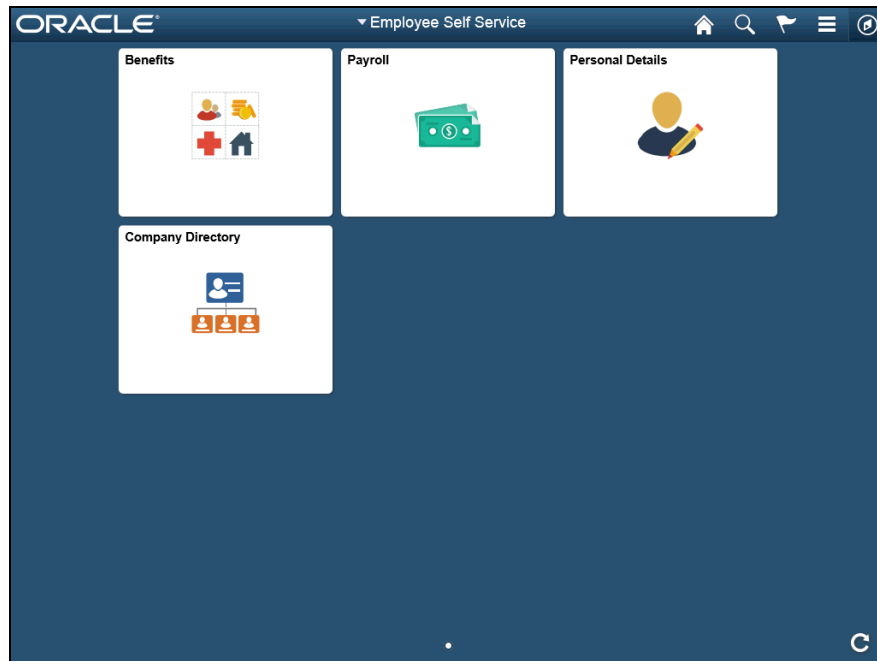
Adding a Direct Deposit
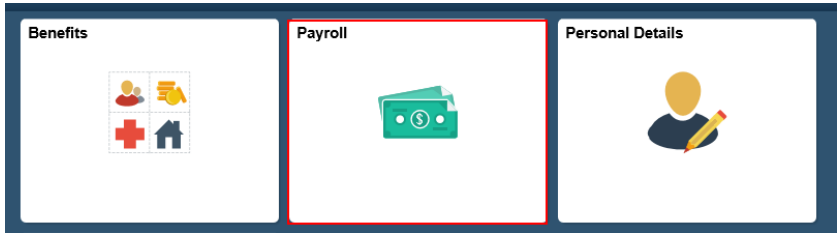
The basic steps are:

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.

Procedure

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Step	Action
1.	Click the **Payroll** tile.

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Step	Action
2.	Click the **Direct Deposit** link.

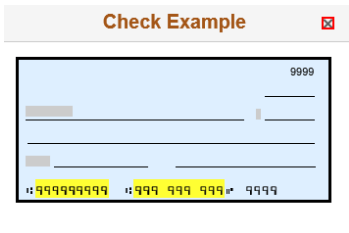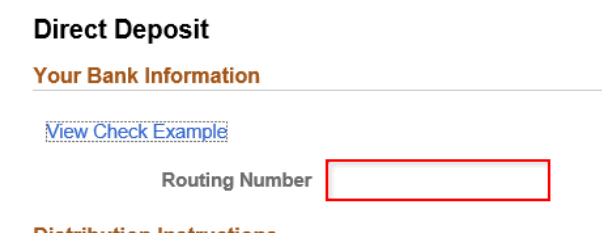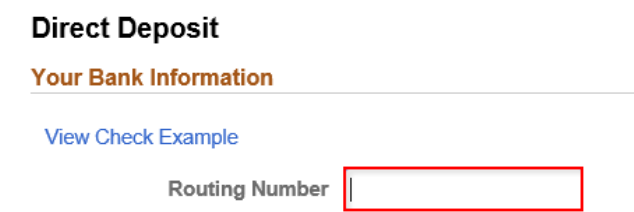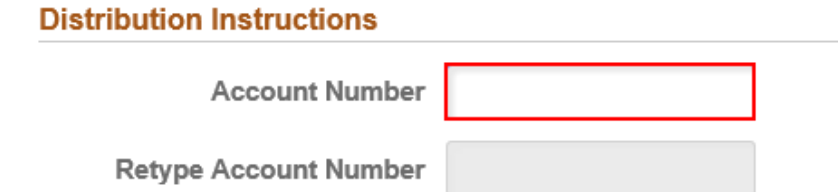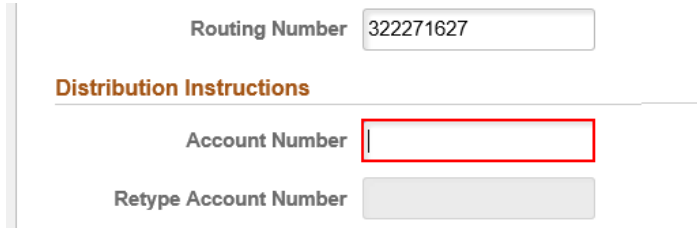| Step	Action
3.	The **Direct Deposit** page displays. You have not yet set up a direct deposit. For this example, you will add direct deposit information. Your direct deposit will be made to a checking account (**Account Number**: 123456789) at J.P. Morgan Chase (**Routing Number**: 322271627).
4.	Click 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**
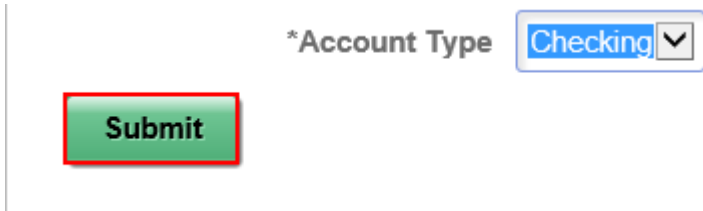
Step	Action
6.	If you are not sure of how to locate your bank's routing number and your account number (for a checking account), click the **View Check Example** link.
7.	The **Check Example** page displays. This page explains how to locate your bank's routing number and your account number for a checking account.
8.	Click the **Close** button.
9.	Click in the **Routing Number** field.
10.	Enter the desired information into the **Routing Number** field. Enter "**322271627**".
11.	Click in the **Account Number** field.

Step	Action
12.	Enter the desired information into the **Account Number** field. Enter "**123456789**".
13.	Press **[Tab]** to move away from the Account Number field. The **Retype Account Number** field will become active.
14.	Click in the **Retype Account Number** field.
15.	Enter the desired information into the **Retype Account Number** field. Enter "**123456789**".
16.	Click the **Account Type** list.
17.	Click the **Checking** list item.

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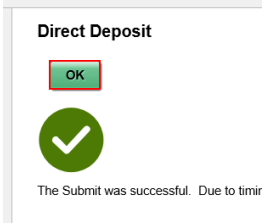
Step	Action
18.	You have completed entering your direct deposit information. This information must be submitted for further processing by payroll staff. Click the **Submit** button. *Account Type [Checking ▼] **Submit**

Step	Action
19.	Notice a banner appears at the top of the **Direct Deposit** 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.

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Step	Action
20.	Click the **OK** button.
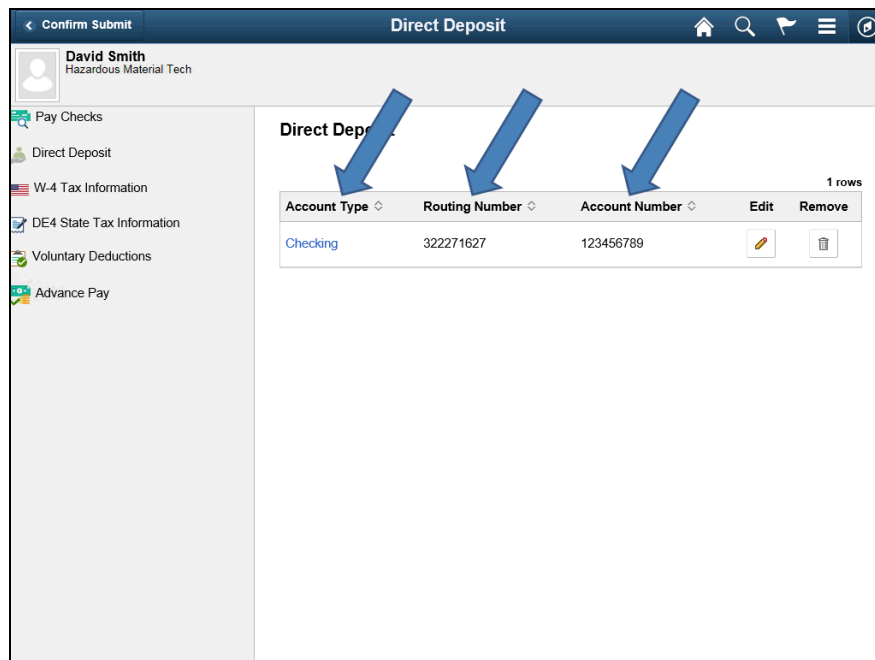
Step	Action
21.	Notice the **Direct Deposit** page grid now displays the direct deposit information you just entered.
22.	Click the **Home** button.
23.	**End of Procedure.**

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Editing a Direct Deposit

Editing a Direct Deposit
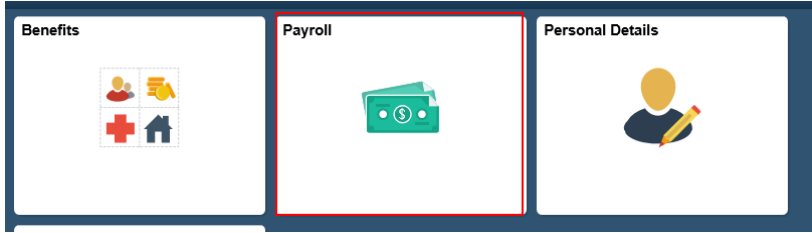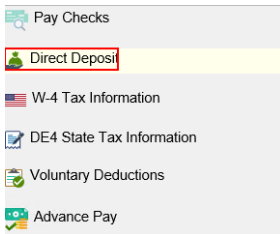
The basic steps are:

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

Fields	What's Changing		
	Bank	Account Only	Account Type
Routing Number	X		
Account Number	X	X	X
Retype Account Number	X	X	X
Account Type	X		X

Procedure

Step	Action
1.	Click the **Payroll** button.
2.	Click the **Direct Deposit** link.

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Step	Action
3.	The **Direct Deposit** 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 **Edit** button.

Step	Action
5.	The **Direct Deposit Details** page displays. You will change information in the following fields to reflect the new direct deposit: - **Routing Number** - **Account Number** - **Retype Account Number** - **Account Type**
6.	Click in the **Routing Number** field.
7.	Enter the desired information into the **Routing Number** field. Enter "**121000248**".

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 **[Tab]** to move away from the Account Number field. The **Retype Account Number** field will become active.

‹ Direct Deposit   **Direct Deposit Details**   🏠 🔍 🚩 ☰ ⊚

David Smith
Hazardous Material Tech

- Pay Checks
- Direct Deposit
- W-4 Tax Information
- DE4 State Tax Information
- Voluntary Deductions
- Advance Pay

Direct Deposit
Your Bank Information

View Check Example

Routing Number   121000248

Distribution Instructions
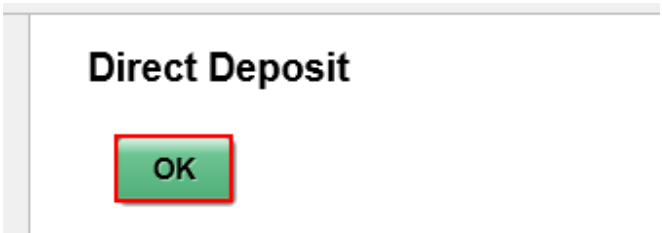
Account Number   321654987

Retype Account Number |

*Account Type   Checking ▾

Submit

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Step	Action
11.	Click in the **Retype Account Number** field.

Distribution Instructions

Account Number	321654987
Retype Account Number	

Step	Action
12.	Enter the desired information into the **Retype Account Number** field. Enter "**321654987**".

Distribution Instructions

Account Number	321654987
Retype Account Number	

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Step	Action
13.	Click the **Account Type** list. **Distribution Instructions** Account Number: 321654987 Retype Account Number: 321654987 *Account Type: Checking
14.	Click the **Savings** 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 **Submit** 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 **OK** button.

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

Deleting a Direct Deposit

Deleting a Direct Deposit
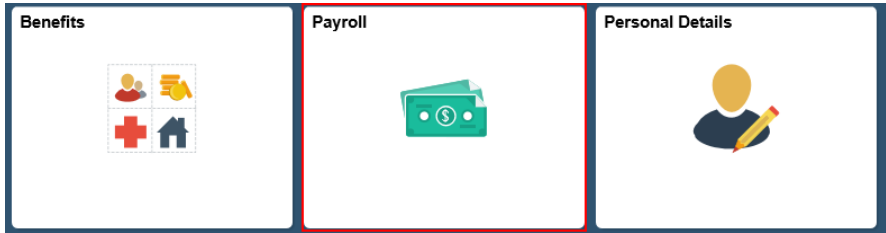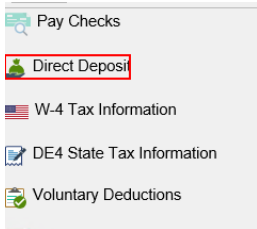
The basic steps are:

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

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Procedure
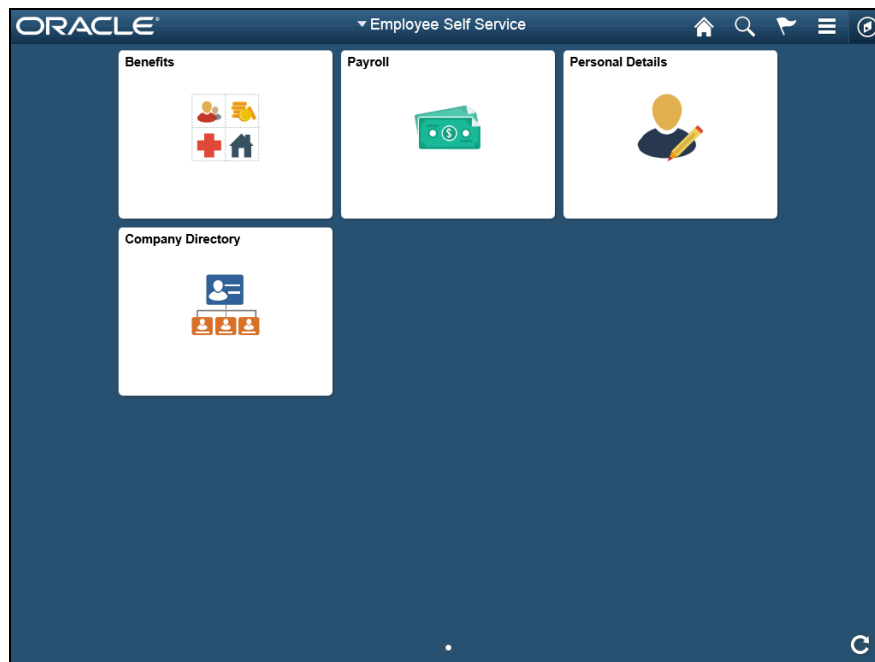
Step	Action
1.	Click the **Payroll** tile.
2.	Click the **Direct Deposit** link.

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

Step	Action
7.	Click the **OK** button. OK
8.	The **Direct Deposit** page displays. You currently have no direct deposits. **Note:** 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.

Procedure

Step	Action
1.	Click the **Payroll** tile.

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Step	Action
2.	Click the **Voluntary Deductions** link.

Step	Action
3.	The **Voluntary Deductions** page displays. You currently do not have any voluntary deductions. For this example, you will add a single voluntary deduction to the United Way to start on 02/15/2017 in the amount of $25 with a goal amount of $500. The system will automatically keep track of the Goal Balance (the amount you have contributed to date) and will stop the deduction once the goal amount you specify has been met.
4.	Click the **Add Deduction** button.

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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:

-**Type of Deduction**: Charity United Way
- **Enter Amount**: 25
-**Take deduction until I reach this Goal Amount**: 500
- **Enter Deduction Start Date**: 02/15/2017
- **Enter Deduction Stop Date:** leave blank |
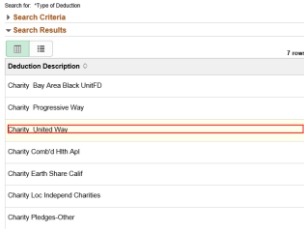
Step	Action
6.	Note: The **Flat Amount** field defaults to Amount and is presented in display-only mode. You cannot edit the value in this field. All voluntary deductions must be a flat amount. You cannot specify that a deduction represent a percentage of your gross pay.
7.	Click the **Look up *Type of Deduction** button.
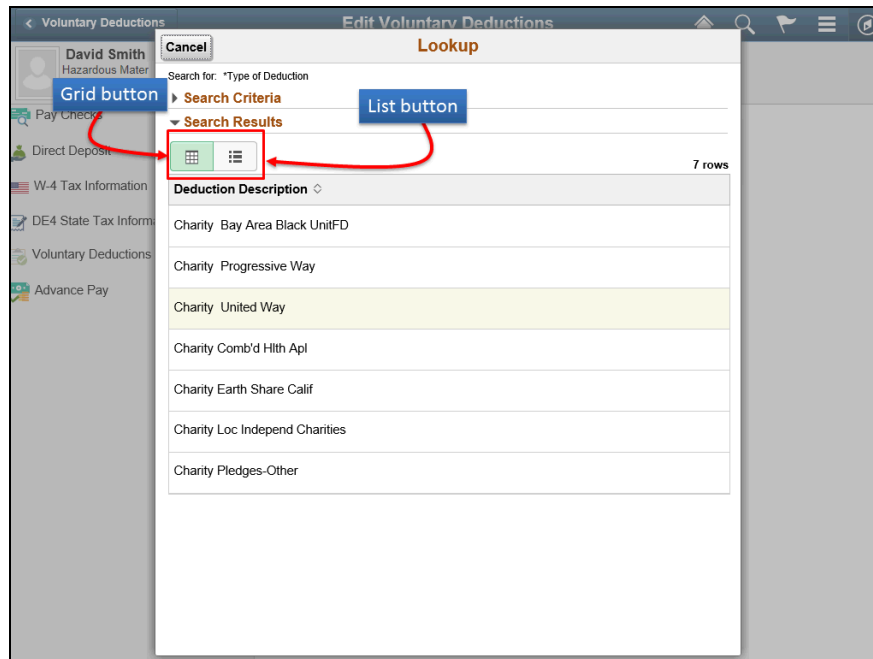
Step	Action
8.	The **Look Up** page for Type of Deductions displays. Use this page to select a charity. Use the Grid or List button to change how the search results are displayed.

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 **Enter Amount** field. Use this field to indicate the amount you want deducted from your pay each month for this deduction.
12.	Enter the desired information into the **Enter Amount** field. Enter "**25**".
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.

Step	Action
14.	Enter the desired information into the **Take deduction until I reach this Goal Amount** field. Enter "**500**".
15.	Click in the **Enter Deduction Start Date** field. Use this field to indicate the date on which you want the deduction to start.
16.	Enter the desired information into the **Enter Deduction Start Date** field. Enter "**2/15/2017**".

Step	Action
17.	The **Enter Deduction Stop Date** 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.

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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. **Voluntary Deductions** OK
20.	Click the **OK** button. ...ission was successful. Please contact your departmental payroll personnel to complete 'CCYY' Contr... campaign form to ensure deductions are submitted to your charity of choice. OK Cancel

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Step	Action
21.	Note the **Voluntary Deductions** grid now displays the deduction information you just entered. You can use the **Edit** button to edit this information. Editing deductions is covered in another topic. You can use the **Add** button to add additional deductions of the same or other types. The **Status** 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 **Home** button.
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.

Procedure

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Step	Action
1.	Click the **Payroll** tile. **Payroll**
2.	Click the **Voluntary Deductions** link. Voluntary Deductions

Step	Action
3.	The **Voluntary Deductions** page displays. The **Voluntary Deductions** 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.
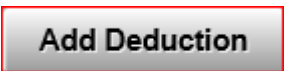
Step	Action
5.	The **Edit Voluntary Deductions** page displays. You can use this page to change the amount of the deduction, the goal amount, and the deduction stop date. You cannot edit the deduction type, the flat amount, or the deduction start date. The **Type of Deduction** field, the **Flat Amount** Field, and the **Enter Deduction Start Date** field are presented in display-only mode. For this example, you will change the value in the **Take Deduction until I reach this Goal Amount** 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 500.00 ×
8.	Click the **Submit** button. Submit

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Step	Action
9.	**Note:** 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 **OK** button. OK
10.	**Note:** 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 **OK** button. OK

Step	Action
11.	The **Voluntary Deductions** page displays. The **Voluntary Deductions** grid now reflects the change you just made. The **Goal Amount** 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

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 **Enter Amount** field. Enter "**25**". *Enter Amount
18.	Click in the **Take deduction until I reach this Goal Amount** field. 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 **Enter Deduction Start Date** field. Enter "**3/1/2017**". *Enter Deduction Start Date ▢

Step	Action
22.	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. Your deduction will continue until either the goal amount or the deduction stop date is reached.
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. OK

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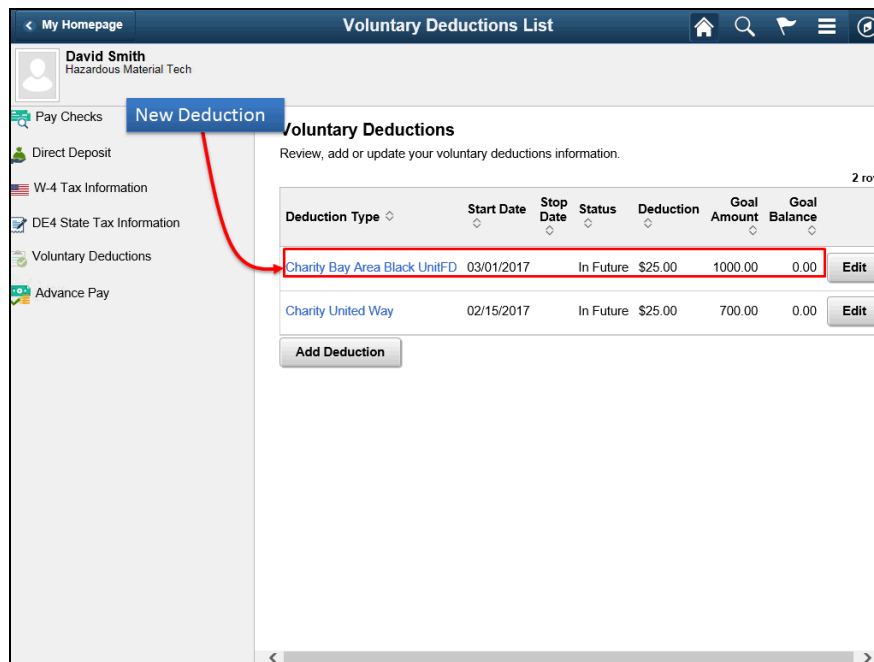
Step	Action
26.	Notice, the new deduction now appears on the grid on the **Voluntary Deductions** page.
27.	Click the **Home** button.
28.	**End of Procedure.**

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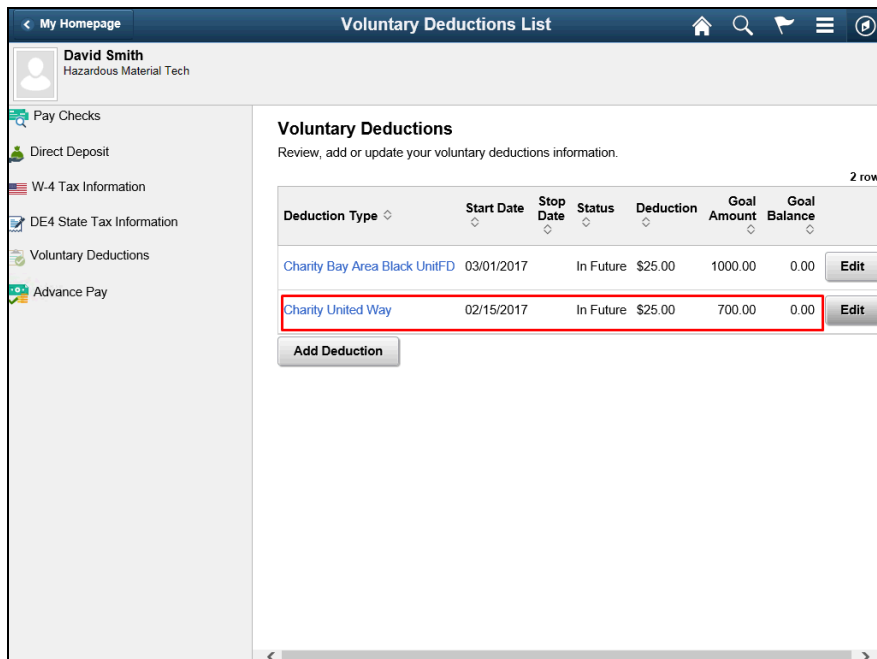
The Stop date for a deduction must be greater than the Start date for the deduction.

Procedure
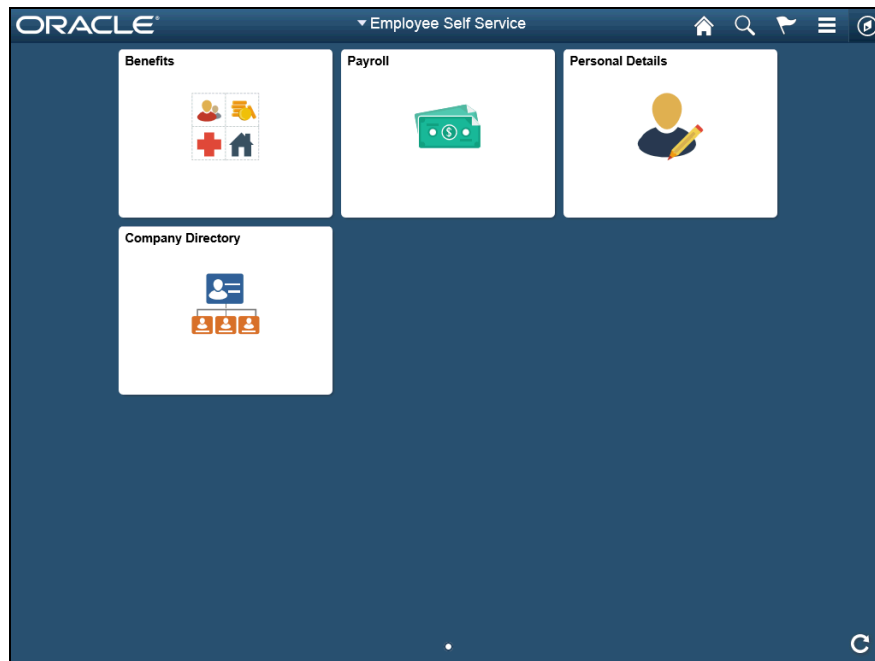
Step	Action
1.	Click the **Payroll** button.
	Payroll
2.	Click the **Voluntary Deductions** link.
	Voluntary Deductions
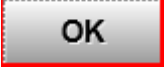
Step	Action
3.	The **Voluntary Deductions** page displays. The Voluntary Deductions grid contains two rows. The first for a deduction for Charity Bay Areas Black UnitFD and the second for Charity United Way.
	For this example you will cancel the deduction for the deduction for the United Way.
	To cancel a deduction, enter/edit the date in the **Enter Deduction Stop Date** 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 **Edit** button. Edit
5.	Click in the **Enter Deduction Stop Date** field. Enter Deduction Stop Date
6.	Enter the desired information into the **Enter Deduction Stop Date** 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 **Submit** button. Submit
8.	**Note:** 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 **OK** button. OK
9.	Click the **OK** button. OK

Step	Action
10.	The **Voluntary Deductions** page displays. The **Stop Date** column for the Charity United Way deduction now displays 03/15/2017. The deduction will stop as of that date.
11.	Click the **Home** 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
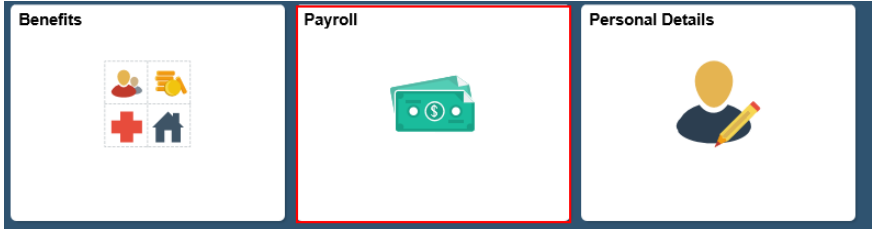
The basic steps are:

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

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Procedure

Step	Action
1.	Click the **Payroll** tile.

Step	Action
2.	Click the **W-4 Tax Information** link.

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Step	Action
3.	The **W-4 Tax Information** 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.	Click the scrollbar.

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. |

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.
8.	Enter the desired information into the **Enter total number of Allowances you are claiming** field. Enter "**1**".

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.

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 **Claim Exemption** section. |
| 12. | Click the **Submit** button to submit the changes that you made.

Note: 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.

 |

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 **Current Password** field. Click in the **Current Password** field. Remember you should never share your User ID and password with another person. ![Verify Your Password to Submit Changes dialog with Cancel and Done buttons, User ID DREYN1 and Current Password field]
14.	Enter the desired information into the **Current Password** field. Enter "**password1**". ![Verify your identity by typing your password, User ID DREYN1, Current Password field]
15.	Click the **Done** button. ![Verify Your Password to Submit Changes dialog with Done button highlighted, Current Password filled in]
16.	Click the **OK** button. **W-4 Tax Information** ![OK button]

Step	Action
17.	The **W-4 Tax Information** 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 **Home** button.
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

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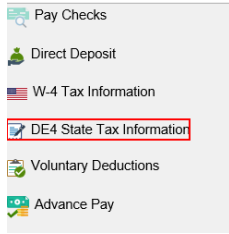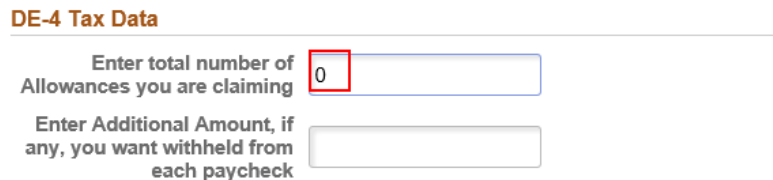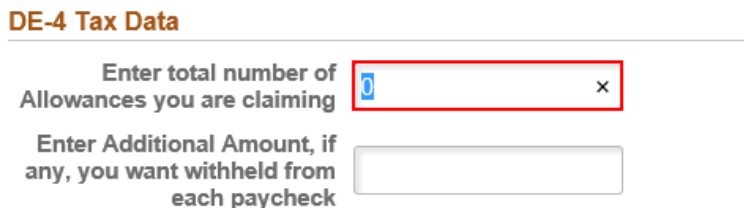
This form only relates to State taxes. You must also complete the W-4 Tax Information form to set your exemptions/withholdings for Federal taxes.

Procedure

Step	Action
1.	Click the **Payroll** Tile.

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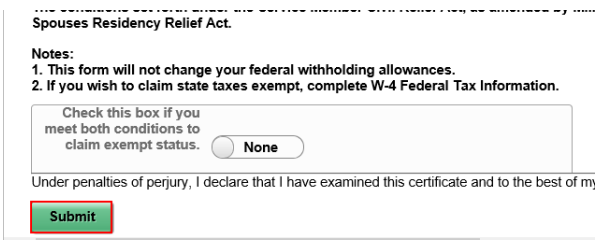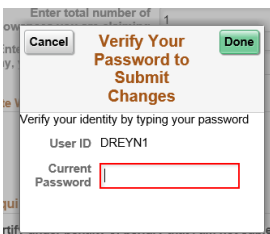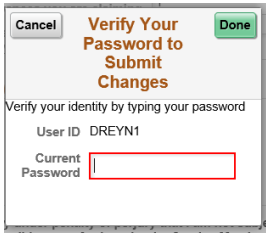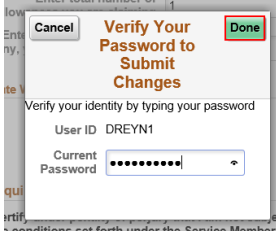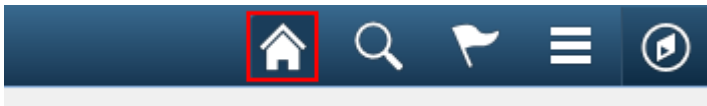
Step	Action
2.	Click the **DE-4 State Tax Information** link.
	Pay Checks
	Direct Deposit
	W-4 Tax Information
	DE4 State Tax Information
	Voluntary Deductions
	Advance Pay
3.	The **DE-4 State Tax Information** page displays. Review this information and make any necessary changes.
	Review your address 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 [0]
	Enter Additional Amount, if any, you want withheld from each paycheck [ ]
7.	Enter the desired information into the **Enter total number of Allowances you are claiming** field. Enter "**1**".
	DE-4 Tax Data
	Enter total number of Allowances you are claiming [0 ×]
	Enter Additional Amount, if any, you want withheld from each paycheck [ ]
8.	Click the scrollbar.

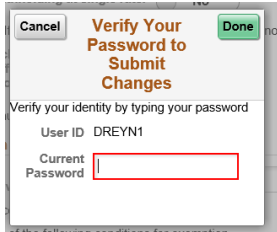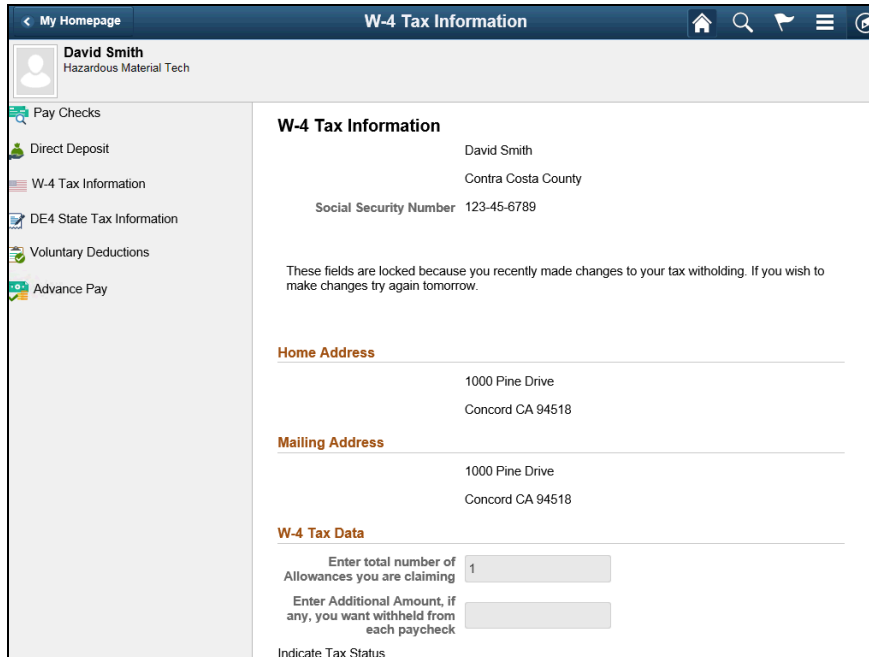| Step	Action
9.	Review the information in the **Requirements for Exempt Status**. If you believe you are meet the requirements for exempt status, click the Check this box if you meet both conditions to claim exempt status to change the value from None to Exempt. The two requirements are: -- Last year 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 **Submit** button to submit the changes that you made. **Note**: if you did not make any changes to your DE-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. 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 **Current Password f**ield. Click in the **Password** field. Remember you should never share your UserID and password with another person. Enter total number of 1 Cancel **Verify Your Password to Submit Changes** Done Verify your identity by typing your password User ID DREYN1 Current Password

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.	The **DE-4 Tax Information** 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 fields on this page. To make changes to you DE-4 information you must wait one day.
16.	Click the **Home** 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
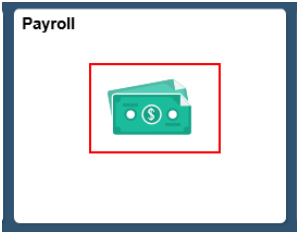
The basic steps to request advance pay are:

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

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Procedure

Step	Action
1.	Click the **Payroll** tile.

Step	Action
2.	Click the **Advance Pay** link.

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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 **Percentage Selected** field and the **Advance Amount** field are current inactive. You cannot select or enter any values in this fields. These fields will not become active until you use the **EE Advance Status** field to indicate that you want to request advance pay.

Step	Action
4.	The **EE Advance Status** 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 **EE Advance Status** option.

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Step	Action
6.	Notice, both the **Percentage Selected** field and the **Advance Amount** 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 **EE Advance Statu**s field from Advance to None.
7.	You can use the **Percentage Selected field** 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.

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.

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Step	Action
9.	If you enter a value in the **Advance Amount** field that is greater than one-third of your compensation and click the **Submit** 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 **Advance Amount** field to an amount that is less than one-third of your compensation and then click the **Submit** button.

Step	Action
10.	For this example you will use the **Percentage Selected** field. In the next topic, you will use the **Advance Amount** field to indicate the amount you want as advance pay.
11.	Click the **Percentage Selected** option.

Step	Action
12.	Notice the **Advance Amount** field is now inactive. You cannot enter a value in this field. Also notice that a **Calculated Amount** 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 button]
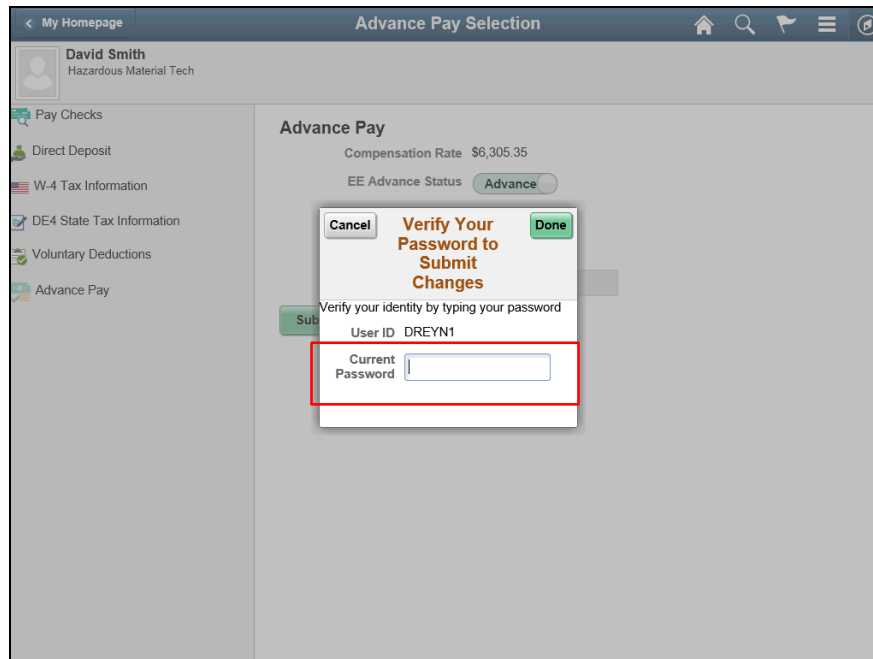
Step	Action
14.	A verification page displays requesting that you verify your identity by entering my password—the password you use to sign in to PeopleSoft—into the **Current Password** field. Remember, you should not share your password with any one.
15.	Click in the **Current Password** field.
16.	Enter the desired information into the **Current Password** field. Enter "**password1**".
17.	Click the **Done** button.

Step	Action
18.	A **Submit Confirmation** 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.

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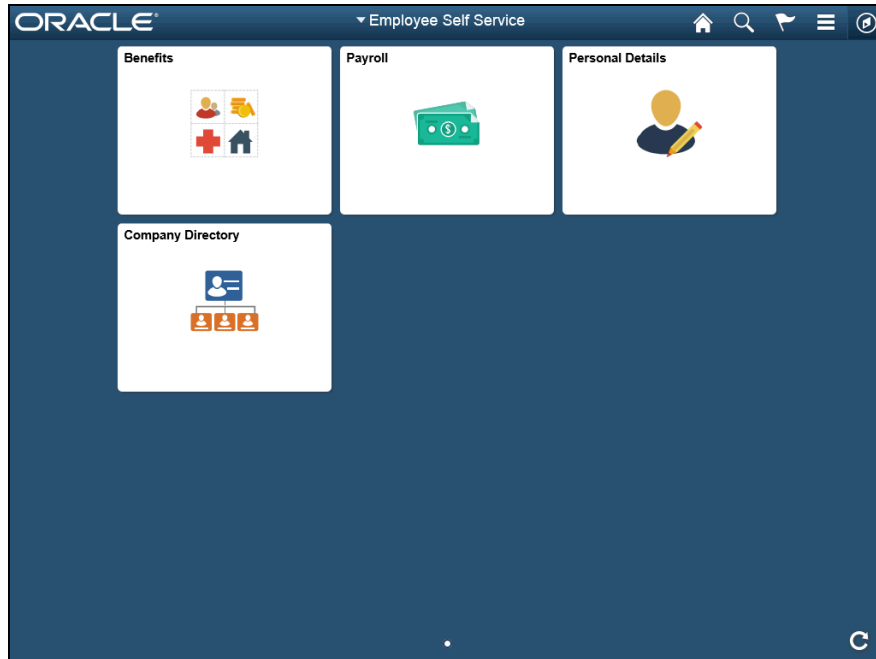| Step	Action
22.	Click the **Home** button.
23.	**End of Procedure.**

Editing an Advance Pay Request
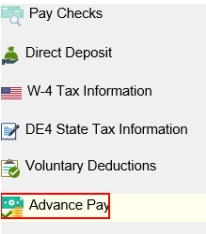
Editing and Advance Pay Request

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 **Payroll** button.
2.	Click the **Advance Pay** link.

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Step	Action
3.	The **Advance Pay** 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 **Advance Amount** 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 **Percentage Selected** 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

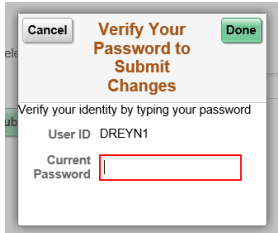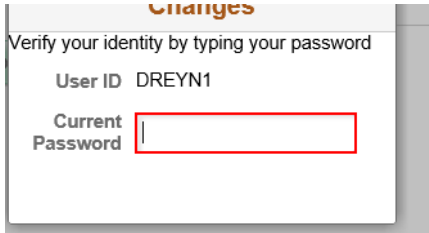| Step	Action
5.	The **Advance Amount** field is now active and the Calculated Amount field no longer displays. You can now use the **Advance Amount** field to indicate how much of your monthly salary you want paid as advance pay. Remember you cannot request that more than one-third of your monthly salary 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 **Advance Amount** field that is greater than one-third of your compensation and click the **Submit** 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 **Advance Amount** field to an amount that is less than one-third of your compensation and then click the **Submit** button.
7.	Click in the **Advance Amount** field. **Advance Pay** Compensation Rate $6,305.35 EE Advance Status Advance Percentage Selected None Select an amount up to 1/3 of your montly salary. Advance Amount [ ] Submit

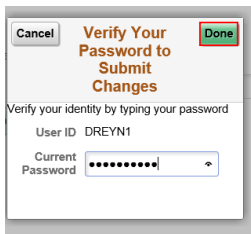| Step	Action
8.	Enter the desired information into the **Advance Amount** field. Enter "**1000**". **Advance Pay** Compensation Rate $6,305.35 EE Advance Status Advance Percentage Selected None Select an amount up to 1/3 of your montly salary. Advance Amount [ ]
9.	Click the **Submit** button. Submit

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 **Current Password** field. Remember, you should not share your password with any one.

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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.

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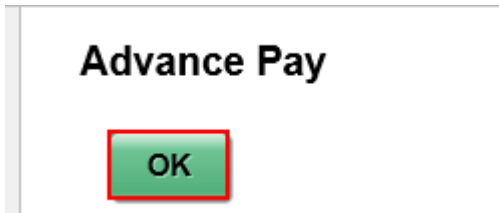
Step	Action
14.	A **Submit Confirmation** page displays indicated that my advance pay information has been updated. This page also provides a reminder that the information you just submitted my not be reflected in your next paycheck, depending on where that check is in the pay cycle.
15.	Click the **OK**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

Step	Action
16.	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 I will have to wait until tomorrow to make edits to this information.

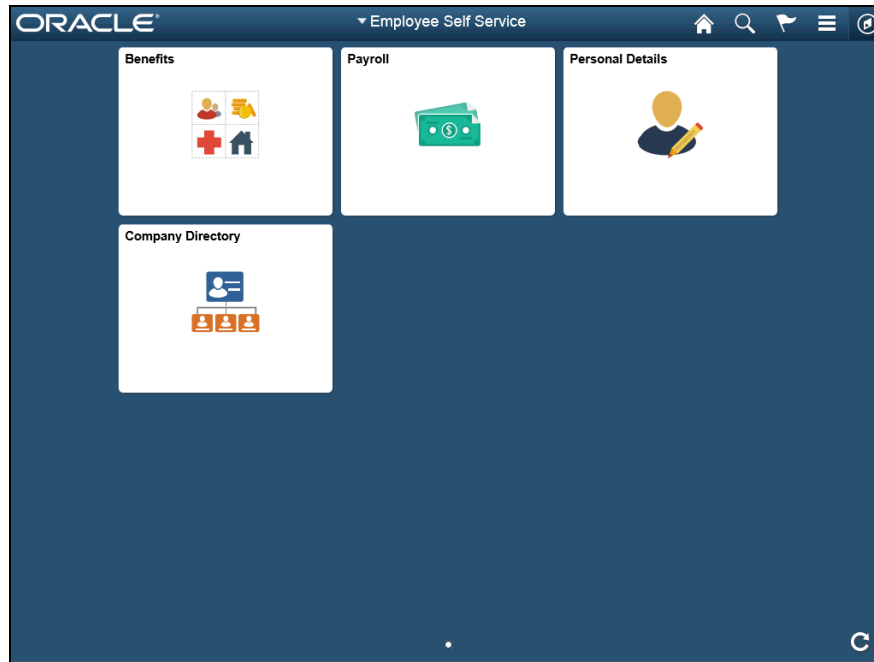| Step	Action
17.	Sample page
18.	Click the **Home** button.
19.	**End of Procedure.**

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.

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Procedure

Step	Action
1.	Click the **Payroll** tile.

Step	Action
2.	Click the **Advance Pay** link.

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Step	Action
3.	The **Advance Pay** 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.

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Step	Action
4.	To cancel an advance pay request, change the value in the **EE Advance Status** 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 montly salary. Advance Amount 1000.00 Submit

Advance Pay Selection

David Smith
Hazardous Material Tech

- Pay Checks
- Direct Deposit
- W-4 Tax Information
- DE4 State Tax Information
- Voluntary Deductions
- Advance Pay

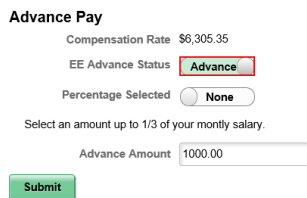**Advance Pay**
Compensation Rate $6,305.35
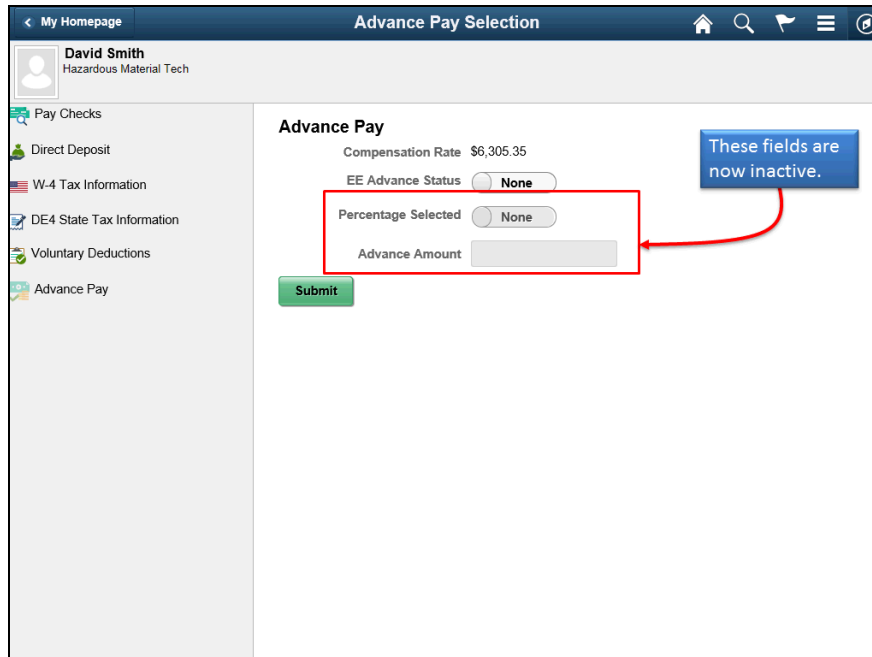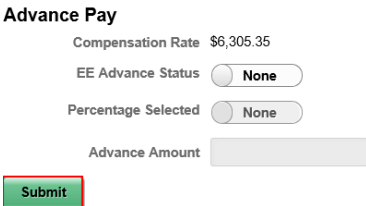EE Advance Status None
Percentage Selected None
Advance Amount

These fields are now inactive.
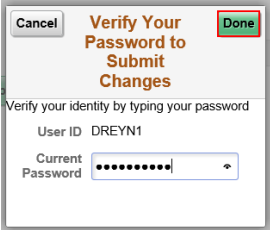
Submit

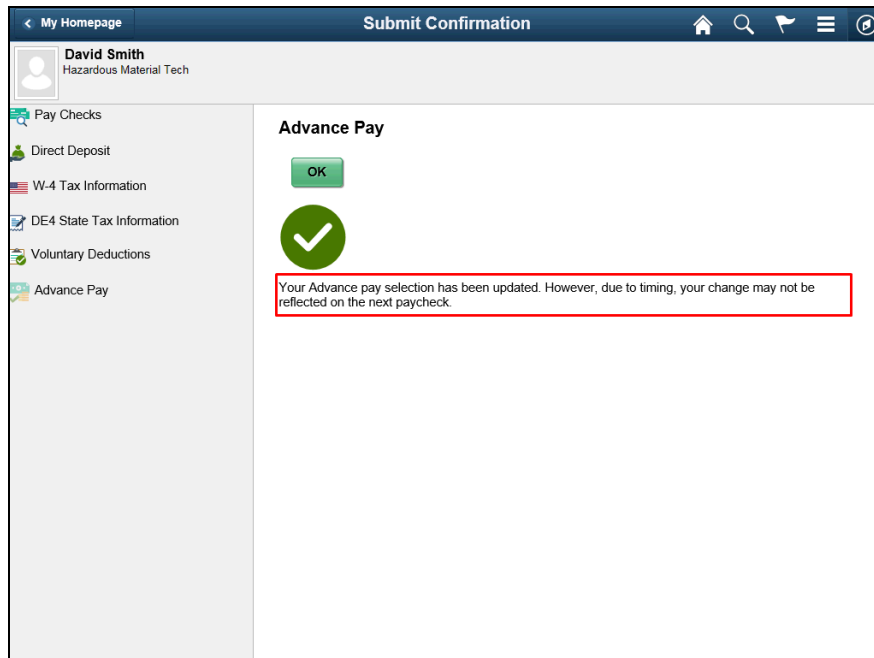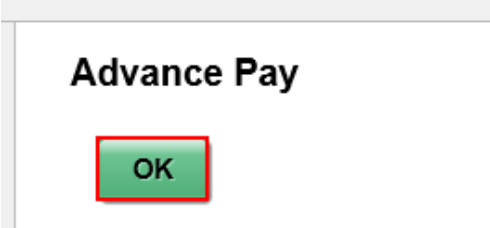| Step	Action
6.	Notice, the **Percentage Selected** field now displays None and the **Advance Amount** field is empty. Both fields are inactive. You cannot select or enter any values in either field.
7.	Click the **Submit** button. **Advance Pay** Compensation Rate $6,305.35 EE Advance Status None Percentage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

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 **Current Password** field. Enter "**password1**".

Step	Action
11.	Click the **Done** button.

Step	Action
12.	The **Submit Confirmation** 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 **OK** button.

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Step	Action
14.	The **Advance Pay** 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.

Step	Action
15.	Sample page
16.	Click the **Home** button.
17.	**End of Procedure.**