City of Minneapolis

PeopleSoft HCM/ELM v9.2 Upgrade

PAYROLL EMPLOYEE SELF-SERVICE:
STEP-BY-STEP INSTRUCTIONS

Payroll
Created on 9/3/2015 10:27:00 PM

Table of Contents

Payroll

View Paycheck

View Paycheck
Review current and prior paychecks.

Menu Path: *Click Employee Self Service tab > Payroll and Compensation link > View Paycheck link*

Review your available paychecks below. Select the check date of the paycheck you would like to review.

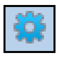
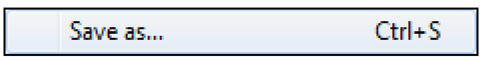
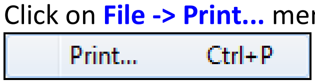
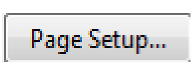
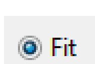
Select Paycheck — Personalize | Find | View All | First 1-2 of 2 Last

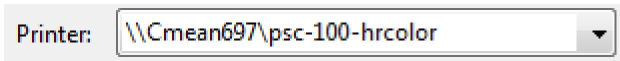
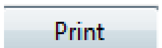
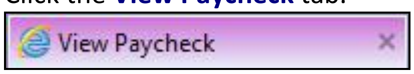
Check Date	View Paycheck	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
08/22/2014	View Paycheck	City of Minneapolis	07/27/2014	08/09/2014	$1973.73	2433607	✓
04/04/2014	View Paycheck	City of Minneapolis	03/09/2014	03/22/2014	$2119.03	2383941	✓

Note: The following step-by-step instructions describe how to view and print a paycheck.

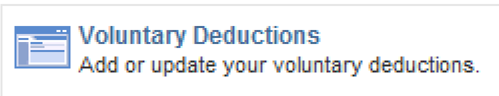
Procedure

Step	Action
1.	Click the **Self Service** object.
2.	Click the **Payroll and Compensation** link. Payroll and Compensation
3.	Click the **View Paycheck** link. View Paycheck
4.	Paycheck history is listed in the Select Paycheck section. To view a paycheck for a particular **Check Date**, select the hyperlink for the appropriate check. Click the **View Paycheck** link. View Paycheck **Note:** Clicking on a column heading (**Check Date, Pay Begin Date, Pay End Date, Net Pay, Paycheck Number** and **PDF File**) will sort paychecks in ascending or descending order, based on the column heading selected. Make sure to select the appropriate column for sorting when trying to locate a particular paycheck.
5.	The paycheck will appear in a separate browser. Click the **minneapolis.mn.us** tab. minneapolis....

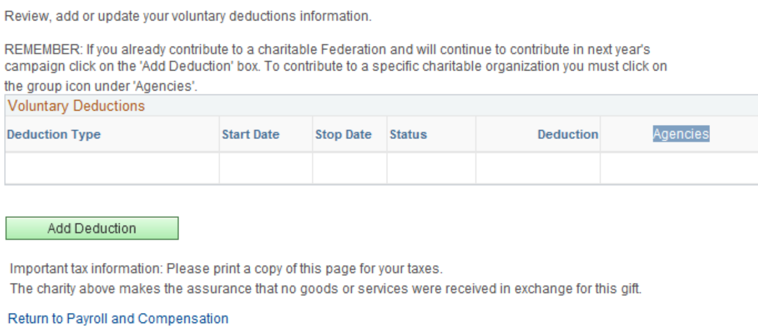
Step	Action
6.	A copy of a paycheck can be printed for your home records, or a copy can be accessed via the internet. Sick, vacation and comp time balances will appear at the bottom of the on-line check. You have the capability to print or save a paycheck from a browser. This example walks through the steps for printing/saving a paycheck using Internet Explorer 9.0. The steps to print/save a paycheck may vary, based on the browser version installed on your computer. Click the **Tools** button. 
7.	This example shows how to save a paycheck as a PDF file. Click on **File -> Save as...** menu 
8.	Enter the desired information into the **File name:** field.
9.	Click the **Save** button. 
10.	Click the **Tools** button. 
11.	This example shows how to **Print** a paycheck as a PDF file. Click on **File -> Print...** menu 
12.	Click on the **Page Setup** button. 
13.	Under Page Setup, ensure the paper size is "**Letter (8 1/2 x 11")**" and the paper source is **"Auto".** The Orientation should be set to **"Portrait"**. Click the **OK** button. 
14.	Under **Page Sizing & Handling** - select the **Fit** radio button. This ensures that the paycheck, when printed, will fit on one page. 

Step	Action
15.	Under the **Printer** list box, select the printer location for the printing of the paycheck. 
16.	Click on the **Print** button. 
17.	Close the browser for the paycheck that was printed. Click the **Close Tab (Ctrl+W)** button. 
18.	Return to the **View Paycheck** browser by selecting the browser tab. Click the **View Paycheck** tab. 
19.	To perform additional Paycheck functions, select the **Home** link to return to the Main Menu. Click the **Home** link. 
20.	 **End of Procedure.**

Voluntary Deductions



Menu Path: *Click Employee Self Service tab > Payroll and Compensation link > Voluntary Deductions Link*



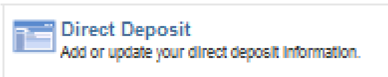
Note: This page is used during the charitable campaign season, or at any other time of the year, to manage your charitable contributions. Your current charitable deductions will be listed on the opening page.

Procedure

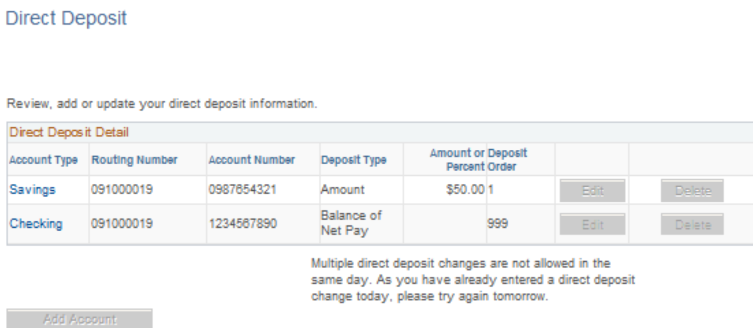
Step	Action
1.	Click on the "Add Deduction" button. **REMEMBER:** If you already contribute to a charitable Federation and will continue to contribute in next year's campaign, click on the **Add Deduction** button. To contribute to a specific charitable organization, you must click on the group under 'Agencies'. Add Deduction
2.	Select the magnifying glass under Charitable Organizations. Click the **Look up *Charitable Organization: (Alt+5)** button.
3.	Select the appropriate charitable organization listed under the "**Deduction Description**". Open Your Heart
4.	Click in the **Amount per Pay Period** field. Enter the amount to be deducted for a pay period.

Step	Action
5.	Enter the desired amount into the **Amount per Pay Period** field. This amount will be deducted from your pay check on a bi-weekly basis.
6.	Select either the **Next January** or **Next Paycheck** radio buttons. By selecting **Next January**, deductions will not start until January of the next calendar year. Click the **Next Paycheck** option. Next Paycheck
7.	Select either the **Every Period** or **Single Period** radio buttons. By selecting **Every Period**, the **Amount per Pay Period** will be deducted from every paycheck. By selecting **Single Period**, the **Amount per Pay Period** will be deducted from a paycheck only once. All other options will stop in December at the end of the calendar year. Click the **Single Period** option. Single Period
8.	Click the **Save** button. Save
9.	Click the **OK** button. OK
10.	Click the **Return to Payroll and Compensation** link. Return to Payroll and Compensation
11.	**End of Procedure.**

Direct Deposit



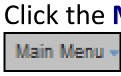
Menu Path: *Click Employee Self Service tab > Payroll and Compensation link > Direct Deposit Link*



Notes: Entering Direct Deposit information allows HRIS to automatically deposit your paycheck into your bank account(s).

- The account information you enter must match the transit number and account number provided to you by your financial institution or located at the bottom of your personal checks.
- When using Direct Deposit, the entire paycheck must be deposited into one or more accounts. You cannot deposit part of a paycheck using direct deposit, and receive the remainder as a physical paycheck.
- All changes are tested through the Federal Reserve before they are implemented and become effective.
- Direct Deposit changes may not take effect for one or two pay cycles.

Procedure

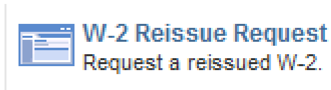
Step	Action
1.	Click the **Main Menu** button. 
2.	Click the **Self Service** menu. 
3.	Click the **Payroll and Compensation** menu. 
4.	Click the **Direct Deposit** menu. 

Step	Action
5.	In this example, it is assumed that no direct deposit accounts have been established, so a new account will be added. Click the **Add Account** button. Add Account
6.	The first step is to specify the bank's **Routing Number.** An example of both a **Routing Number** and **Account Number** can be displayed by selecting the **View check example** link. Click the **View check example** link. View check example
7.	Click the **Return** button. Return
8.	Click in the **Routing Number** field.
9.	Enter the desired information into the **Routing Number** field.
10.	Click in the **Account Number** field.
11.	Do not enter spaces between the numbers. Enter the desired information into the **Account Number** field.
12.	Click the **Deposit Type Required** list.
13.	Select 'Checking' or 'Savings' account. Click the **Checking** list item. Checking
14.	Click the **Deposit Type Required** list.
15.	**'Amount'** can be selected to deposit a set dollar amount of your net pay; **'Percent'** can be selected to deposit a percentage of your net pay; **'Balance'** is used to deposit the remaining net balance of your check after other deposits are taken from net pay. **'Balance'** must always be selected for the lowest priority entry. Press the left mouse button and drag the mouse to the desired location.

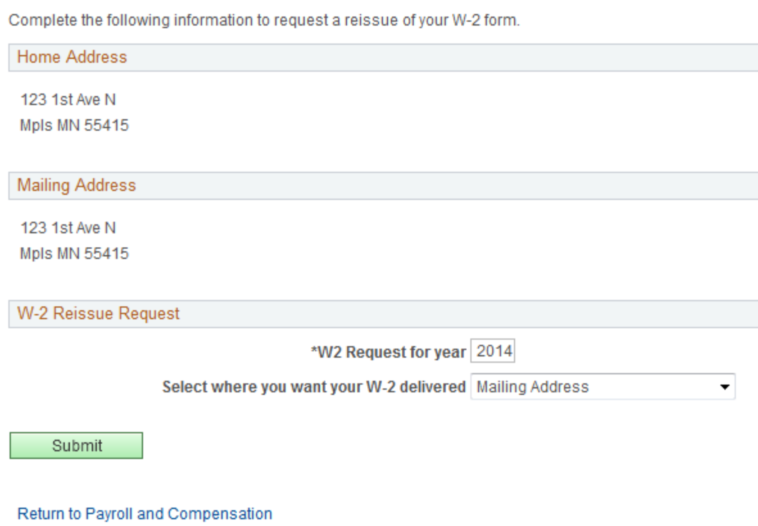
Step	Action
16.	Click in the **Amount or Percent** field. Based on the **Deposit Type** selection, enter a dollar amount or a percentage number. Do not enter decimal points, dollar signs or percent signs. If **'Balance of Net Pay'** was selected, then leave this field blank.
17.	Click in the **Deposit Order Required** field. When depositing amounts to multiple accounts, each line must have a unique priority number. The priority number determines the order in which the deposits are processed (e.g. 1,2,3...999). A single line with a **Deposit Type** of **'Balance'** must exist. This is the account where the remained of the paycheck will be deposited, after all other deposits are calculated. The **'Balance'** line will automatically default to **'999'.** 
18.	Click the **Submit** button. Clicking on the **Submit** button will take you to a Confirmation page. 
19.	Click the **OK** button. 
20.	This example explains the steps for adding a second Direct Deposit account. Click the **Add Account** button. 
21.	Click in the **Routing Number** field.
22.	Enter the desired information into the **Routing Number** field.
23.	Click in the **Account Number** field.
24.	Enter the desired information into the **Account Number** field.
25.	Click the **Deposit Type Required** list.
26.	Click the **Deposit Type Required** list.

Step	Action
27.	In this example, a **Savings** account is being added. Click the **Savings** list item.
28.	Click the **Deposit Type Required** list.
29.	In this example, a specific amount for **Savings** will be entered. Click the **Amount** list item.
30.	Click in the **Amount or Percent** field.
31.	Enter the desired information into the **Amount or Percent** field.
32.	Click in the **Deposit Order Required** field.
33.	Enter the desired information into the **Deposit Order Required** field.
34.	Click the **Submit** button.
35.	Click the **OK** button.
36.	In this example, the **Savings** account type will be edited, in order to change the Direct Deposit amount. Click the **Edit** button.
37.	Click in the **Amount or Percent** field.
38.	Enter the desired information into the **Amount or Percent** field.
39.	Click the **Submit** button.
40.	Click the **OK** button.
41.	Click the **Home** link.
42.	**End of Procedure.**

W-2 Reissue Request



Menu Path: *Click Employee Self Service tab > Payroll and Compensation link > View Reissue Request link*



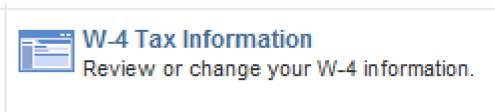
Note: If your tax address is incorrect, you can change your home address by using the Personal Information > Home & Mailing Address

Procedure

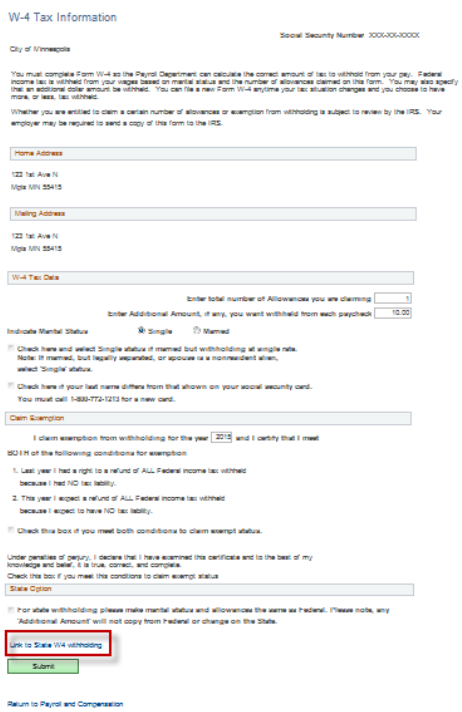
Step	Action
1.	Click the **W-2 Reissue Request** link. W-2 Reissue Request
2.	Specify the appropriate year for the "**W2 Request for Year**" field. Enter the desired information into the **W2 Request for year Required** field.
3.	Click the **Select where you want your W-2 delivered** list. Mailing Address
4.	Select either the **Home Address** or **Mailing Address** for the "Select where you want your W-2 delivered" drop down box. Do not select **Work Location,** as a Work Location may not be current for an employee in the system. Click the **Home Address** list item. Home Address

Step	Action
5.	Click the **Submit** button. Submit
6.	Central Payroll will process your request and send you the W-2. Click the **OK** button. OK
7.	Click the **Return to Payroll and Compensation** link. Return to Payroll and Compensation
8.	 **End of Procedure.**

W-4 Tax Info - Link to State Tax Form

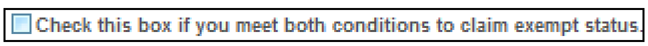
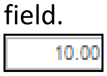
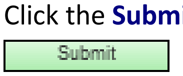


Menu Path: *Click Employee Self Service tab > Payroll and Compensation link > W-4 Tax Information Link*



Procedure

Step	Action
1.	Click the **Payroll and Compensation** link. Payroll and Compensation
2.	Click the **W-4 Tax Information** link. W-4 Tax Information
3.	Change the number of tax allowances you are claiming by modifying the number in the allowances box. Enter the desired information into the **Enter total number of Allowances you are claiming** field.

Step	Action
4.	An additional flat tax amount can be applied against each paycheck. Enter the desired information into the **Enter Additional Amount, if any, you want withheld from each payc** field.
5.	Indicate your marital status by clicking either the **Single** or **Married** radio button. Marital status changes are for tax purposes only. Click the **Single** option. 
6.	Click the **Check here and select Single status if married but withholding at single rate.** option. (if applicable)
7.	If you wish to claim exemptions from paying taxes for a previous or current tax year, fill in the appropriate tax year. Read the qualifying statements - if you satisfy both conditions, check the **'Exempt'** box. Click the **Check this box if you meet both conditions to claim exempt status.** option. 
8.	Selecting the **'Link to State W4 Withholding'** hyperlink will take you to the State Tax Data page. Click the **Link to State W4 withholding** link. 
9.	The MN W-4 Tax Information page displays. Enter the desired information into the **Enter total number of Allowances you are claiming** field.
10.	Click in the **Enter Additional Amount, if any, you want withheld from each payc** field. 
11.	Enter the desired information into the **Enter Additional Amount, if any, you want withheld from each payc** field.
12.	Indicate your marital status by clicking either the **Single** or **Married** radio button. Click the **Single** option. 
13.	Read the qualifying statements - if you satisfy all conditions, click on the **"Check this box if you meet this condition to claim exempt status"** box. 
14.	Click the **Submit** button. 

Step	Action
15.	Click in the **Password** field.
16.	Enter your HRIS password to verify identity. Enter the desired information into the **Password** field.
17.	Click the **Continue** button.
18.	The **Minnesota Employee Withholding Allowances/Exemption Certificate (Form W-4MN)** is displayed in a new browser. This form needs to be completed, printed, signed and returned to the Payroll Department. **W-4MN**
19.	After printing/saving the **W-4MN** form, the browser containing the form can be closed. Click the **Close Tab (Ctrl+W)** button.
20.	Return the HRIS browser - **"W-4 Tax Information"**. Click the **W-4 Tax Information** tab.
21.	On the Submit Confirmation page, a message displays: *"You have requested to withhold an additional amount for State. You must complete the MN-W4 and sent to Payroll Dept at 210 1/2 City Hall".* Click the **OK** button.
22.	Upon submittal, you will display the **'Submit Confirmation'** page. The following message is displayed: *"The Submit was successful. However, due to timing, your change may not be reflected on the next paycheck".* Click the **OK** button.
23.	Click the **Return to Payroll and Compensation** link.
24.	Click the **Home** link.

Step	Action
25.	**End of Procedure.**

Compensation History

Compensation History
Review compensation history for base, variable, and stock options.

Menu Path: *Click Employee Self Service tab > Payroll and Compensation link > Compensation History link*

Compensation History — Personalize | View All | First 1-3 of 3 Last

Date of Change	Amount	Change	Type	Source	Currency	Job Title
07/01/2014	103,850.999	4,927.998400	Data Change	Base Salary	USD	Director HRIS Administration-C
01/26/2014	98,923.001	2,413.001760	Pay Rate Change	Base Salary	USD	Director HRIS Administration-C
09/23/2013	96,509.999		Hire	Base Salary	USD	Director HRIS Administration-C

Issued Currency

Procedure

Step	Action
1.	Click the **Self Service** link. Self Service
2.	Click the **Payroll and Compensation** link. Payroll and Compensation
3.	Click the **Compensation History** link. Compensation History
4.	In the Compensation History section, choose an entry under 'Date of Change' by selecting a date. Click the **07/01/2014** link. 07/01/2014
5.	Click the **Return** button. Return
6.	Click the **Home** link. Home
7.	**End of Procedure.**