Human Resources PeopleSoft Documentation

User Manual

December, 1999

This sample is from a 450-page user procedure manual for the Human Resources portion of PeopleSoft, an enterprise resources planning (ERP) application. Included in this sample is:

1. The title page and its verso (this page)
2. The complete table of contents
3. The Payroll chapter title page, modified to include only the included procedures
4. Two of the procedures from the Payroll chapter.

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Contents

6. Payroll Processes

This chapter describes the actions to take in PeopleSoft to handle the various changes in employees payroll. It includes the following processes:

Create Ongoing Pay Deduction

A general pay deduction can be initiated for a variety of reasons. The following figure shows the current types of pay deductions.

GNB	1099	1099
GNB	ADVANC	Advance
GNB	CHSUPP	Child Support
GNB	CLOTH	Clothing Allowance
GNB	CRUN	Credit Union
GNB	DDRVSL	Direct Deposit Reversal
GNB	DEFCM$	Defferred Comp $
GNB	DEFCM%	Def Comp %
GNB	EIC	Earned Income Credit
GNB	ESPP	Emp Stock Purchase Plan Percnt
GNB	ESPPRE	ESPP Refund
GNB	LOAN	Company Loan
GNB	MED-HI	Medical - Hawaii
GNB	MISC	Miscellaneous
GNB	NLOAN	Non Home Loan
GNB	ORWCMP	Oregon Worker's Compensation
GNB	PAC	Political Action Comm
GNB	SHOTX	Sharon Hill Occup Tax
GNB	TAXADJ	Tax Adjustment
GNB	TFB	Taxable Fringe Benefit
GNB	ULOAN	Union Loan
GNB	UNION	Union
GNB	UNWAY	United Way
GNB	WAGE$	Wage $
GNB	WAGE%	Wage %

Figure 1. Currently Available Deduction Codes

Trigger Event

This process starts upon receipt of BigTime Distributer Company Personnel Action package for one of the above types of deduction.

Inputs

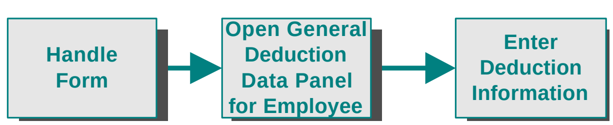
All information for this process comes from a BigTime Distributer Company Personnel Action Form submitted by the employee.

Outputs

As a result of this process, a pay deduction will be established (cancelled) using the following PeopleSoft panel:

- **GENERAL DEDUCTION.**

Overview



Procedure

Handle Forms

1. Receive BigTime Distributer Company Personnel Action form from the employee.
2. Verify that form is complete and has the required signature.
   - If not, call sender and rectify the deficiencies..

Open the General Deduction Data Panel for the Employee

1. Open the **GENERAL DEDUCTION DATA** panel.
   a. Open the record selection panel for **GENERAL DEDUCTION DATA**.
      Go ➡ Compensate Employees ➡ Maintain Pay US
      Use ➡ General Deduction Data ➡ Update/Display

   b. Enter the employee's social security number.

   c. Click on the **OK** button (or press the **Enter** key). The list of matching employees is displayed.

   c. Select the person from the hit list. Either:
      Double-click on the employee's name.
      Single-click on the employee's name and then click the ***Enter*** *key.*
   The **GENERAL DEDUCTION DATA** panel for the employee is displayed.

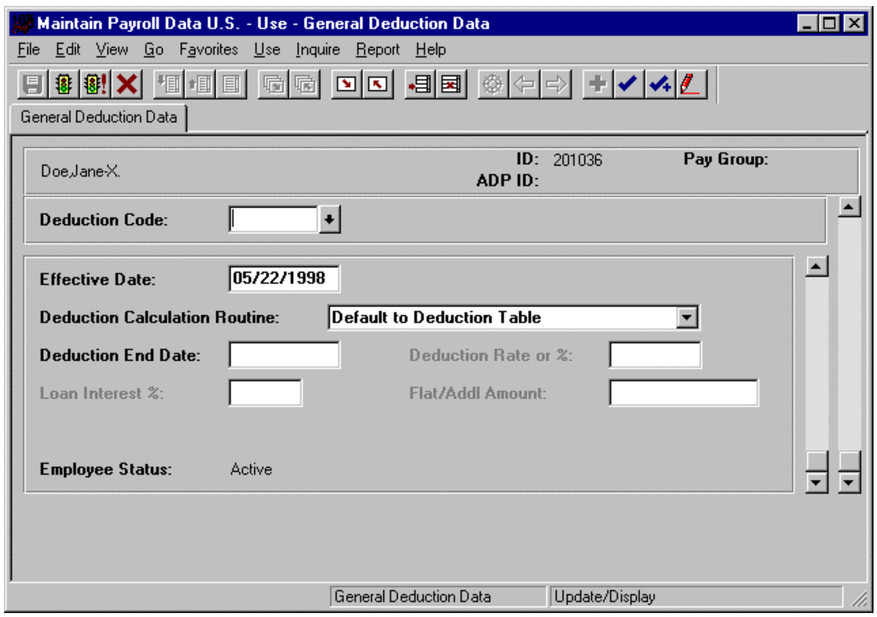


Figure 2. Starting General Deduction Data Panel

Enter Deduction Information

1. If the employee already has information in this panel from previous deductions, insert a new row for this action.
   Click on the ***Insert Row*** *icon ( ) on the toolbar.*

   The following fields are automatically filled in by the system.
   - ***EFFECTIVE DATE***
   - ***DEDUCTION CALCULATION ROUTINE***

2. Fill in the following fields on the **GENERAL DEDUCTION DATA** panel:
   - ***DEDUCTION CODE*** — select from one of those listed earlier in this section
   - ***EFFECTIVE DATE***
   - ***DEDUCTION CALCULATION ROUTINE*** — if the default selection is not correct, select one of the other available methods shown in Figure 3
   - ***DEDUCTION RATE OR %*** — if needed
   - ***LOAN INTEREST %*** — if needed
   - ***FLAT/ADDL AMOUNT*** — if needed

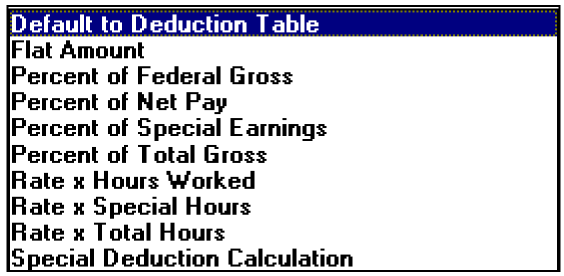


Figure 3. Deduction Calculation Methods

When the **GENERAL DEDUCTION DATA** panel is correctly completed for a flat-amount pay advance, it is shown in the following example.

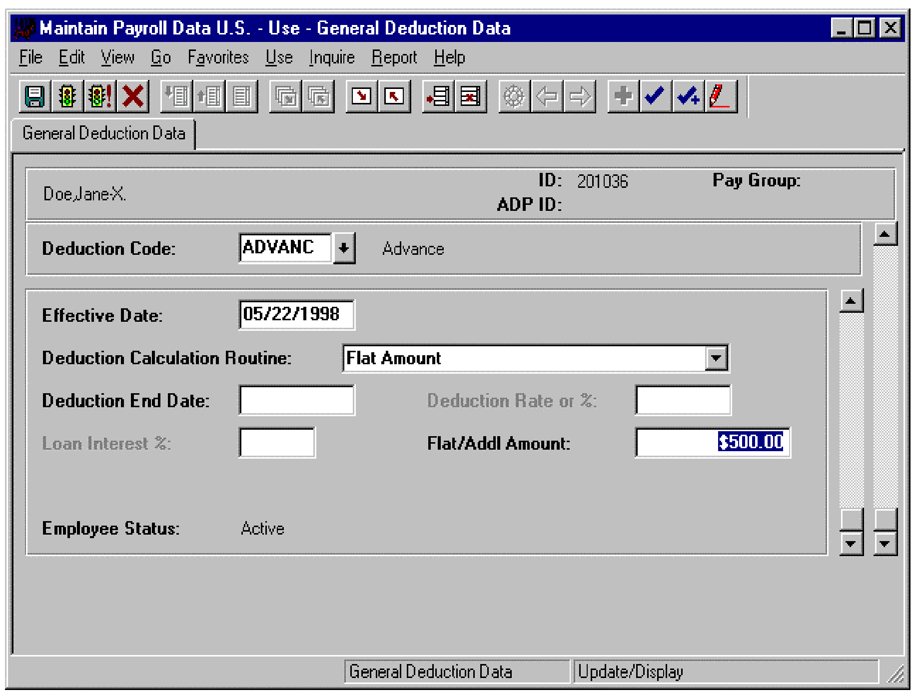


Figure 4. Completed General Deduction Data Panel

Other types of general deductions will use different deduction calculation routines, and, as a consequence, fill in different fields.

3. Save the record.
   ✍ *Click on the **Save** icon ( ) on the toolbar*

Tax Change

Use this process when an employee has a personal tax situation change such as:

- Change in marital status
- Change in number of dependents
- Change in additional withholding
- Change in state of residence
- Change in state of employment
- Change in locality that has local taxes.

Trigger Event

This process starts upon receipt of a federal and/or state W-4 form from an employee.

Inputs

All information for this process comes from the W-4 form(s).

Outputs

As a result of this process, new employee tax information is entered into PeopleSoft in one or more of the following panels:

- **Federal Tax Data 1**
- **Federal Tax Data 2**
- **State Tax Data 1**
- **State Tax Data 2**
- **Local Tax Data**.

Overview

Procedure

Handle Forms

1. Receive above form from the employee.
2. Verify that form is complete and has the required signature.
   - If not, call sender and rectify the deficiencies..

Open the Dependent/Beneficiary 1 Panel for the Employee

1. Open the **Federal Tax Data 1** panel. (If the change affects only the state tax, open **State Tax Data 1** instead.)
   a. Open the record selection panel for **Federal Tax Data 1**.
      ✍ *Go ➨ Compensate Employees ➨ Maintain Payroll Data US*
      ✍ *Use ➨ Employee Tax Data ➨ Federal Tax Data 1 ➨ Update/Display*

b. Enter the employee's BigTime Distributer Company ID number.

c. Click on the **OK** button (or press the **Enter** key). The list of matching employees is displayed.

c. Select the person from the hit list. Either:
- *Double-click on the employee's name.*
- *Single-click on the employee's name and then click the **Enter** key.*

The **FEDERAL TAX DATA 1** panel for the employee is displayed.

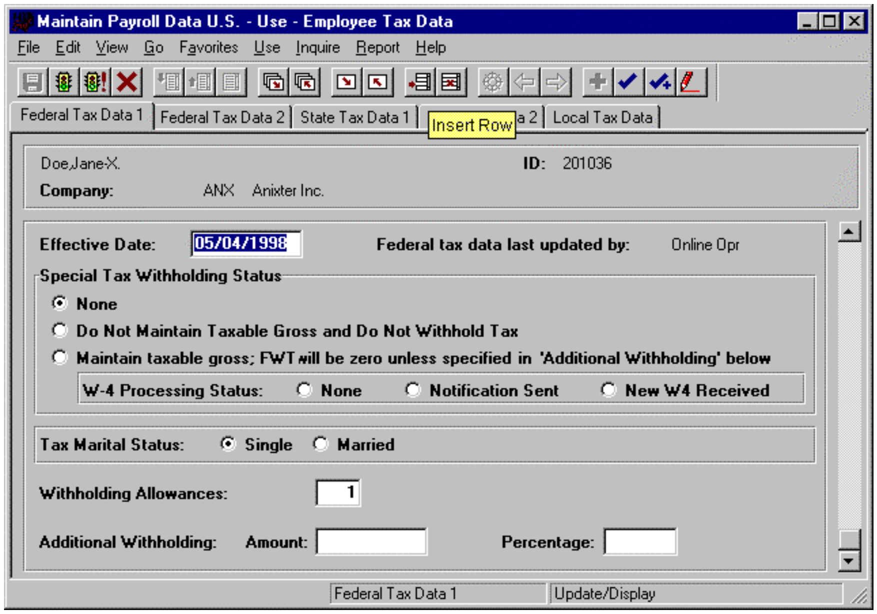
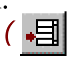


Figure 5. Federal Tax Data 1 Panel

Change Federal Tax Data

1. Insert a new row for the changed data.
   - *Click on the **Insert Row** icon () on the toolbar.*

2. Change fields as necessitated by the W-4 form.

   An example of an employee who changed to married status is shown in the following figure.

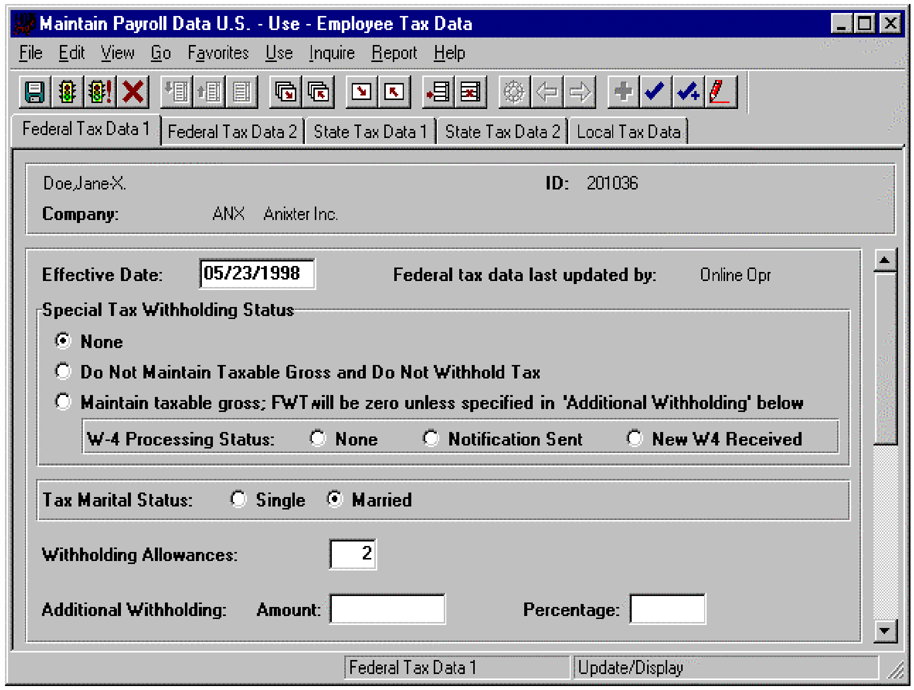


Figure 6. Completed Federal Tax Data 1 Panel

3. Display the **FEDERAL TAX DATA 2** panel.
   ✍ *Click on the **FEDERAL TAX DATA 2** tab.*

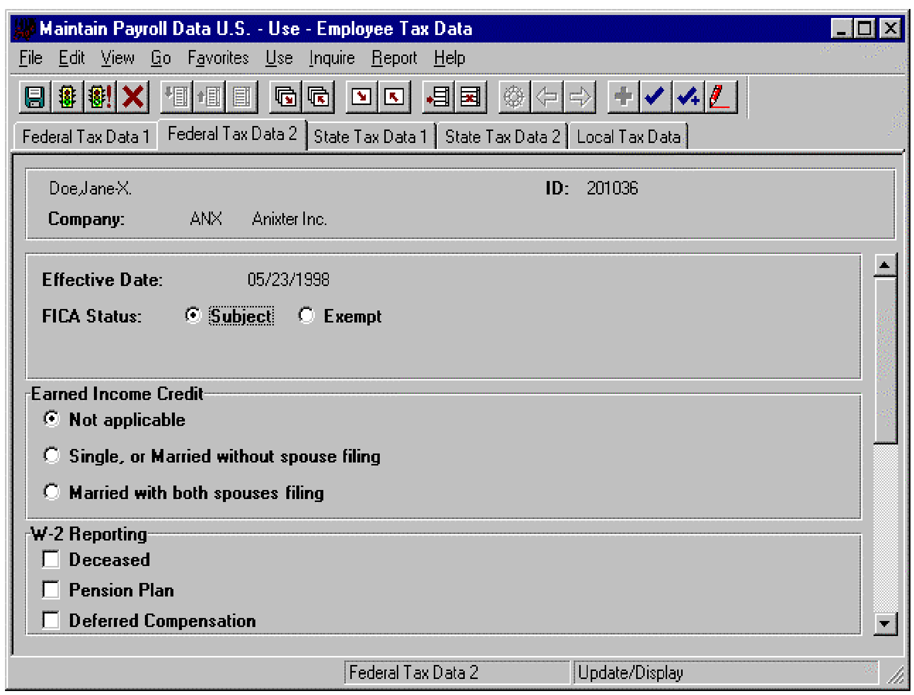


Figure 7. Starting Federal Tax Data 2 Panel

4. Change fields as necessitated by W-4 form.

Change State Tax Data, If Necessary

1. Display the **STATE TAX DATA 1** panel.
   *Click on the **STATE TAX DATA 1** tab.*

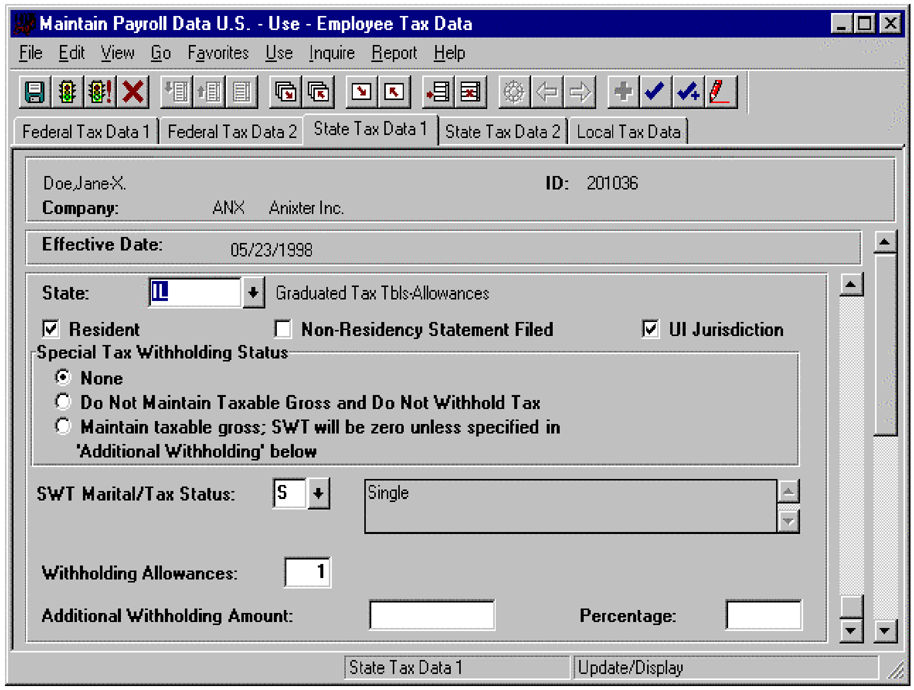


Figure 8. Starting State Tax Data 1 Panel

2. Change any of the fields on the **STATE TAX DATA 1** panel.

WORKS IN ONE STATE AND LIVES IN ANOTHER

If the employee works in one state and lives in another, you need to use two rows on the **STATE TAX DATA 1** panel:

- Use one row for the state of residence. Check the following fields:
  - ❑ ***RESIDENT***
  - ❑ ***UI JURISDICTION*** (UI = Unemployment Insurance)
- Use another row for the state of employment. Complete the following fields:
  - ❑ Non-Residency Statement Filed
  - ❑ SWT Marital/Tax Status (SWT = State Withholding Tax)
  - ❑ Withholding allowance.

CHANGE IN MARITAL STATUS OR NUMBER OF DEPENDENTS

Another common state tax change involves a change in marital status or number of dependents. An example of an employee changed to a married status is shown in the following figure.

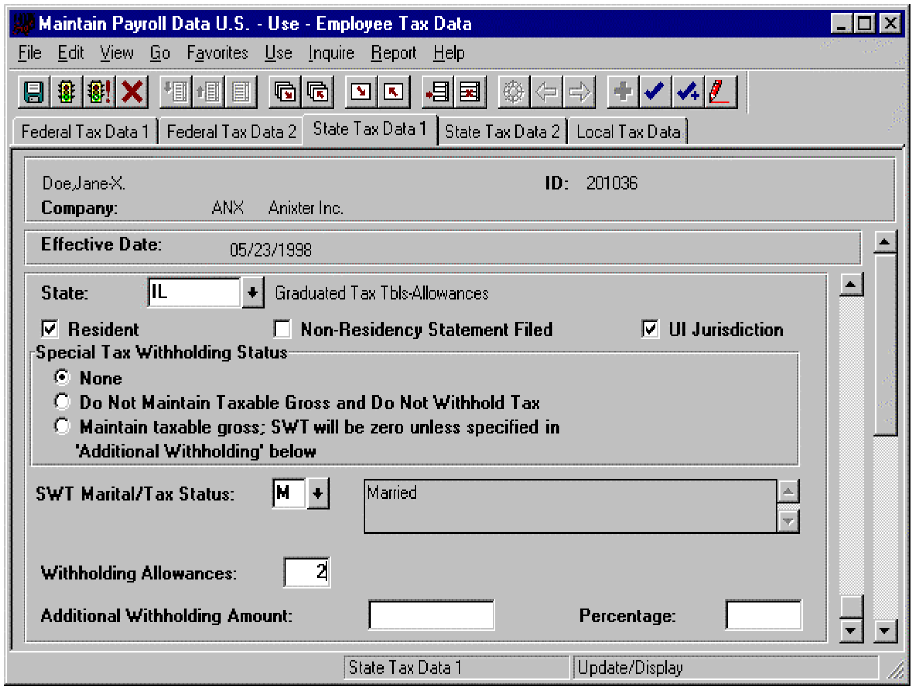


Figure 9. Completed State Tax Data 1 Panel for Marital Status Change

3. Display the **STATE TAX DATA 2** panel.
   Click on the State Tax Data 2 tab.

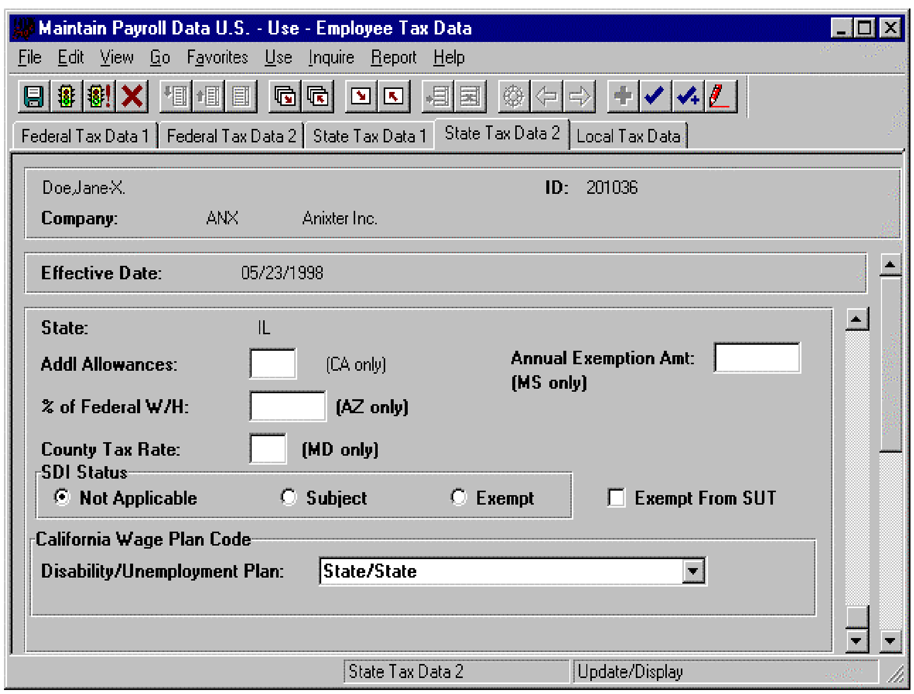


Figure 10. Starting State Tax Data 2 Panel

4. Change fields as necessitated by the W-4 form.

Change Local Tax Data, If Necessary

1. Display the **LOCAL TAX DATA** panel.
   ✍ *Click on the Local Tax Data tab.*

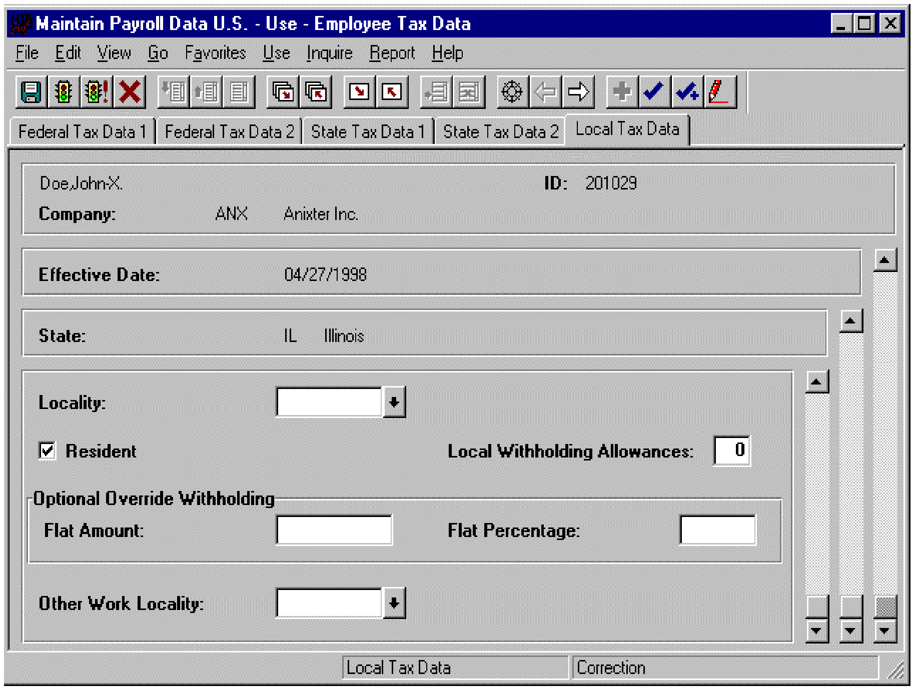


Figure 11. Starting Local Tax Data Panel

2. Change fields as necessitated by the W-4 form.
3. Save the record.
   ✍ *Click on the **Save** icon () on the toolbar.*