

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.**

Developed by J. J. Oehler Corporation, Lisle, IL, USA (Phone: 630-355-5490)

Contents

Introduction	1
2. Sign On and Navigate PeopleSoft	3
Sign On to PeopleSoft	4
Exit PeopleSoft	7
Introducing a PeopleSoft Window	9
The “Go” Menu: Navigate to Where You Do Your Work	10
Navigate from Panel to Panel	15
Open a Panel without Closing the Previous Panel	17
Toggle Between Open Panels	19
Use the Menus as a Road Map to Your Work	20
Close Extra Panels If You Don’t Need Them Open	26
3. Common Procedures	27
Selecting an Employee Record	28
PeopleSoft Toolbar	35
4. Important PeopleSoft Concepts	37
How to Learn PeopleSoft Concepts	38
PeopleSoft Navigation	38
Accessing Windows with the Go Menu	40
Accessing a Panel or Panel Group	42
Specifying Actions	43
Understanding Effective Dates	44
Effective Dates and Effective Sequence	46
Standard PeopleSoft Employee Name Format	47
Multiple Scroll Bars and Parent-Child Tables	48
5. Employment Status Change Processes	51
Hire New Employee	52
Rehire Employee	73
Initiate Leave-of-Absence	76
Return from Leave of Absence	79
Position Change or Transfer	80
Termination	85
Employment Verification	91
6. Payroll Processes	95
Bonus Paid	96
Bonus Plan	100
Create Ongoing Pay Deduction	103
Cancel Ongoing Pay Deduction	108
Create One-Time Pay Deduction	112
Pay Rate Change Process	113
Tax Change	118
7. Payroll Interface Processes	125
Executing the Payroll Interface	126
Transferring Export Files to ADP	158

8. Benefits Administration Processes	161
Determine New Hires and Prepare Labels	162
New Hire Medical/Dental Benefit Enrollment	176
Medical/Dental Benefit Change	186
Enroll Rehired Employee and Dependents in Benefits	197
Life & AD/D and Supplemental Life Plan Enrollment	198
Life & AD/D and Supplemental Life Change	208
FSA (Pre-Tax Care) Plan Enrollment	220
FSA Contribution Change	225
401(k) Savings Plans Setup, Change, and Termination	232
Beneficiary Add/Change	249
Dependent Add/Change	254
Benefits Open Enrollment	259
Benefits Termination	260
Benefits Summary	284
Benefits Deduction Summary	286
Dependent/Beneficiary Summary	288
Employee Data Summary	290
9. Manager Self Service Tool	293
Introduction to the Manager Self Service Tool	294
Terminate an Employee via MSS	295
Change Your MSS Password	300
Process: Add a Manager to MSS	302
Define a Controller for MSS	304
10. Administration of Lotus Notes Global Business Unit	307
Process: Administrate Europe PS HR via PeopleSoft	308
Administrate Europe PS HR via Lotus Notes	312
11. Miscellaneous Processes	315
Anixter Vendor Number Update	316
Change PeopleSoft Employee ID	319
Personal Data Change	323
Refresh Employees Table	328
Job Summary	332
Print Out the Department Security Changes Report	334
12. Initial Setup and Annual Processes	335
Stock Plan Set Up and/or Year-End Change	336
Pay Calendar and Pay Run Creation	343
Balance ID Annual Creation	352
Benefit Setup and Annual Premium Change	357
Reorganization	405
Appendix	407
Benefit Plans	408
Benefit Programs	409
Benefit Providers and Benefit Policy Numbers	410
Departments and Department Numbers	411
Employment Eligibility Documents	444
Termination Reasons, Types, and Codes	445
Index	447

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:

Process	Page
Create Ongoing Pay Deduction _____	96
Tax Change _____	99

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\$	Deferred 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	ULDAN	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

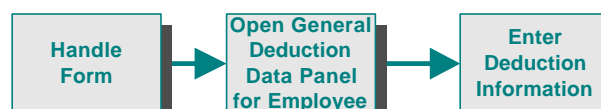
All information for this process comes from a BigTime Distributer Company Personnel Action Form submitted by the employee.

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

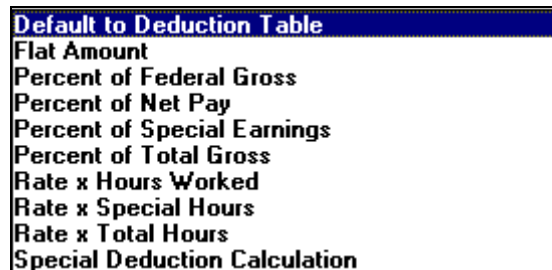


Figure 3. Deduction Calculation Methods

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

Maintain Payroll Data U.S. - Use - General Deduction Data

File Edit View Go Favorites Use Inquire Report Help

General Deduction Data

Doe, Jane-X ID: 201036 Pay Group:
ADP ID:

Deduction Code: Advance

Effective Date:

Deduction Calculation Routine:

Deduction End Date: Deduction Rate or %:

Loan Interest %: Flat/Addl Amount:

Employee Status: Active

General Deduction Data Update/Display

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

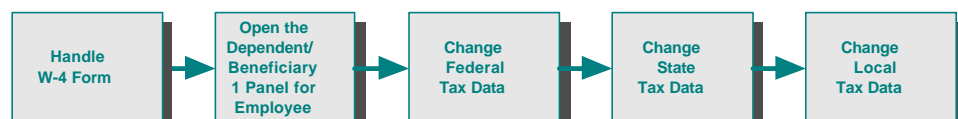
All information for this process comes from the W-4 form(s).

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.

Maintain Payroll Data U.S. - Use - Employee Tax Data

File Edit View Go Favorites Use Inquire Report Help

Federal Tax Data 1 | Federal Tax Data 2 | State Tax Data 1 | State Tax Data 2 | Local Tax Data

Doe,Jane-X ID: 201036
 Company: ANX Anixter Inc.

Effective Date: 05/23/1998 Federal tax data last updated by: Online Opr

Special Tax Withholding Status

None
 Do Not Maintain Taxable Gross and Do Not Withhold Tax
 Maintain taxable gross; FWT will be zero unless specified in 'Additional Withholding' below

W-4 Processing Status: None Notification Sent New W4 Received

Tax Marital Status: Single Married

Withholding Allowances: 2

Additional Withholding: Amount: Percentage:

Federal Tax Data 1 Update/Display

Figure 6. Completed Federal Tax Data 1 Panel

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

Maintain Payroll Data U.S. - Use - Employee Tax Data

File Edit View Go Favorites Use Inquire Report Help

Federal Tax Data 1 | Federal Tax Data 2 | State Tax Data 1 | State Tax Data 2 | Local Tax Data

Doe,Jane-X ID: 201036
 Company: ANX Anixter Inc.

Effective Date: 05/23/1998

FICA Status: Subject Exempt

Earned Income Credit

Not applicable
 Single, or Married without spouse filing
 Married with both spouses filing

W-2 Reporting

Deceased
 Pension Plan
 Deferred Compensation

Federal Tax Data 2 Update/Display

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.

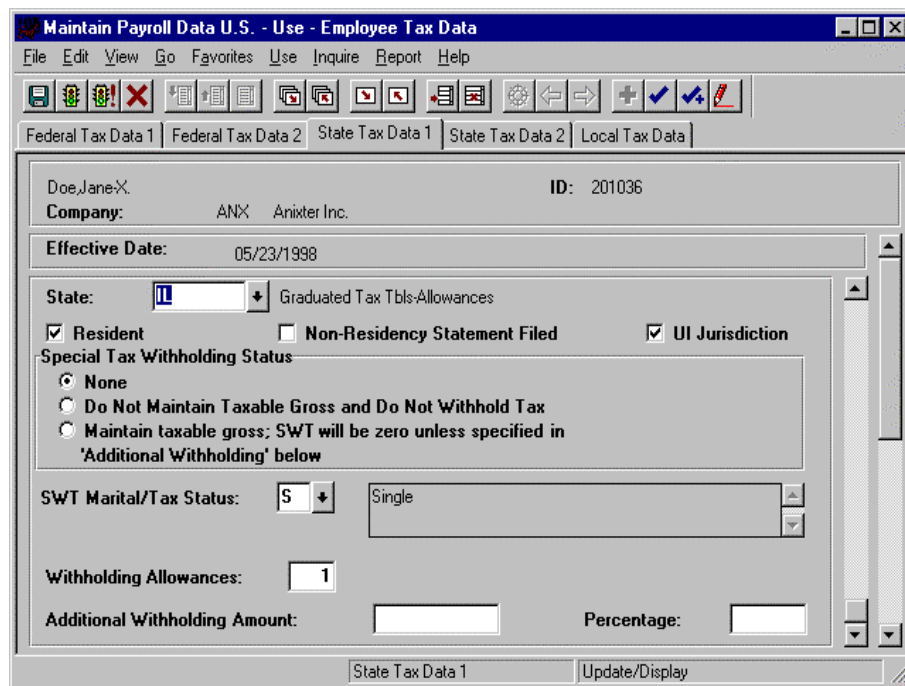


Figure 8. Starting State Tax Data 1 Panel

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.

Maintain Payroll Data U.S. - Use - Employee Tax Data

File Edit View Go Favorites Use Inquire Report Help

Federal Tax Data 1 | Federal Tax Data 2 | State Tax Data 1 | State Tax Data 2 | Local Tax Data

Doe, Jane-X ID: 201036
 Company: ANX Anixter Inc.

Effective Date: 05/23/1998

State: IL Graduated Tax Tbls-Allowances

Resident Non-Residency Statement Filed UI Jurisdiction

Special Tax Withholding Status

None
 Do Not Maintain Taxable Gross and Do Not Withhold Tax
 Maintain taxable gross; SWT will be zero unless specified in 'Additional Withholding' below

SWT Marital/Tax Status: M Married

Withholding Allowances: 2

Additional Withholding Amount: Percentage:

State Tax Data 1 Update/Display

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.

Maintain Payroll Data U.S. - Use - Employee Tax Data

File Edit View Go Favorites Use Inquire Report Help

Federal Tax Data 1 | Federal Tax Data 2 | State Tax Data 1 | State Tax Data 2 | Local Tax Data

Doe, Jane-X ID: 201036
 Company: ANX Anixter Inc.

Effective Date: 05/23/1998

State: IL

Addl Allowances: (CA only) Annual Exemption Amt: (MS only)

% of Federal W/H: (AZ only)

County Tax Rate: (MD only)

SDI Status

Not Applicable Subject Exempt Exempt From SUT

California Wage Plan Code

Disability/Unemployment Plan: State/State

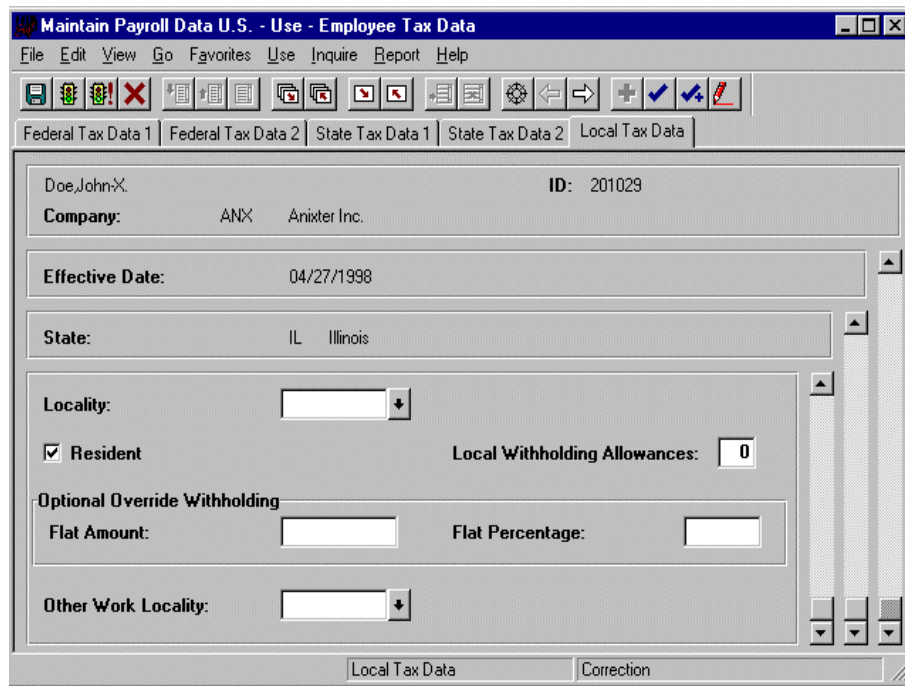
State Tax Data 2 Update/Display

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.



The screenshot shows a software window titled "Maintain Payroll Data U.S. - Use - Employee Tax Data". The window has a menu bar with "File", "Edit", "View", "Go", "Favorites", "Use", "Inquire", "Report", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into several tabs: "Federal Tax Data 1", "Federal Tax Data 2", "State Tax Data 1", "State Tax Data 2", and "Local Tax Data". The "Local Tax Data" tab is currently selected. The data entered in this panel is as follows:

Doe, John X.		ID: 201029
Company:	ANX	Anixter Inc.
Effective Date:	04/27/1998	
State:	IL Illinois	
Locality:	[Dropdown menu]	
<input checked="" type="checkbox"/> Resident	Local Withholding Allowances:	0
Optional Override Withholding		
Flat Amount:	[Text box]	Flat Percentage: [Text box]
Other Work Locality:	[Dropdown menu]	

At the bottom of the window, there are two buttons: "Local Tax Data" and "Correction".

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.