
PeopleSoft ePay 9.1 PeopleBook

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PeopleSoft ePay Preface

This preface discusses:

- PeopleSoft products.
- PeopleSoft HCM Application Fundamentals.

PeopleSoft Products

This PeopleBook refers to the following PeopleSoft products:

- PeopleSoft ePay.
- PeopleSoft Global Payroll.
- PeopleSoft Global Payroll for Japan.
- PeopleSoft Payroll for North America.
- PeopleSoft Payroll Interface.

PeopleSoft HCM Application Fundamentals

Additional, essential information describing the setup and design of your system appears in a companion volume of documentation called *PeopleSoft HCM Application Fundamentals PeopleBook*. Each PeopleSoft product line has its own version of this documentation.

See Also

PeopleSoft HCM Application Fundamentals PeopleBook

PeopleBooks and the PeopleSoft Online Library

A companion PeopleBook called *PeopleBooks and the PeopleSoft Online Library* contains general information, including:

- Understanding the PeopleSoft online library and related documentation.
- How to send PeopleSoft documentation comments and suggestions to Oracle.
- How to access hosted PeopleBooks, downloadable HTML PeopleBooks, and downloadable PDF PeopleBooks as well as documentation updates.

- Understanding PeopleBook structure.
- Typographical conventions and visual cues used in PeopleBooks.
- ISO country codes and currency codes.
- PeopleBooks that are common across multiple applications.
- Common elements used in PeopleBooks.
- Navigating the PeopleBooks interface and searching the PeopleSoft online library.
- Displaying and printing screen shots and graphics in PeopleBooks.
- How to manage the locally installed PeopleSoft online library, including web site folders.
- Understanding documentation integration and how to integrate customized documentation into the library.
- Application abbreviations found in application fields.

You can find *PeopleBooks and the PeopleSoft Online Library* in the online PeopleBooks Library for your PeopleTools release.

Chapter 1

Getting Started with ePay

This chapter provides an overview of ePay and discusses:

- ePay business processes.
- ePay integrations.
- ePay navigation.
- ePay roles and security.
- ePay implementation.

ePay Overview

ePay interfaces with Global Payroll, Payroll for North America, and Payroll Interface to enable workers to review and in some cases update payroll information through self-service transactions.

This table lists the ePay transactions provided for each payroll application:

<i>Payroll Interface</i>	<i>Payroll for North America</i>	<i>Global Payroll</i>
3rd Party Pay Inquiry	View Paycheck	View Payslip
Direct Deposit	Direct Deposit	(GBR) View Payslip GBR
W-4 Tax Information	W-4 Tax Information	Personal Bank Accounts
W-2 Reissue Request	W-2 Reissue Request	Pay Distribution Instructions
Voluntary Deductions	View Year-End Forms	(JPN) Year-End Adjustment Data
	Voluntary Deductions	

ePay Business Processes

ePay provides the following business processes:

- Manage pay information for Payroll Interface.

- Manage pay information for Payroll for North America.
- Manage pay information for Global Payroll.
- (JPN) Update year-end adjustment data.

We discuss these business processes in the business process chapters in this PeopleBook.

See Also

[Chapter 2, "Managing Pay Information for Payroll Interface," page 5](#)

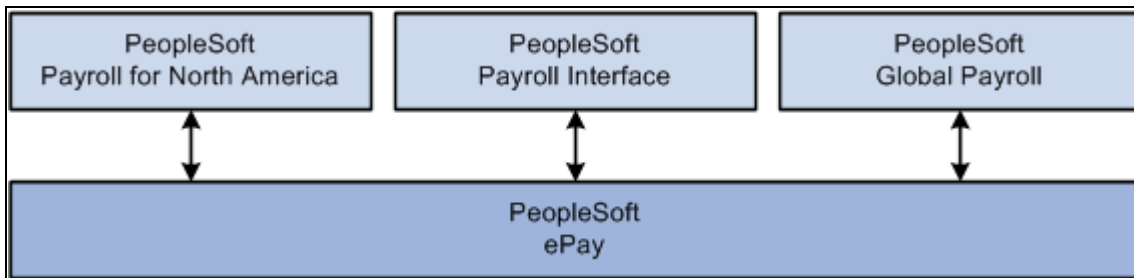
[Chapter 3, "Managing Pay Information for Payroll for North America," page 9](#)

[Chapter 4, "Managing Pay Information for Global Payroll," page 31](#)

[Chapter 5, "\(JPN\) Updating Year-End Adjustment Data," page 51](#)

ePay Integrations

PeopleSoft Payroll for North America, PeopleSoft Payroll Interface, and PeopleSoft Global Payroll all exchange information with PeopleSoft ePay. The following diagram shows the integration between ePay and other PeopleSoft applications:



ePay integration flow with other PeopleSoft applications

We discuss integration considerations in the implementation chapters in this PeopleBook.

ePay Navigation

The standard menu driven navigation path through Self Service, Payroll and Compensation is the traditional PeopleSoft access method. Menu navigation is used throughout this PeopleBook to describe how to access a page.

ePay Roles and Security

User roles determine default access to transactions. Set up user roles on the Roles page in the User Profiles component (USERMAINT). Profiles are linked to permission lists. Permission lists identify the pages that users can access. To modify access to specific web pages for each role, modify the permission list. User profiles also control the data that each employee can access.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up and Administering HCM Security"

ePay Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps.

See Also

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "PeopleSoft HCM Application Fundamentals Preface"

PeopleTools: PeopleSoft Setup Manager PeopleBook

Chapter 2

Managing Pay Information for Payroll Interface

This chapter provides an overview of ePay transactions for Payroll Interface and discusses how to manage and view payroll information.

Understanding ePay Transactions for Payroll Interface

You can use these ePay transactions if your organization licenses PeopleSoft Payroll Interface:

- Direct Deposit (PY_IC_DIR_DEP).

Employees can view, add, change, or discontinue direct deposit instructions.

- 3rd Party Pay Inquiry (PI_IC_CHK_RVW).

Employees can review paycheck information for earnings, taxes, deductions, and net pay distribution.

- W-2 Reissue Request (PY_IC_W2).

Employees can request a duplicate W-2 to be sent to either their work or home addresses.

- W-4 Tax Information (PY_IC_W4).

Employees can enter or update tax withholding information. Workflow sends an email notification to the employee verifying the W-4 details.

Note. The W-4 Tax Information self-service transaction does not work when WWW_AUTHENTICATION is used. With WWW_AUTHENTICATION, the user receives a message at the final confirmation page that their password is invalid and is unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.

- Voluntary Deductions (PY_IC_VOL_DEDS).

Employees add, change, or stop (delete) voluntary deductions.

Managing and Viewing Payroll Information

This section lists the pages used to manage and view payroll information.

Pages Used to Manage and View Payroll Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Direct Deposit	PY_IC_DD_LIST	Self Service, Payroll and Compensation, Direct Deposit, Direct Deposit	View current direct deposit information.
Add Direct Deposit Change Direct Deposit	PY_IC_DD_DATA	Click the Add Account or Edit button on the Direct Deposit page.	Add or change direct deposit information. If the bank is in the United States, indicate whether funds are actually going to a non-US bank.
Delete Confirmation	EO_DEL_CONFIRM	Click the Delete button on the Direct Deposit page.	Delete direct deposit information.
Pay Statement Print Option	PY_IC_DD_SUPP	Click the Pay Statement Print Option link on the Direct Deposit page.	Employees indicate whether they want a printed copy of the pay statement mailed to their home address. The default is set to yes.
(USA) W-4 Tax Information	PY_IC_W4_DATA	Self Service, Payroll and Compensation, W-4 Tax Information, W-4 Tax Information	<p>Change tax data. If you work for multiple companies, select the employer for whom you want to change tax information. Workflow associated with this page sends an email notification to the employee verifying the W-4 details.</p> <p>Note. The W-4 Tax Information self-service transaction does not work when WWW_AUTHENTICATION is used. With WWW_AUTHENTICATION, users receive a message on the final confirmation page that their password is invalid and are unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.</p>

Page Name	Definition Name	Navigation	Usage
Pay Inquiry	PI_IC_CHK_DATA	Self Service, Payroll and Compensation, 3rd Party Pay Inquiry, Pay Inquiry	For Payroll Interface users only, employees view paycheck information for any confirmed pay period.
(USA) W-2 Reissue Request	PY_IC_W2_DATA	Self Service, Payroll and Compensation, W-2 Reissue Request, W-2 Reissue Request	Employees request to have a new W-2 form sent to their home or work address. Workflow associated with this page generates an email confirmation to the employee.
Voluntary Deductions	PY_IC_DED_LIST	Self Service, Payroll and Compensation, Voluntary Deductions, Voluntary Deductions	View a list of current voluntary deductions.
Add Voluntary Deduction Change Voluntary Deduction	PY_IC_DED_DATA	Click the Add Deduction or Edit button on the Voluntary Deductions page.	Add, change, or stop voluntary deductions.
(USF) Add Distribution Information	W3_GVT_PY_ALOT_IC	Click the Distribution Information link on the Add Voluntary Deduction page or the Change Voluntary Deduction page.	Enter details of the account from which the voluntary deduction is taken.

See Also

Chapter 3, "Managing Pay Information for Payroll for North America," Viewing and Updating Voluntary Deductions, page 28

Chapter 3

Managing Pay Information for Payroll for North America

This chapter provides an overview of ePay transactions for Payroll for North America and discusses how to:

- Set up and view self-service paychecks.
- Manage consent for electronic year-end forms.
- View year-end forms.
- Set up and view direct deposit.
- View and update voluntary deductions.
- (USA) Manage W-4 and W-2 reissue.

Understanding ePay Transactions for Payroll for North America

You can use these ePay transactions if your organization licenses PeopleSoft Payroll for North America:

- View Paycheck (PY_IC_PAY_INQ).

Employees review paycheck information for earnings, taxes, deductions, and net pay distribution.

- Year End Form Consent (PY_SS_YE_CONS_USA) and (PY_SS_YE_CONS_CAN).

Employees grant or withdraw consent to receive year-end forms or slips electronically rather than on paper. Workflow sends email confirmation of changes in consent status.

- Year End Forms (PY_SS_YE_FORM_USA) and (PY_SS_YE_FORM_CAN).

Employees view and print year-end forms or slips. Workflow notifies employees by email when the forms are ready for viewing.

- Direct Deposit (PY_IC_DIR_DEP).

Employees display, add, change, or discontinue direct deposit instructions.

- Voluntary Deductions (PY_IC_VOL_DEDS).

Employees add, change, or stop (delete) voluntary deductions.

- W-2 Reissue Request (PY_IC_W2).

Employees request a duplicate W-2 to be sent to either their work or home addresses.

- W-4 Tax Information (PY_IC_W4).

Employees enter or update tax withholding information. Workflow sends an email notification to the employee verifying the W-4 details.

Setting Up and Viewing Self-Service Paychecks

This section provides an overview of the View Paycheck transaction, lists prerequisites, and lists the pages used to view self-service paychecks.

Understanding the View Paycheck Transaction

If you want to display self-service paychecks in PDF, you must use Oracle Business Intelligence Publisher (BI Publisher, or BIP) PDF creation method of printing paychecks and direct deposit advice forms. To use the BI Publisher PDF creation processes, you must update the Paycheck Options table page in Payroll for North America to set up the options for displaying self-service paychecks in PDF. Options that you specify include:

- The URL for the XML data to display self-service checks.
- Whether to display only PDF checks.
- Whether to display manual checks with a \$0 or negative net amount in self-service.
- The number of days from the check date that the paychecks should be available in self-service.

See *PeopleTools: BI Publisher for PeopleSoft PeopleBook*.

PDF and Historical Paychecks

The ePay View Paycheck transaction displays paychecks and direct deposit advice forms that you create in Payroll for North America release 9.0 and later in PDF only. When you define self-service paycheck options on the Paycheck Options Table page, you must specify whether to display only the PDF paychecks or to display both the PDF paychecks and the historical paychecks.

Paycheck Availability

On the Paycheck Options table, indicate the default timing of when paychecks should be available for viewing in the ePay self-service View Paycheck transaction. Indicate whether paychecks should be available on the check date or specify the number of days before or after the check date. You can override this value on the run control page when you run the check and advice PDF creation processes. You can specify paycheck availability differently for various company and pay group combinations.

Note. If you have enabled viewing of historical paychecks, the paycheck data from the current pay run is visible to employees in self service as soon as you run pay confirmation. Running the BI Publisher PDF creation process triggers the paycheck availability option for the PDF paycheck, after which the checks are not viewable until the availability date that you specify. For this reason, we recommend that you run the BI Publisher PDF creation process immediately after confirming the payroll.

Self-Service Paychecks for Accessibility Users

In accessible mode, the system always displays checks on a PeopleSoft page (and not in a PDF file) regardless of your PDF settings.

Self-Service Paycheck and Advice Templates

Payroll for North America delivers RTF templates for displaying the paychecks and advice forms as PDF documents in the self-service transaction. You can modify the templates if required.

See Also

PeopleSoft Payroll for North America 9.1 PeopleBook, "Setting Up the Payroll Process," Setting Up to Print and View Paychecks with BI Publisher (BIP)

Prerequisites

Before you can display PDF self-service paychecks, you must complete these setup steps:

- Configure Integration Broker and Report Manager.
- Update the BI Publisher form definitions with specifics for your implementation.
- Specify BI Publisher printing and self-service options.
- Complete payroll processing and run the PSCHKUSA, PSCHQCAN, PSYDDAUSA, or PSYDDACAN PSJob processes to create self-service checks and advices.

Note. We recommend running the BI Publisher PDF creation processes immediately after confirming the pay run.

See Also

PeopleTools: Integration Broker PeopleBook

PeopleTools: PeopleSoft Process Scheduler PeopleBook

PeopleSoft Payroll for North America 9.1 PeopleBook, "Setting Up the Payroll Process," Setting Up to Print and View Paychecks with BI Publisher (BIP)

PeopleSoft Payroll for North America 9.1 PeopleBook, "Working with Checks and Direct Deposit," Printing Paychecks and Direct Deposit Advices

Pages Used to View Self-Service Paychecks

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Paycheck	PY_IC_PI_LIST	Self Service, Payroll and Compensation, View Paycheck, View Paycheck	Displays a list of paychecks by check date. Depending upon setup options, the page can list PDF paychecks and historical checks that are not in PDF format. By clicking the check date link, employees access PDF paychecks in a new window and view historical paychecks on the View Paycheck page.
View Paycheck	PY_IC_PI_DATA	Click a check date link for a non-PDF paycheck on the View Paycheck page (PY_IC_PI_LIST).	View historical paychecks that are not in PDF format. View paychecks in accessibility mode even if the paycheck would otherwise be available in PDF format.
View Self Service Paycheck	PY_SSP_ADMIN_VIEW PY_SSP_VIEW_DATA	<ul style="list-style-type: none"> Payroll for North America, Payroll Processing USA, Produce Payroll, Review Self Service Paycheck, View Self Service Paycheck Payroll for North America, Payroll Processing USF, Produce Payroll, Review Self Service Paycheck, View Self Service Paycheck 	To resolve questions raised by employees about their paychecks, the payroll administrator can view employees' self-service paychecks in an online view that replicates the employees' view. The list page lists both PDF paychecks and historical checks that are not in PDF format. Administrators can view all paychecks, regardless of the availability date specified for employee viewing of PDF checks. Clicking the check date link displays PDF paychecks in a new window and displays historical paychecks on another View Self Service Paycheck page.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View Self Service Paycheque	PY_SSP_ADMIN_VIEW PY_SSP_VIEW_DATA	Payroll for North America, Payroll Processing CAN, Produce Payroll, Review Self Service Paycheque, View Self Service Paycheque	To resolve questions raised by employees about their paycheques, the payroll administrator can view employees' self-service paycheques in an online view that replicates the employees' view. The list page lists both PDF paycheques and historical cheques that are not in PDF format. Administrators can view all paycheques, regardless of the availability date specified for employee viewing of PDF cheques. Clicking the cheque date link displays PDF paycheques in a new window and displays historical paycheques on another View Self Service Paycheque page.

Managing Consent for Electronic Year-End Forms

This section provides an overview of employee consent and discusses how to:

- Set up self-service viewing.
- Enable self-service consent and year-end forms.
- Set up consent and notification text.
- Monitor employee consent status.

Understanding Employee Consent

You must secure employee consent before you can substitute self-service viewing and printing of electronic year-end forms or slips in place of printed forms. Among other requirements, you must also provide the opportunity for employees to withdraw their consent. All employees who do not have a valid consent on file at the time you generate the year-end slips must be provided with their documents in paper format.

Canadian employees who do not have a valid consent on file are not able to access online slips. US employees who do not have a valid consent on file are still able to access online forms, but they must also be provided with hard copy.

The Payroll for North America and ePay applications provide:

- Setup pages where administrators enable or disable self-service year-end form functionality, enter text for consent emails and notifications to employees, and specify forms and other options.
- Self-service pages where employees grant and withdraw consent to receive electronic year-end forms.
- Workflow email confirmation of an employee's current consent status after each online consent status update.
- An online page and a report that administrators use to monitor employee consent status.
- A reset process that enables administrators to reset consent status for all employees, selected companies, or selected employees.

For example, use this process to reset the consent status of terminated employees to ensure the printing of paper year-end forms.

See Chapter 3, "Managing Pay Information for Payroll for North America," [Consent Reset Due to Termination](#), page 15.

- PDF year-end forms creation processes that generate year-end forms and slips.

Note. Payroll for North America uses BI Publisher to create year-end forms in PDF format for printing and to display the year-end forms in self-service. You must use the correct PDF year-end form creation process in conjunction with the ePay consent functionality. The processes print the forms only for employees who have not consented to electronic forms.

- Workflow email notification that year-end forms are ready for self-service viewing.

This table describes the availability of year-end forms in each country by employee consent status:

Country	Consent Status	Form Availability
U.S.	Consented	The PDF year-end form creation process suppresses the printing of the employee's paper W-2 or W-2c. The employee views and prints the year-end form through self service.
U.S.	No Consent Received Withdrawn Reset by Employer	The PDF year-end form creation process prints the employee's paper W-2 or W-2c. The employee can also view and print the year-end form through self service.
Canada	Consented	The PDF year-end form creation process suppresses the printing of the employee's paper T4 or T4A. The employee views and prints the year-end slip through self service.
Canada	No Consent Received Withdrawn Reset by Employer	The PDF year-end form creation process prints the employee's paper T4 or T4A. The employee cannot view or print the year-end slip through self service.

Note. If the U.S. employee consents to receive an electronic Form W-2, you must also deliver any related Form W-2c electronically.

Initial Employee Notification About Consent

After you set up the consent processing, you must use your normal method of employee notification to inform employees that they can enter the self-service consent page to grant consent. The ePay application does not provide functionality for the initial notification to employees.

Consent Reset Due to Termination

The system does not automatically reset the consent status of terminated employees. The payroll administrator must run the Reset Form Consent process for terminated employees to ensure that paper forms will be printed at year end.

Note. The automatic notification of reset status is likely to be undeliverable to terminated employees. Use a standard procedure to notify the terminated employee of reset consent status, such as including the notification in the termination package.

See Also

Year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

Appendix A, "Delivered Workflows for ePay," page 61

Pages Used to Manage Consent for Self-Service Year-End Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Tax Form XMLP Options	PY_YE_XMLP_OPTION	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Tax Form XMLP Options, Tax Form XMLP Options Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Tax Form XMLP Options, Tax Form XMLP Options 	Specify the tax year, the tax form, the report definitions, and the URL for the table in which the XML data is stored for producing the self-service forms.

Page Name	Definition Name	Navigation	Usage
Year End Form Options	PY_YE_OPTION_CAN PY_YE_OPTION_USA	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Options, Year End Form Options Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Options, Year End Form Options 	Enable self-service year-end forms or slips. This step is required to enable employees to grant consent to receive electronic forms. Also specify the availability date for each form and tax year.
Year End Form Text	PY_YE_NOTES	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Text, Year End Form Text Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Text, Year End Form Text 	Set up consent and notification text to be used on the consent page or in email notifications sent to employees.
T4/T4A Consent Form W-2/W-2c Consent Form	PY_SS_CONSENT_CAN PY_SS_CONSENT_USA	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, T4/T4A Consent, T4/T4A Consent Form Self Service, Payroll and Compensation, W-2/W-2c Consent, W-2/W-2c Consent Form 	Employees request or withdraw consent to receive electronic year-end slips or forms. Appropriate text appears on the page based on the employee's current status. After saving an update on the page, the employee must enter password verification. After verification, the system displays confirmation of the submit and triggers email confirmation of the change.

Page Name	Definition Name	Navigation	Usage
Review T4/T4A Consent Status Review W-2/W-2c Consent Status	PY_FORM_STAT_CAN PY_FORM_STAT_USA	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Review T4/T4A Consent Status, Review T4/T4A Consent Status Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Review W-2/W-2c Consent Status, Review W-2/W-2c Consent Status 	Monitor employee consent status. Review the history of each employee's consent and email notification status.
Year End Consent Status Report	RUNCTL_TAX900CS	Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Year End Consent Status Report, Year End Consent Status Report	Run the TAX900CS report, which lists employees' most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.
Year End Consent Status Report	RUNCTL_CTX900CS	Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Year End Consent Status Report, Year End Consent Status Report	Run the CTX900CS report, which lists employees' most current self-service year-end form consent status based on dates and status codes that you specify in the report request parameters.
Reset T4/T4A Consent Status Reset W-2 Consent Status	PY_RC_RESCON_CAN PY_RC_RESCON_USA	<ul style="list-style-type: none"> Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Reset T4/T4A Consent Status, Reset T4/T4A Consent Status Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Reset W-2 Consent Status, Reset W-2 Consent Status 	Reset consent status to <i>Reset Consent</i> for all employees, selected companies, or selected employees. Enter run parameters for the Reset Form Consent Application Engine process (PYYE_RESCAN or PYYE_RESUSA).

Setting Up Self-Service Viewing

Access the Tax Form XMLP Options page (Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Tax Form XMLP Options, Tax Form XMLP Options or Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Tax Form XMLP Options, Tax Form XMLP Options).

Tax Form XMLP Options

Tax Year: 2008
Last Update Date/Time: 10/21/2008 11:10:23AM
Updated By: PS

Tax Form Options Find | View All First 1 of 10 Last

***Tax Form ID:** T4A Slip

XML Data Files

URL Identifier: PY_YE_CAN_XML_DATA T4/T4A XML DATA

Filing Instructions

URL Identifier: PY_YEAR_END_ATTACH Year End Filing Instructions
Attached File: PYT4A08_INSTR.pdf
 Add Attachment Delete Attachment View Attachment

Report Definitions Customize | Find | View All First 1-4 of 4 Last

Report Name	Report Description	Template ID	Template Description	Copy Type	Burst?	Batch Size		
PYT4A08N_CO	T4A Company Print Form 2008	PYT4A08N_CO_1	T4A Company Copy	Company Copy	<input type="checkbox"/>		+	-
PYT4A08N_EE	T4A Employee Print Form 2008	PYT4A08N_EE_1	T4A Employee Print Copy	Employee Copy	<input type="checkbox"/>		+	-
PYT4A08N_GVT	T4A Government Print Form 2008	PYT4A08N_GVT_1	T4A Government Copy	Government Copy	<input type="checkbox"/>		+	-
PYT4A08S_EE	T4A Employee SS Form 2008	PYT4A08S_EE_1	T4A Employee SS Copy	Employee Copy	<input checked="" type="checkbox"/>		+	-

Tax Form XMLP Options page

XML Data Files

URL Identifier

Enter the URL to the table in which you store the XML data for self-service viewing. We deliver a URL and associated table for this purpose. If you create a separate table and URL to store the data, enter your URL here.

Report Definitions

Report Name Select the appropriate print and self-service form report definitions for the tax year and tax form specified. PeopleSoft delivers the necessary report definitions and filing instructions each year for each tax form.

Batch Size Enter the number of employees that you want in each PDF print file for those employees who do not give consent to receive their forms through self service.

See Also

Year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

Enabling Self Service Consent and Year-End Forms

Access the Year End Form Options page (Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Options, Year End Form Options or Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Options, Year End Form Options).

Year End Form Options

W-2 Reporting Company: GBI Global Business Institute 9999

Self Service Options Find | View All | First 4 of 4 Last

Tax Year: 2008 + -

Last Update Date/Time: 10/31/2008 1:16:49PM **Updated By:** SAMPLE

Electronic Forms Option

☒ Enable Electronic Year End Forms In Self Service

Tax Form Options Find | View All | First 1 of 8 Last

Tax Form ID: W-2VI + -

Self Service Availability

Availability Date: 31 Availability Notification

Date Notified:

Report Definitions Customize | Find | View All | First 1-4 of 4 Last

Report Name	Report Description	Template ID	Template Description	W-2/W-2c Type	Burst?	Batch Size
PYW2VI08N_CO	W2VI Company Print Form 2008	PYW2VI08N_CO_1	W2VI Employer Government Copy	Company Copy	<input type="checkbox"/>	
PYW2VI08N_EE	W2VI Employee Print Form 2008	PYW2VI08N_EE_1	W2VI Employee Print Copy	Employee Copy	<input type="checkbox"/>	
PYW2VI08N_GV	W2VI Government Form 2008	PYW2VI08N_GV_1	W2VI Employer Government Copy	Government Copy	<input type="checkbox"/>	
PYW2VI08S_EE	W2VI Employee SS Form 2008	PYW2VI08S_EE_1	W2VI Employee SS Copy	Employee Copy	<input checked="" type="checkbox"/>	

Year End Form Options page

The Year End Form Options page configures printing of year-end forms in XMLP PDF format for the company specified. The output files are determined by the tax year and tax form ID.

Note. (USA) Configuration is by W-2 company for the U.S.

Tax Year Create a new row each tax year.

Enable Electronic Year End Forms in Self Service

Select this check box to enable the W-2 company or T4/T4A company to provide XMLP PDF forms or slips in the ePay self-service transaction.

If this check box is not selected, employees cannot enter or withdraw consent or view year-end forms and slips.

If you want to disable the feature after employees have granted consent, deselect this check box and run the Reset T4/T4A Consent Status process or the Reset W-2 Consent Status process.

Note. (USA) Self-service year-end form functionality is available only for companies set up with tax report type *W-2 or Territories* on the Company Table - Default Settings: Tax Details page.

Tax Form ID

Enter all valid tax form IDs for the W-2 company or T4/T4A company.

Availability Date

After generating the individual PDF forms, enter an availability date when employees can view the forms in self-service.

Availability Notification

After entering an availability date, click this button to trigger workflow to send email notification of form availability to employees who are eligible to receive the electronic form. Set up the email text on the Year End Form Text page.

Note. Before you click this button, verify that the availability date in the email notification is correct.

Date Notified

After you click the Availability Notification button and trigger the workflow email notification, the system enters the current date.

Report Definitions

Displays a list of valid report definitions based on the tax year and tax form ID entered. This is for information only. Maintain this information on the Tax Form XMLP Options page.

See Also

Year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

Setting Up Consent and Notification Text


Access the Year End Form Text page (Payroll for North America, Year-End Processing CAN, Define Annual Tax Reporting, Year End Form Text, Year End Form Text or Payroll for North America, U.S. Annual Processing, Define Annual Tax Reporting, Year End Form Text, Year End Form Text).

Year End Form Text

Text Type: Consent Instructions

Country: USA United States

Text Details Find | View All First 1 of 1 Last

Effective Date: 01/01/1980 


Usage: Page Text

***Description:** Consent Instructions

Text:

You must complete this consent form to receive electronic W-2 or W-2c forms. If you do not submit a consent form or a withdrawal of consent form, the Payroll Department will process your year-end forms based on the information currently on file. After you submit your consent form, it will remain valid until you submit a withdrawal of consent form. The exception is when your employment is terminated or electronic access to forms is discontinued.

If you have any questions, please contact your Payroll Administrator.



Year End Form Text page

Text Types

When you enter the page, select the type of consent form or email text that you want to enter or update. This table describes the text types:

Text Type	Description
Consent Instructions	Instructional text displayed on the W-2/W-2c Consent page or T4/T4A Consent page to request consent.
Withdrawal Instructions	Instructional text displayed on the W-2/W-2c Consent page or T4/T4A Consent page to withdraw consent.
Consent Confirmation	Email to an employee to confirm that consent is granted. Workflow issues this email when the employee submits a consent request through self service.
Withdrawn Confirmation	Email to an employee to confirm that consent is withdrawn. Workflow issues this email when the employee submits a consent withdrawal request through self service.
Consent Reset Notification	Notification to employees that consent has been reset. Workflow issues this email when the payroll administrator resets an employee's consent status or runs a mass reset process.
Form Available	Notification to employees that the W-2 or T4 is available for self-service viewing and printing. Workflow issues this email when the payroll administrator clicks the Availability Notification button on the Year End Form Options page.
Correction Available	Notification to employees that the W-2c or T4A is available for self-service viewing and printing. Workflow issues this email when the payroll administrator clicks the Availability Notification button on the Year End Form Options page.

Additional Page Elements

Usage	Select <i>Page Text</i> for text types <i>Consent</i> or <i>Withdrawal</i> . Select <i>Email Text</i> for all other text types.
Text	Enter the exact wording of text to display in the email or consent form. Payroll for North America provides sample text for each text type for the U.S. and Canada. You can use the sample text as an example when you create your own text.
	<hr/> Note. Use the spell checking button or press Alt + 5 to check the spelling of your text. <hr/>

Consent Instruction Requirements

The instructional page text that you create for consenting and withdrawing consent should include these details:

- Notification that a paper copy will be provided if consent is not given.
- The scope and duration of the consent.
- Post consent requests for paper statements.
- Option to withdraw consent.
- Conditions under which the employer will no longer furnish electronic statements.
- Procedures for updating information.
- Hardware and software requirements.

For example, inform employees that Adobe Reader is required to view the forms.

- Contact information.

Monitoring Employee Consent Status

Access the Review W-2/W-2c Consent Status page (Payroll for North America, U.S. Annual Processing, Year-End/New Year Preparation, Review W-2/W-2c Consent Status, Review W-2/W-2c Consent Status) or the Review T4/T4A Consent Status page (Payroll for North America, Year-End Processing CAN, Year-End/New Year Preparation, Review T4/T4A Consent Status, Review T4/T4A Consent Status).

Review W-2/W-2c Consent Status

Douglas Lewis

Employee ID: KU0001

Consent Information

Find | View All | First | 1 of 1 | Last

Effective Date: 07/12/2009

Effective Sequence: 0

Last Update Date/Time: 07/12/2009 2:42:33PM

Updated By User:

Consent Status

☒ No consent received. Print paper forms.

☐ Consent granted. Produce electronic forms.

☐ Consent withdrawn. Print paper forms.

☐ Consent reset by employer. Print paper forms.

Email Notification Status

Consent

☐ Consent Granted

☐ Consent Withdrawn

☐ Consent Reset

Form

☐ W-2 Form Available

☐ W-2c Form Available

Review W-2/W-2c Consent Status page

Note. The Review T4/T4A Consent Status page is identical to the Review W-2/W-2c Consent Status page.

Consent Status	Review the selected employee's consent status for each effective-dated row.
Email Notification Status	Review the email notifications that have been sent to the employee by workflow for each row of consent status.

Note. You can also generate the Year End Consent Status report to view a list of employees with the specified consent status values within a specified date range.

Viewing Year-End Forms

This section lists prerequisites and lists the pages employees and administrators use to view year-end forms.

Prerequisites

These steps are required before employees can view and print electronic year-end forms and slips in self-service:

1. Configure Integration Broker and Report Manager.

2. Specify tax form XMLP options.

See Year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

3. Specify the year-end form options.

On the Year End Form Options page, specify the tax year and the form availability date.

See Year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

4. Complete the employee consent process.

See [Chapter 3, "Managing Pay Information for Payroll for North America," Managing Consent for Electronic Year-End Forms, page 13.](#)

5. Create year-end form data and then create the forms using the PDF year-end form creation processes.

Note. On the run control pages for the PDF year-end form creation processes, select the Final Print check box to enable employee self-service viewing as of the availability date specified on the Year End Form Options page. In Canada, self-service viewing is also subject to the consent status.

See Year-end processing instructions issued with the tax update posted on My Oracle Support in October of each year.

See Also

PeopleTools: Integration Broker PeopleBook

PeopleTools: PeopleSoft Process Scheduler PeopleBook

Pages Used to View Year-End Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View T4/T4A Slips	PY_SS_YE_FORM_CAN PY_TAX_LIST_CAN	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, View T4/T4A Slips, View T4/T4A Slips Payroll for North America, Year-End Processing CAN, Create Slip Data, View T4/T4A Slips, View T4/T4A Slips 	<p>Canadian employees who have consented to electronic slips can view and print year-end slips and filing instructions, listed by tax year. The slip and filing instructions open in separate windows when the employee clicks the corresponding document link.</p> <p>To resolve inquiries, the payroll administrator can view or reprint employees' self-service slips in an online Payroll for North America view that replicates the employees' self-service view.</p> <p>If the Final Print check box is selected, the employee can view the year-end form in self-service on or after the availability date if consent has been granted. If Final Print is not selected, only the payroll administrator can view the form.</p>

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
View W-2/W-2c Forms	PY_SS_YE_FORM_USA PY_TAX_LIST_USA	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, View W-2/W-2c Forms, View W-2/W-2c Forms Payroll for North America, U.S. Annual Processing, Create W-2 Data, View W-2/W-2c Forms, View W-2/W-2c Forms 	<p>U.S. employees can view and print year-end forms and filing instructions, listed by tax year. The form and filing instructions open in separate windows when the employee clicks the corresponding document link.</p> <p>To resolve inquiries, the payroll administrator can view or reprint employees' self-service forms in an online Payroll for North America view that replicates the employees' self-service view.</p> <p>If the Final Print check box is selected, the employee can view the year-end form in self-service on or after the availability date. If Final Print is not selected, only the payroll administrator can view the form.</p>

Setting Up and Viewing Direct Deposit

This section provides an overview of the direct deposit transaction and lists the pages used to set up and view direct deposit.

Understanding the Direct Deposit Transaction

To set up direct deposit, employees enter:

- Bank and account information.
- Deposit type (amount or percent) and the value.
- Deposit order for multiple deposits.

Employees can also update or cancel direct deposit instructions in the self-service transaction.

Note. (USA) In the U.S., prenotification may affect the timing of updates to direct deposit.

Upon saving data in the transaction, employees receive a message confirming the save and informing them that due to timing, the change might not be reflected on the very next pay.

Note. (USA and USF) Direct deposit add or edit changes are limited to one transaction per day. You can add or edit information for multiple direct deposit accounts in a single self-service transaction, but once you save the changes and exit the Direct Deposit page, you cannot make additional changes on the same day. If you attempt to make additional changes, a message appears from the Direct Deposit page saying that multiple direct deposit changes are not allowed on the same day.

Pages Used to Set Up and View Direct Deposit

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Direct Deposit	PY_IC_DD_LIST	Self Service, Payroll and Compensation, Direct Deposit, Direct Deposit	Employees view current direct deposit information.
Add Direct Deposit Change Direct Deposit	PY_IC_DD_DATA	Click the Add Account or Edit button on the Direct Deposit page.	Employees add or change direct deposit information.
Delete Confirmation	EO_DEL_CONFIRM	Click the Delete button on the Direct Deposit page.	Employees delete direct deposit information.
Pay Statement Print Option	PY_IC_DD_SUPP	Click the Pay Statement Print Option link on the Direct Deposit page.	Employees indicate whether they want a printed copy of the pay statement mailed to their home. The default is yes.

Viewing and Updating Voluntary Deductions

This section provides an overview of voluntary deductions, describes the prerequisite, and lists the pages used to set up and view voluntary deductions.

Understanding Voluntary Deductions

To control which general deductions employees can update using self service, use the Allow update via Emp Self Serv (allow update via employee self-service) option on the General Deduction Table page in the Payroll for North America application.

If you enable self-service updates for a deduction, employees can update their own voluntary deductions online. The employee's voluntary deduction changes in the ePay transaction directly update the Payroll for North America database tables.

Prerequisite

To use this transaction, select the Allow update via Emp Self Serv option on the General Deduction Table page for each voluntary deduction that employees can update online.

See *PeopleSoft Payroll for North America 9.1 PeopleBook*, "Defining Deductions," Defining General Deductions.

Pages Used to Set Up and View Voluntary Deductions

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Voluntary Deductions	PY_IC_DED_LIST	Self Service, Payroll and Compensation, Voluntary Deductions, Voluntary Deductions	View a list of current voluntary deductions.
Add Voluntary Deduction Change Voluntary Deduction	PY_IC_DED_DATA	Click the Add Deduction or Edit button on the Voluntary Deductions page.	Add, change, or stop voluntary deductions.
(USF) Distribution Information	W3_GVT_PY_ALOT_IC	Click the Distribution Information link on the Add Voluntary Deduction page or the Change Voluntary Deduction page.	Enter details of the account from which the voluntary deduction is taken.

(USA) Managing W-4 and W-2 Reissue

This section provides overviews of the W-4 transaction and the W-2 reissue transactions and lists the pages used to manage W-4 and reissued W-2 forms.

Understanding the W-4 Transaction

Employees can file a new Form W-4 through self service anytime that their tax status changes.

Using the self-service transaction, employees can:

- Change their federal tax data.
- Select the company for which they need to change data if they work for multiple companies.
- Specify an additional withholding amount.

Users are asked to confirm their password after updating the W-4. This functions as an employee's electronic signature. Workflow generates an email to the employee confirming that the change was made.

Note. The W-4 Tax Information self-service transaction does not work when WWW_AUTHENTICATION is used. With WWW_AUTHENTICATION, users receive a message on the final confirmation page that their password is invalid and are unable to save the W-4 changes. To use the W-4 Tax Information self-service transaction, you must use a different authentication method.

Understanding the W-2 Reissue Transaction

Employees can request a reissued W-2 form. Workflow associated with this transaction generates a worklist for the payroll administrator.

Pages Used to Manage W-4 and Reissued W-2 Forms

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
(USA) W-4 Tax Information	PY_IC_W4_DATA	Self Service, Payroll and Compensation, W-4 Tax Information, W-4 Tax Information	Employees can change tax data.
(USA) W-2 Reissue Request	PY_IC_W2_DATA	Self Service, Payroll and Compensation, W-2 Reissue Request, W-2 Reissue Request	Employees request a new W-2 form and select the delivery address.

Chapter 4

Managing Pay Information for Global Payroll

This chapter provides an overview of ePay transactions for Global Payroll and discusses how to:

- Set up personal bank account information.
- Update personal bank account information.
- Set up payment instructions and distribution details.
- Enter payment instructions and distribution details.
- Set up View Payslip.
- View payslips online.
- (GBR) View payslips online.

Understanding ePay Transactions for Global Payroll

You can use these ePay transactions if your organization has licensed PeopleSoft Global Payroll:

- Personal Bank Accounts (GP_SS_EE_BANK).

Employees can enter and maintain their personal bank account information.

- Pay Distribution Instructions (GP_SS_EE_NPD).

Employees can define their net pay distribution requirements.

- View Payslip (GP_SS_EE_PSLP).

Employees can review paycheck information for earnings, taxes, deductions, and net pay distribution.

- (GBR) View Payslip GBR (GPGB_PSLIP_SS_PNLG).

Employees can review payslips (PeopleSoft Global for the United Kingdom only).

- (JPN) Year-End Adjustment (YEA) Data (GPJP_YEA_SSERVICE).

Employees can update their year-end adjustment data for YEA calculations (PeopleSoft Global Payroll for Japan only).

Setting Up Personal Bank Account Information

To define personal bank account information, use the Payee Bank Acct/Net Pay Dist (GP_SS_NPD_CONFIG_GBL) component.

This section provides an overview of how to define personal bank account information and discusses how to set up banking instructions.

Understanding How to Define Personal Bank Account Information

The steps for setting up and entering personal account data are:

1. Before employees can use the self-service pages to enter personal bank information, the payroll administrator must set up general bank and bank branch information by using the Bank Table and Branch Table pages in PeopleSoft HCM.
2. If you want to replace default instructions that appear in the Personal Bank Accounts component (GP_SS_EE_BANK) with instructions that are specific to your company, define these instructions on the Banking Instructions page.

The new instructions appear in place of default messages from the Message Catalog.

Note. (GBR) If you are a United Kingdom user, specify additional instructions on the Banking Instructions page for employees that belong to building societies.

After general bank and bank branch information is set up, Global Payroll employees can enter personal bank information, such as bank locations and account types, bank and branch names, account names, account numbers, and currency codes. Employees enter this information by using the Personal Bank Accounts component.

Note. Any information that an employee enters in the Personal Bank Accounts component automatically updates the Maintain Bank Accounts page in the Global Payroll core application.

See Also

Chapter 4, "Managing Pay Information for Global Payroll," Updating Personal Bank Account Information, page 34

PeopleSoft Global Payroll 9.1 PeopleBook, "Defining Banking Instructions"

PeopleSoft HCM 9.1 Application Fundamentals PeopleBook, "Setting Up Banks and Bank Branches"

Pages Used to Define Personal Bank Account Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Bank Table	BANK_EC	Set Up HRMS, Common Definitions, Banking, Banks, Bank Table	Set up general bank information that is needed to enable employee self-service transactions.
Branch Table	BANK_BRANCH_EC	Set Up HRMS, Common Definitions, Banking, Banks, Branch Table	Set up general bank branch information that is needed to enable employee self-service transactions.
Banking Instructions	GP_SS_NPD_CNF_INST	Set Up HRMS, Product Related, ePay, Payee Bank Acct / Net Pay Dist, Banking Instructions	Create instructions that you want employees to see on pages in the Personal Bank Accounts component. These instructions override any default messages in the Message Catalog.

Setting Up Banking Instructions

Access the Banking Instructions page (Set Up HRMS, Product Related, ePay, Payee Bank Acct / Net Pay Dist, Banking Instructions).

Run Types Banking Instructions

Country: AUS Australia

On-page Instructions to Self Service User

Bank Instructions

If your financial institution is not listed, please advise your Payroll Manager.

Branch Instructions:

If your financial institution BRANCH is not listed, please advise your Payroll Manager.

Banking Instructions page

Bank Instructions

Enter a message that will appear directly above the list of banks from which a user can select on the self-service Select a Bank page.

Branch Instructions

If you set up bank branches by using the Branch Table page, when employees select a bank on the Select a Bank page, the system displays a list of available branches. Employees then see any instructions that you define here.

Note. This field is not available if the country is *GBR* or *USA*.

(GBR) Building Society Instructions

If an employee specifies *GBR* (Great Britain) in the Bank Location field and selects *Building Society Roll Number* in the Account Type field on the Bank Location and Account Type page, the Select a Building Society field appears, and displays the instructions that you define here.


Note. This field is available only if the country is *GBR*.

Updating Personal Bank Account Information

This section lists the pages used to update personal bank account information.

Pages Used to Update Personal Bank Account Information

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Personal Bank Accounts	GP_SS_EE_BANK	Self Service, Payroll and Compensation, Personal Bank Accounts, Personal Bank Accounts	<p>View any previously defined accounts and delete or edit earlier entries.</p> <p>After employees have defined their personal account information by using the Personal Bank Accounts component, they can click the Pay Distribution Instructions link. The system displays the Pay Distribution Instructions component (GP_SS_EE_NPD), where employees can define their net pay distribution.</p> <p>Note. Any information that an employee enters in the Personal Bank Accounts component automatically updates the Maintain Bank Accounts page in the Global Payroll core application.</p>

Page Name	Definition Name	Navigation	Usage
Bank Location and Account Type	GP_SS_EE_BANK_CTRY	Click the Add a New Account button on the Personal Bank Accounts page.	Enter the country where the bank is located and select the account type.
(GBR) Select a Building Society	GP_SS_EE_BANK_BRC	On the Bank Location and Account Type page, enter <i>United Kingdom</i> in the Bank Location field and <i>Building Society Roll Number</i> in the Account Type field, then click the Continue button.	(GBR) Select a building society. Note. The system displays this page only when you select <i>GBR</i> in the Bank Location field and <i>Building Society Roll Number</i> in the Account Type field on the Bank Location and Account Type page. Otherwise, the Select a Bank page appears.
Select a Bank	GP_SS_EE_BANK_BNK	Click the Continue button on the Bank Location and Account Type page.	Select a bank.
Select a Branch	GP_SS_EE_BANK_BRC	On the Select a Bank page, select a bank for which branches have been defined.	Select a bank branch. Note. If the bank that you select does not have any branches defined, the Add Account Details page appears instead of the Select a Branch page.
Add Account Details	GP_SS_EE_BANK_DET	<ul style="list-style-type: none"> Select a bank for which branches have not been defined on the Select a Bank page. Select a bank branch on the Select a Branch page. Select a building society on the Select a Building Society page. 	<p>Add additional account details, such as the account name, account number, and currency code.</p> <p>(GBR) Enter building society roll name and roll number.</p> <p>(BEL, CHE, DEU, ESP, FRA, GBR, ITA, and NLD) Enter the international bank account number.</p> <p>(USA) If the bank is in the United States, indicate whether funds are actually going to a non-US bank.</p>
(USA) Funds going to a non U.S. Bank	GP_SS_EE_BNK_HELP	 Click the Help icon next to the Funds going to a non U.S. Bank check box on the Add Account Details page.	Explains the use of the Funds going to a non U.S. Bank field.

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Save Confirmation	GP_SS_SAVE_CONFIRM	Click the Save button on the Add Account Details page.	Confirm that the personal bank account information is saved.
Edit Account Details	GP_SS_EE_BANK_DET	Click the Edit button on the Personal Bank Accounts page.	Edit account details, such as the account name, account number, and currency code.
Delete Confirmation	GP_SS_DEL_CONFIRM	Click the Delete button on the Personal Bank Accounts page.	Delete a personal bank account.

Setting Up Payment Instructions and Distribution Details

To define payment instructions and distribution details, use the Payee Bank Acct/Net Pay Dist (GP_SS_NPD_CONFIG_GBL) component.

This section provides an overview of how to set up payment instructions and distribution details and discusses how to define run type information.

Understanding How to Set Up Payment Instructions and Distribution Details

To set up payment instructions and distribution details, the payroll administrator must:

1. Set up general bank and bank branch information by using the Bank Table and Branch Table pages.
2. Determine whether employees can define separate payment instructions and distributions for different run types, such as expenses and bonuses.

If you configure the system so that users can specify different distributions for different run types, then users are required to select a run type before entering distribution details.

Note. If employees have more than one job, they must also select the job for which they are entering distribution details.

3. If the payroll administrator enables employees to define separate payment instructions and distributions for different run types, select a default election to use if the payee has no net distribution instructions for the run type.
4. Decide whether to lock net pay transactions so that employees cannot alter their distributions before or during a banking run.

The payroll administrator uses the ePay Run Types page to enter the decisions that are made in steps 2 through 4.

Pages Used to Define Payment Instructions and Distribution Details

Page Name	Definition Name	Navigation	Usage
Bank Table	BANK_EC	Set Up HRMS, Common Definitions, Banking, Banks, Bank Table	Set up general bank information that is needed to enable employee self-service transactions.
Branch Table	BANK_BRANCH_EC	Set Up HRMS, Common Definitions, Banking, Banks, Branch Table	Set up general bank branch information that is needed to enable employee self-service transactions.
Run Types	GP_SS_NPD_CONFIG	Set Up HRMS, Product Related, ePay, Payee Bank Acct / Net Pay Dist, Run Types	Set up the net pay distribution options that are available to employees in the self-service Pay Distribution Instructions transaction.

Defining Run Type Information

Access the Run Types page (Set Up HRMS, Product Related, ePay, Payee Bank Acct / Net Pay Dist, Run Types).

Run Types
Banking Instructions

Country: GBR United Kingdom

Run Type Defaults
Customize | Find | First 1-2 of 2 Last

*Run Type	Description	Default Election	Net Pay Transaction Locked		
GXERBONUS	Earnings Bonus Run	<input type="checkbox"/>	<input type="checkbox"/>	+	-
GXERREG	Earnings Regular Run	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Run Types page

Run Type

Select the run type for which you want to allow or prevent employees from entering distribution instructions.

Only run types with a calculation type of payroll are listed. The Global Payroll security settings determine whether you can select run types designated for all countries or only selected countries.

If you do not select run types on this page, employees see the following message when they access the Pay Distribution Instructions component: "There are no payroll types set up in the system which you can access. Please contact your Payroll Administrator."

If you select only one run type, employees do not have to choose a run type before they define their distribution amounts and percentages.

If you select more than one run type, employees must select a run type before they enter distribution instructions.

Default Election

Enables you to define the distribution options that are selected by an employee for a particular run type as a default distribution. The default works as follows: When you run the banking process, the system looks at the run type that is defined on the pay calendar. It then tries to find the net distribution selections that the employee has made for that run type in the Pay Distribution Instructions component. If the current run type does not have distribution instructions defined for it, the system uses the distribution amounts and percentage corresponding to the row marked as default election.

If you choose a default run type, when employees go to the Payment Instruction Details page to enter their distribution amounts and percentages for that run type, the Use Payment Instructions for All Payroll Runs check box is selected. This lets employees know that the distributions that they make for that run type are used as the default election. Employees can override this default and set any other defaults that they want by deselecting the check box.

Net Pay Transaction Locked

Select this check box if you want to temporarily prevent employees from entering distribution instructions for this run type. For example, you might want to select this option while you are running the banking process.

Doing so causes the following message to appear after the name of the run type in the Pay Distribution Instructions component: "Locked by Payroll Administrator – please try later."

Entering Payment Instructions and Distribution Details

This section provides an overview of how to enter payment instructions and distribution details and lists the pages used to enter payment instructions and distribution details.

Understanding How to Enter Payment Instructions and Distribution Details

After the payroll administrator has set up payment instructions and distribution details, employees can enter their own bank account information, payment instructions, and distribution details.

To enter personal bank account information, payment instructions, and distribution details, the employee:

1. (Optional) Uses the Personal Bank Accounts component to enter personal bank account information, first selecting a bank, then a branch, and then entering the account name and account number.

The employee can select only those banks and branches that you have set up by using the Bank Table and Branch Table pages.

The accounts defined here are those to which employees distribute their net pay in step two. If the employee does not have bank account information when the employee uses the Pay Distribution Instructions component (GP_SS_EE_NPD), the employee can add personal bank account information because the Personal Bank Accounts transaction is incorporated within the Pay Distribution Instructions transaction.

Note. Any information that the employee enters in this component automatically updates the Maintain Bank Accounts page in the Global Payroll core application. The Maintain Bank Accounts page is designed to enable payroll departments to enter employee bank account information, while the Personal Bank Accounts component is designed as part of a self-service application that enables employees to enter their own account information online. Regardless of which page is used to enter account information, both pages display the most up-to-date account data because both pages reference the same bank table (PYE_BANKACCT).

2. Uses the Pay Distribution Instructions component to:

- Select bank transfer as the payment method and distribute electronic transfer payments between the various banks and accounts defined in step 1.
- Select check, postal order, or cash as the payment method to receive some or all of their earnings.

Each user can specify one cash and one check distribution. The priority order determines the order of payment during processing.

- Specifies the priority order for each disbursement.

The priority order determines the order of payment during processing.

If you configure the system so that employees can specify different distributions for different run types, then employees are required to select a payroll type before entering distribution details. If employees have more than one job, they must also select the job for which they are entering distribution details.

Note. Any information that employees enter on these pages automatically updates the Net Distribution page in the Global Payroll core application. The Net Distribution page was designed to enable payroll departments to define net distribution details, while the Pay Distribution Instructions component was designed as part of a self-service application, enabling employees to set their own distribution amounts and percentages online. Regardless of which page is used to enter pay distribution information, both pages display the most up-to-date pay distribution data because both pages reference the same bank tables (GP_NETDIST, GP_NETDIST_DT, and GP_NETDIST_DTL).

Pages Used to Enter Payment Instructions and Distribution Details

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Select Job Title	GP_SS_EE_NPD_JOB	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, Pay Distribution Instructions, Select Job Title Self Service, Payroll and Compensation, Personal Bank Accounts, Personal Bank Accounts <p>Click the Pay Distribution Instructions link on the Personal Bank Accounts page.</p>	<p>Select a job for which you want to enter distribution and payment instructions.</p> <p>Note. The system displays this page only if the employee has multiple jobs. If the employee has only one job, the system displays the Select Type of Payroll page or the Pay Distribution Instructions page.</p>
Select Type of Payroll	GP_SS_EE_NPD_RT	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, Pay Distribution Instructions, Select Type of Payroll Select a job title on the Select Job Title page. Self Service, Payroll and Compensation, Personal Bank Accounts, Personal Bank Accounts <p>Click the Pay Distribution Instructions link on the Personal Bank Accounts page.</p>	<p>Select the run type for which you want to enter payment instructions and define distribution amounts and percentages.</p> <p>Note. The system displays this page only if more than one run type is selected for distribution on the Run Types page. If only one run type is selected, the system displays the Pay Distribution Instructions page.</p>

Page Name	Definition Name	Navigation	Usage
Pay Distribution Instructions	GP_SS_EE_NPD	<ul style="list-style-type: none"> Self Service, Payroll and Compensation, Pay Distribution Instructions, Pay Distribution Instructions Select a job title on the Select Job Title page. Select a payroll type on the Select Type of Payroll page. Self Service, Payroll and Compensation, Personal Bank Accounts, Personal Bank Accounts <p>Click the Pay Distribution Instructions link on the Personal Bank Accounts page.</p>	View, delete, or edit any previously defined distributions and payment instructions, and add new distributions and payment instructions.
Select Distribution Method	GP_SS_EE_NPD_PAY	Click the Add a Distribution Instruction button on the Pay Distribution Instructions page.	Select a payment method for which you want to distribute amounts or percentages.
Pay Distribution Instructions - Personal Bank Accounts	GP_SS_EE_BANK_SUMM	Select <i>Bank Transfer</i> in the Distribution Methods column on the Select Distribution Method page.	Select a bank account for which you want to distribute amounts or percentages.

Page Name	Definition Name	Navigation	Usage
Distribution Instruction Details	GP_SS_EE_NPD_DET	<ul style="list-style-type: none"> Select <i>Cash</i>, <i>Check</i>, or <i>Postal Order</i> in the Distribution Methods column on the Select Distribution Method page. Select a bank account on the Pay Distribution Instructions - Personal Bank Accounts page. Click the Edit button on the Pay Distribution Instructions page. 	<p>Specify the priority and the amount or percentage of funds to be paid for the selected payment method.</p> <p>Distribution is processed in priority order. To change priority order when the priority has already been used, the original row with that priority must be changed first.</p> <p>Note. Employees must specify an amount or a percentage, but cannot specify both. Employees can also leave both amount and percentage blank if they select the Use for any Remaining Pay check box. If Use for any Remaining Pay has been selected on a row, it cannot be selected on another row. The user would have to assign an amount or percentage to the original row before assigning the remaining pay to another account.</p>
Delete Confirmation	GP_SS_DEL_CONFIRM	Click the Delete button on the Pay Distribution Instructions page.	Delete a payment instruction.

Setting Up View Payslip

To set up View Payslip, use the Self Service Payslip Options (GP_SS_PSLP_OPTIONS_GBL) component.

This section provides an overview of the View Payslip transaction setup, lists prerequisites, and discusses how to:

- Identify the FTP URL used for storing PDF files.
- Enable online payslip printing.

Understanding the View Payslip Transaction Setup

You can make employees' payslips available in PDF format in the View Payslips transaction (GP_SS_EE_PSLP). The system creates the PDF files when the Create Self Service Payslips Application Engine process (GP_EPAY) runs. This process is included as part of the PS Job process that you run from each country extension's payslip creation page.

As part of the payslip generation process, the system launches a series of processes that:

- Gather information and create a temporary file.
- Create a PDF file that is used to print the payslips.
- Split the PDF file into individual PDF files for each employee.

These individual PDF files are stored on a secure server.

Important! When scheduling a process request for a payslip job, the following values can be used with ePay in the Type and Format fields on the Process Scheduler Request page: *None* and *None* (defaults to Web and PDF), *Web* and *PDF*, or *File* and *PDF*. If using *File* and *PDF*, do *not* use a custom output destination on the Process Scheduler Request page.

To set up the View Payslip transaction:

1. Define the URL identifier for the server that will store the individual PDF files.

The Create Self Service Payslips process (GP_EPAY) uses this URL to identify where the PDF files are to be stored.

You can use the default, GP_SS_PSLP_FTP, or you can create your own URL identifier.

2. Define the parameters for the View Payslip transaction.

Using the Self Service Payslip Options page, you define:

- The default URL identifier.
- Whether to suppress printed payslips as a default.
- When payslip information is available for employees to view.
- Whether to override payslip information availability dates for one or more run types.

Prerequisites

Before you can set up the View Payslips transaction, you must:

1. Set up a secure FTP server to store the individual PDF payslip files.
2. Obtain the FTP URL from your environments engineers.
3. Set up payslips.

Each country extension has instructions on how to set up payslips for that country.

Pages Used to Set Up View Payslip

Page Name	Definition Name	Navigation	Usage
URL Maintenance	URL_TABLE	PeopleTools, Utilities, Administration, URLs, URL Maintenance	Stores URL addresses.
Self Service Payslip Options	GP_SS_PSLP_OPTIONS	Set Up HRMS, Product Related, ePay, Self Service Payslip Options, Self Service Payslip Options	Enable online payslip printing using the View Payslip self-service transaction.

Identifying the FTP URL Used for Storing PDF Files

Access the URL Maintenance page (PeopleTools, Utilities, Administration, URLs, URL Maintenance).

URL Maintenance

URL Identifier: GP_SS_PSLP_FTP

*Description: Payslip File attachments

*URL: ftp://

Comments: URL used to attach Payslip PDF Files for Self Service. Add your ftp location in the URL field. Example: ftp://<userid>:<password>@<machine name>/PAYSLIPS/

URL Maintenance page

Important! If you are creating your own URL identifier to use instead of GP_SS_PSLP_FTP, you must update the Self Service Payslip Options page to reflect the new URL identifier.

URL

Enter the address for the location of the stored individual PDF files. Your environments engineers can provide this address.


Note. The format of your URL may not match the format of the example provided in the Comments field. The format of the address is dependent on the operating system you are using. You should contact your system administrator for the exact format of the URL.

Enabling Online Payslip Printing

Access the Self Service Payslip Options page (Set Up HRMS, Product Related, ePay, Self Service Payslip Options, Self Service Payslip Options).

Self Service Payslip Options

Country: AUS Australia

Default Payslip URL Identifier: GP_SS_PSLP_FTP  Payslip File attachments

Default Payslip Print Options


☐ Suppress Printing of Payslips


ePay Availability Options

☐ Enable Option in Self Service

Days after Payment Date:

Payslip Availability By Run Type

Customize | View All |  First 1 of 1 Last

Run Type	Description	Days after Payment Date		
<input type="text"/> 		<input type="text"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

Updated on: 07/29/04 2:22:20PM

Updated By: PSSTG

Self Service Payslip Options page

Default Payslip URL Identifier

Enter the URL identifier that contains the FTP URL where the PDF files for this country are stored.

The default URL identifier is GP_SS_PSLP_FTP. If you created your own URL identifier, you must make sure to enter that URL identifier here.

Default Payslip Print Options

Suppress Printing of Payslips

Select this check box if you do not want payslips to be printed.

Note. If your country extension does not support the ability to suppress the printing of payslips, you should leave this check box deselected.

This check box serves as the default selection for your organization. It does not override existing individual payee settings.

ePay Availability Options

Enable Option in Self Service Select this check box if you want employees to control whether they receive a printed copy of their payslip, overriding the default selection that you enter on this page. If selected, the Paper Payslip Instructions group box displays on the View Payslips page.

Note. If your country extension does not support the ability to suppress the printing of payslips on an individual payee basis, you should leave this check box deselected.

Days after Payment Date Specify when the payslip is available for viewing using View Payslip. The date determined using this information is the earliest date that the payslip is available; once this date has passed, the payslip is always available. You can enter:

- Zero to indicate that the payslips are available on the payment date.
- A number greater than zero to indicate the number of days after the payment date that payslips are available.
- A negative number to indicate the number of days before the payment date that payslips are available.

Payslip Availability By Run Type

Run Type and Days after Payment Date If you want a run type to have a different payslip availability date than the default that is specified in the ePay Availability Options group box, enter the run type and then specify the number of days before or after the payment date that you want payslips to be available.

Viewing Payslips Online

This section provides an overview of online payslip views and discusses how to review employee payslips.

Understanding Online Views of Payslips

Employees can view their payslips using the View Payslip transaction. When the employee accesses the View Payslips page, the system displays all payslips available, listed 10 at a time. To display the detailed payslip, the employee clicks the date link.

If the Enable Option in Self Service field is selected on the Self Service Payslip Options page, employees also have the option of indicating whether they want to receive a printed copy of their payslip.

To aid in resolving questions raised by employees about their payslips, the payroll administrator can view employees' self-service payslips in an online view that replicates the employees' view.

Pages Used to View Payslips Online

Page Name	Definition Name	Navigation	Usage
View Payslips	GP_SS_EE_PSLP	Self Service, Payroll and Compensation, View Payslips, View Payslips	The employee selects the paycheck date to display the payslip as a PDF file. The employee can also instruct payroll whether to print a hard copy of the payslip.
Review Self Service Payslips	GP_SS_PSLP_ADMINVW	Global Payroll and Absence Mgmt, Payslips, Review Self Service Payslips, Review Self Service Payslips	The payroll administrator reviews employee payslips to respond to employee questions. Select the employee by name or employee ID on the search page, then click the paycheck date to view the same payslip that the employee views in self service.

Reviewing Employee Payslips

Access the Review Self Service Payslips page (Global Payroll and Absence Mgmt, Payslips, Review Self Service Payslips, Review Self Service Payslips).

Review Self Service Payslips

[Samuel Brooks](#)

Person ID: G1EE0001

Selection Criteria

Filter By: Payment Date

From Date: 04/11/2009

To Date: 07/12/2009

Select with Matching Criteria

Clear

Select Payslip

Customize | Find |

First 1 of 1 Last

Payslip Content Details

Payslip File Details

Period Begin Date	Period End Date	Net Pay	Description	Status	Payslip ID

Review Self Service Payslips page

Selection Criteria

Filter By	Specify the criteria by which you want to filter payslips. The options are <i>Payment Date</i> , <i>Pay Period Begin Date</i> , or <i>Pay Period End Date</i> .
From Date and To Date	Enter the date range for the payslips that you want to view. <hr/> Note. You can specify an open date range by leaving one of the date fields blank. <hr/>
Select with Matching Criteria	Click to generate a list of payslips based on the selection criteria you specify.
Clear	Click to clear the From Date and To Date fields along with any results listed in the Select Payslip group box.

Select Payslip

Status	Update the status for a payslip. Valid values are: <ul style="list-style-type: none"> • <i>Original</i>: Indicates that this is the original payslip generated by the system. • <i>Modified</i>: Indicates that the payslip was modified after it was originally generated. • <i>Void-Hidden</i>: Indicates that the payslip has been voided and is not visible to the payee through self-service. • <i>Void-Deleted</i>: Indicates that the payslip was invalid and has been deleted. It is not visible to the payee through self-service. • <i>Void-Display</i>: Indicates that the payslip has been voided and is visible to the payee through self-service.
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(GBR) Viewing Payslips Online

For U.K. employers, there is a separate payslip provided in ePay. This section lists the prerequisites and page used to view payslips online.

Prerequisites

Setup of the U.K. payslip is managed in Global Payroll for the U.K. This is discussed in the *PeopleSoft Global Payroll for the U.K. PeopleBook*.

Before employees can view their payslips, you must run the payslip process, which produces the payslips.

See Also

PeopleSoft Global Payroll for the United Kingdom 9.1 PeopleBook, "Setting Up Payslips"

PeopleSoft Global Payroll for the United Kingdom 9.1 PeopleBook, "Generating and Viewing Payslips"

Page Used to View Payslips Online

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Payslips	GPGB_PSLIP_SS_LIST	Self Service, Payroll and Compensation, View Payslip GBR, Payslips	Employees use this page to view their payslips when payroll has been finalized.

Chapter 5

(JPN) Updating Year-End Adjustment Data

This chapter provides an overview of the year-end adjustment (YEA) data self-service transaction and discusses how to:

- Set up the YEA data self-service transaction.
- Review and update YEA data.
- Review, approve, and load YEA self-service data.

See Also

PeopleSoft Global Payroll for Japan 9.1 PeopleBook, "Preparing Year-End Adjustment"

Understanding the YEA Data Self-Service Transaction

This section discusses:

- YEA data self-service transaction.
- Status codes.

YEA Data Self-Service Transaction

The YEA data self-service transaction provides updated data for the YEA calculations in Global Payroll for Japan. Employees can update YEA data including:

- Their personal information such as name and address (available if PeopleSoft eProfile is licensed).
- Their own and dependents' tax data.
- Deduction data such as insurance deduction, spouse special deduction, dependent deductions, and special deduction for housing loan.

Note. Employees who are eligible for dependent deduction from secondary salaries cannot use the YEA data self-service transaction to enter their own tax data or dependent tax data.

Payroll administrators and employees perform the following tasks in this business process:

1. The payroll administrator specifies the time period during which employees can review and update data through the YEA data self-service transaction.

The payroll administrator also specifies the date on which tax data and deduction data take effect.

2. Employees review and update their data on the YEA data self-service transaction pages.

Employees must review all data before they can successfully submit data.

3. The payroll administrator reviews the employee's YEA data.

Administrators can reject an employee's deduction data and request revision.

Approval of each employee's deduction data before loading is an optional feature.

4. The payroll administrator loads updated deduction data including life and other insurance, spouse, dependent and housing loan deduction information to a Global Payroll for Japan table, where it is available for further review and processing.

Status Codes

The system assigns a status to each employee's YEA data to enforce employees' complete review and to facilitate the administrator's review, optional approval, and data load to payroll. The system displays status codes on the YEA Information page that employees access. Payroll administrators can edit the status codes on the Review/Approve Self Service Data JPN page. The status codes *Submitted* and *Approved* are available as run control parameters when loading the data.

Following is a list of the status codes:

Open	The employee has not reviewed the data. This is the default status for each data section when the employee first accesses the YEA Information page.
Reviewed	The employee has accessed the data page and either clicked the Save button for updates or the Return to YEA Information link if data was unchanged. Employees can still access and update pages that have a reviewed status.
Submitted	The employee has successfully submitted deduction data. The employee cannot change deduction data once this status is assigned. This status is available as a run control parameter when loading data to records.
Approved	The payroll administrator sets this status on the Review/Approve Self Service Data JPN page if the organization requires approval of deduction data before loading. The employee cannot update the page once this status is assigned. This status is available as a run control parameter when loading data to records.
Rejected	The payroll administrator sets this status on the Review/Approve Self Service Data JPN page if the employee is required to again review some of the deduction data. The administrator must notify the employee separately to change the data. The system changes the status of all data back to reviewed if one section has the rejected status, so that the employee can review all data again.

Sent to Payroll

The system sets this status after the payroll administrator runs the Load YEA Self Service Application Engine process (GPJP_YEASSLD) to load the deduction data into the corresponding records. The employee cannot access the update page once this status is assigned.

Setting Up the YEA Data Self-Service Transaction

To set up the YEA data self-service transaction, use the YEA Self Service Setup JPN (GPJP_YEA_SETUP_GBL) component.

This section discusses how to specify control dates for YEA data.

Page Used to Set Up the YEA Data Self-Service Transaction

Page Name	Definition Name	Navigation	Usage
Year End Adjustment Self Service Setup	GPJP_YEA_SETUP	Set Up HRMS, Common Definitions, Self Service, YEA Self Service Setup JPN, Year End Adjustment Self Service Setup	Specify the period during which the YEA data self-service transaction is available to employees and specify the effective date of tax and deduction data entered through the transaction.

Specifying Control Dates for YEA Data

Access the Year End Adjustment Self Service Setup page (Set Up HRMS, Common Definitions, Self Service, YEA Self Service Setup JPN, Year End Adjustment Self Service Setup).

Year End Adjustment Self Service Setup

Object Year:

2009


*As Of Date:

11/30/2009




*From:

04/01/2009



*Through:

12/31/2009



Year End Adjustment Self Service Setup page

Object Year

The year that is being adjusted.

As Of Date

The system uses this date when retrieving current information from effective-dated tables. The system also uses this date as the effective date when loading YEA self-service data into tables.

From and Through

Enter the begin and end dates of the period that employees can access the YEA data self-service transaction.

Reviewing and Updating YEA Data

This section provides an overview of how to review and update YEA data and lists the pages used to review and update YEA data.

Understanding How to Review and Update YEA Data

Through the YEA Information page, employees access other pages to review and update YEA information. Current data is displayed on each page when first accessed. Employees click the links to access the corresponding pages, where they can view and modify existing data. The current status of the data in the section is displayed to the right of each link. Employees can access the corresponding page only if the status is *Open*, *Reviewed*, or *Rejected*.

Employees must review every page that is accessible from the main page before they can successfully submit their data. The system presents an error message if the employee tries to submit when there is still a status of open or rejected. To set a section's status to reviewed, employees click the Save button if they have updated data or the Return to YEA information link if they have only reviewed the data.

See Also

Chapter 5, "(JPN) Updating Year-End Adjustment Data," Status Codes, page 52

Pages Used to Review and Update YEA Data

Page Name	Definition Name	Navigation	Usage
YEA Information	GPJP_YEA_SSERVICE	Self Service, Payroll and Compensation, Year End Adjustment Info JPN, YEA Information	Employees access individual transactions to review and update YEA data.
Employee Tax Information	GPJP_YEA_EETAX	Click the Employee Tax Information link on the YEA Information page.	Employees review and update tax information such as relationship to head of household and disability information.

Page Name	Definition Name	Navigation	Usage
Personal Information	HR_EE_PERS_INFO	Click the Employee Personal Information link on the YEA Information page.	Employees review and update name, address, and other personal data information. This page is not available if you do not license eProfile. Note. The Employee Personal Information link is available only if the organization also licenses eProfile.
Dependent Tax Information	GPJP_YEA_DEPTAX	Click the Dependent Tax Information link on the YEA Information page.	Employees review dependent relationship, type, and disability type information. They also access a page for editing dependent information.
Edit Dependent Tax Information	GPJP_YEA_DEPTX_2	Click the Edit button on the Dependent Tax Information page.	Employees edit dependent information. They cannot add or delete a dependent on this page.
Life Insurance	GPJP_YEA_LIFE	Click the Life Insurance link on the YEA Information page.	Employees review and update life insurance and personal pension insurance information.
Other Insurance	GPJP_YEA_NONLIFE	Click the Other Insurance link on the YEA Information page.	Employees review and update nonlife insurance information, including social insurance and small mutual aid.
Spouse Special Deduction	GPJP_YEA_SPOUSE	Click the Spouse Special Deduction link on the YEA Information page.	Employees review and update spouse special deduction data.
Special Deduction for Housing Loan	GPJP_YEA_HOUSE	Click the Special Deduction for Housing Loan link on the YEA Information page.	Employees review and update information relative to the special deduction for housing loan.

Reviewing, Approving, and Loading YEA Self-Service Data

This section discusses how to:

- Review and approve employee YEA data.

- Load YEA self-service deduction data.

Pages Used to Review, Approve, and Load Employee YEA Data

<i>Page Name</i>	<i>Definition Name</i>	<i>Navigation</i>	<i>Usage</i>
Review/Approve Self Service Data JPN	GPJP_YEA_PAYADM	Global Payroll & Absence Mgmt, Year-End Processing, Rvw/Appr Self Service Data JPN, Review/Approve Self Service Data JPN	Payroll administrators view a summary and details of employee YEA data, edit status, and approve if required. Administrators cannot edit employee data.
Load YEA Self Service Data JPN	GPJP_RC_YEALOAD_SS	Global Payroll & Absence Mgmt, Year-End Processing, Load YEA Self Service Data JPN, Load YEA Self Service Data JPN	Run the Load YEA Self Service process to load updated self-service employee personal data, dependent deduction data, life and nonlife insurance, and spouse and housing loan deduction information into the Global Payroll for Japan YEA table and the corresponding page (GPJP_YEA_PYEADJ).
Payee List	GPJP_RC_YEA_SEC	Click the Payee List link on the Load YEA Self Service Data JPN page.	Select individual employees to load their data.

See Also

Chapter 5, "(JPN) Updating Year-End Adjustment Data," Reviewing and Updating YEA Data, page 54

Reviewing and Approving Employee YEA Data

Access the Review/Approve Self Service Data JPN page (Global Payroll & Absence Mgmt, Year-End Processing, Rvw/Appr Self Service Data JPN, Review/Approve Self Service Data JPN).

Review/Approve Self Service Data JPN

Search ID: jpn

Object Year: 2009

Selection Criteria

*Tax/Ins Establishment:

Pay Entity:

Business Unit:

Department:

Location Code:

Empl ID:

Get YEA Information

YEA Status

☐ Submitted

☐ Reviewed

☐ Approved

☐ Rejected

☐ Open

☐ Sent to Payroll

YEA Review Status

Tax

Personal

Empl ID	Name	EE Tax	Dependent Tax	Dep Tax	Life Ins Status	Life Ins	Non Life Ins Status	Non Life Ins	Spouse Spe Stat
1									

Review/Approve Self Service Data JPN page

Selection Criteria

Use the fields in this group box to define the group of employees to display in the YEA Review Status group box. Use the optional Pay Entity, Business Unit, Department, Location Code, and EmplID fields to restrict the list as desired.

- YEA Status (year-end adjustment status)

Select status codes; the system displays employees whose status codes match the selections.

Get YEA Information (get year-end adjustment information)

Click to load the data that matches the parameters that you defined in the YEA Status group box.

YEA Review Status - Tax Tab

This grid displays the current status of each employee's YEA data. To view details of the employee's data, click the corresponding button, which takes you to the self-service page on which the employee entered data. Administrators cannot edit employee data on the self-service pages.

You can reject dependent deductions, employee life insurance, nonlife insurance, spouse special deduction, or housing loan special deduction data by changing the status for that data to *Rejected*. If you reject any employee data, notify the employee to correct and resubmit it.

Note. The system changes the status of all data back to *Reviewed* if one section has the *Rejected* status, so that the employee can review all data again. When this happens, the following message appears: "If you change the Status to *Rejected*, all other nonrejected status codes change to *Reviewed*."

Approve

Approval is optional. Click this button for each employee if the organization requires approval before loading the data. The status of all data for the employee becomes *Approved*.

YEA Review Status - Personal Tab

Select the Personal tab to view the employee's home and mailing address, phone, or birthday information.

See Also

Chapter 5, "(JPN) Updating Year-End Adjustment Data," Status Codes, page 52

Loading YEA Self-Service Deduction Data

Access the Load YEA Self Service Data JPN page (Global Payroll & Absence Mgmt, Year-End Processing, Load YEA Self Service Data JPN, Load YEA Self Service Data JPN).

Load YEA Self Service Data JPN

Run Control ID: PS [Report Manager](#) [Process Monitor](#) [Run](#)

Process Request Parameter(s)

*Tax Establishment:

*Object Year:

Pay Entity:

Business Unit:

Location Code:

Department:

Load Year End Adjustment information with status: ☐ Submitted ☐ Approved

☐ Payee List

Go To: [Payee List](#)

Load YEA Self Service Data JPN page

Process Request Parameter(s)

Use the optional Pay Entity, Business Unit, Location Code, and Department fields to restrict the load to a group of employees as desired. You can use the fields on the Payee List page to identify individual employees.

Business Unit	This is a required field if you select a location code or department.
Submitted and Approved	Records that meet the other criteria (including the criteria that you indicate on the Payee List page) and that have the selected status are loaded. You can select both check boxes.
Payee List	<p>Click to access the Payee List page, where you can select any number of individual employees for the process run.</p> <p>When you return to the Load YEA Self Service page, this check box is selected.</p>

See Also

PeopleSoft Global Payroll for Japan 9.1 PeopleBook, "Preparing Year-End Adjustment," Entering Deduction Data for the Year-End Adjustment (YEA)

Appendix A

Delivered Workflows for ePay

This appendix discusses delivered workflows for ePay.

See Also

PeopleTools: Workflow Technology PeopleBook

PeopleTools: PeopleSoft Application User's Guide PeopleBook

Delivered Workflows for ePay

This section discusses ePay workflows. The workflows are listed alphabetically by workflow name.

W-2 Reissue Request

This section discusses the W-2 reissue request workflow.

Description

Event Description	Employees use the W-2 Reissue Request page to request a new W-2 be sent to their home or work location.
Action Description	When the page is submitted, a workflow worklist item is routed to the Payroll Administrator to indicate that this request for a duplicate W-2 has been generated.
Notification Method	Worklist

Workflow Objects

Event	PY_IC_W2
Workflow Action	Manual
Role	Payroll Administrator

Email Template	W2 Request Worklist
Business Process	SELF_SERVICE_PAYROLL
Business Activity	W2Request
Business Event	Save W2

W-4 Tax Information

This section discusses the W-4 tax information workflow.

Description

Event Description	An employee uses ePay to change W-4 information.
Action Description	An email notification is sent to the employee upon completion that verifies the W-4 details.
Notification Method	Email

Workflow Objects

Event	PY_IC_W4
Workflow Action	Manual
Role	Roleuser by Oprid Qry
Email Template	Send E-mail to employee
Business Process	SELF_SERVICE_PAYROLL
Business Activity	ReviewChangeFederalW4Info
Business Event	Save changes

Year End Form Consent Confirmation

This section discusses the year-end form consent confirmation workflow.

Description

Event Description	An employee uses ePay to grant consent to receive year-end forms (W-2, W-2c, T4, or T4A) electronically in self service.
Action Description	Upon confirmation of submittal of consent, an email notification is sent to the employee that confirms the consent.
Notification Method	Email

Workflow Objects

Event	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
Workflow Action	Automatic
Role	Roleuser by Oprid Qry
Email Template	Send E-mail to employee; text type Consent Confirmation
Business Process	NA
Business Activity	NA
Business Event	Notify Employee

Year End Form Consent Withdrawn Confirmation

This section discusses the year-end form consent withdrawn confirmation workflow.

Description

Event Description	An employee uses ePay to withdraw consent to receive year-end forms (W-2, W-2c, T4, or T4A) electronically in self service.
Action Description	Upon confirmation of withdrawal of consent, an email notification is sent to the employee that confirms the consent withdrawal.
Notification Method	Email

Workflow Objects

Event	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
Workflow Action	Automatic

Role	Roleuser by Oprid Qry
Email Template	Send E-mail to employee; text type Withdrawn Confirmation
Business Process	NA
Business Activity	NA
Business Event	Notify Employee

Year End Form Consent Reset

This section discusses the year-end form consent reset workflow.

Description

Event Description	Payroll administrator resets the status of employee consent to receive year-end forms (W-2, W-2c, T4, or T4A) electronically in self service.
Action Description	When the payroll administrator runs the Reset Form Consent Application Engine process, an email notification is sent to each processed employee that confirms the reset of consent status.
Notification Method	Email

Workflow Objects

Event	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
Workflow Action	Automatic
Role	Payroll administrator
Email Template	Send E-mail to employee; text type Consent Reset Notification
Business Process	NA
Business Activity	NA
Business Event	Notify Employee

Year End Form Available

This section discusses the year-end form available workflow.

Description

Event Description	Payroll administrator notifies employees that year-end forms (W-2 or T4) are available for viewing in self service.
Action Description	When the payroll administrator clicks the Availability Notification button on the Year End Form Options page, an email notification is sent to each consenting employee notifying that forms are available for viewing and printing.
Notification Method	Email

Workflow Objects

Event	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
Workflow Action	Manual
Role	Payroll administrator
Email Template	Send E-mail to employee, text type <i>Form Available</i> .
Business Process	Manage Annual Tax Rptg U.S. and Manage Annual Tax Rptg Can
Business Activity	Send W2 Notification and Send T4 Notification
Business Event	Notify Employee

Year End Form Correction Available

This section discusses the year-end form correction available workflow.

Description

Event Description	Payroll administrator notifies employees that corrected year-end forms (W-2c or T4A) are available for viewing in self service.
Action Description	When the payroll administrator clicks the Availability Notification button on the Year End Form Options page, an email notification is sent to the employee notifying that the form is available for viewing and printing.
Notification Method	Email

Workflow Objects

Event	PY_YE_SEND_NOTE_USA and PY_YE_SEND_NOTE_CAN
--------------	---

Workflow Action	Manual
Role	Payroll administrator
Email Template	Send E-mail to employee; text type Correction Available
Business Process	Manage Annual Tax Rptg U.S. and Manage Annual Tax Rptg Can
Business Activity	Send W2 Notification and Send T4 Notification
Business Event	Notify Employee

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