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Employee Self-Service (ESS) Time and Labor

PeopleSoft HR Management System(HRMS) 9.2 Upgrade

Overview of Changes/Updates

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HRMS PeopleSoft 9.2

In December of 2017, the home page was upgraded to the Fluid Interface and we were aware that the Fluid pages would be integrated into HRMS once we upgraded to 9.2.

The PeopleSoft HRMS system is being upgraded to version 9.2 the weekend of 10/13-14.

This session will cover the changes in look and functionality to the Employee Self-Service (ESS) pages.

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Hourly Employees

Hourly employees that punch in/out will utilize a feature called Report Time. Report time is accessed from the Employee Self-Service (ESS) home page and click on the Time tile.
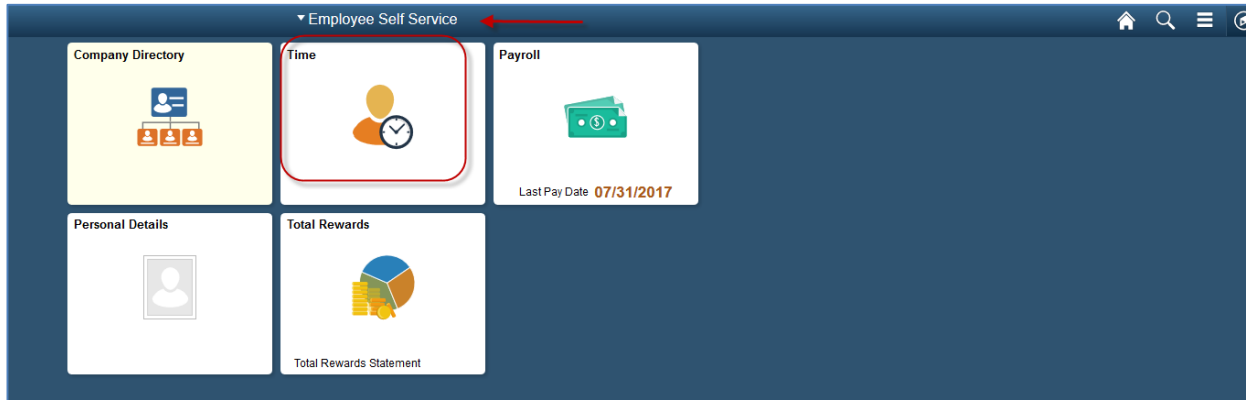
Once the Time Tile is selected another page opens up and the left side of the page has different links available for quick access. This is called a navigation collection. The navigation collection can be hidden and unhidden by click on the button ❚❚ half way down the page.
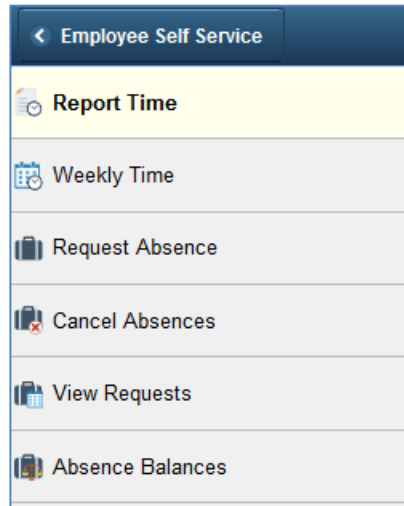
Reporting Time With Multiple Jobs

Hourly employees with multiple jobs will need to select the job they are punching in/out by selecting a job from the drop down menu. Once the job is selected the steps are the same as below.

The first link displayed is **Report Time**. This new feature replaces the classic web clock. Select the Punch Type In and click on the Submit button. The Time Reporting Code (TRC) defaults to Regular Earnings – H01. Only change this if directed by a manager. To punch out navigate to Report Time again and select Punch Type of Out and click Submit.

If directed by a manager to select a funding source (combination code) click open the Time Details and click on the lookup glass under the combination code. The only combination codes that will appear are ones that are attached to the employees department.

Report Time

◄ **Tuesday, Aug 28, 2018** ►

Submit

*Punch Type [In ▾]   Time Reporting Code [Regular Hours - H01 ▾]

▾ **Time Details**

Time Zone CST Central Time (US)   Override Rate [▾]

Time Collection Device ID   Company

Business Unit NDSU1 North Dakota State University   Combination Code [🔍]

Submitted 0 Hours

Last reported time was Out on Monday, Aug 27, 2018 at 7:14 AM.

After the punch is submitted the recorded information can be viewed under the Submitted Hours section.

Report Time

◄ **Tuesday, Aug 28, 2018** ►

*Punch Type [In ▾]

Time Rep

▸ **Time Details**

Submitted 0 Hours

Last reported time was Out on Monday, Aug 27, 2018 at 7:14 AM.

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The Weekly Time link opens up to a week view. To view other weeks click the arrows next to the date either backward or forward.

The other links listed in the navigation collection apply to the Absence Management. Information regarding Request Absence, Cancel Absence, View Requests and Absence Balances can be found later in this manual.

Temporary (non-benefited) employees that are not eligible for a leave plan will have the links available but will not have any actions available to take.

To navigate to the Time tile click on the compass in the upper right hand corner of the page.

Click on Navigator > Self Service > Time Reporting > Report Time > Time.

Salaried Employees

Salaried employees that need to submit hours will utilize the **Timesheet** (Non-Exempt employees that are eligible for comp time/overtime). The Timesheet is accessed from the ESS home page and click on the Time tile.
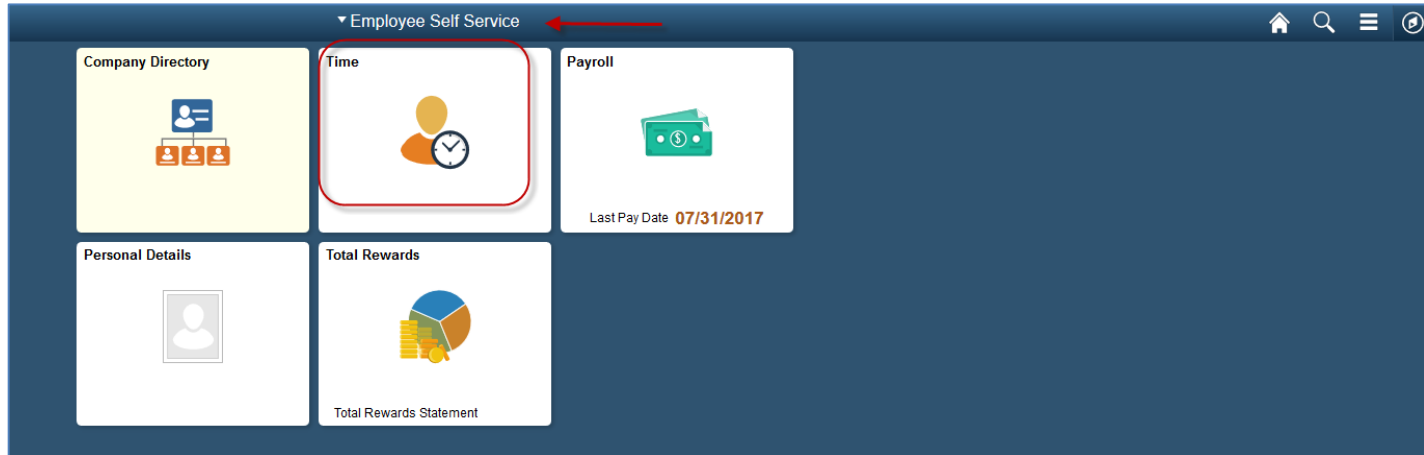
Once the Time Tile is selected another page opens up on the left side of the page has different links available for quick access. This is called a navigation collection. The navigation collection can be hidden and unhidden by clicking on the

 button half way down the page.
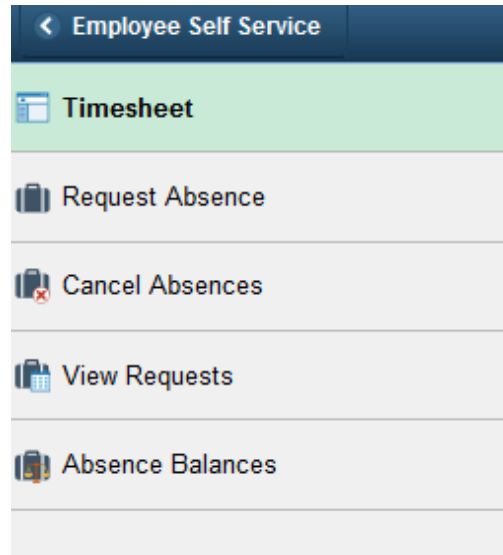
The Timesheet is the first link for salaried employees. Employees enter a total number of hours worked each day. Salaried non-exempt employees are expected to enter and submit time only for work weeks where overtime is incurred.

Salaried exempt employees are not required to use the timesheet.

Employees eligible for comp time (regular/benefited) will have the option to select Comp Time in lieu of being paid out overtime. Select an Override Combo Cd only if directed by a manager.

Timesheet

Custodian

Employee ID
Empl Record 0
Earliest Change Date 08/06/2017

Actions ▾

Select Another Timesheet

*View By Calendar Period

Previous Period   Next Period

*Date 08/01/2018

Scheduled Hours 89.00   **Reported Hours** 0.00

From Wednesday 08/01/2018 to Wednesday 08/15/2018 ②

Wed 8/1	Thu 8/2	Fri 8/3	Sat 8/4	Sun 8/5	Mon 8/6	Tue 8/7	Wed 8/8	Thu 8/9	Fri 8/10	Sat 8/11	Sun 8/12	Mon 8/13	Tue 8/14	Wed 8/15

Submit

Reported Time Status | Summary | Absence

Reported Time Status

Personalize | Find | 🔁 | 🔢 1 of 1

Date	Total	TRC	Description	Sched Hrs	Add Comments
	0.00			0.00	

Self Service
Time Reporting

	Total	Time Reporting Code	Override Rate	Comp Time	Override Combo Cd		
		Regular Hours - H01		🔍	▾	➕	➖
		Regular Hours - H01		🔍	▾	➕	➖
		Regular Hours - H01		🔍	▾	➕	➖

The other links listed in the navigation collection apply to the Absence Management. Information regarding Request Absence, Cancel Absence, View Requests and Absence Balances can be found in the ESS for Absence Management.

To navigate to the Time tile click on the compass in the upper right hand corner of the page.

Click on Navigator > Self Service > Time Reporting > Report Time > Time. When using the navigation Self Service > Time Reporting > Timesheet it will not enable the navigation collection.

Requesting An Absence in ESS
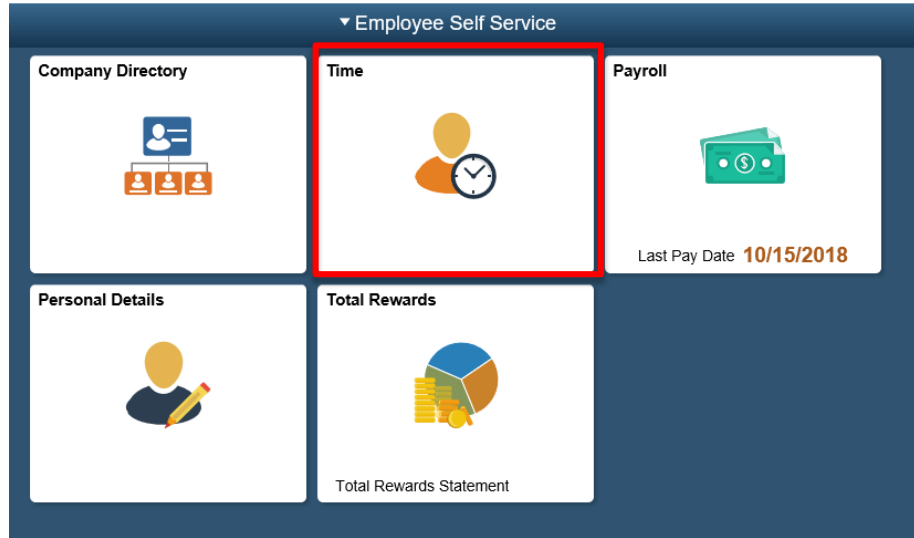
Click on the **TIME** tile to begin the absence request.

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Select **Request Absence** and the **Absence Name** selection box will appear. Click on the dropdown arrow to open the options and select the type of leave; example: Annual, Comp Time, Sick, Dependent Sick, Funeral Leave, Jury Duty, Military Leave, Sick Leave and any other leave you are eligible to select.

Once you have selected the **Absence Name**, then the rest of the criteria boxes will appear. Fill in the **Start Date** and **End Date**, the Duration defaults in with a full day of hours per your configured schedule. If you want something other than a full day, you will **Click the Arrow** on the right border of the **Partial Days Box**.
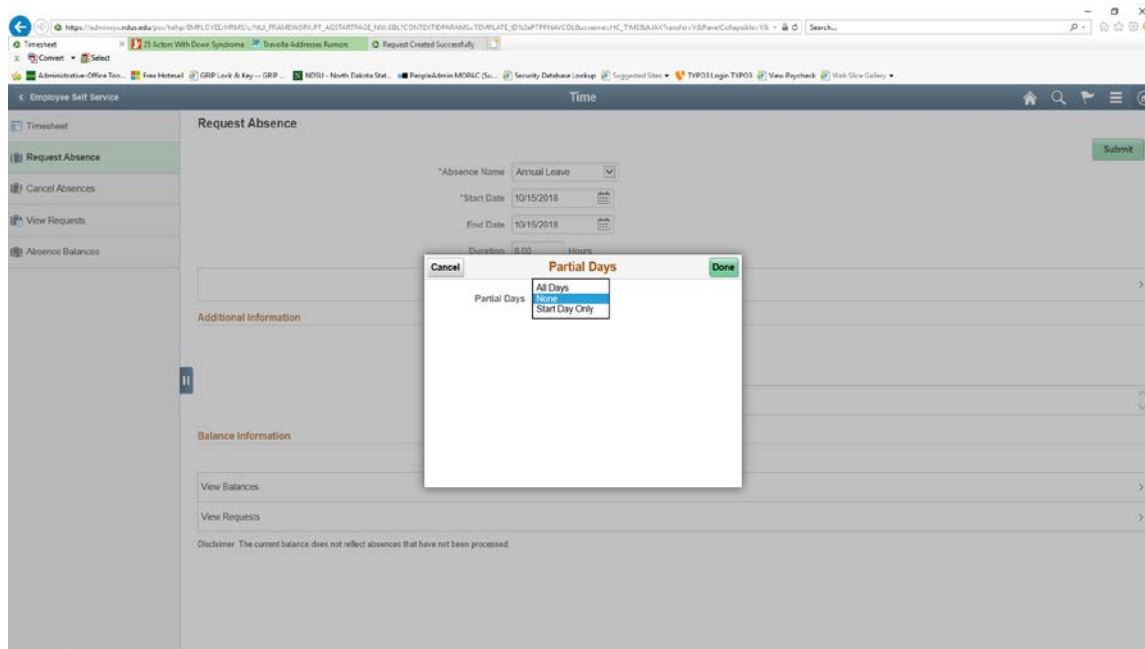
When you click on the dropdown box, you will see **All Days, None** and **Start Day Only**. When you select anything other than none, you need to put the number of leave hours you will be taking in the duration box and those hours will carry over to the previous page. Data you enter in the Additional Information boxes are for information only, it does not affect the number of hours in the duration box.

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Once you have finished entering the leave, you will click on the **Submit** button.
It will then ask you if you are sure you want to Submit your leave and you click **Yes**.
Then you will see a banner across the top stating that the Request has been Submitted Successfully.

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Updating Direct Deposit in ESS

After logging into HRMS, select the Payroll tile from the Employee Self Service Home page:

Then select Direct Deposit in the navigation collection on the left:
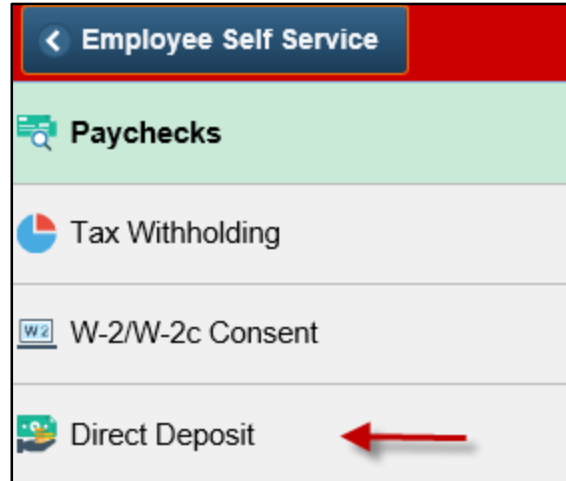
The Direct Deposit page will appear, showing the bank accounts that are setup currently for the employee. To update the Direct Deposit with a new account, select the plus sign on the left side of the page:

Direct Deposit
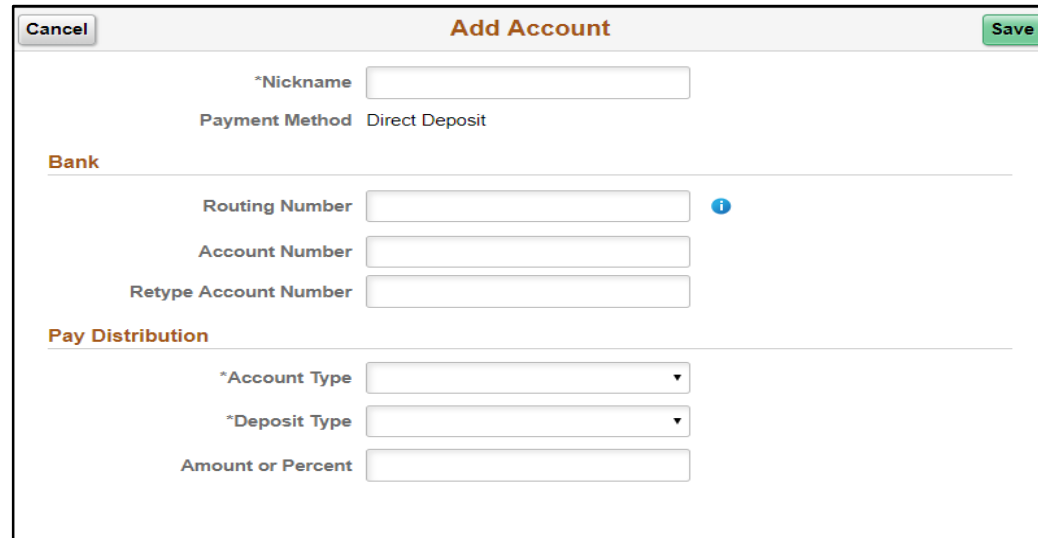
Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
Last	Test1	Direct Deposit	063107513	XX4123	Checking	Remaining Balance	›

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The Add Account window will appear for the employee to enter their banking information. Enter a Nickname for the account they are adding. Under Bank, add the banks routing number, account number and retype the account number. Then under Pay Distribution select from the dropdown an account type which can either be checking or savings and then a deposit type which can be an amount or a percentage of their pay. Enter the amount or percentage that is associated to this account. Click on the green save button.

Once the employee clicks save it will return to the Direct Deposit page where they can verify that the account information is updated and correct.

Direct Deposit

Accounts

| + | ▼ |

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
1	Test 2	Direct Deposit	091000019	XX3456	Checking	$10.00	›
Last	Test1	Direct Deposit	063107513	XX4123	Checking	Remaining Balance	›

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If the employee would like to make changes to or remove an existing account, they would click on the arrow on the right side:

Direct Deposit

Accounts

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent	
1	Test 2	Direct Deposit	091000019	XX3456	Checking	$10.00	>
Last	Test1	Direct Deposit	063107513	XX4123	Checking	Remaining Balance	>

The Edit Account will appear, and they can update their information and then click the green save button. They can also remove this account from their direct deposit simply by clicking remove which will prompt a message "Are you sure you want to remove the account". Click yes and it will remove the account.

The other way employees can change direct deposit is by going to the following navigation: ***Employee Self Service>Payroll and Compensation>Direct Deposit***

Updating Tax Withholding in ESS

After logging into HR, select the Payroll tile from the Employee Self Service Home page:

Then select Tax Withholding in the navigation collection on the left:
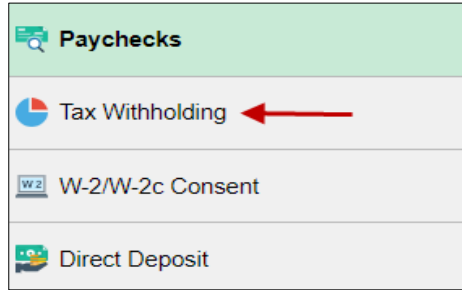
The Tax Withholding page will appear, showing the Company name, Status, Form Types, Jurisdiction and Withholding Details for the employee.

Form Type	Jurisdiction	Withholding Details		
Federal	Federal	Tax Status Single Additional Amount 0.00 Additional Percentage	Withholding Allowances 4 Additional Allowances Other	>
State	North Dakota	Tax Status Single Additional Amount 10.00 Additional Percentage	Withholding Allowances 4 Additional Allowances Other	>

To update the Federal withholding status, select the arrow on the right:

Federal	Federal	Tax Status	Single	Withholding Allowances	0
		Additional Amount	0.00	Additional Allowances	
		Additional Percentage		Other	

- A window will open with special instructions that the user should read before continuing. It is important to know that when an employee is updating their federal tax withholding status, it will NOT automatically update their state tax withholding status. This is included in the first paragraph of the instructions. If the employee wants to update their state tax withholding status, they can do it separately starting in the Tax Withholding page.

  It is also important to note that it is a requirement to use Adobe Acrobat to download the updateable PDF form. The user might need to change their browser settings so that the default for PDF forms is Adobe Acrobat. This technology is only available on a personal computer. It is not currently available using a mobile device.

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Federal Tax Withholding Forms

Company   NDUS System Info Tech Services

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes. Also remember to update your state tax withholding status because the change you make for Federal withholding does NOT automatically update your state tax withholding status.

Whether you are entitled to claim a certain number of allowances or exemptions from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

You can make changes to your withholding allowances online using the downloaded updateable PDF form and submit the changes for processing by your payroll department. Download the PDF to Adobe Acrobat (you may need to update your browser settings). Be sure to print or save a copy of the completed form for your records.

Updateable Forms

Form Description
Federal Withholding Allowance Certificate

- Select the arrow on the right and the following message will appear. Selecting OK will open the updateable form in PDF format. Selecting Cancel will cancel the transaction and the employee can go to their Payroll department to complete the necessary forms to update their tax withholding status.

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WARNING

The system will download to your computer a copy of the tax form which contains personal information.
You should only continue if you are using a trusted and secure computer.
You should not continue if you are using a shared computer or public computer (such as those in a library or internet café); doing this could leave your personal information vulnerable.
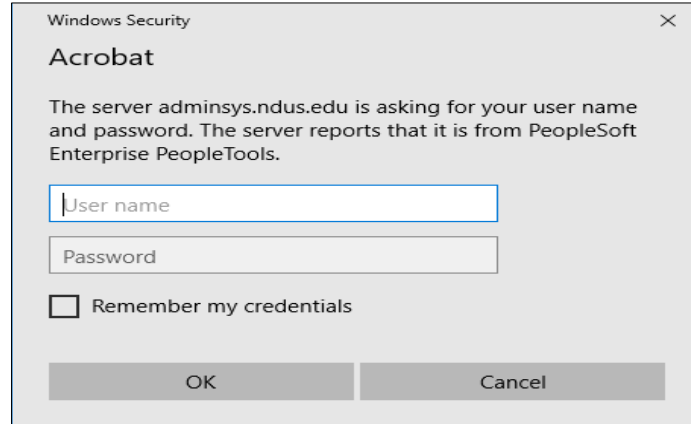
OK   Cancel

- When OK is selected the PDF form will open in a separate window. The user's Name, SSN, Address, Employee's Signature, Date, Employer's name, Employer's Address and FEIN will all be prepopulated. The SSN is masked and only shows the last 4 digits. Lines 3 through 7 will be editable. The employee completes the form and then selects the Submit button located in the bottom right corner of the form.

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Form W-4
Department of the Treasury
Internal Research Service

Employee's Withholding Allowance Certificate

▶ Whether you're entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

OMB No. 1545-0074

20**18**

1 Your first name and middle initial	Last name	2 Your social security number
Doe	John	XXX-XX-2255

Home address (number and street or rural route)	3 ☐ Single ☐ Married ☐ Married, but withhold at higher Single rate.
100 Anywhere St	Note: If married filing separately, check "Married, but withhold at higher Single rate."

City or town, state, and ZIP code	4 If your last name differs from that shown on your social security card, check here. You must call 800-772-1213 for a replacement card. ▶ ☐
Any Town, ND 58102	

5	Total number of allowances you're claiming (from the applicable worksheet on the following pages) . . .	5	
6	Additional amount, if any, you want withheld from each paycheck	6	$

7 I claim exemption from withholding for 2018, and I certify that I meet **both** of the following conditions for exemption.

• Last year I had a right to a refund of **all** federal income tax withheld because I had **no** tax liability, **and**

• This year I expect a refund of **all** federal income tax withheld because I expect to have **no** tax liability.

If you meet both conditions, write "Exempt" here . . . . ▶ | 7 | Not Applicable ▾

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature
(This form is not valid unless you sign it.) ▶ John Doe

Date ▶ 08/21/2018

8 Employer's name and address (**Employer:** Complete boxes 8 and 10 if sending to IRS and complete boxes 8, 9, and 10 if sending to State Directory of New Hires.)	9 First date of employment	10 Employer identification number (EIN)
NDUS System Info Tech Services 10th Floor, State Capitol Bismarck, ND 58505-0230		461100936

For Privacy Act and Paperwork Reduction Act Notice, see page 4.

Cat. No. 10220Q

Form **W-4** (2018)

Submit

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- The user is then prompted to enter their User name and Password:

- The data is then uploaded to the HR system to update the employee's federal tax withholding status. The employee can save or print a copy of the W-4 for their records

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The employee will also receive an email notification of the update:

Your tax withholding request on 2018-08-21-09.27.28.000000 for the following Company and Jurisdiction has been successfully submitted:

Company: NDUS System Info Tech Services
Jurisdiction: Federal

However, due to the timing, your tax withholding change may not be reflected on the next paycheck.

If you did not change your tax withholding data, please contact your payroll administrator immediately.

This is a system-generated email message that cannot accept incoming-email. Please do not reply to this message.

The employee can then go back to the Tax Withholding page and complete the process for their state tax withholding. They will not be prompted again to enter their User Name and Password if they kept the PDF page open.

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State tax withholding forms are available for every state that has state tax withholding and they accept the Federal W-4 and/or the state's own W-4.

The SSN is masked in the state forms and only shows the last for digits.

North Dakota

Form **W-4**

Department of the Treasury
Internal Revenue Service

Employee's Withholding Allowance Certificate

► Whether you're entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

OMB No. 1545-0074

2018

1 Your first name and middle initial	Last name	2 Your social security number
Jane	Doe	XXX-XX-0112

Home address (number and street or rural route)
1418 11th St W

3 ☐ Single ☐ Married ☐ Married, but withhold at higher Single rate.
Note: If married filing separately, check "Married, but withhold at higher Single rate."

City or town, state, and ZIP code
West Fargo, ND 58078

4 If your last name differs from that shown on your social security card, check here. You must call 800-772-1213 for a replacement card. ► ☐

5	Total number of allowances you're claiming (from the applicable worksheet on the following pages) . . .	5	
6	Additional amount, if any, you want withheld from each paycheck	6	$
7	I claim exemption from withholding for 2018, and I certify that I meet **both** of the following conditions for exemption.		

• Last year I had a right to a refund of **all** federal income tax withheld because I had **no** tax liability, **and**
• This year I expect a refund of **all** federal income tax withheld because I expect to have **no** tax liability.

If you meet both conditions, write "Exempt" here . . . . ► | 7 | Not Applicable ▾

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature
(This form is not valid unless you sign it.) ►   Tricia Johnson

Date ►   09/13/2018

8 Employer's name and address (**Employer:** Complete boxes 8 and 10 if sending to IRS and complete boxes 8, 9, and 10 if sending to State Directory of New Hires.)	9 First date of employment	10 Employer identification number (EIN)
North Dakota State University 1919 University Drive N Fargo, ND 58108-6050		456002439

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Cat. No. 10220Q

Form **W-4** (2018)

Questions??