CHAPTER 2

THE HIRE PROCESS

Chapter 2

Overview

The employee information required to process a payroll resides on many different pages in the PayServ system. The basic information needed for each employee - name, address, Social Security number, rate of pay, and department - is essential to processing payroll in PayServ.

Objectives

After completing this chapter, you will be able to:

- Reserve an Empl ID prior to hiring an employee
- Enter a hire transaction
- Enter employee tax data
- Enter employee direct deposit information.

Instructor Notes

OBJECTIVE:

- Reinforce the scope of training.
- Set participants' expectations for hands-on activities – sharing one database.

TALKING/KEY POINTS:

- ❑ Remind students that nothing should be done in PayServ without the proper paperwork and/or approval.

Summarize the chapter:

- ❑ Exercise 1 – Reserve an Empl ID
- ❑ Exercise 2 – Verifying Employee status prior to entering a hire.
- ❑ Exercise 3 – Enter a Hire Transaction
- ❑ Exercise 4 – Enter Employee Tax Data
- ❑ Exercise 5 – Enter Employee Direct Deposit Information

Inform students:

- ❑ Not all procedures associated with this topic will be covered in class.
- ❑ The activities in this guide are designed to provide participants with hands-on training in a shared database.

Emphasize:

- ❑ Participants are sharing a fictitious database.
- ❑ Participants may work through each step-by-step activity, entering data into fields; however, it is important that PARTICIPANTS DO NOT SAVE UNLESS DIRECTED TO BY THE INSTRUCTOR.
- ❑ For instances where saving is required in order to advance to the next stage, participants may observe the results of the instructor saving.
- ❑ Instructor will provide information to the participants on how to navigate to the beginning of the next step-by-step activity, as necessary.

Exercises

Step-by-Step exercises involve a single procedure. The instructor demonstrates how to perform these exercises while participants work through the Step-by-Step activities at their individual workstations. Participants should not save these transactions unless instructed to do so.

Exercises in Entering New Hire Data:

Exercise 1 – Reserve an Empl ID

Exercise 2 – Verifying Employee status prior to entering a hire

Exercise 3 – Enter a Hire Transaction

Exercise 4 – Enter Employee Tax Data

Exercise 5 – Enter Employee Direct Deposit Information

Instructor Information

Instructor Notes

OBJECTIVE:

- Describe the process for reserving an Empl ID prior to hiring an employee.

TALKING/KEY POINTS:

- ❑ OSC no longer uses the Social Security number as the employee identifier in PayServ.
- ❑ The new Empl ID is a 9 character system assigned number beginning with N.
- ❑ Agencies can reserve or pre-assign this number prior to hiring an employee for use in time reporting.
- ❑ The employee must be hired in the system before the reserved Empl ID can be used for other transactions.
- ❑ Reserving an Empl ID is NOT a prerequisite to entering a New Hire transaction.

Exercise 1: Reserve an Empl ID

Introduction

New York State no longer uses the Social Security number as the primary employee identifier in the PayServ system. Instead, a system-generated Empl ID is assigned during the hire process. In some instances, an agency may need to reserve a pre-assigned Empl ID in order to prepare time reports or complete other agency functions. This is an optional step available for use by agencies, and is not a prerequisite to entering a New Hire transaction.

Objectives:

- Know how to reserve an Empl ID prior to entering a Hire transaction.

Instructor Information

Instructor Notes

OBJECTIVE:

- Demonstrate reserving an Empl ID.

TALKING/KEY POINTS:

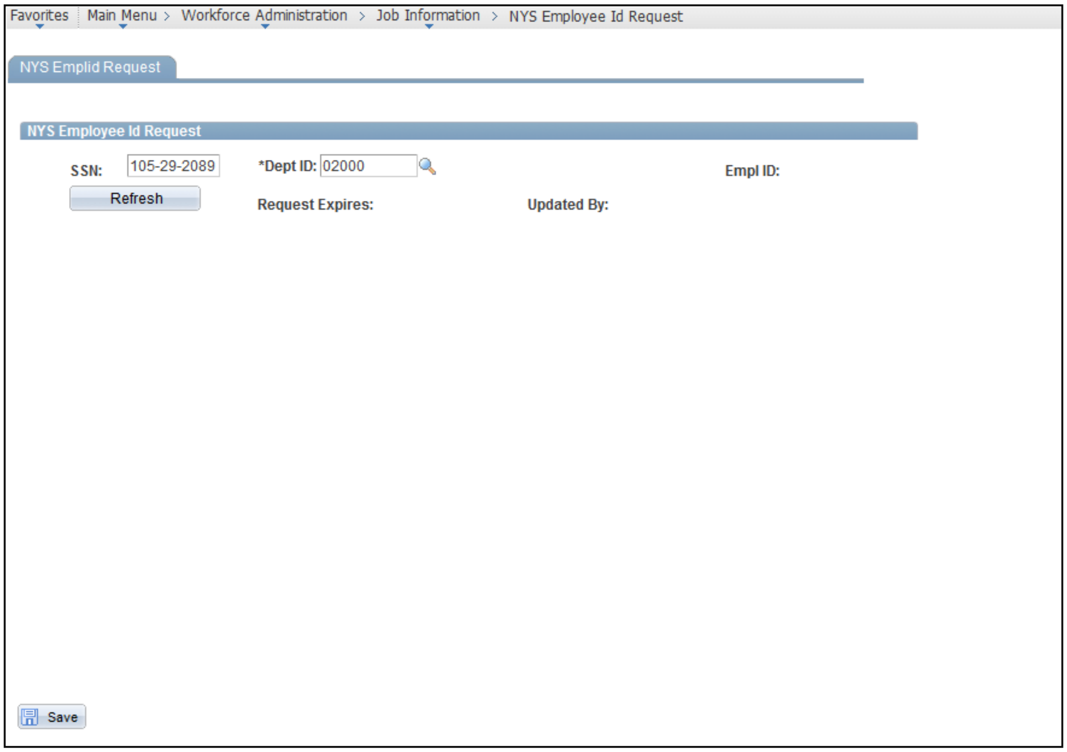
- ❑ Reserving an Empl ID requires a Social Security number, and is only available when an employee has an SSN.
- ❑ When a new Hire transaction is Saved, the system will reference the pre-assigned Empl ID table to determine if an Empl ID was reserved for the associated SSN. If a corresponding Empl ID is found, the system will display the pre-assigned Empl ID. If no corresponding Empl ID is found, the system will assign the next available Empl ID.
- ❑ The reserved Empl ID will expire in 60 days if a Hire transaction is not entered for the employee.

ADDITIONAL INFORMATION

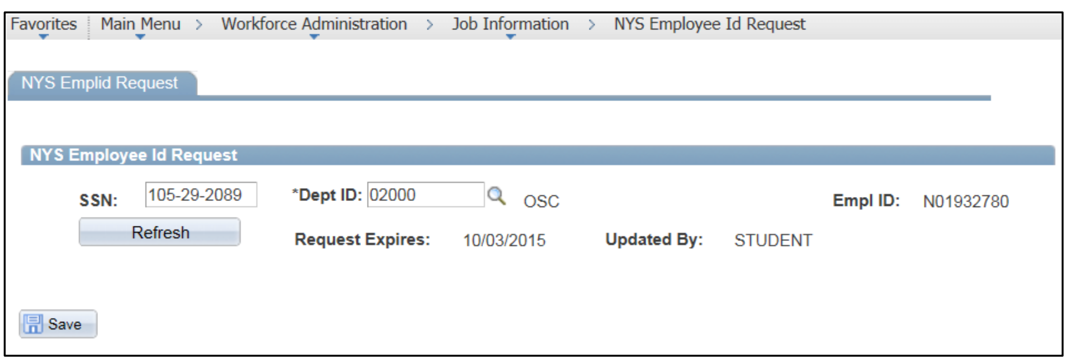
- ❑ Use SSN: 105-29-2089, Dept ID: 02000.

Exercise 1 (continued)

- Navigate to *Workforce Administration* > *Job Information* > *NYS Employee Id Request*
- Enter **SSN:** 105-29-2089 and **Dept ID:** 02000.



- Click **Save**.



The system will assign an Empl ID to this employee.

The reserved Empl ID will expire in 60 days if a new Hire transaction is not entered for this employee.

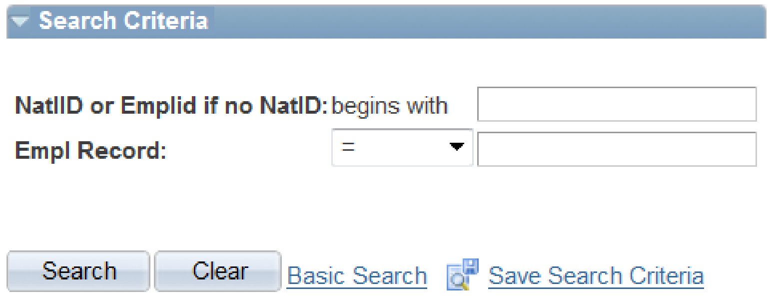
Instructor Notes

OBJECTIVE:

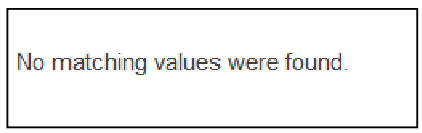
- Demonstrate how to identify if the employee you are trying to hire has prior State service. Explain that employees are only hired once within PayServ

- Direct students to Main Menu > PayServ Custom > Statewide Job Summary.

- Enter 029-20-7029 and click Search



- Message should be received:



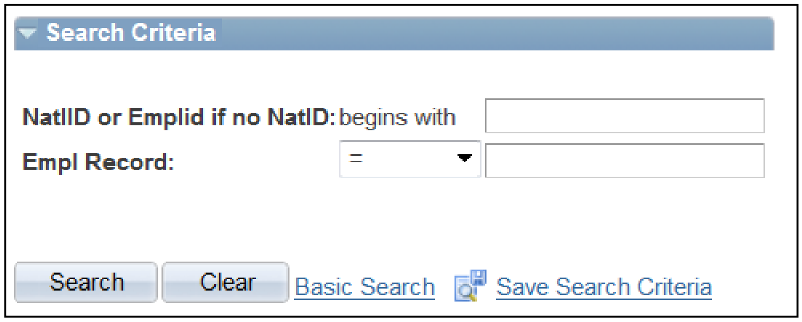
- Explain to students that if history was retrieved, then you would be doing a different process such as Rehire, Concurrent Hire or Transfer.

Exercise 2: Search Prior to Entering New Hire Data

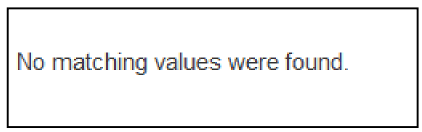
Introduction

Before starting the Hire Process, verify that this is a "NEW" employee.

- Navigate to *Main Menu > PayServ Custom > Statewide Job Summary*
- Enter 029-20-7029 and click Search



- Message should be received:



- You are now ready to proceed with a Hire.

Instructor Information

Instructor Notes

OBJECTIVE:

- Set up the activity for the participants.

TALKING/KEY POINTS:

Launch the activity:

- ❑ Hire a new employee while reviewing the fields and processes within Workforce Administration.
- ❑ Review the information needed for correct calculation of pay and processing direct deposits.
- ❑ Participants will enter the data as directed on each page but will not save.

Entering New Hire Data

Introduction

The New Hire transaction is the process of adding a new employee to the PayServ system. Personal data is gathered, such as name, address and Social Security number, and the NYS Employee ID is assigned. The proper tax and direct deposit forms are completed and submitted for payroll processing. Once all the initial information is gathered and recorded, the hire transaction is completed.

Objectives:

- Understand the functionality in PayServ as it relates to New Hires, including:
    - Effective-dated Name History
    - Entering employee names
    - Effective-dated Address History
    - Effective-dated Personal History
    - Entering Position Numbers
    - Navigating the New Hire pages

OBJECTIVE:

- Familiarize users with the “Home” hyperlink.

TALKING/KEY POINTS:

Remind students:

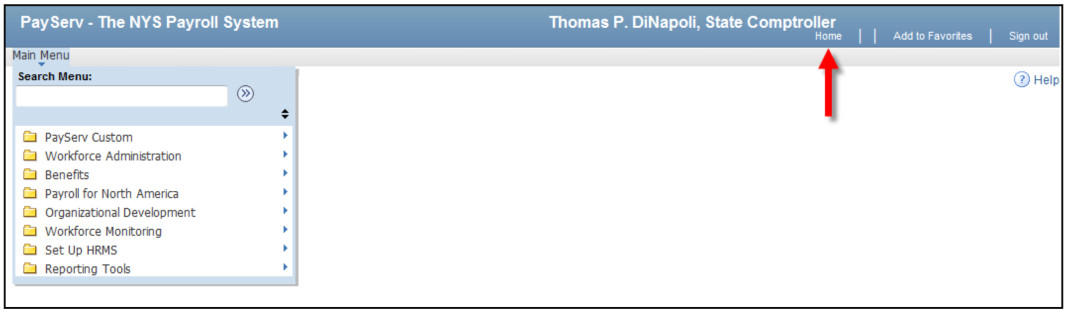
- ❑ Clicking ‘Home’ will clear the data from the previous exercise, providing a good starting point for new exercises.

Instruct students to:

- ❑ Use a single click of the mouse; double click is not necessary.

Exercise 3: Enter a Hire Transaction

To begin the Hire process, navigate to the PayServ Main Menu shown below by clicking on the Home hyperlink in the upper right corner of the screen, then clicking **Main Menu**.



Instructor Information

Instructor Notes

OBJECTIVE:

- Navigate to the Hire (Agency) page from the main menu "Home."

TALKING/KEY POINTS:

Remind students:

- ❑ They will not save during this activity.

Instruct students to:

- ❑ Use a single click of the mouse; double click is not necessary.
- ❑ Navigate to Hire.
- ❑ Navigate to: *Workforce Administration* > *Job Information* > *Hire (Agency)*.
- ❑ To begin, click Hire the Person.

ADDITIONAL INFORMATION

- ☝ Remember:
  - Cheryl Snyder will be hired into the system with the following Social Security number: 029-20-7029.
  - The Empl ID the system assigns at the completion of the hire process should be posted in the classroom for students to use in later chapters.
  - Note that there are some SSN combinations that cannot be used because they are not valid numbers, such as 111111111. Also, common entry IDs such as 123456789 already exist in the database and cannot be used for the activity.

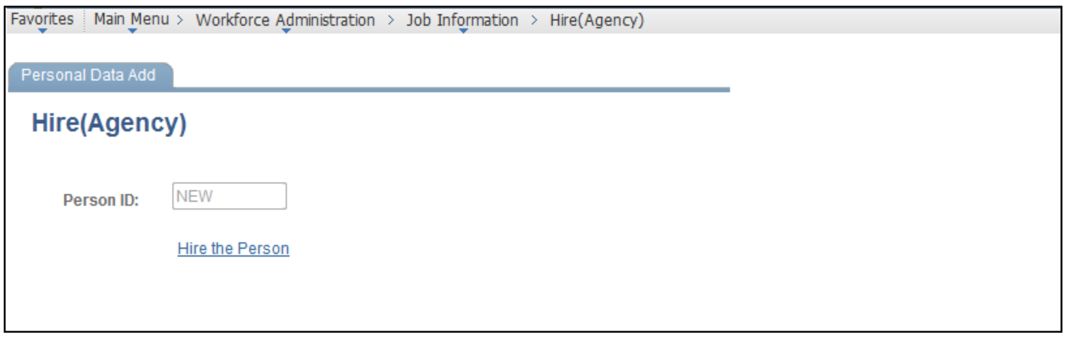
Exercise 3 (continued)

Introduction

Cheryl Snyder was hired as a Tax Complnc Rep 1 for the Department of Tax & Finance. Your goal is to enter her hire information in PayServ.

Step 1. Navigate to Hire

- Navigate to: *Workforce Administration* > *Job Information* > *Hire (Agency)*.
- To begin, click Hire the Person.



This activity will be a step-by-step explanation of the hiring process in PayServ. **DO NOT SAVE** at any point in this activity.

Instructor Notes

OBJECTIVE:

- Complete the **Name History** page.

TALKING/KEY POINTS:

- ❑ The Personal Information Component is three pages.

- ❑ **Name** is an effective-dated field.
- ❑ After entering an effective date, select **Add Name** hyperlink.
- ❑ During a hire, the effective dates for name, address, and biographical history must be the same date. The effective date must be less than or equal to the system date. A different date may be used as a Hire date on the *Job* page as long as it is equal to or greater than the effective date on the Personal Information pages.

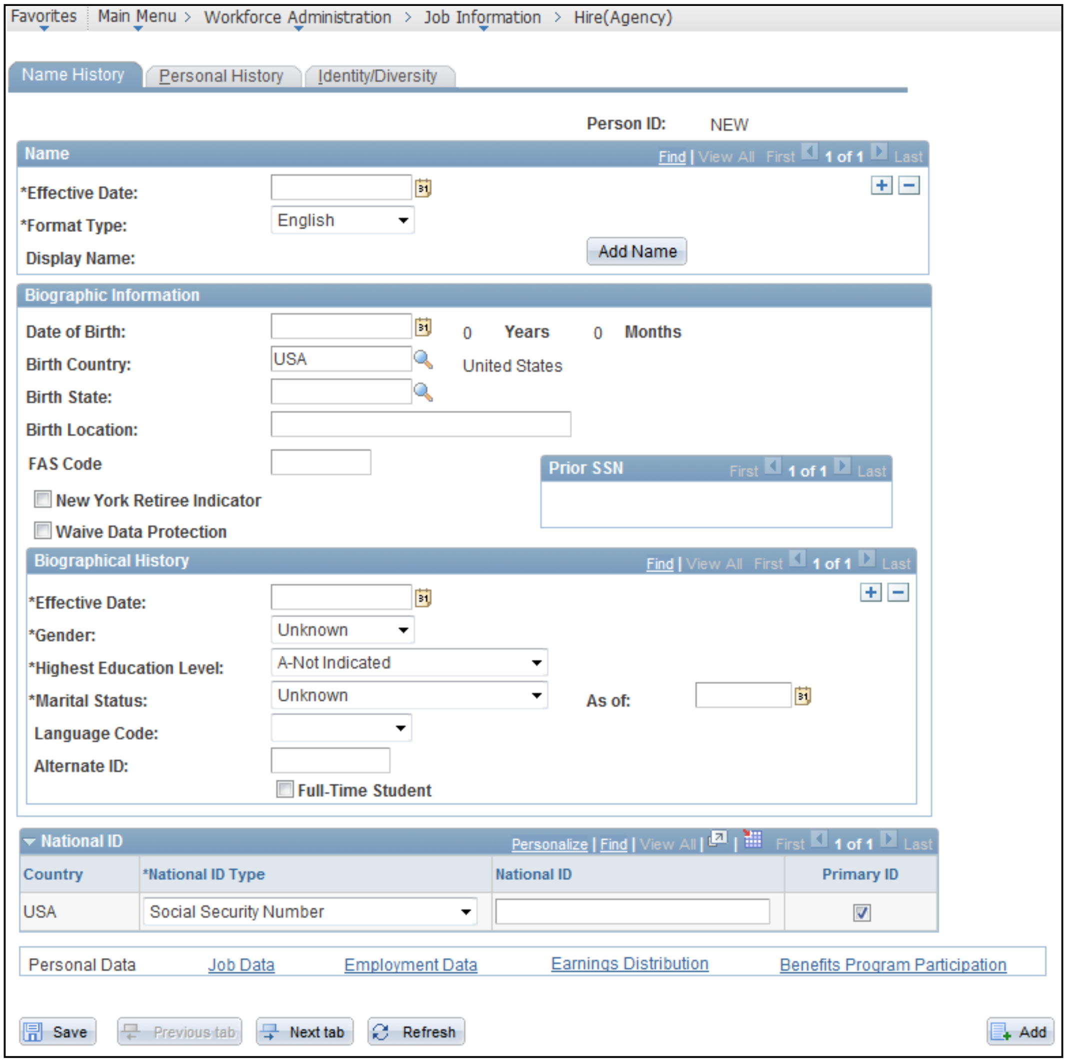
☝ Remember:

- ○ Place questions that are unrelated to the activity or need additional research in the “parking lot” to be discussed or addressed later.

Exercise 3 (continued)

Step 2. Complete the Name page

- Enter an **Effective Date** and select the <u>Add Name</u> pushbutton.



Chapter 2

Instructor Information

Instructor Notes

OBJECTIVE:

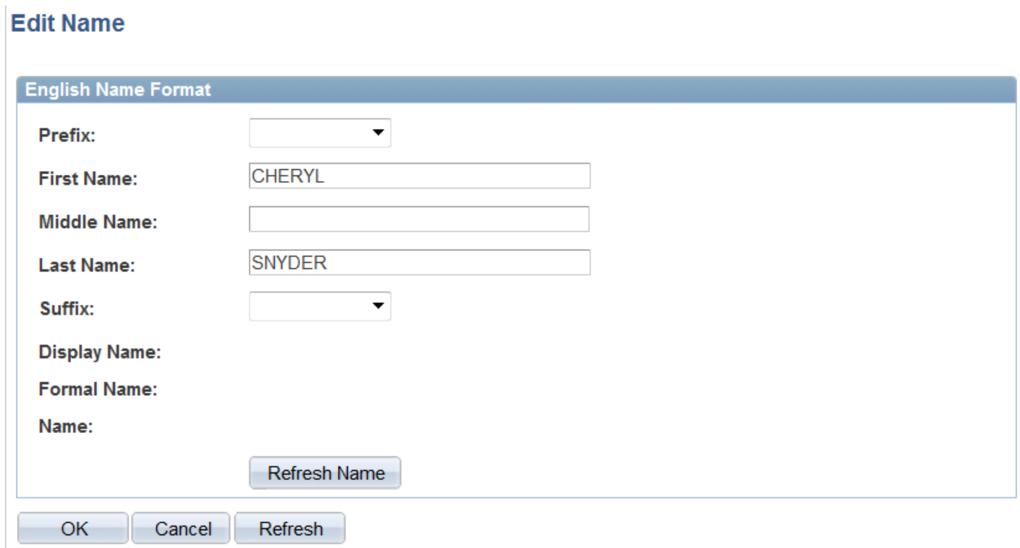
- Complete the Edit Name page.

TALKING/KEY POINTS:

- ❑ Enter in First, Middle, and Last name.
- ❑ Regardless how the employee's name is entered, the system will format the employee's name into upper case if mixed case was used.
- ❑ Click **OK** when finished. Inform students this information is not saved, and may be changed if necessary.

Exercise 3 (continued)

- Complete the *Edit Name* page.
- Enter the employee's name.
- Click **OK**.



Fields and Field Definitions

Field	Definition
First	The employee's first name.
Last	The employee's last name.
Refresh button	This optional button can be used to refresh the name. The name will automatically be refreshed after the page is saved.

Instructor Information

Instructor Notes

OBJECTIVE:

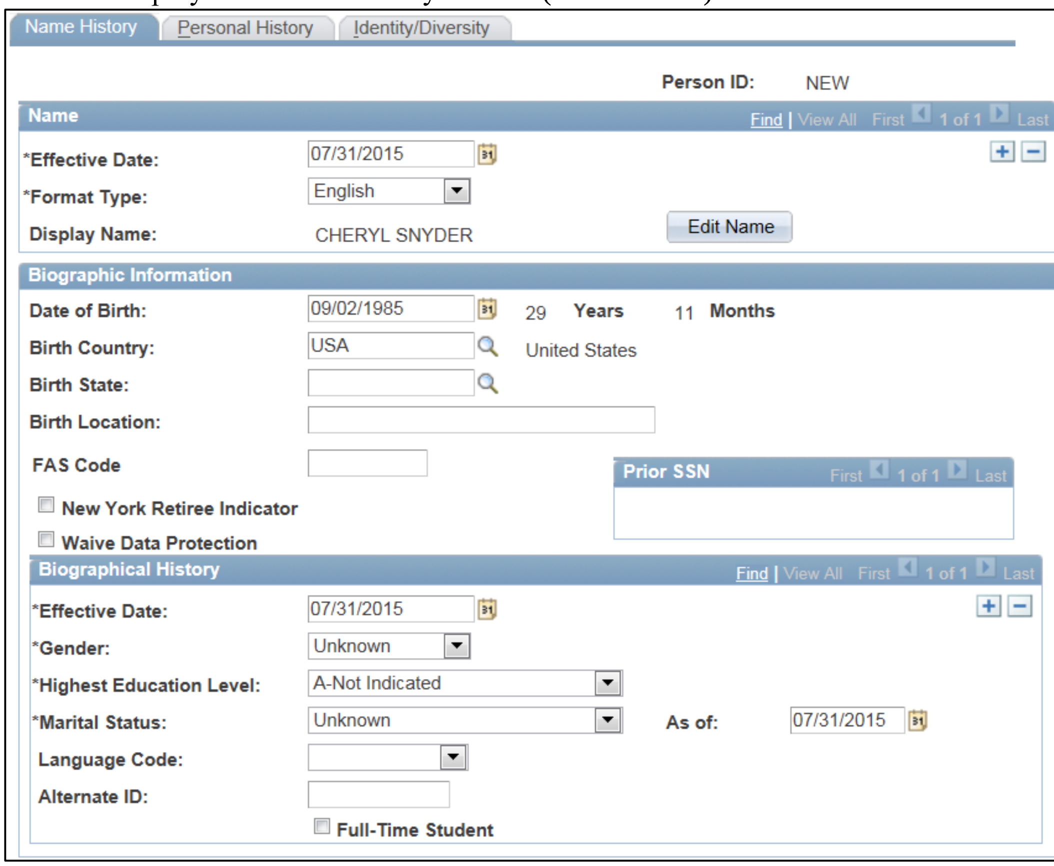
- Complete the *Name History* page.

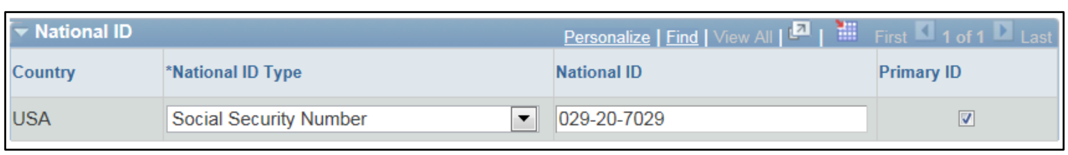
TALKING/KEY POINTS:

- ❑ **Date of Birth** is a required field.
- ❑ An effective date is required for **Biographical History**
- ❑ Instruct class that the other fields on *Biographic Information* and *Biographical History* are not required fields. Marital Status entered here has no bearing on the employee's taxes.
- ❑ **Prior SSN** – this field defaults automatically when the National ID field is changed from the old value. (Any time an employee is paid from the system under a different SSN, the old SSN needs to be retained for reporting purposes (W-2's).
- ❑ **National ID Type** defaults to the SSN. **National ID** should be completed at this time with the employee's SSN, if they have one.
- ❑ Because some employees do not have an SSN, the Hire process can be saved if this field is left empty.

Exercise 3 (continued)

- Enter the employee’s date of birth (09/02/1985) in the **Date of Birth** field.
- Biographical History - Enter effective date (same as effective date used in Name field) (07/31/2015).
- Enter the employee’s Social Security number (029-20-7029) in the **National ID** field.





Fields and Field Definitions:

Field	Definition
National ID Type	The National ID Type defaults to the Social Security number.
National ID	The Social Security number of the employee.
Primary ID	The Primary ID checkbox defaults to checked by the system. It is a required field when the National ID has been populated.

Instructor Information

Instructor Notes

OBJECTIVE:

- Use the *Personal History* tab to navigate to the *Personal History* page.

TALKING/KEY POINTS:

Key points for the *Personal History* page.

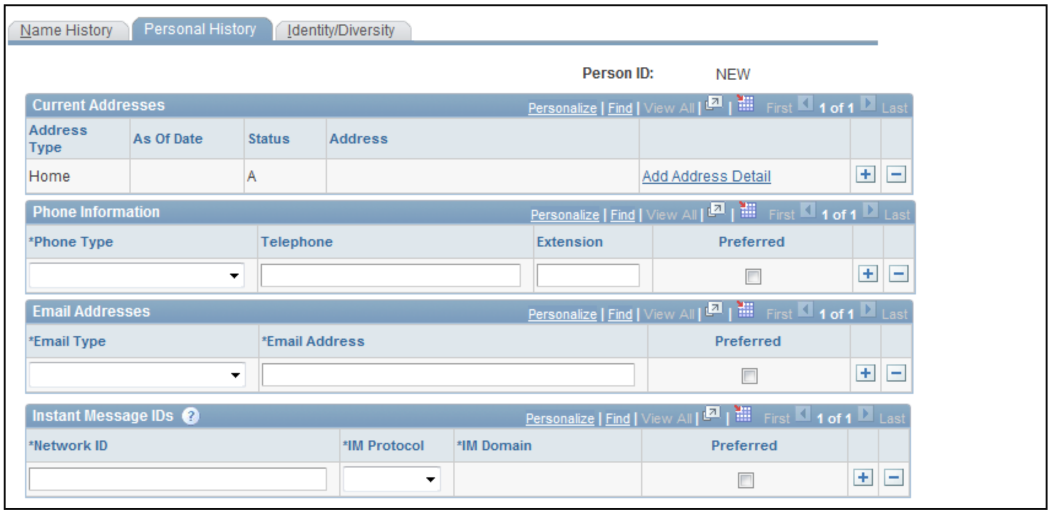
Emphasize:

- ❑ **Address Type** defaults to Home.
- ❑ Select the *Add Address Detail* hyperlink to enter a home address. The process for entering other address types will be discussed in Maintaining Employee Data.
- ❑ *Address History* is effective dated. The effective date must be the same date used on the *Name History* page.
- ❑ After entering an effective date, click Add Address.
- ❑ Populate address information and click **OK**.
- ❑ The county must be entered.

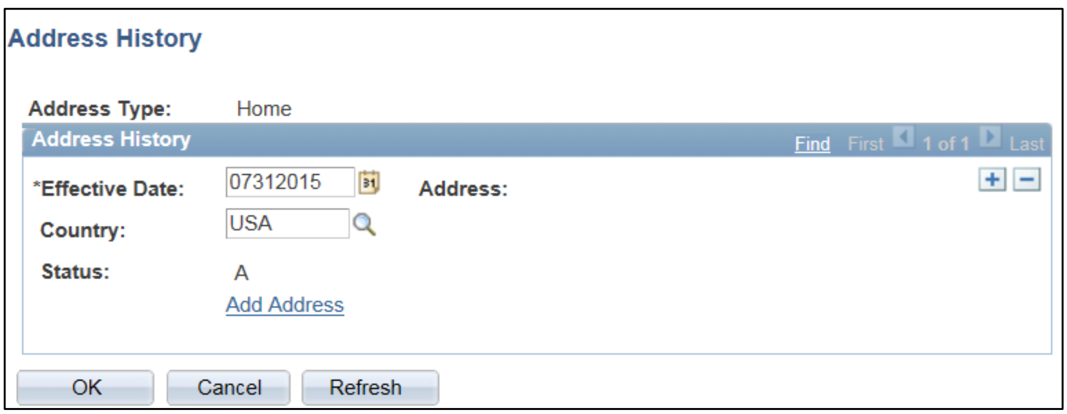
Exercise 3 (continued)

Step 3. Complete the Personal History page

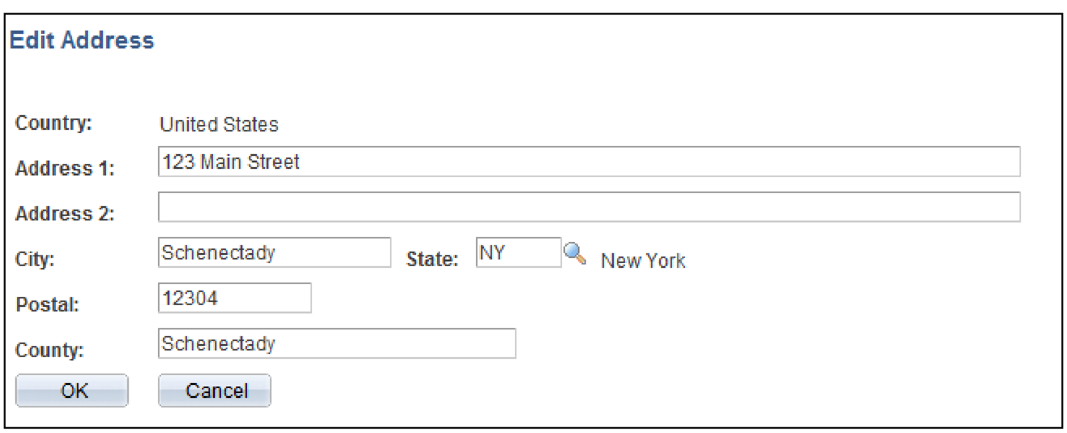
- Click the *Personal History* tab.
- Click the Add Address Detail hyperlink.



Enter the **Effective Date** and click Add Address.



The *Edit Address* page will appear. Enter the employee's address and click **OK**.



Instructor Notes

OBJECTIVE:

- Complete the *Personal History* page.

TALKING/KEY POINTS:

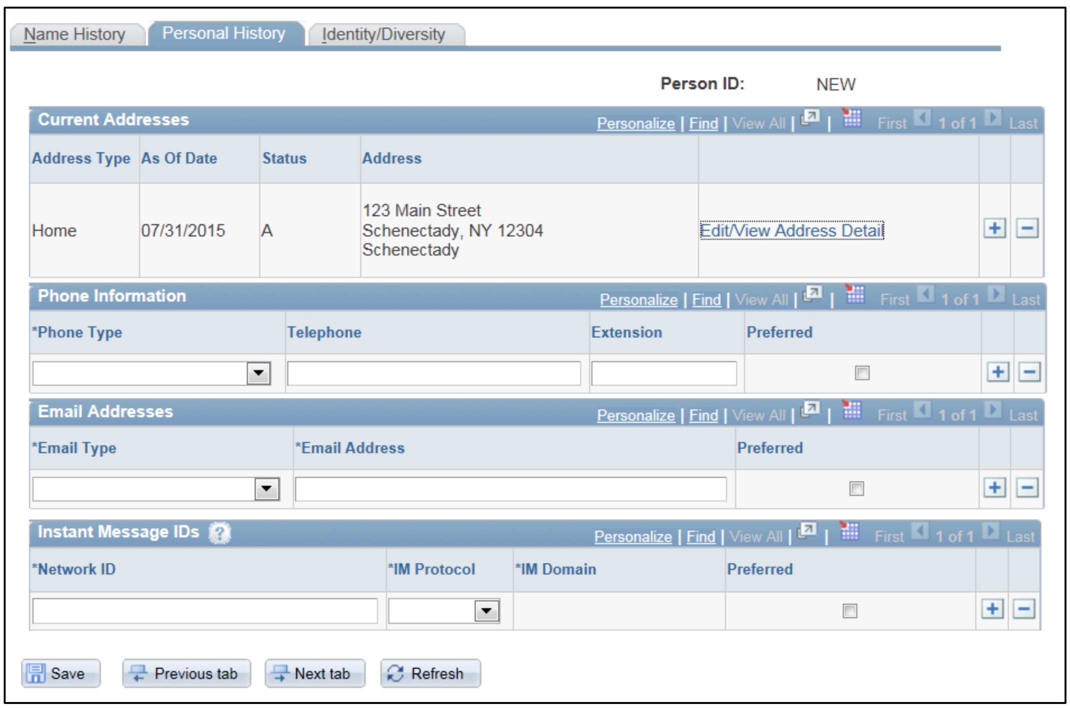
Key points for completing the *Personal History* page.

Emphasize:

- ❑ Review information prior to clicking **OK**.
- ❑ Fields available under Phone Information and Email Addresses are optional fields that are not used in PayServ.

Exercise 3 (continued) Review information prior to clicking OK.

Proceed with entering additional optional information.



Fields and Field Definitions:

Field	Definition
Address Type	More than one type of address can be recorded on the Personal History record. The values for the Address Type field are: CHK, HOME, and MAIL. Select the appropriate value by clicking on the dropdown arrow upon entering a new row. HOME is the default.
As of Date	The date on which an address change occurs. If during the hire process another address type is entered, the effective date must be the same date as the home address entered previously.
Phone Information & Email Addresses	Optional fields not used in PayServ.

OBJECTIVE:

- Complete the *Identity/Diversity* page.

  This information is not used in PayServ Agencies can use at their own discretion.

TALKING/KEY POINTS:

Key Points for the *Identity/Diversity* page.

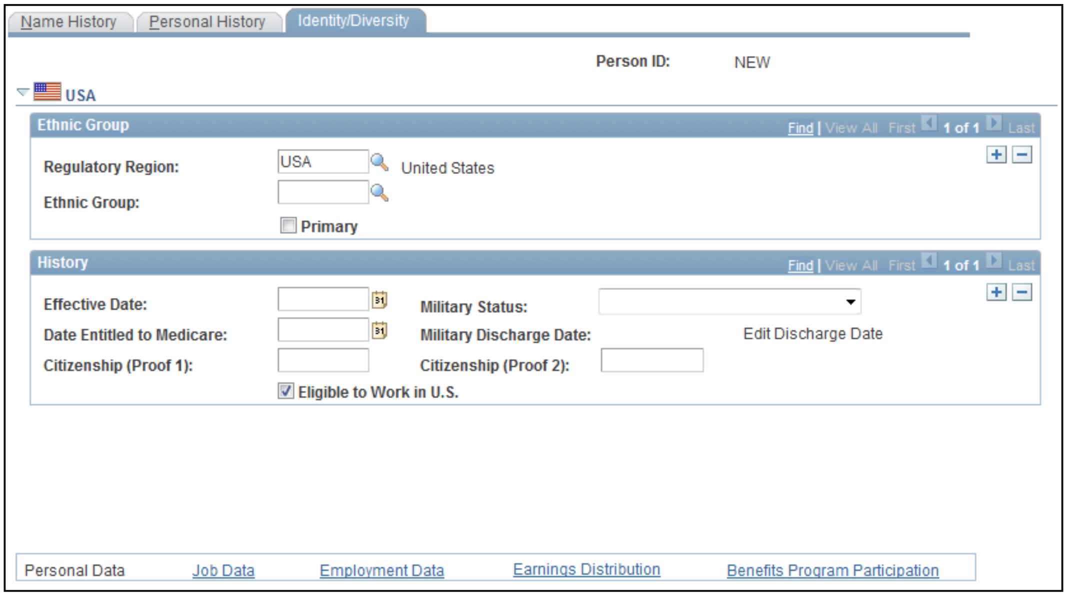
- ❑ All fields on this page are optional.
- ❑ When complete, access the Job Data hyperlink at the bottom of the page.
- ❑ Remind students that during the Hire Process all of these fields must be completed prior to saving. Otherwise all required values will turn RED.

Personal Data	Job Data	Employment Data	Earnings Distribution	Benefits Program Participation

Exercise 3 (continued)

Step 4. Access the Identity/Diversity page

- Click the *Identity/Diversity* tab to access this page.


Name History | Personal History | Identity/Diversity

Person ID: NEW

USA

Ethnic Group — Find | View All First 1 of 1 Last

Regulatory Region: USA United States

Ethnic Group:

Primary

History — Find | View All First 1 of 1 Last

Effective Date:

Military Status:

Date Entitled to Medicare:

Military Discharge Date:

Edit Discharge Date

Citizenship (Proof 1):

Citizenship (Proof 2):

Eligible to Work in U.S.

Personal Data | Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Fields on this page are optional.

Instructor Information

Instructor Notes

OBJECTIVE:

- Emphasize key fields on the *Work Location* tab.

TALKING/KEY POINTS:

- ❑ **HR Status** will either display a value of Active or Inactive – Active when the employee is Active and Inactive when the employee is terminated or retired.

- ❑ **Payroll Status** is determined by the action specified on the current *Job Data* record. The **Hire Action** will give the employee a status of Active.

- ❑ The **Job Indicator** field is used in association with multiple job functionality. If an employee only has one job, it is Primary. The **Job Indicator** field defaults to Primary during a hire. Each additional job is identified as a Secondary Job.

- ❑ **Position Numbers** are always eight character numbers - all leading zeros must be entered.

- ❑ The **Effective Date** can be the same date entered on the *Personal Data* pages or future dated.

- ❑ All Job transactions are considered BOB (Beginning of Business).

- ❑ **Regulatory Region** will always appear as USA.

- ❑ **Business Unit** appears by default from the position number. This value is always NYSPY.

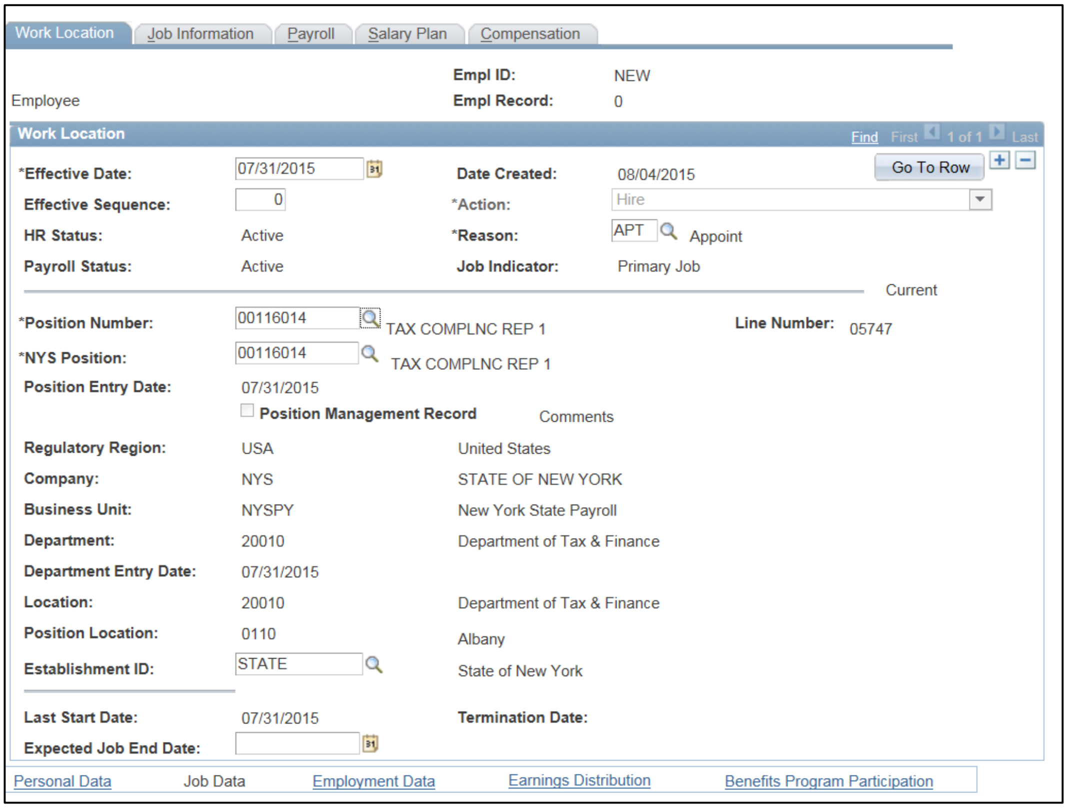
- ❑ The Comments hyperlink takes the user directly to the General Comments page. Comments cannot be entered in the system until the hire transaction has been saved.

    - If a student attempts to click Comments before the hire transaction has been saved, the page will inaccessible.

Exercise 3 (continued)

Step 5. Access the Work Location page

- Click the Job Data hyperlink at the bottom of the page to access the *Job Data* pages.
- Hire Cheryl Snyder into the Tax Complnc Rep 1 position 00116014.
- **Effective Date:** 07/31/2015. **Action / Reason:** APT (Appointment)



Work Location | Job Information | Payroll | Salary Plan | Compensation

Employee

Empl ID: NEW

Empl Record: 0

Work Location — Find First 1 of 1 Last

*Effective Date:	07/31/2015	Date Created:	08/04/2015
Effective Sequence:	0	*Action:	Hire
HR Status:	Active	*Reason:	APT Appoint
Payroll Status:	Active	Job Indicator:	Primary Job

Go To Row

Current

*Position Number:	00116014	TAX COMPLNC REP 1	Line Number: 05747
*NYS Position:	00116014	TAX COMPLNC REP 1	
Position Entry Date:	07/31/2015		
	Position Management Record	Comments	
Regulatory Region:	USA	United States	
Company:	NYS	STATE OF NEW YORK	
Business Unit:	NYSPY	New York State Payroll	
Department:	20010	Department of Tax & Finance	
Department Entry Date:	07/31/2015		
Location:	20010	Department of Tax & Finance	
Position Location:	0110	Albany	
Establishment ID:	STATE	State of New York	
Last Start Date:	07/31/2015	Termination Date:	
Expected Job End Date:			

Personal Data | Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Fields and Field Definitions:

Field	Definition
Effective Date	The Effective Date is the date on which a Job Data transaction occurs. All Job transactions are BOB (Beginning of Business).
Job Indicator	This field indicates whether the position is the employee's primary or secondary job.
Business Unit	This field will always be NYSPY.
Regulatory Region	This field will always be USA.
Comments	Comments is a hyperlink to the General Comments page, where the agency can enter comments for that employee.
Establishment ID, Last Start Date, Expected Job End Date, Termination Date	These fields are not necessary to New York State Payroll processing and should not be used.

Instructor Information

Instructor Notes

OBJECTIVE:

- Review and complete key fields on the Job Information page.

TALKING/KEY POINTS:

- ❑ Ensure that the appropriate Full/Part indicator for Full-Time or Part-Time employment has been selected. There is no edit on a new hire to verify that Full/Part and Part-Time Pct. fields are in agreement. Point out for future information that Sick Leave with pay is still considered to be ‘Full-Time.’

- ❑ Ensure that this field represents the percentage of the position’s FTE (Full-Time Equivalent) that the employee works, and that it is consistent with the data entered in the Full/Part field.

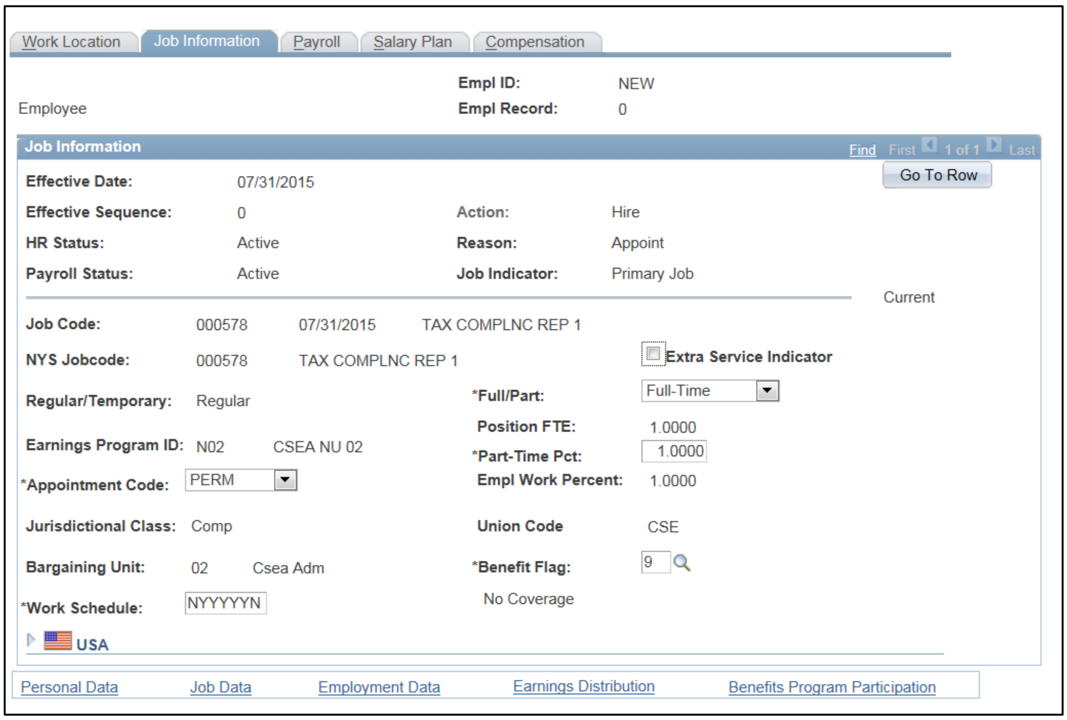
Bring the students to the *Payroll* page after the *Job Information* page. Use the tab or hyperlink option for navigation.

Exercise 3 (continued)

Chapter 2

Step 6. Complete the Job Information page

- Click the Job Information tab to access this page.
- View the default information on this page.
- Assign the appropriate Benefit Flag.



If percentage is less than a 1.00, make sure that the **Full/Part** indicator is set to Part-Time.

If the **Full/Part** indicator is set to Full-Time, the **Part-Time Pct** field must be 1.00. There is no edit for this on a hire.

Instructor Information

Instructor Notes

OBJECTIVE:

- Tax Location is changed here.

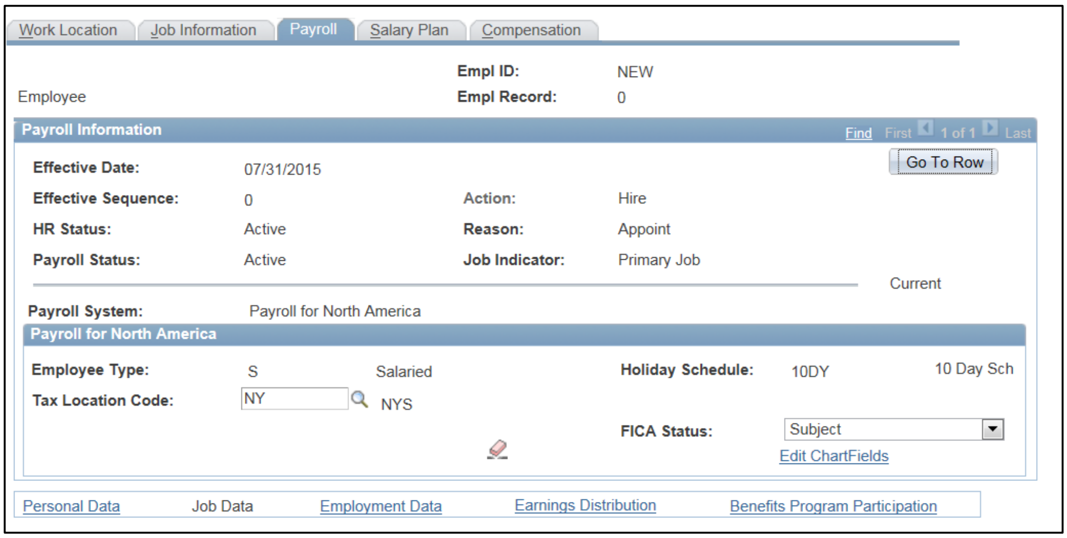
TALKING/KEY POINTS:

- ❑ Stress the importance of the correct Tax Location Code.
- ❑ A new pushbutton, represented by an eraser icon (**Delete Combination Codes**), now appears on the **Job Data > Payroll** tab. This button has no functionality.
- ❑ Feel free to talk about some of the fields on the page and reinforce navigational or difficult concepts as necessary.

Exercise 3 (continued)

Step 7. Complete the Payroll page

- Click the *Payroll* tab to access this page.
- View the defaults on this page.



Instructor Information

Instructor Notes

OBJECTIVE:

- Explain uses of the *Salary Plan* page.

TALKING/KEY POINTS:

- ❑ Tell students that they are not entering new information on this page. The data defaults from the Position information.

- ❑ Salary Plan is reflective of the bargaining unit.

ADDITIONAL INFORMATION

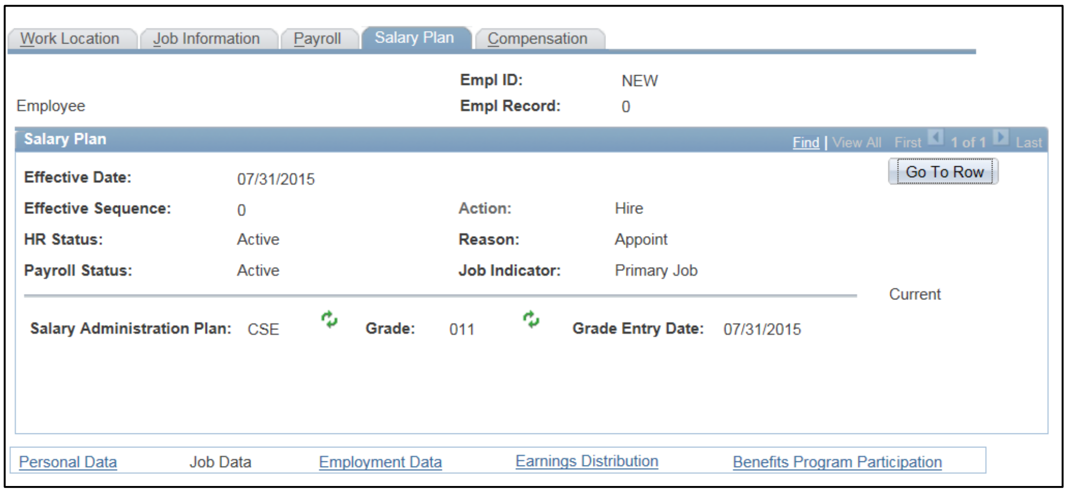
☝ Remember:

  - The green arrows in the middle of the page are refresh arrows and have no functionality on this page. Address this if it comes up in class, but it is not necessary to cover it as part of the page review.

Exercise 3 (continued)

Step 8. Review the Salary Plan page

- Click the *Salary Plan* tab to access this page.
- View the defaults on this page.



The data on the *Salary Plan* page defaults from the position information.

OBJECTIVE:

- Explain the *Compensation* page.

TALKING/KEY POINTS:

- ❑ The employee's salary information is entered on the *Job Request* pages. The Job Request function is discussed in the next chapter. The **Compensation Rate** is automatically populated after the Salary has been validated or approved by OSC.

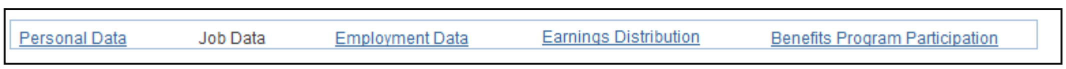
- ❑ The **Frequency** field located to the right of the **Compensation Rate** field is used to factor an employee's salary.

- ❑ The **Salary** field indicates the amount of the employee's salary.

- ❑ The Frequency Code located under the Pay Components section refers to how the Salary is displayed. A Frequency of A is an annual salary rate.

- ❑ FTA Salary (full-time annual salary) is located in the Salary field under the Pay Components section.

- ❑ To get to the next page, *Employment Data*, the user will use the hyperlink towards the bottom of the page.

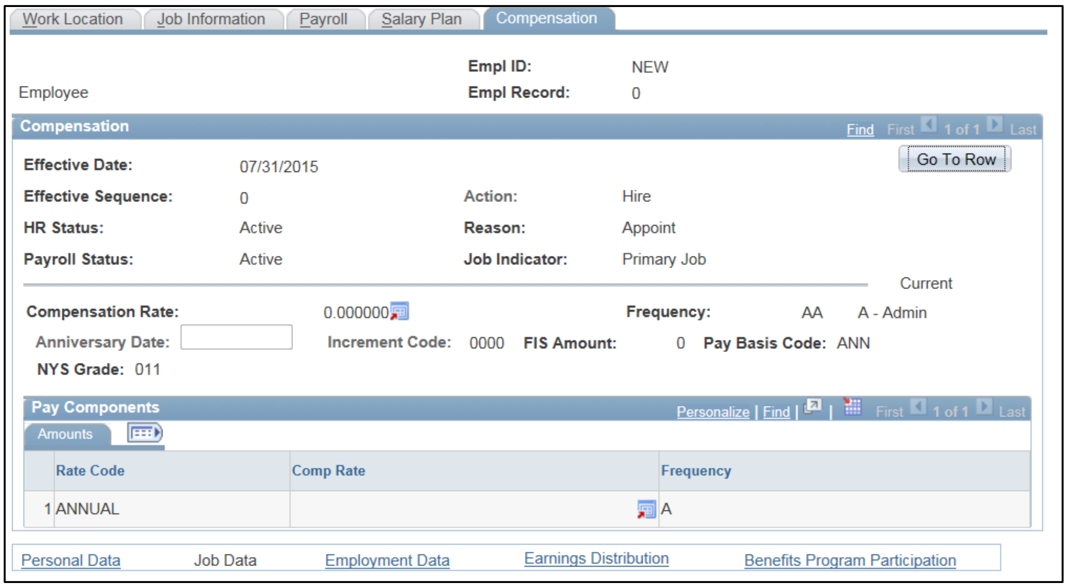


Instructor Notes

Exercise 3 (continued)

Step 9. Complete the Compensation page

- Click the *Compensation* tab to access this page.
- The *Compensation* page contains the employee's salary, which is used to calculate earnings.
- View the defaults on this page.



Fields and Field Definitions:

Field	Definition
Compensation Rate	The Compensation Rate is the rate of pay used to determine an employee's regular or contract biweekly earnings. It is system generated.
Rate Code	This code is a system indicator for payroll purposes.
Salary	The amount of the employee's pay based on the employee's pay basis code. It is populated from an approved agency job request.
Frequency (Pay Component)	Refers to how an employee's salary is quoted. Values include A - Annual, B - Biweekly, or H - Hourly.

OBJECTIVE:

- Use a hyperlink to access the *Employment Data* page.

TALKING/KEY POINTS:

- ❑ To access the *Employment Information* page, students should click on the Employment Data hyperlink at the bottom of any Job page.
- ❑ The only way to access the *Employment Information* page is through the hyperlink in Job Data.
- ❑ Most of the data fields are automatically filled in based on what is entered on the *Personal Data* and other *Job Data* pages.
- ❑ The **Temp Assign** field is used by DOCCS to track employees when Correction Officers are temporarily assigned to another facility.
- ❑ The **Internal Control Nbr** is used by City University of New York only.

Personal Data	Job Data	Employment Data	Earnings Distribution	Benefits Program Participation

NOTES:

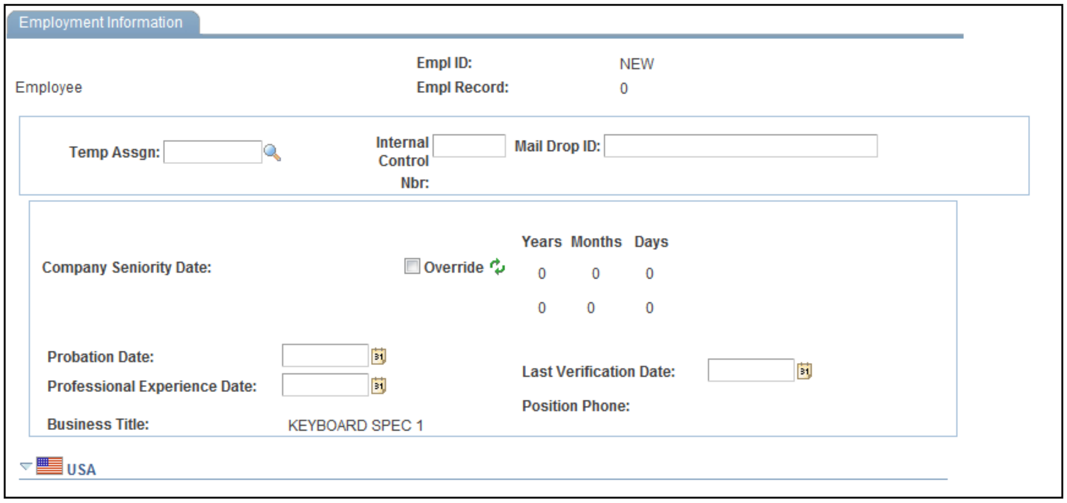
- If **Mail Drop ID** is left blank, the check/advice sort will be in alphabetical order.
- This page is not effective-dated.

Exercise 3 (continued)

Step 10. Review the Employment Information page

- Click the Employment Data hyperlink at the bottom of the page to access the *Employment Information* page.

- View the default information on this page.



Instructor Information

Instructor Notes

OBJECTIVE:

- The *Earnings Distribution* page is disabled so the next page to be completed is *Benefits Program Participation*. Use the hyperlink towards the bottom of the page.

- Use a hyperlink to access the *Benefit Program Participation* page.

- Reinforce that students DO NOT SAVE during the hands-on activities.

- Complete the *Benefit Program Participation* page.

TALKING/KEY POINTS:

❑ To access the Benefit Program Participation page, students should click on the Benefit Program Participation hyperlink at the bottom of any Job page.

❑ The Effective Date of the Benefit Program must match the effective date on the Hire page. This date appears by default based on the entries in the prior Effective Date fields.

❑ Use the magnifier to open selection of Benefit Programs. Select correct Benefit Program based on the bargaining unit.

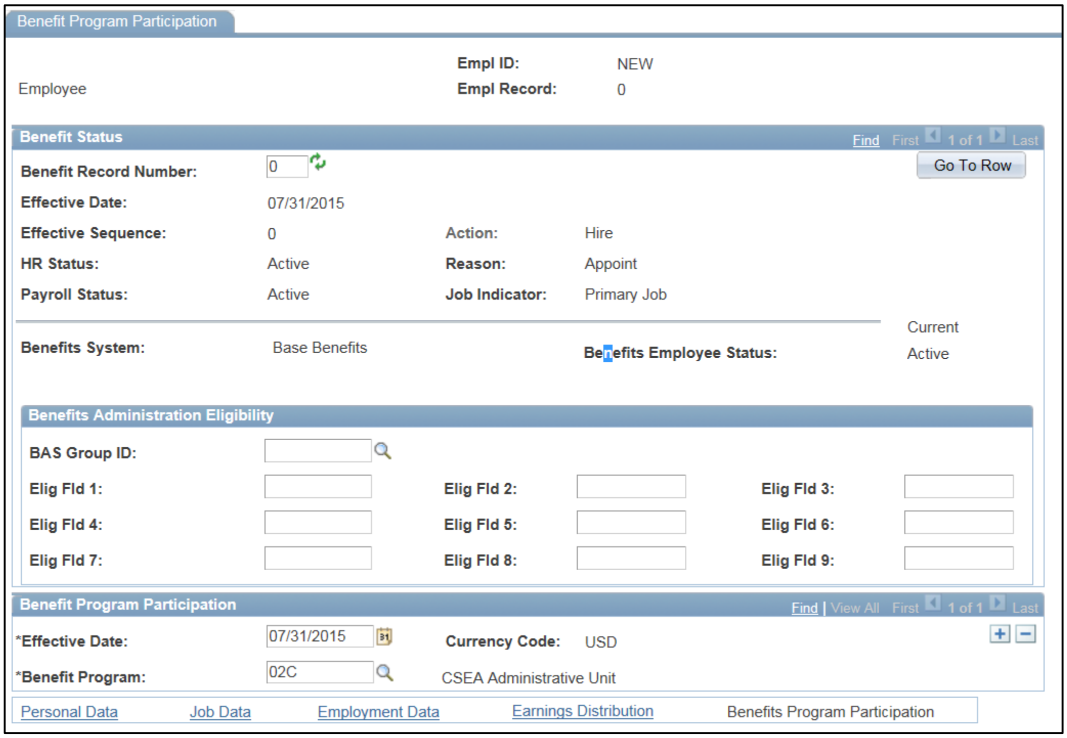
❑ Note when working with multiple record numbers to verify that the Benefit Record Number is for the correct record.

Exercise 3 (continued)

Step 11. Update the Benefits Program Participation page

Click the Benefits Program Participation hyperlink at the bottom of the page to access the *Benefits Program Participation* page.

- Verify that the effective date has defaulted from the date of the Hire.
- Enter or select the Benefit Program 02C.



Instructor Information

Instructor Notes

OBJECTIVE:

- Finish the Hire activity.
- View the newly assigned New York State Empl ID.

TALKING/KEY POINTS:

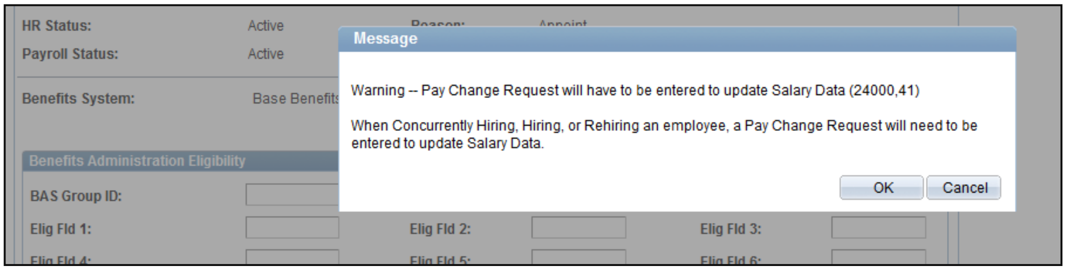
- ❑ To access the Benefit Program Participation page, students should click on the Benefit Program Participation hyperlink at the bottom of any Job page.
- ❑ The Effective Date of the Benefit Program must match the effective date on the Hire page. This date appears by default based on the entries in the prior Effective Date fields.
- ❑ Wrap up the step-by-step activity. Instruct participants to watch the front screen while you Save the transaction.
- ❑ **Instructor – Save your work:**
  - Click **Save**. A warning message appears saying a Job Request is required. Click **OK** to complete the save.
  - The Student should watch the upper right-hand corner of your screen to see the words “Processing” and “Saved” appear after you have clicked Save.

Exercise 3 (continued)

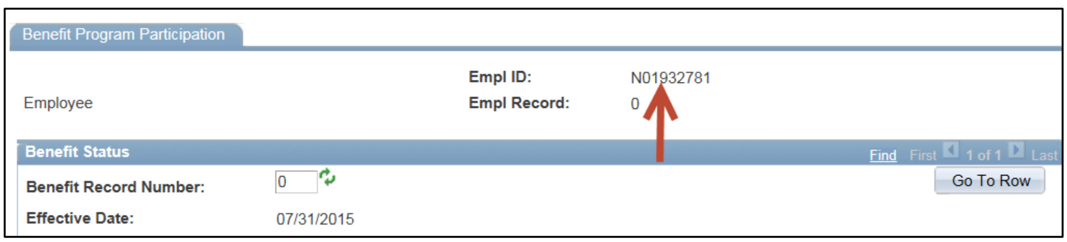
Step 12. The NYS Empl ID is assigned by the system

The Instructor will click **Save** to hire the employee into the system. **DO NOT SAVE YOUR WORK!**

After a the hire transaction is saved, a warning message appears instructing the user to enter a Job Request for the salary.



During the final step of the Hire process, the system assigns the NYS Empl ID, a unique alpha-numeric employee identifier which is used throughout the system and printed on employee pay stubs and direct deposit advices.



If an Empl ID was reserved for the employee, the system will display the pre-assigned Empl ID.

NOTE: Because the Empl ID is assigned by the system, Cheryl Snyder's Empl ID will be different each time she is hired into the training database.

OBJECTIVE:

- Transition to Setting Up Payroll Data.

TALKING/KEY POINTS:

- ❑ The next step is to set up Employee Pay Data USA.
- ❑ This chapter will not cover all of the payroll maintenance procedures in class, just those required during the Hire process.

Setting Up Payroll Data

Introduction

Employee Pay Data USA contains the PayServ pages used to maintain payroll-specific data such as tax information, additional pay, general deductions, and direct deposit.

These pages work in conjunction with the earnings information entered on the *Job Information* pages.

Objectives:

- Understand PayServ functionality as it relates to employee taxes and direct deposit, including:
    - Lock-in Details and Tax Treaty Data
    - Direct Deposit of partial amounts
    - Deposit Types

Chapter 2

Instructor Information

Instructor Notes

OBJECTIVE:

- Explain the *Federal Tax Data* page.

TALKING/KEY POINTS:

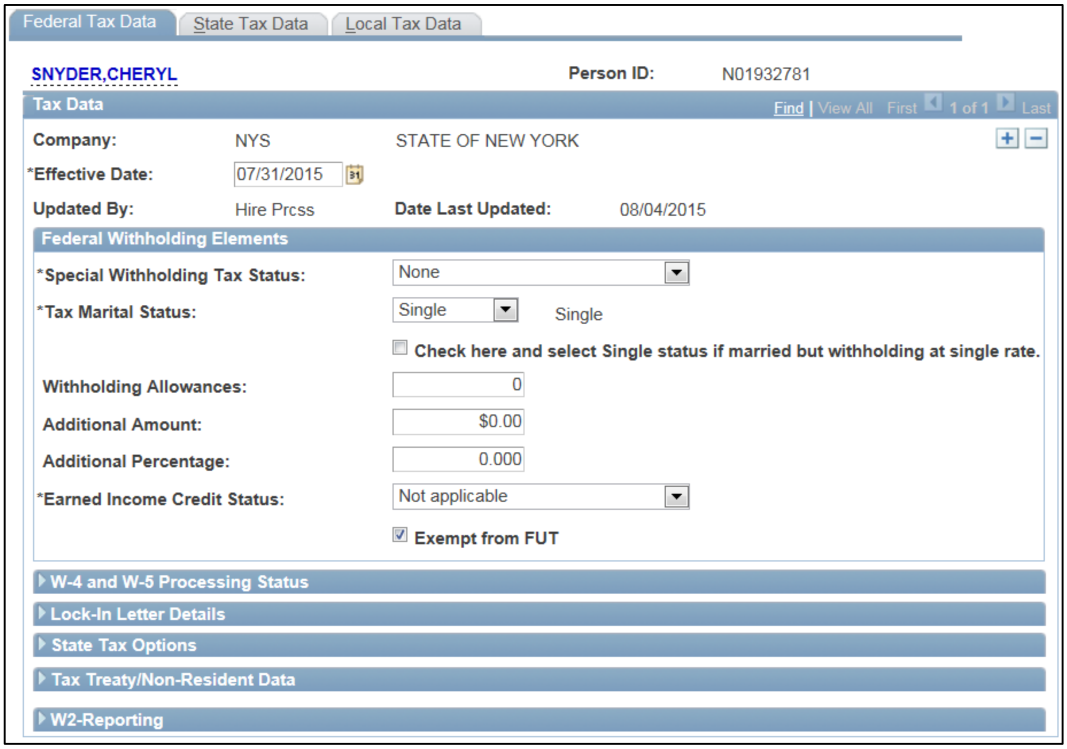
- ❑ Navigate to: *Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data.*
- ❑ Tax information on a new hire defaults to Single 0.
- ❑ Click the Lock-In Letter Details collapsible menu if a letter has been received from the IRS specifying the allowances an employee is allowed to take. *If lock-in exemptions are entered, the employee will not be able to elect more than that number. Agencies must not modify this section. Any changes should only be entered by OSC.*
- ❑ **Lock-In Letter Details** also appears on State Tax Data.
- ❑ The Tax Treaty/NR Data will be used for those individuals who are non-resident aliens.

Exercise 4: Enter Employee Tax Data

Step 1. Navigate to Employee Tax Data

Navigate to: *Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data*

- Enter Cheryl Snyder's Empl ID in the **Search** field.



Chapter 2

OBJECTIVE:

- Review changing an employee's federal tax data.

TALKING/KEY POINTS:

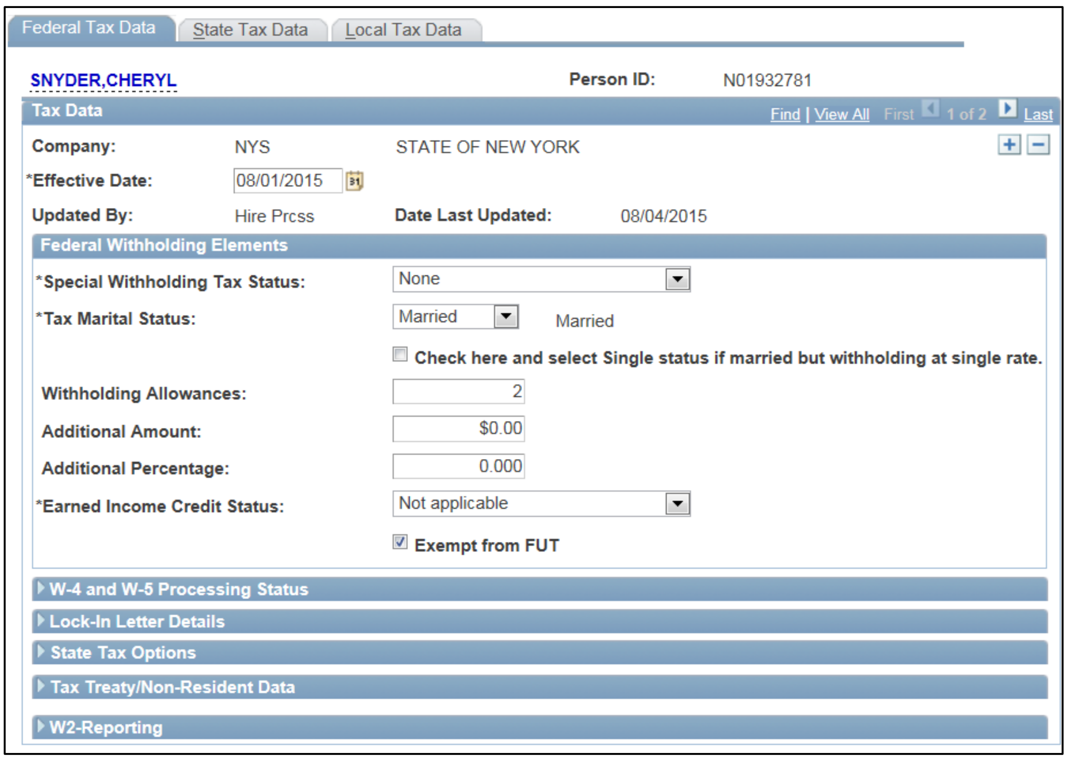
- ❑ To update any of the tax pages, insert a new effective-dated row on the *Federal Tax Data* page. Once the row is inserted, any of the three tax pages can be updated.
- ❑ For new hires, enter the Effective Date **one day after the actual hire date**, because the Effective Date/Sequence must be greater than the Effective Date/Sequence of current record. (In this case, the current record is the Hire Process.) For this example, we will be using Cheryl Snyder, a new hire. Use the effective date of August 1, 2015.
- ❑ For an existing employee, the Effective Date should be changed to the beginning of the current pay period in order to make the change effective for the entire pay period. Regardless of how many changes are made during the pay period, the last one will be taken for the entire period.
- ❑ Use the folder tabs located at the top of the page or the hyperlinks at the bottom of the page to navigate between the pages.

Exercise 4 (continued)

Step 2. Enter data on the Federal Tax Data page

Cheryl Snyder has submitted her tax forms. Her Federal Tax Data currently reflects the default values of Single with 0 withholdings, as applied by the hire process. Follow the steps below to update Cheryl's tax information.

- Place cursor in the **Effective Date** field; click [+] to insert a new effective-dated row. Change the effective date to the day after the hire date. Enter 08/01/2015.
- In the **Tax Marital Status** field, select **Married** from the dropdown menu, as elected on the W-4 form.
- Enter the number of exemptions elected on the W-4 form. Enter 2.
- Data entry is complete for the *Federal Tax Data* page. Click on the State Tax Data link on the bottom of the page or the *State Tax Data* tab at the top of the page.


Federal Tax Data | State Tax Data | Local Tax Data

SNYDER,CHERYL   Person ID: N01932781

Tax Data   Find | View All   First 1 of 2 Last

Company: NYS   STATE OF NEW YORK

*Effective Date: 08/01/2015

Updated By: Hire Prcss   Date Last Updated: 08/04/2015

Federal Withholding Elements

*Special Withholding Tax Status: None

*Tax Marital Status: Married   Married

Check here and select Single status if married but withholding at single rate.

Withholding Allowances: 2

Additional Amount: $0.00

Additional Percentage: 0.000

*Earned Income Credit Status: Not applicable

Exempt from FUT

W-4 and W-5 Processing Status

Lock-In Letter Details

State Tax Options

Tax Treaty/Non-Resident Data

W2-Reporting

Federal Tax Data | State Tax Data | Local Tax Data

When making a change to federal, state or local tax data, the new effective-dated row must be entered on the *Federal Tax Data* page and should not be entered on any subsequent Tax Data page.

Instructor Information

Instructor Notes

OBJECTIVE:

- Explain the *State Tax Data* page.

TALKING/KEY POINTS:

- ❑ Confirm or enter the appropriate withholding state for the employee. The value should match the state the employee works in. Exception: VA & DC. DC employees are taxed DC taxes if they reside in DC. DC employees who live in VA are taxed VA taxes.

- ❑ The resident check box is always selected, regardless of the employee's actual residency status.

- ❑ The **SWT Marital/Tax Status** field is the marital status for calculating state withholding tax in this state for the employee. It indicates which tax table the system should use for the SWT calculation.

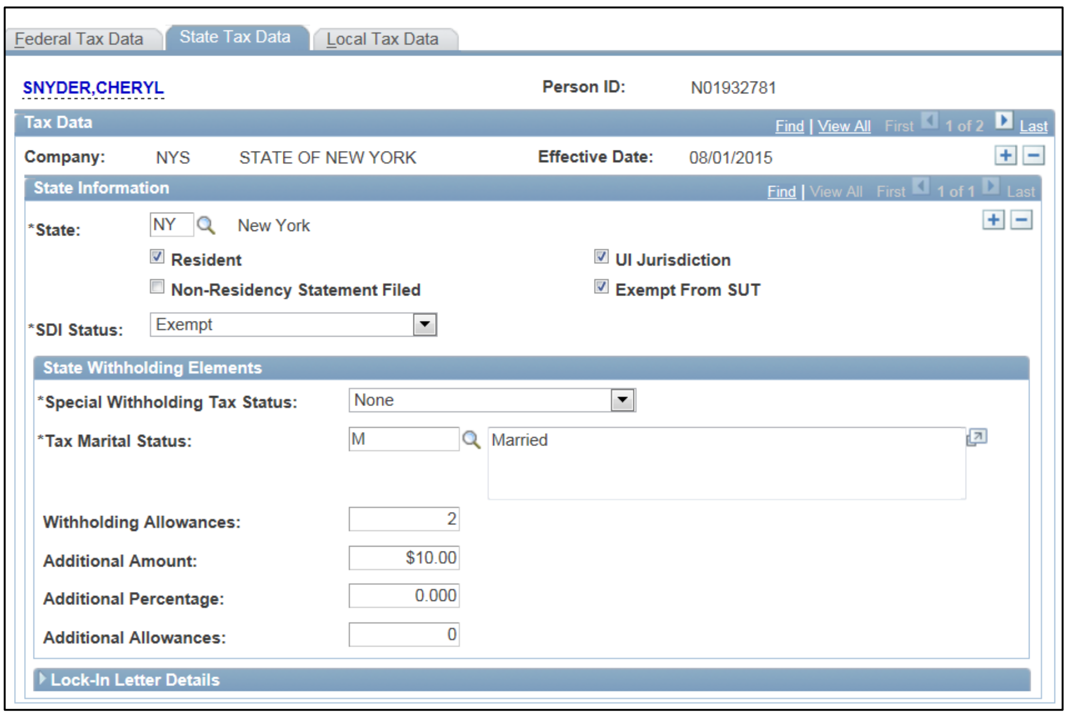
- ❑ Use the Lock-In Letter Details group box if you have received a letter from the Department of Taxation and Finance specifying the allowances an employee is allowed to take. *This feature works in the same way as the Lock-In feature for Federal Tax Data.* Note: We have yet to receive a lock-in letter from NYS.

Exercise 4 (continued)

Step 3. Enter data on the State Tax Data page

Follow the steps below to change Cheryl's State Tax Data from the default values:

- In the **SWT Marital/Tax Status** field enter M (for Married) or click the (lookup feature) and select Married.
- Enter the number of exemptions elected on the form. Enter 2.
- Cheryl would also like an additional $10.00 taken.
- Data entry is complete for the *State Tax Data* page. Click on the *Local Tax Data* link on the bottom of the page or the *Local Tax Data* tab at the top of the page.



Chapter 2

OBJECTIVE:

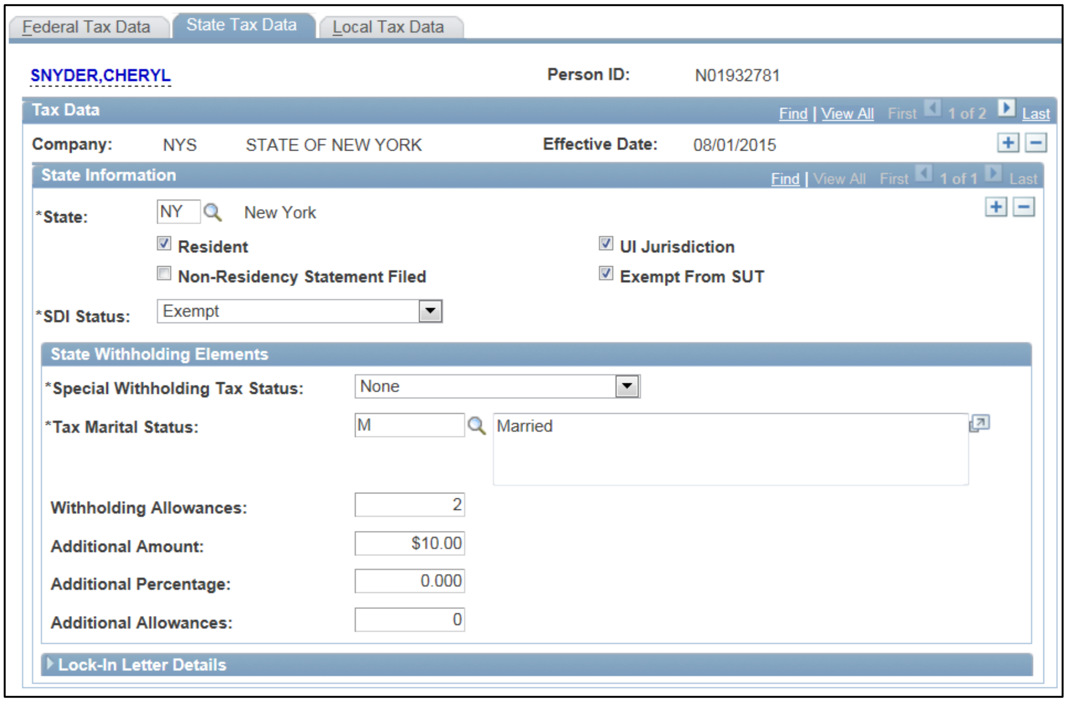
Explain the *Local Tax Data* page.

TALKING/KEY POINTS:

- You will use this page to define the localities in which the employee lives or works.
- For each locality, you should indicate if it is a Resident locality.
- Insert a row on the *Local Tax Data* page if the employee is required to pay taxes in an additional locality within the state. The effective date is still the date entered on the *Federal Tax Data* page.
- If an Employee lives in NYC and works in Yonkers, they will have 2 local tax data pages.

Exercise 4 (continued)

Step 4. Review the Local Tax Data page



Federal Tax Data | State Tax Data | Local Tax Data

SNYDER,CHERYL   Person ID: N01932781

Tax Data   Find | View All   First 1 of 2 Last

Company: NYS STATE OF NEW YORK   Effective Date: 08/01/2015

State Information   Find | View All   First 1 of 1 Last

*State: NY New York

☑ Resident   ☑ UI Jurisdiction

☐ Non-Residency Statement Filed   ☑ Exempt From SUT

*SDI Status: Exempt

State Withholding Elements

*Special Withholding Tax Status: None

*Tax Marital Status: M Married

Withholding Allowances: 2

Additional Amount: $10.00

Additional Percentage: 0.000

Additional Allowances: 0

Lock-In Letter Details

Chapter 2

If the employee works at a location in New York City or Yonkers, but are not a resident of that locality the resident checkbox must be unchecked. If the employee is required to pay taxes in an additional locality within the state (e.g., Yonkers), click the button within the Local Information box to insert a new row.

<u>OBJECTIVE:</u>

- Discuss the *Direct Deposit* page.

<u>TALKING/KEY POINTS:</u>

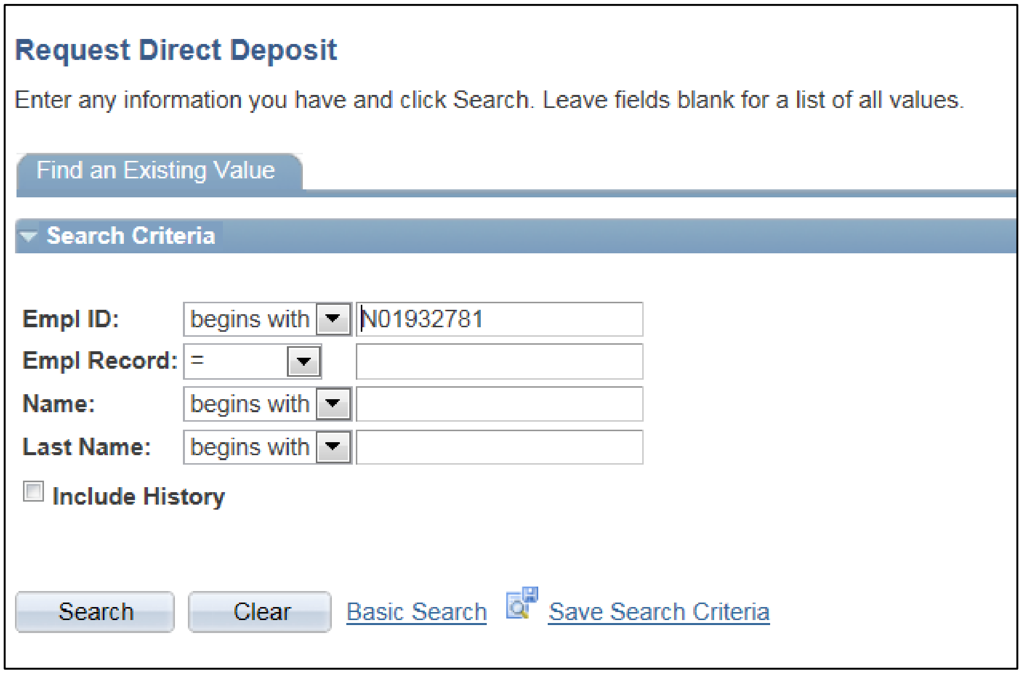
- ❑ Continue using the record for Cheryl Brown.
- ❑ Direct deposits are effective-dated and have an active or inactive status.
- ❑ Priority is set to 100 for the highest priority. (Allocation is taken first.)
- ❑ When entering more than one account, click the add sign under **Distribution Information**. Do not add a new effective-dated row.
- ❑ Priority structure consists of 100, 200, 300, 400, 500, 600, 700, and 800.
- ❑ Edits will appear for incorrect data entry. (Refer to Payroll Bulletin No. 390.)

Exercise 5: Enter Employee Direct Deposit Information

Step 1. Navigate to Direct Deposit

Navigate to: *Payroll for North America > Employee Pay Data USA > Request Direct Deposit.*

- Enter Cheryl's Empl ID if it has not defaulted from the previous activity.



Instructor Information

Instructor Notes

OBJECTIVE:

- Enter information for Direct Deposit.

TALKING/KEY POINTS:

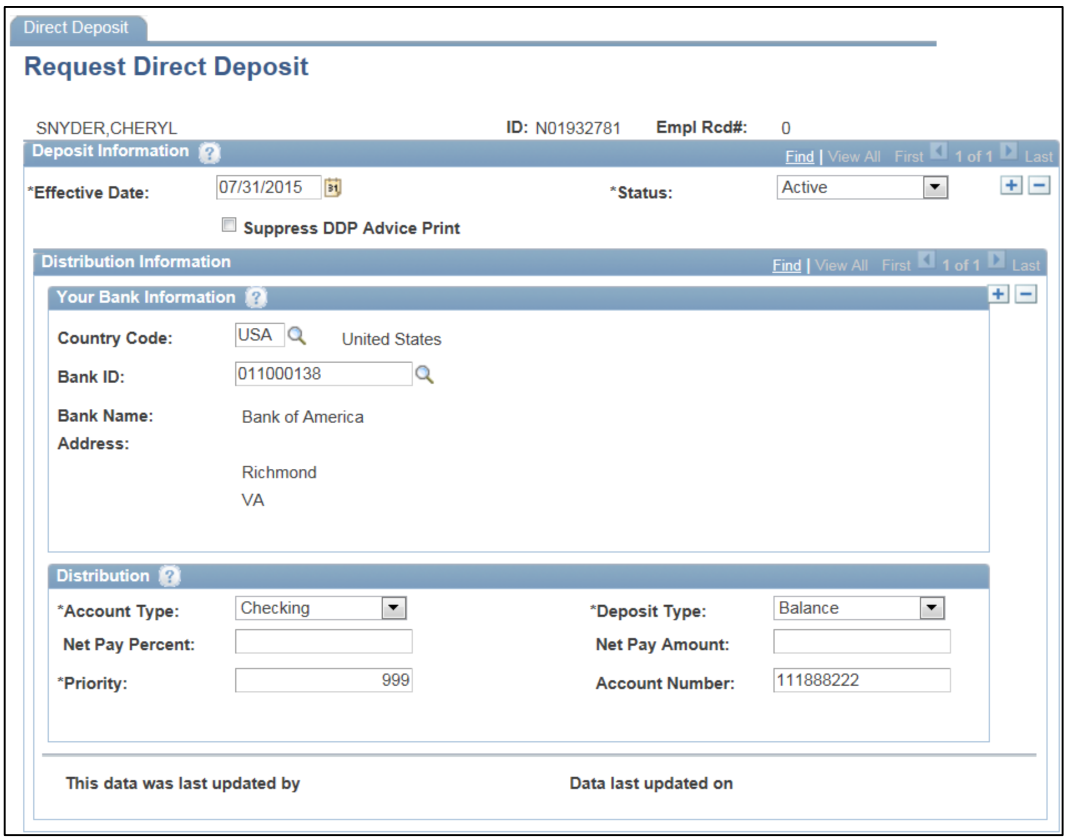
- ❑ Use the **View All** button to show the students that they can view all rows of data at once.
- ❑ Users should always view all rows before entering a new row of data to ensure the data does not already exist.
- ❑ The **Bank ID** and **Account Number** represent the checking or savings account to which the employee's money should be deposited.
- ❑ **Account Type** refers to the type of bank account the funds are being deposited into: Checking or Savings.
- ❑ **Deposit Type** is one of the following, depending on what the employee has indicated on their enrollment form:
    - *Amount*: The employee wants a fixed dollar amount to be deposited in this account.
    - *Balance*: The balance of the employee's pay is to be deposited in this account. Every employee must have a Balance deposit type.
    - *Percent*: The employee wants a specific percentage of his net pay to be deposited in this account.
- ❑ If you are establishing a direct deposit for an employee with multiple accounts, Balance should be selected for the account that will receive the remainder of the net pay (excess).
- ❑ All accounts are set to take partial amounts if necessary.

Exercise 5 (continued)

Step 2. Enter data on the Direct Deposit page

Cheryl Snyder has decided to enroll in Direct Deposit. Follow the steps below to add her Direct Deposit information.

- Enter the **Effective Date** of 07/31/2015 – the date of hire.
- Change the **Status** to Active.
- Enter the **Bank ID** or use the lookup feature to select the **Bank ID**.
- Select the **Account Type** from the dropdown menu.
- Choose **Deposit Type** of Balance.
- Enter 999 in the **Priority** field.
- Enter the **Account Number**.



Field	Definition
Deposit Type	Values are Amount, Balance, and Percent. Select the appropriate type of deposit from the dropdown list.
This data was last updated by:	This field displays "Online User" after the page is saved.

The priority number 999 will be used for the 'Balance' row only. This priority appears as a default when the Account Type of Balance is used.

Instructor Information

Instructor Notes

OBJECTIVE:

- Review the Key Points for this chapter with the class and address any remaining questions.

TALKING/KEY POINTS:

- ❑ All employees must be assigned to a position, and to a NYS Position where applicable. Most Job data is determined by the position.
- ❑ Names and addresses are effective-dated.
- ❑ When entering a new hire, all dates within Personal History (Name History, Address Detail, and Biographical History) must be equal. Retroactive dates continue to be acceptable.
- ❑ Effective date for Hire must be entered and can be future-dated. The effective date for Benefit Program Participation will appear by default with the current system date and must be changed to reflect the Hire date.
- ❑ Salary information must be added through the *Job Request* page.
- ❑ All direct deposit types allow partial deposits.

Chapter Key Points

- All employees must be assigned to a position, and to a NYS Position where applicable. Most Job data is determined by the position.
- Names and addresses are effective-dated.
- When entering a new hire, all dates within Personal History (Name History, Address Detail, and Biographical History) must be equal. Retroactive dates continue to be acceptable.
- Effective date for Hire must be entered and can be future-dated.
- The effective date for the Benefit Program Participation will reflect the Hire date.
- Salary information must be added through the *Job Request* page.
- All direct deposit types allow partial deposits.

Instructor Information

Instructor Notes

Wrap up chapter.

Does anyone have any questions?

This is the last page of the chapter.