PeopleSoft
myHR User Training
Payroll and Compensation
Training Participant Guide

myHR
Payroll and Compensation
August 4, 2014
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Welcome to the myHR - Payroll and Compensation Training Guide.

Accessing myHR
At the end of this lesson, you should have the skills and knowledge to:

1. Access the myHR website.
2. Log in to the myHR website.

Reminder: When navigating in myHR, DO NOT use the Back button within your Internet browser window. Please use the navigation provided.

The myHR website is the portal for accessing Self Service information.

myHR URL: https://myhr.umsystem.edu/

Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>To access the myHR website, you must first open a web browser. For this training example, double-click the Internet Explorer icon.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
2. | If the myHR website does not display when you open your web browser, enter "https://myhr.umsystem.edu" in the Address field.
3. | Click the **Refresh** button or press **Enter**.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 4.   | The myHR sign-in page will display. Note the resources that are available from this page.  
Click in the **User ID** field. |
| 5.   | Enter your Single Sign On ID into the **User ID** field.  
For this training example, enter "**TRAINING**".  
**Note:** In the live environment, users should use their Single Sign On ID. The User ID and Password used in this example is just for training purposes. |
| 6.   | Click in the **Password** field.  
Enter your password into the **Password** field.  
For this training example, enter "**TRAINING**". |
| 7.   | Click the **Sign In** button. |
9. The **myHR Welcome** page will display.

Click the **Main Menu** button to navigate to Self Service.

**Note:** You can also access many myHR features via the links available on the welcome page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>Self Service</strong> link.</td>
</tr>
</tbody>
</table>
| 11.  | Self Service menu options will display.  
      The Sign Appointment Notification menu option is used to view the Appointment Notification Form you signed during the onboarding process. |
### Table: Training Guide

#### UMSYS HR 9.1 myHR Payroll and Compensation

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.</td>
<td>When you are finished using myHR it is important to always sign out. To sign out, click the <strong>Sign out</strong> link.</td>
</tr>
<tr>
<td>13.</td>
<td><strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>
Payroll and Compensation
Welcome to myHR Payroll and Compensation!

At the end of this training, you should have the skills and knowledge to:

1. Understand the features available through the myHR Payroll and Compensation pages.
2. View leave balances.
3. View and edit State and Federal W-4 elections.
4. View and print pay advices.
5. View and edit direct deposit information.
6. View W-2 forms.
7. Provide or withdraw electronic W-2 consent.
8. Obtain contact information for requesting a W-2 or 1099-R reissue.
Leave Balances

Procedure

The Leave Balances page is used by employees to view current vacation, sick, personal, and compensatory time balances.

Note: The leave balances in the Payroll and Compensation section of myHR reflect what is on the pay advice. Leave and Compensatory Time Balances on the Timesheet reflect time submitted, but not yet reflected on the pay advice.

Navigation: Self Service > Payroll and Compensation > Leave Balances

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Vacation hours will display based on the last time vacation was used and will show hours earned, adjusted, and taken. The Hours Adjusted field represents adjustments made by HR personnel.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Sick Leave</strong> tab.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
2. | Sick leave hours will display based on the last time sick leave was used and will show hours earned, adjusted, and taken. The Hours Adjusted field represents adjustments made by HR personnel.

Click the **Personal** tab.
Step | Action
---|---
3. | Personal days will display based on the last time personal time was used and will show hours earned, adjusted, and taken. The Hours Adjusted field represents adjustments made by HR personnel.

Click the **Compensatory** tab.
Compensatory time (if applicable) will show hours earned, adjusted, used, and the hours available. The Time Adjusted field represents adjustments made by HR personnel.
5. If you are not eligible for University leave plans, no information will display upon selecting the Leave Balances menu option.

6. **End of Procedure.**
Employee Federal and State W-4

Procedure

The Employee Federal and State W-4 page is used by employees to view and edit federal and/or state W-4 information.

**Navigation:** Self Service > Payroll and Compensation > Employee Federal and State W-4

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1.   | To update your federal and/or state tax information, click the **Update Tax Information** button. **Update Tax Information**  

**Note:** If you are unsure of what to select, use the **W-4 Calculator** link to calculate your W-4 selections. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td>Make changes to the existing information in the federal and state W-4 Tax Data and/or Claim Exemption sections. If you select the check box to claim exempt status, you will receive a warning message with additional information. Changes to both federal and state W-4 data are not required. Scroll to the bottom of the page.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Save Changes</strong> button.</td>
</tr>
</tbody>
</table>

Step 3. Click the **Save Changes** button.
4. If you make changes to your federal withholding, you will be asked to re-enter your password as a security measure. Enter the desired information into the **Password** field.

   For this training example, enter "TEST1".

5. Click the **Continue** button.

   **Note:** Due to payroll processing deadlines, your changes may not be in effect on your next paycheck.

6. **End of Procedure.**
View Paycheck

Procedure

The View Paycheck page is used by employees to view their current and past pay advices as well as access the print pay advice option.

**Navigation:** Self Service > Payroll and Compensation > View Paycheck

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This is the View Paycheck page. To view a specific paycheck, select the Check Date link of the corresponding check. For this training example, select the <strong>2014-05-30</strong> check.</td>
</tr>
</tbody>
</table>

**2014-05-30**
# Header Field Descriptions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.</td>
<td><strong>Header Field Descriptions</strong></td>
</tr>
</tbody>
</table>

**Net Pay**: Amount paid to the employee.  
**Pay Begin Date**: The first day of the pay period.  
**Pay End Date**: The last day of the pay period.  
**Check Date**: The day the employee is paid.  
**View a Different Paycheck**: Click to select a different paycheck to view.  
**Print My Pay Advice**: Click to print the selected paycheck.
### General Field Descriptions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.</td>
<td><strong>General Field Descriptions</strong></td>
</tr>
</tbody>
</table>

**Name:** Employee's name, as shown in the system.  
**Employee ID:** Special identification number assigned to each employee.  
**Address:** The address of the employee's department (i.e., campus mail address).  
**Business Unit:** Primary campus grouping for employees (i.e., COLUM, HOSPT, KCITY, ROLLA, STLOU, UMSYS, UWIDE, or UOEXT).  
**Pay Group:** Employee grouping based on pay frequency (i.e., biweekly or monthly).  
**Department:** Employee's home department.  
**Job Title:** Title assigned to the primary job of the employee.  
**Pay Rate:** Gross pay for the pay frequency.
Step | Action
--- | ---
4. | **Tax Data Field Descriptions**

**Fed Marital Status:** Federal tax filing status.

**Fed Allowances:** Number of allowances claimed on federal W-4.

**Fed Addl Amount:** Additional amount withheld on federal W-4.

**State Marital Status:** State tax filing status.

**State Allowances:** Number of allowances claimed on state W-4.

**State Addl Amount:** Additional amount withheld on state W-4.

**Note:** For married employees that select to have their withholding at the single rate on their Federal W-4, Single will display instead of Married in the status field.
### Step 5: Paycheck Summary Descriptions

**Gross Earnings**: Current and Year-To-Date (YTD) amounts for the current paycheck displayed. **Note**: When viewing prior paychecks, only the current amounts display.

**Fed Taxable Gross**: Amount of taxable income for the pay period and YTD.

**Total Taxes**: Amount of taxes deducted for the pay period and YTD.

**Total Deductions**: The total amount of before and after tax deductions for the current pay period and YTD.

**Net Pay**: Amount paid to the employee for the current pay period and YTD.
Step | Action
--- | ---
6. | The **Earnings**, **Taxes**, **Before-Tax Deductions**, **After Tax Deductions**, **Employer Paid Benefits** grids all contain descriptions of earnings and deductions for the current pay period as well as the YTD amount. Corresponding amounts display for each earning or deduction.
7. **Net Pay Distribution Field Descriptions**

   **Payment Type:** Method in which the employee is paid.
   **Paycheck Number:** Number assigned to each advice or check.
   **Account Type:** Determined by direct deposit information (i.e., checking or savings).
   **Account Number:** Bank account where employee's net pay is deposited (as submitted through the paper form or Self Service). Please refer to the Direct Deposit section of this training information for more details.
   **Amount:** Equal to the net pay, this is the amount deposited in the account.

8. To select a different paycheck to view, scroll back to the top of the page.
Step | Action
--- | ---
9. | Click the View a Different Paycheck link.

View a Different Paycheck
Step | Action
--- | ---
10. | Click an entry in the Check Date column.

For this training example, select the 2013-12-24 Check Date.

[2013-12-24]
Step | Action
--- | ---
11. | The selected paycheck will display.  
**Note:** Checks written outside the regular payroll cycle, as well as any corrections run through the system (i.e., reversal or manual checks), are not available for viewing in myHR.
Print Pay Advice

Step | Action
--- | ---
12. | Click the **Print my Pay Advice** link.

**Important!** Pop-up blockers should be turned off in order to print a pay advice.
13. The pay advice will display.

**Note:** Viewing a paycheck requires the most recent version of Java. If you receive an error message, use the following URL to verify your Java version and, if necessary, download a new version.


14. Use the Acrobat Reader tool bar to save a copy to your computer or print a copy.

**Note:** For security reasons, if you are on a public computer, please do not save your pay advice to a local drive.
Step | Action
--- | ---
15. | Click the [Go Back to MyHR](#) link (upper left hand corner of the screen) to exit the printable pay advice. **Go Back to MyHR**

16. | **End of Procedure.**
Direct Deposit

Procedure

The Direct Deposit page is used by employees to view and edit direct deposit information.

### Navigation: Self Service > Payroll and Compensation > Direct Deposit

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>This is the summary page for employee Direct Deposit information. To view account details, click an entry in the <strong>Account Type</strong> column (i.e., Checking). For this training example, click <strong>Checking</strong>.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
2. | The Direct Deposit Detail page will display.

Click the **Return to Direct Deposit** link to return to the Direct Deposit page.
Step | Action
--- | ---
3. | To make changes to the existing direct deposit information, click the **Edit** button. At this time, this feature is unavailable. Contact your campus HR/Payroll office to edit your direct deposit information.

4. | **End of Procedure.**
### View Your W2 Form

**Procedure**

**Navigation: Self Service > Payroll and Compensation > View Your W2 Form**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>For security purposes, you must verify your Social Security Number. Click in the <strong>Enter your SSN here, do not include any dashes (XXXXXXXXX)</strong> field.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter the desired information into the <strong>Enter your SSN here, do not include any dashes (XXXXXXXXX)</strong> field. For this training example, enter <strong>123456789</strong>.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the <strong>Submit</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
4. | The most current tax form(s) will display. To view different years, select the View a Different Tax Year link.
| Click the Year End Form link.

[View End Form]
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.</td>
<td>The selected form will display in a separate window. To print the form, click the print button. To return to myHR, close the open tab.</td>
</tr>
</tbody>
</table>
6. Click the **Filing Instructions** link to view and/or print a copy of the form tax filing instructions.

7. **End of Procedure.**
W-2/W-2c Consent

Procedure

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>The W-2/W-2c Consent Form page will display. &lt;br&gt;To receive your W-2 electronically, read the terms and agreements and click the <strong>Check here to indicate your consent to receive electronic W-2 and W-2c forms</strong> option.</td>
</tr>
<tr>
<td>2.</td>
<td>Click the <strong>Submit</strong> button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>3.</td>
<td>Click in the <strong>Password</strong> field.</td>
</tr>
</tbody>
</table>
| 4. | Because you are requesting a change, you will be asked to re-enter your password as a security measure. Enter the desired information into the **Password** field.  
   For this training example, enter "**TRAINING**". |
<p>| 5. | Click the <strong>Continue</strong> button. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.</td>
<td>A confirmation message will display, click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>

Submit Confirmation

- The Submit was successful.

**OK**
### Step 7

You may remove your consent at any time. To remove your consent, select the check box again and click the Submit button.

**Note:** In order to be in effect for the upcoming tax year, providing or withdrawing your consent must occur prior to midnight on December 31.

### Step 8

**End of Procedure.**
W-2 or 1099-R Reissue Request

Procedure

The W-2 or 1099-R Reissue Request page is used by employees to request another copy of their W-2 or 1099-R for the most recent tax year.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This is the <strong>W-2 or 1099-R Reissue Request Information</strong> page. Refer to the campus-specific contact information on this page for W-2 and 1099-R reissue requests.</td>
</tr>
<tr>
<td>2.</td>
<td><strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

THIS CONCLUDES THE TRAINING ON MYHR PAYROLL AND COMPENSATION.