

Payroll

INTRODUCTION AND OVERVIEW

February 2009

Agenda

- Payroll Overview
- Your Payroll Pages
 - Additional Pay
 - General Deductions
 - Direct Deposit
 - Optional Payroll Processing Information
 - Understanding the Tax Treaty Update
- Understanding HR Direct: Online Tutorials & More
- Questions

Payroll Overview

Key Changes

- Eliminated requirement for combo code updates in Additional Pay.
- Enhanced the 2% Retirement Deduction Calculation Process.
- Converted Employee 403 savings and FSA Enrollment Deductions to Benefit Savings and FSA Plans.
- Streamlined the paycheck process.
- Updated the Tax Treaty process.

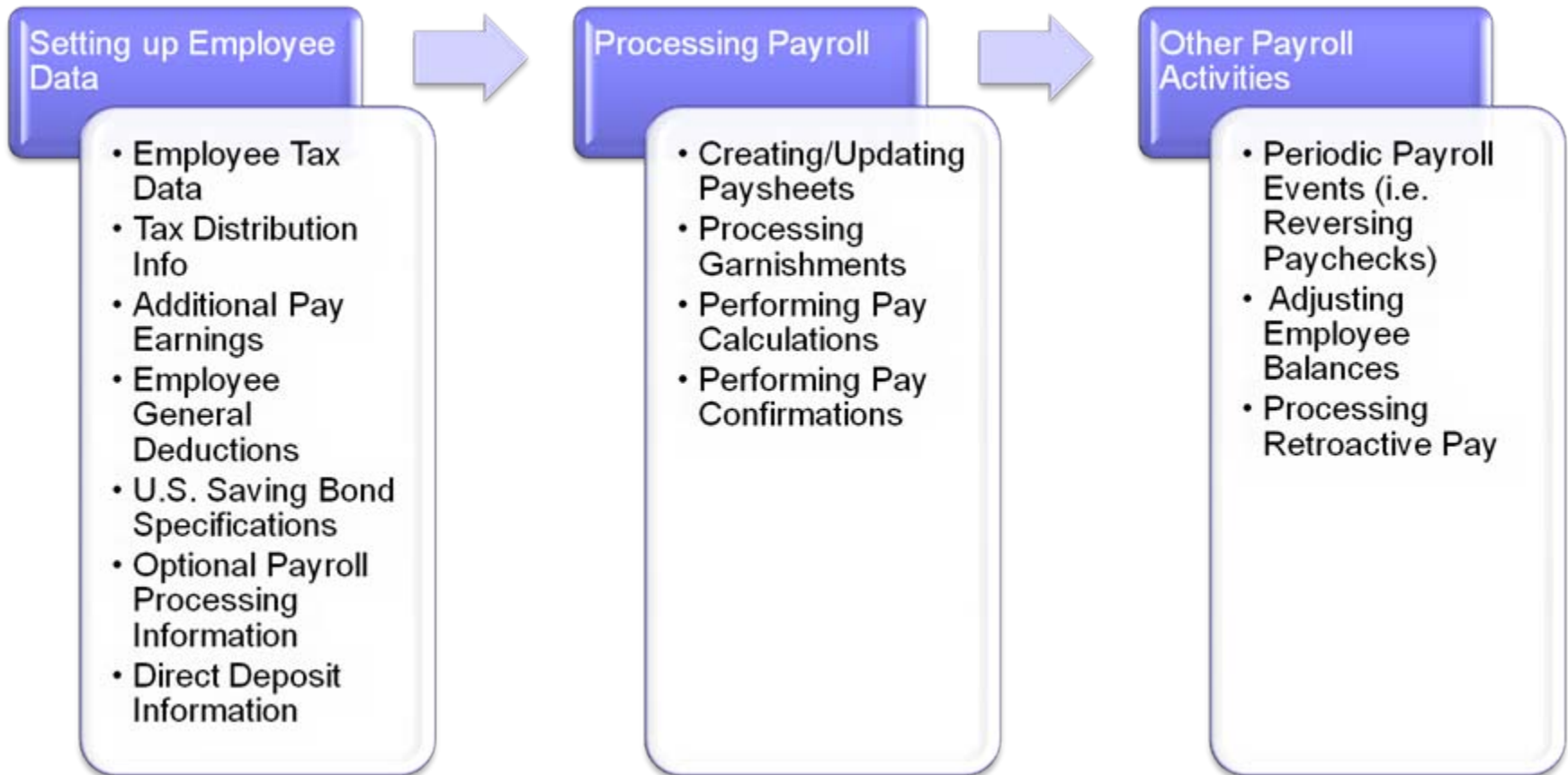
Payroll Overview

Key Changes

- The following processes were moved to the new Commitment Accounting module:
 - Funding Source Information now recorded in Department Budget Table.
 - Retroactive Distribution transactions are now processed in one of two ways:
 - Direct Retro – Manual process where the Commitment Accounting user moves payroll expense amounts from one funding source to another.
 - Budget Retro – Automatically triggered by retroactive funding change information in the Department Budget Table.

Your Payroll Pages

Maintaining and Processing Your Payroll Data



Your Payroll Pages

Additional Pay

Additional Pay Find | View All

Freddie Mac EMP ID: 10107007 Empl Rcd #: 0

'Earnings Code: Add Comp Faculty

Effective Date Find | View All

Effective Date: 31

Payment Details Find | View All

'Addl Seq #:	<input type="text"/>	End Date:	<input type="text"/> 31
Rate Code:	<input type="text"/> 31	Reason:	Not Specif ▼
Earnings:	<input type="text"/>	Hours:	<input type="text"/>
Goal Amount:	<input type="text"/>	Hourly Rate:	<input type="text"/>
Goal Balance:	<input type="text"/>		

Sep Chk #: Disable Direct Deposit Prorate Additional Pay OK to Pay

Applies to Pay Periods: First Second Third Fourth Fifth

▶ Job Information

▶ Tax Information

Additional Pay

Please keep in mind that all base-level funding source information is now kept in the Commitment Accounting Department Fund Table. Only add a combo code in add'l pay, if it is different from the employee's regular funding.

Your Payroll Pages

General Deductions

■ 2% Deduction Code

- Used by the University for employees who make an annualized gross over \$30,000.
- Remains a general payroll deduction but will be broken down into four general deductions: RTLIN2 (Lincoln), RTTIA2 (TIAA), RTAIG2 (AIG), RTSER2 (State Retirement).

■ Employee Enrollment Deductions

- Converted Employee 403 savings, and FSA Enrollment Deductions to Benefit Savings and FSA Plans.
- You will be provided with a document that maps old general deductions to new benefits plans prior to Go Live.

Your Payroll Pages

General Deductions

General Deduction Data
 The General Deduction Data is now recorded at the Employee ID level (see Person ID), instead of the Employee Record level.

General Deduction Data

Freddie Mac Person ID: 10107007

Company: UMS Commonwealth of Massachusetts

General Deduction Find | View All

'Deduction Code:

Deduction Details Find | View All

'Effective Date:	<input type="text" value="09/29/2008"/>	Take on all Paygroups	<input checked="" type="checkbox"/>
'Deduction Calculation Routine:	Default to Deduction Table		
Deduction End Date:	<input type="text"/>	Deduction Rate or %:	<input type="text"/>
Loan Interest %:	<input type="text"/>	Flat/Addl Amount:	<input type="text"/>
Goal Amount:	<input type="text"/>	Current Goal Balance:	<input type="text"/>
		Ded. stopped by Self Serv User	<input type="checkbox"/>

This data was last updated by Data last updated on

Your Payroll Pages

Direct Deposit

Direct Deposit

Freddie Mac

Person ID: 10107007

Deposit Information
Find | View All First ◀ 1 of 1 ▶ Last

*Effective Date: *Status: Suppress DDP Ac

Distribution Information
Find | View All First ◀ 1 ▶

*Account Type:

*Deposit Type:

% Net Pay/\$ Amount:

Bank ID:

Account#:

*Priority:

Prenotification Required

Prenote Date:

Prenotification Status: Not Submtd

This data was last updated by Data last updated on

Direct Deposit
 Direct Deposit is now recorded at the Employee ID level (see Person ID), instead of the Employee Record level.

Save	Return to Search	Notify	Refresh	Update/Display	Include History	Correct History
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Your Payroll Pages

Optional Payroll Processing Information

■ Payroll Options 1

- Data is now stored by EmplID, not by Employee Record.
- Store employee's mail drop information here.
- Verify you have the correct mail drop for an employee who has multiple jobs.

Payroll Options 1 | **Payroll Options 2**

Freddie Mac ID: 10107007 Company: UMS

Paycheck Delivery Option Company Distribution Postal Service

Distribution Mail Option

Home Address Mailing Address Check Address [Update Check Address](#)

Employee's Current Address

Country:	USA	United States
Address:	24 Plumtree Lane Sunderland, MA 01005	

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)

[Payroll Options 1](#) | [Payroll Options 2](#)

Your Payroll Pages

Optional Payroll Processing Information

- Understanding the Impact: One Paycheck for Multiple Job Records
 - Payroll data will be maintained at the Employee ID level.
 - Employees with multiple jobs will now receive only one paycheck or advice each pay period.
 - When pay calculations are processed, payroll will look at all records and calculate deductions based on the total sum of payment.
 - Taxes may increase for employees with multiple jobs due to this change.

Your Payroll Pages

Optional Payroll Processing Information

■ Payroll Options 2

- Identify the Primary Pay Group at the Employee ID level.
- The default paycheck location is the employee's home address.

Payroll Options 1
Payroll Options 2

Freddie Mac
ID: 10107007
Company: UMS

Primary PayGroup:

Paycheck Location Option

- Home Department Location
- Job Location
- Other Location SetID: Location CD:

Mail Drop ID:
Paycheck Name:

Deductions Taken

'Deductions Taken': Deduction Subset ID:

Save
Return to Search
Notify
Refresh

Update/Display
Include History

[Payroll Options 1](#) | [Payroll Options 2](#)

Your Payroll Pages

Understanding the Tax Treaty Update

- In the past, when there was not a valid treaty with the NRA's home Country, you would set up a dummy treaty.
- Now you have the “No Tax Treaty” (QKNA and QKNA2) value for those Countries that do not have a valid treaty.
- When using the QKNA or QKNA2, the country entered in the tax data pages will always be \$S.

Understanding HR Direct: Online Tutorials & More

- You will have access to the following training tools:
 - Training Courses (Classroom)
 - Online Tutorials
 - Job Aids
 - Direct help within the HR Direct Application, click the Help link.

Demo of Online Tutorial

- For more information, contact your local HR group at XXX-XXX-XXXX.

Questions

