PAYROLL AND TAX SELF-SERVICE INFORMATION IN PEOPLESOFT

Note: This document is designed to be used online and has a number of embedded links to processes and additional information. We discourage the printing of manuals as they are updated frequently and consume paper resources when printed.

If you have questions about information in this user guide, please e-mail Payroll Services.

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Overview

In this document, you will find directions on setting up your direct deposit, process for notifying Payroll if you are working out of state, updating your W4 elections, accessing your W2 electronically, setting up voluntary deductions and information regarding your first paycheck.

Add or Edit Direct Deposit

General Information:

- When setting up a new direct deposit request or when changing banks, the direct deposit will take two payrolls to process. A paper check will be issued in the first payroll in which the change was made effective. The next check may be directly deposited, depending on the date that direct deposit information is added it maybe two payroll cycles before the pay is transmitted via DD.
- A confirmation e-mail will be sent at the end of the procedure.
- As a US entity, the University of Vermont is obligated to comply with the requirements of the United States Department of Treasury Office of Foreign Assets Control (OFAC), which oversees payments sent outside the territorial jurisdiction of the United States. This includes automated clearing house payments, such as direct deposits. If the direct
deposit is into a foreign bank or if there are instructions with the recipient bank to immediately wire the full amount of the direct deposit to a foreign financial institution, we request that a Direct Deposit Compliance form be completed that provides further detail about the foreign transaction. Full information is on the UVM Division of Finance website.

Step-by-Step Instructions: Add Direct Deposit Information

1. Log in to PeopleSoft through the Human Resources Login www.uvm.edu/~erp/portal
2. Navigation: UVM Employee > Select Payroll and Tax from tile selection

   Payroll and Tax

   Last Pay Date 05/29/2020

3. Select Direct Deposit from menu selection on the left.

   Direct Deposit

4. If direct deposit exists, it will display on the screen.
5. Click the plus sign (Add Account) button.

   Direct Deposit

   Accounts

6. The Add Direct Deposit page is displayed. Fill in the appropriate information. Fields marked by an asterisk (*) are required.
- **Account Type:** Select **Checking** or **Savings**.
- **Deposit Type:** Specify a flat amount, the balance of the paycheck, or a percent.

**Note:**
- If only one account is specified, choose **Balance** in this field.
- If multiple accounts are used, one of the accounts should receive the **Balance** of the paycheck amount. This is particularly important when amount is chosen for any account.
- When using direct deposit, the total amount of the check must be distributed electronically. A paper check cannot be issued for a partial distribution of the check.

- **Amount/Percent:** To be used when amount or percent is chosen for the deposit type.
- **Routing Number:** This is the nine-digit number obtained from the bottom of a personal check (see below for an example).
- **Deposit Order:** When depositing to more than one account, use **Deposit Order** to indicate which distribution is made first, which is second, etc. (The deposit marked **Balance** should be distributed last).
• **Example:** Depositing 6% into a savings account and the balance in a checking account:
The savings account would have a deposit order of 1, and the checking account a
deposit order of 2.

7. Click green **Save** button.

**Step-by-Step Instructions: Edit Direct Deposit Information**

1. Log into PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).

2. Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection

3. Select **Direct Deposit** from menu selection on the left.

4. If a direct deposit exists, it will display on the screen.

5. Click the account you would like to **Edit** and the information will appear.
6. Make the necessary changes on this page. Select **Remove** if account should be removed altogether.

7. Click the green **Save** button.

8. An e-mail will be generated.

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**View, Add, Edit and End a Voluntary Deduction**

**General Information:**

- Use the **Voluntary Deductions** page to add, change, or stop voluntary deductions.
- This page allows updates to the following voluntary deductions: CATCARD, Staff Emergency Loan Donation, and UVM Annual Giving.
- Notification of the changes made on this screen will be sent to a UVM e-mail address.
Step-by-Step Instructions: View Voluntary Deductions

1. Log into PeopleSoft through the Human Resources Login (www.uvm.edu/~erp/portal/).


3. Select Voluntary Deductions from menu selection on left.

4. Click Voluntary Deductions icon and the Voluntary Deductions Summary will appear. Click Add Deduction button.

5. The Voluntary Deduction Detail page will appear. Click the magnifying glass icon to select from a list of available deductions.
6. Once the type of deduction is selected, **Voluntary Detail** page will reappear. Complete all required fields and click **Submit**.

   ![Voluntary Deductions](image)

   * Required Field

7. Click **OK** on the submission confirmation page.

**Step-by-Step Instructions: Edit an Existing Deduction**

1. Log into PeopleSoft through the [Human Resources Login](http://www.uvm.edu/~erp/portal/).

2. Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.

   ![Payroll and Tax](image)

   **Last Pay Date** 05/29/2020

3. Select **Voluntary Deductions** from menu selection on left.

   ![Voluntary Deductions](image)

4. Click the **Edit** button next to the deduction to be changed.
5. To change the amount of the deduction, enter the new amount or percent into the **Enter Amount/Percent to be deducted** field.

6. Click the **Submit** button.

7. Click the **OK** button on the submission confirmation page.

**Step-by-Step Instructions: End an Existing Deduction**

1. Log into PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).

2. Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.

3. Select **Voluntary Deductions** from menu selection on left.
4. Click the Edit button next to the deduction to be changed.

5. To end a voluntary deduction, enter an end date in the Deduction Stop Date field to stop deduction.

6. Click the Submit button.

7. Click the OK button on the submission confirmation page.

**View and Change W-4 Tax Information**

**General Information:**

Both Federal W-4 and State W-4 withholdings can be changed through PeopleSoft. Federal W-4 settings will default to Single and State W-4 settings will default to Single with 0 allowances, unless an employee submits either or both forms in PeopleSoft. Once these forms are submitted in PeopleSoft, they will automatically populate in the system and the next unconfirmed payroll will pick up the changes.

**Step-by-Step Instructions: View W-4 Tax Information**

1. Log in to PeopleSoft through the Human Resources Login (www.uvm.edu/~erp/portal/).

3. Select **Tax withholding** from menu selection on the left.

4. Tax Withholdings Summary will appear.

### Tax Withholding

<table>
<thead>
<tr>
<th>Company</th>
<th>The University of Vermont</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Active</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Form Type</th>
<th>Jurisdiction</th>
<th>Withholding Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>Federal</td>
<td>Tax Status: Single</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Withholding</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Allowances: Other</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Additional</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Amount: 0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Percentage:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>State</th>
<th>Vermont</th>
<th>Tax Status: Single</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Withholding</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Allowances: Other</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Additional</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Amount: 0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Percentage:</td>
</tr>
</tbody>
</table>

**Step-by-Step Instructions: Change Federal W-4 Tax Information**

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).

2. Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.
3. Select **Tax withholding** from menu selection on the left.

4. Tax Withholding Summary will appear.

5. Select **Federal** Form.

<table>
<thead>
<tr>
<th>Form Type</th>
<th>Jurisdiction</th>
<th>Withholding Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal</td>
<td>Federal</td>
<td>Tax Status: Married</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other Income: 0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Extra Withholding:</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>State</th>
<th>Vermont</th>
<th>Tax Status: Single</th>
<th>Withholding Allowances: 0</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Additional Amount:</td>
<td>Additional Allowances:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Additional Percentage</td>
<td>Other</td>
</tr>
</tbody>
</table>

6. Select **Federal Withholding Allowance Certificate** from Updateable Forms list.
7. You will receive a **Warning** notifying you that a tax form will download to your computer. 
Select **OK**.

8. A fillable Federal W-4 PDF form will download to your computer. Complete the form and select green **Submit** button at the bottom of the form when it is complete.

9. Click the **OK** button on the submission confirmation page. Your new **Federal W-4** elections will be picked up in the next unconfirmed payroll that runs.

**Step-by-Step Instructions: Change State W-4 Tax Information**

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).

2. Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.

3. Select **Tax withholding** from menu selection on the left.

4. Tax Withholding Summary will appear.
5. Select **State** form.

6. Select **Vermont Withholding Allowance Certificate** from Updateable Forms list.
   - **Note:** PeopleSoft will default to Vermont as the State W-4 set up. *If you are not working in Vermont, Payroll & Tax Services must be notified, and completing an Electronic Out of State Questionnaire will be required* (directions below).
   - **Note:** New York State, Maryland, and Indiana State W-4 forms are not available online and must be completed using a paper form and secure file transferred to Payroll Services.

7. You will receive a **Warning** notifying you that a tax form will download to your computer.
   Select **OK**.

8. A fillable State W-4 PDF form will download to your computer. Complete the form and select green **Submit** button at the bottom of the form when it is complete.
9. Click the OK button on the submission confirmation page. Your new State W-4 elections will be picked up in the next unconfirmed payroll that runs.

Request a New W-2

General Information:

These screens can be used to request a copy of an existing W-2 Form.

Step-by-Step Instructions: Requesting a New W-2 Form

1. Log in to PeopleSoft through the Human Resources Login (www.uvm.edu/~erp/portal/).


4. Select W-2 Reissue Request from drop down menu.
5. Complete the **W-2 Request for year** field and select where the W-2 should be delivered.

6. Click the **Submit** button.

7. Click the **OK** button on the submission confirmation page.

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### Printing a Pay Stub

**General Information:**

Unnecessary printing of pay stubs should be avoided. When a copy of a pay stub is necessary, use the procedures listed in this document.

**WARNING:** The printed pay stub displays the Direct Deposit account information. DO NOT leave a printed copy unattended.

Printing a pay stub from PeopleSoft is easy and quick. Simply click the **Printable Version** button found below the Check Date at the top of the page. A PDF of the paycheck being viewed will appear. Follow the computers printing directions to print a copy of the PDF.

**Step-by-Step Instructions: Printing a Pay Stub**

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).

2. Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.
3. Select **Paychecks** from menu selection on the left.

4. All existing paychecks will display. Select the paycheck that needs to be printed and a PDF of the paycheck being viewed will appear. Follow the computers printing directions to print a copy of the PDF.

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**Out of State Form**

**General Information:**

The PeopleSoft Human Resources system (HCM) now features an Electronic Out of State Form for employees living and/or working out of the State of Vermont. All employees living and/or working out of the state of Vermont must notify Payroll Services ([Payroll@uvm.edu](mailto:Payroll@uvm.edu)) of their work location(s) for the purpose of compliance with State Payroll Income Tax Reporting, Unemployment Insurance, and Worker’s Compensation Insurance. Payroll & Tax Services is asking for this information when an employee’s home address or work location is listed in PeopleSoft as outside the State of Vermont. Additionally, if an existing employee changes their work location, Payroll Services must be notified and a new form must be completed. Both the employee and the employee’s supervisor(s) must complete the electronic form.

**Step-by-Step Instructions: Completing Employee Portion of e-OOS Form**

1. Log in to PeopleSoft through the **Human Resources Login** ([www.uvm.edu/~erp/portal/](http://www.uvm.edu/~erp/portal/)).

   **NOTE:** Duo Multi-Factor Authentication tool will be required when logging in to PeopleSoft. Duo Security is a tool used by the University of Vermont to protect sensitive information. Upon logging into a Duo-protected site, you will be required to perform an additional authentication step via Push notification to a smart phone or tablet, SMS text, or a phone call. To use Duo you must [enroll a device](http://example.com) to act as your second authentication factor.

2. Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.
3. Select **Out of State Form** from menu selection on the left.

4. Click the **Begin New Form** button.

   The purpose of this data collection is to capture information needed to comply with State Payroll Income Tax Reporting, Unemployment Insurance, and Worker’s Compensation Insurance.

   Payroll & Tax Services is asking for this information because in PeopleSoft, your home address or work location is outside the State of Vermont.

   **Form History**
   
<table>
<thead>
<tr>
<th>Form ID</th>
<th>Form Date</th>
<th>Living/Working Situation</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>View</td>
</tr>
</tbody>
</table>

   **Begin New Form**

5. Review home address that is currently on record. If the home address is incorrect, select **Edit Home or Mailing Address** and update. If the home address is correct, select **OK/Continue**.

6. Select your current living/working situation. Descriptions for each choice are listed next to
each selection. Click **Continue** once a selection has been made.

**NOTE**: Payroll & Tax Services is looking for information about an employee’s **current** living and working situation. If there are future plans to change the current living/working locations, Payroll must be notified of the changes when they occur.

### Employee Living/Working Outside Vermont

<table>
<thead>
<tr>
<th>Living/Working Situation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out-of-State</td>
</tr>
<tr>
<td>Split Time</td>
</tr>
<tr>
<td>Commute to VT</td>
</tr>
<tr>
<td>Commute from VT</td>
</tr>
<tr>
<td>In-State</td>
</tr>
<tr>
<td>Live Locally</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

Form #: NEW  
Empl ID:  

7. Depending upon which situation has been selected, the form will offer you blank fields to provide the physical location where your work is being done. All of your active jobs will be listed. Enter **% Time**, **Street Address**, **City**, **State**, **County**, **Zip Code** and **Country** where work is being completed for each active job. Any comments should be made in the **Comments** section.

**NOTE**: If you select **Split Time**, utilize the +/- buttons to add multiple addresses. Please ensure that the **% Time** totals 100% for all work locations provided.
8. When work location(s) have been provided, click **Submit** button. The form will now be routed to Payroll Services for review and approval. Once it has been approved, the employee’s supervisor(s) will be inserted so they are able to review and complete the supervisor portion.

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### Frequently Asked Questions

**Why am I not receiving a paper pay stub?**

For employees with direct deposit, paper pay stubs are not generated.

**Can I view the UVM contribution to my 403b in PeopleSoft?**

It is found in the section of the pay stub entitled “Before Tax Deductions” and “After Tax Deductions.

**What is the $1.96 Life Credit in the earnings box on my pay stub?**

This is UVM’s contribution to the cost of the basic life insurance policy.

**Can I print my pay stub using the Google Chrome web browser?**

PeopleSoft is designed to work best with either Microsoft Internet Explorer or Mozilla Firefox, regardless if using a PC or a Mac. The use of other browsers such as Chrome, Safari, Opera or Netscape is neither encouraged nor supported. However, printing successfully with alternate browsers may be possible. Click one of the following links to download the most recent version of [Microsoft Internet Explorer](#) or [Mozilla Firefox](#).
Can I print my pay stub using the Apple Safari web browser?

PeopleSoft is designed to work best with either Microsoft Internet Explorer or Mozilla Firefox, regardless if using a PC or a Mac. The use of other browsers such as Chrome, Safari, Opera or Netscape is neither encouraged nor supported. However, printing successfully with alternate browsers may be possible. Click one of the following links to download the most recent version of Microsoft Internet Explorer or Mozilla Firefox.

Can I print my pay stub using the Opera web browser?

PeopleSoft is designed to work best with either Microsoft Internet Explorer or Mozilla Firefox, regardless if using a PC or a Mac. The use of other browsers such as Chrome, Safari, Opera or Netscape is neither encouraged nor supported. However, printing successfully with alternate browsers may be possible. Click one of the following links to download the most recent version of Microsoft Internet Explorer or Mozilla Firefox.

Can I print my pay stub using the Netscape web browser?

Development and support for Netscape was suspended on March 1, 2008. If using any version of Netscape, the browser performance and security are not optimized. Click one of the following links to download the most recent version of Microsoft Internet Explorer or Mozilla Firefox.

Why do employees need to notify Payroll Services of their home and work location?

All employees living and/or working out of the state of Vermont must notify Payroll Services (Payroll@uvm.edu) of their work location(s) for the purpose of compliance with State Payroll Income Tax Reporting, Unemployment Insurance, and Worker’s Compensation Insurance.

What if I am only working out of the State of Vermont for a short time?

Payroll Services must be notified of any out of state work locations regardless of duration of the assignment. Sending an email to Payroll@uvm.edu is the most efficient way to notify without completing the electronic e-OOS Form if it is potentially not needed.

Resources

Helpful Links

- Payroll Deadline Schedule

Relevant UVM Departments

- Payroll Services
- Human Resource Services
Related Policies

- Staff Handbook
- University Policies and Operating Procedures