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 may be 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
3. Select Direct Deposit from menu selection on the left.
4. If direct deposit exists, it will display on the screen.
5. Click the plus sign (Add Account) button.
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 chose 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.
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/](http://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**.

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 ([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 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/).


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.
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/).


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>
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<tbody>
<tr>
<td>Federal</td>
<td>Federal</td>
<td>Tax Status: Married</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dependent Amount: 0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Other Income: 0.00</td>
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<tr>
<td></td>
<td></td>
<td>Extra Withholding:</td>
</tr>
<tr>
<td>State</td>
<td>Vermont</td>
<td>Tax Status: Single</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Withholding Allowances: 0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Additional Amount: 0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Additional Percentages</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/).

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

4. Tax Withholding Summary will appear.

5. Select State form.

<table>
<thead>
<tr>
<th>Form Type</th>
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<th>Withholding Details</th>
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<tbody>
<tr>
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<td>Federal</td>
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<tr>
<td></td>
<td></td>
<td>Tax Status: Married</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dependent Amount: 0.00</td>
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<tr>
<td></td>
<td></td>
<td>Other Income: 0.00</td>
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<td>Deductions: 0.00</td>
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<td>Extra Withholding: 0.00</td>
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<td></td>
<td></td>
<td>Other</td>
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<tr>
<td>State</td>
<td>Vermont</td>
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<tr>
<td></td>
<td></td>
<td>Tax Status: Single</td>
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<td></td>
<td></td>
<td>Withholding Allowances: 0</td>
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<tr>
<td></td>
<td></td>
<td>Additional Amount: 0.00</td>
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<tr>
<td></td>
<td></td>
<td>Additional Allowances: 0</td>
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<tr>
<td></td>
<td></td>
<td>Other</td>
</tr>
</tbody>
</table>

Last Pay Date: 05/29/2020
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.

### Troubleshooting Electronic W-4 Form:

**General Information:**

The fillable PDF form requires Adobe Acrobat DC or Adobe Acrobat Pro to work correctly. Once the downloaded form is open in an acceptable form of Adobe, you may notice that there is no green “Submit” button at the bottom of the first page of the file. If that is the case, please use the following steps.
Step-by-Step Instructions: Downloading W-4 Fillable Form in Mozilla Firefox

1. After opening W-4 Form in PeopleSoft, the fillable form will download to a webpage in your browser, and automatically save to your File Explorer Downloads folder.

2. Navigate to File Explorer Downloads folder and open the document named PYTWF_FEDE (if you have downloaded the form multiple times, the file name will include a number, this does not affect the form in any way).

3. Right-click the file, select Open With, then select a supported version of Adobe Acrobat.
4. The file will open in Adobe Acrobat and will be fillable and should include the green Submit button. If there is no green submit button, see Enabling the Green “Submit” Button in W-4 PDF File below.

**Step-by-Step Instructions: Downloading W-4 Fillable Form in Google Chrome**

1. By default, Google Chrome attempts to open all PDF files in the browser window. To update this setting before attempting to download the file, select the Menu button in Chrome in the upper right-hand corner. Then, in the dropdown select Settings.
2. Select **Privacy and Security** from the left-hand side menu. The options in the middle of the page should change, and you will then select **Site Settings**.

3. Scroll to the bottom of the **Site Settings** options and then select **Additional Content Settings** dropdown.

4. The dropdown will provide more options once it is selected. Select **PDF Documents** and this will open a new page. On the new page, select **Download PDFs** option. Then exit the **Settings** page by closing the tab.
5. The file can now be downloaded from PeopleSoft and opened in Adobe Acrobat DC or Adobe Acrobat Pro. If the PDF does not display a green **Submit** button, see **Enabling the Green “Submit” Button in W-4 PDF File** below.

**Step-by-Step Instructions: Downloading W-4 Fillable Form in Microsoft Edge**

1. After opening W-4 Form in PeopleSoft, the fillable form will automatically save to your File Explorer Downloads folder.

2. Navigate to File Explorer Downloads folder and open the document named PYTWF_FEDE (if you have downloaded the form multiple times, the file name will include a number, this does not affect the form in any way).
3. Right-click the file, select **Open With**, then select a supported version of Adobe Acrobat.

4. The file will open in Adobe Acrobat and will be fillable and should include the green **Submit** button. If there is no green submit button, see **Enabling the Green “Submit” Button in W-4 PDF File** below.

**Step-by-Step Instructions: Enabling the Green Submit Button in W-4 PDF File**

1. At the top of the file, there should be a yellow ribbon security message that states “JavaScript is currently disabled and this document uses it for some features. Enabling JavaScript can lead to potential security issues.”

2. In the yellow security ribbon, select the **Options** button and a dropdown menu will appear.

3. Select **Enable JavaScript for this document always** and the green **Submit** button will appear.
Consent to an Electronic W-2

General Information:

Consenting to an electronic W-2 form allows you the ability to print a PDF version of your W-2. It is a secure way to receive a W-2 as you will not receive a paper form in the mail.

Step-by-Step Instructions: Consent to an Electronic W-2 Form

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


5. Read the disclaimer and check the box next to *I consent to receive W-2 or W-2c forms electronically*. Select *Submit*.

   **W-2/W-2c Consent Form**

   You currently receive W-2 or W-2c paper forms by mail.

   You must complete this consent form to receive electronic W-2 or W-2c forms. If you do not submit a consent form or a withdrawal of consent form, Payroll Services will process your year-end forms based on the information currently on file. After you submit your consent form, it will remain valid until you submit a withdrawal of consent form. The exception is one year after your employment has terminated or your electronic access to forms is discontinued.

   If you have any questions, please contact Payroll Services 656-6600.

   ![W-2/W-2c Consent Form]

6. You will be prompted to input your netID password for identity verification purposes. Enter your password and select *Continue*.

   **Verify Identity**

   To protect your privacy, verify your identity by typing your password. If you are not this user, click *Cancel*.

   ![Verify Identity]

7. You will receive confirmation that you’ve elected to receive electronic W-2/W-2c Forms.

   **W-2/W-2c Consent Form**

   You will receive W-2 or W-2c forms electronically.

   You have consented to receive electronic W-2 and W-2c forms.
   If you have any questions, please contact Payroll Services at 656-6600.
View and Request a New W-2

General Information:

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

Step-by-Step Instructions: View W-2 Form

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


3. Select **W-2/W-2C** from menu selection on the left.

4. Select **View W-2/W-2c Forms** from drop down menu.

5. Select the Tax Year from the drop down menu. The most recent Tax Year’s W-2 will auto
6. Select View Form and a PDF version will open in a browser tab.

**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 computer's printing directions to print a copy of the PDF.

## 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.

For detailed instructions for completing the Electronic Out of State Questionnaire Form, please see the [Electronic Out of State Form User Guide](#).
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.

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**Resources**

**Helpful Links**

- Payroll Deadline Schedule

**Relevant UVM Departments**

- Payroll Services
- Human Resource Services

**Related Policies**

- Staff Handbook
- University Policies and Operating Procedures