



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](#).

TABLE OF CONTENTS

Overview	2
Add or Edit Direct Deposit.....	2
General Information:	2
Step-by-Step Instructions: Add Direct Deposit Information	3
Step-by-Step Instructions: Edit Direct Deposit Information.....	5
View, Add, Edit and End a Voluntary Deduction	6
General Information:	6
Step-by-Step Instructions: View Voluntary Deductions	7
Step-by-Step Instructions: Edit an Existing Deduction	8
Step-by-Step Instructions: End an Existing Deduction	9
View and Change W-4 Tax Information.....	10
General Information:	10
Step-by-Step Instructions: View W-4 Tax Information	10
Step-by-Step Instructions: Change Federal W-4 Tax Information	11
Step-by-Step Instructions: Change State W-4 Tax Information.....	13
Request a New W-2	15
General Information:	15
Step-by-Step Instructions: Requesting a New W-2 Form	15
Printing a Pay Stub	16
General Information:	16
Step-by-Step Instructions: Printing a Pay Stub.....	16
Out of State Form	17
General Information:	17



Frequently Asked Questions 18

Why am I not receiving a paper pay stub? 18

Can I view the UVM contribution to my 403b in PeopleSoft? 18

What is the \$1.96 Life Credit in the earnings box on my pay stub?..... 18

Can I print my pay stub using the Google Chrome web browser? 18

Can I print my pay stub using the Apple Safari web browser? 18

Can I print my pay stub using the Opera web browser? 18

Can I print my pay stub using the Netscape web browser?..... 18

Why do employees need to notify Payroll Services of their home and work location?
..... 18

What if I am only working out of the State of Vermont for a short time?..... 19

Resources 19

Helpful Links 19

Relevant UVM Departments 19

Related Policies 19

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:

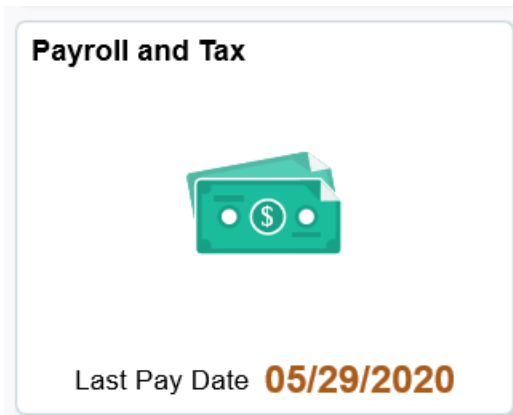
- When setting up a new direct deposit request or when changing banks, the direct deposit will take two payrolls to process. A paper check will be issued in the first payroll in which the change was made effective. The next check may be directly deposited, depending on the date that direct deposit information 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



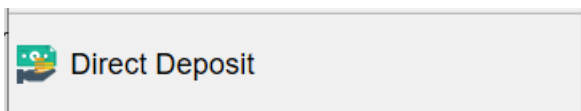
immediately wire the full amount of the direct deposit to a foreign financial institution, we request that a [Direct Deposit Compliance](#) form be completed that provides further detail about the foreign transaction. Full information is on the [UVM Division of Finance website](#).

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.

Direct Deposit

Accounts



6. The **Add Direct Deposit** page is displayed. Fill in the appropriate information. Fields marked by an asterisk (*) are required.



Direct Deposit

Add Account

Cancel Save

For Direct Depositors, at least one Deposit type must be "Balance". If you have only one direct deposit account then that account's Deposit Type should be Balance. If you have more than one account then indicate Balance in the last account's Deposit Type. Also note that your last account deposit order must be 999.

*Nickname

*Payment Method

Bank

Routing Number i

Account Number

Retype Account Number

Pay Distribution

*Account Type

*Deposit Type

Amount or Percent

By pressing SUBMIT, I certify that this direct deposit is being made to a domestic financial institution and will not be transferred in its entirety to a foreign institution as part of a back-to-back transaction.

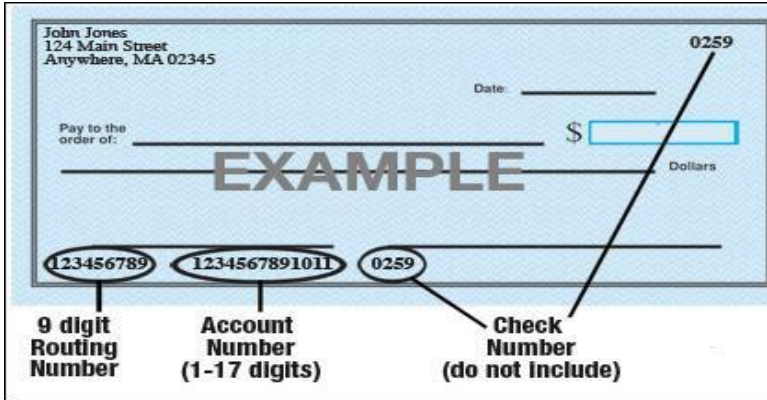
- ***Account Type:** Select **Checking** or **Savings**.
- ***Deposit Type:** Specify a flat amount, the balance of the paycheck, or a percent.

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).



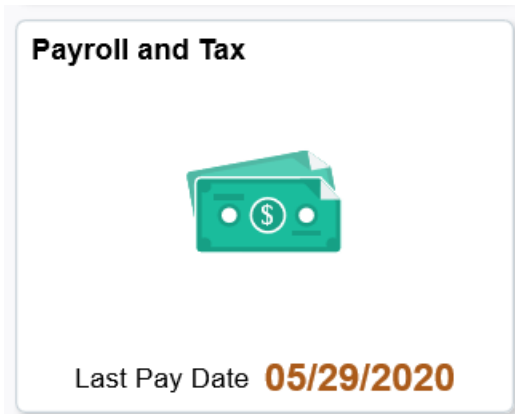
- **Example:** Depositing 6% into a savings account and the balance in a checking account: The savings account would have a deposit order of 1, and the checking account a deposit order of 2.



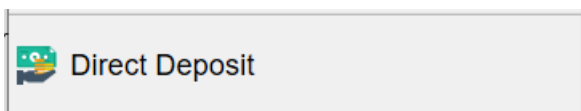
7. Click green **Save** button.

Step-by-Step Instructions: Edit Direct Deposit Information

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



Cancel **Edit Account** **Save**

For Direct Depositors, at least one Deposit type must be "Balance". If you have only one direct deposit account then that account's Deposit Type should be Balance. If you have more than one account then indicate Balance in the last account's Deposit Type. Also note that your last account deposit order must be 999.

*Nickname

*Payment Method

Bank

Routing Number ⓘ

Account Number ✎

Retype Account Number

Pay Distribution

*Account Type

*Deposit Type

Amount

Remove

By pressing SUBMIT, I certify that this direct deposit is being made to a domestic financial institution and will not

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

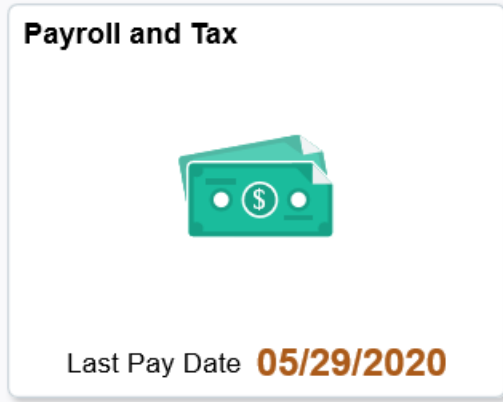
General Information:

- 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.

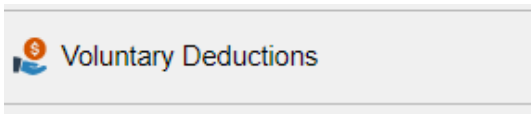


Step-by-Step Instructions: View Voluntary Deductions

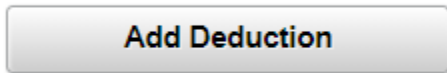
1. Log into PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal/).
2. Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.




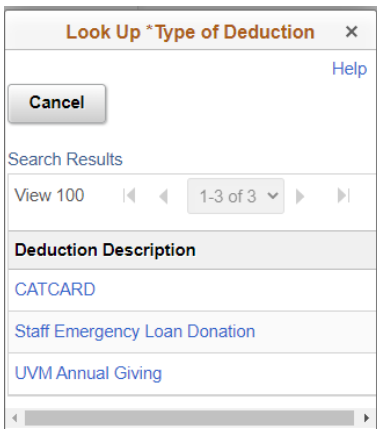
3. Select **Voluntary Deductions** from menu selection on left.



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.





- Once the type of deduction is selected, **Voluntary Detail** page will reappear. Complete all required fields and click **Submit**.

Voluntary Deductions

Add Voluntary Deduction

Sandy Smith
The University of Vermont

*Type of Deduction

*Select whether Deduction is a Flat Amount or Percent

*Enter Amount or Percent to be deducted

Take deduction until I reach this Goal Amount

*Enter Deduction Start Date (example: 12/31/2000)

Enter Deduction Stop Date (example: 12/31/2000)

Current Balance 0.00

Submit

* Required Field

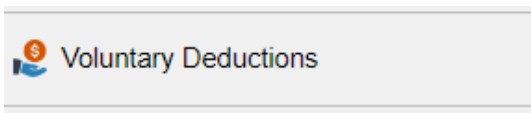
- Click **OK** on the submission confirmation page.

Step-by-Step Instructions: Edit an Existing Deduction

- Log into PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal/).
- Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.



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



- Click the **Edit** button next to the deduction to be changed.



Voluntary Deductions

Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
CATCARD	06/08/2020	06/30/2022	Currently	\$50.00		0.00	<input type="button" value="Edit"/>

- To change the amount of the deduction, enter the new amount or percent into the **Enter Amount/Percent to be deducted** field.

Voluntary Deductions

Change Voluntary Deduction

Sandy Smith
The University of Vermont

*Type of Deduction CATCARD

*Select whether Deduction is a Flat Amount or Percent

*Enter Amount or Percent to be deducted

Take deduction until I reach this Goal Amount

*Enter Deduction Start Date 06/08/2020 (example: 12/31/2000)

Enter Deduction Stop Date 06/30/2022 (example: 12/31/2000)

Current Balance 0.00

* Required Field

- Click the **Submit** button.
- Click the **OK** button on the submission confirmation page.

Step-by-Step Instructions: End an Existing Deduction

- Log into PeopleSoft through the **Human Resources Login** (www.uvm.edu/~erp/portal/).
- Navigation: **UVM Employee** > Select **Payroll and Tax** from tile selection.



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



Voluntary Deductions

- Click the **Edit** button next to the deduction to be changed.

Voluntary Deductions

Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
CATCARD	06/08/2020	06/30/2022	Currently	\$50.00		0.00	<input type="button" value="Edit"/>

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

Voluntary Deductions

Change Voluntary Deduction

Sandy Smith
The University of Vermont

*Type of Deduction CATCARD

*Select whether Deduction is a Flat Amount or Percent

*Enter Amount or Percent to be deducted

Take deduction until I reach this Goal Amount

*Enter Deduction Start Date 06/08/2020 (example: 12/31/2000)

Enter Deduction Stop Date 06/30/2022 (example: 12/31/2000)

Current Balance 0.00

* Required Field

- Click the **Submit** button.
- 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

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

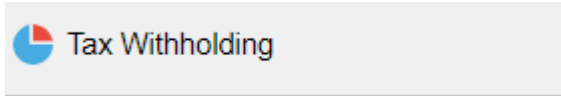


Payroll and Tax



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

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




4. Tax Withholdings Summary will appear.

Tax Withholding

Company The University of Vermont

Status Active

Form Type	Jurisdiction	Withholding Details		
Federal	Federal	Tax Status	Single	Withholding Allowances 0
		Additional Amount	0.00	Additional Allowances >
		Additional Percentage		Other
State	Vermont	Tax Status	Single	Withholding Allowances 0
		Additional Amount	0.00	Additional Allowances >
		Additional Percentage		Other


 the state currently on file will be indicated here

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

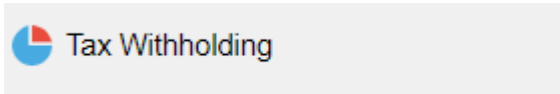


Payroll and Tax



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

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



4. Tax Withholding Summary will appear.

5. Select **Federal Form**.

Form Type	Jurisdiction	Withholding Details		
Federal	Federal	Tax Status	Married	Dependent Amount 0.00
		Other Income	0.00	Deductions 0.00 >
		Extra Withholding		Other
State	Vermont	Tax Status	Single	Withholding Allowances 0
		Additional Amount	0.00	Additional Allowances >
		Additional Percentage		Other

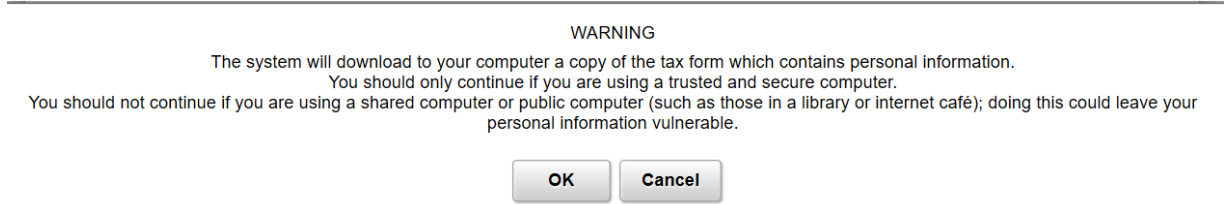
6. Select **Federal Withholding Allowance Certificate** from Updateable Forms list.

Updateable Forms

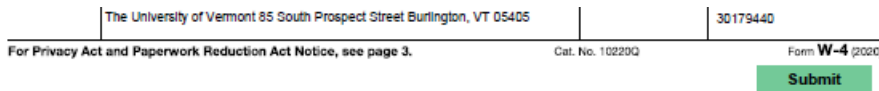
Form Description
Federal Withholding Allowance Certificate >



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



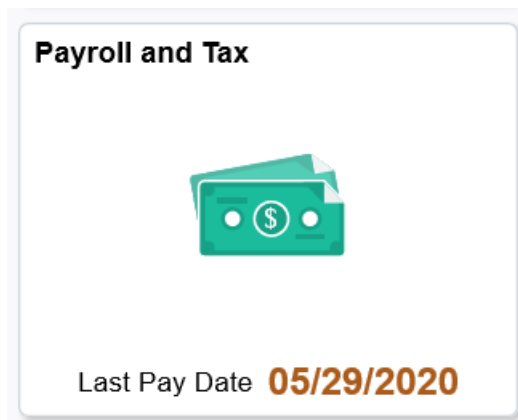
- A fillable Federal W-4 PDF form will download to your computer. Complete the form and select green **Submit** button at the bottom of the form when it is complete.



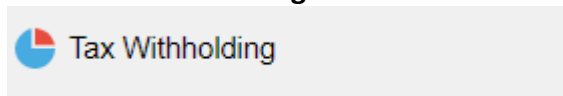
- Click the **OK** button on the submission confirmation page. Your new **Federal W-4** elections will be picked up in the next unconfirmed payroll that runs.

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

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



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



- Tax Withholding Summary will appear.



5. Select **State** form.

Form Type	Jurisdiction	Withholding Details	
Federal	Federal	Tax Status Married	Dependent Amount 0.00
		Other Income 0.00	Deductions 0.00 >
		Extra Withholding	Other
State	Vermont	Tax Status Single	Withholding Allowances 0
		Additional Amount 0.00	Additional Allowances >
		Additional Percentage	Other

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](#).

Updateable Forms

Form Description
Vermont Withholding Allowance Certificate >

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

Select **OK**.

WARNING

The system will download to your computer a copy of the tax form which contains personal information.
You should only continue if you are using a trusted and secure computer.
You should not continue if you are using a shared computer or public computer (such as those in a library or internet café); doing this could leave your personal information vulnerable.

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.

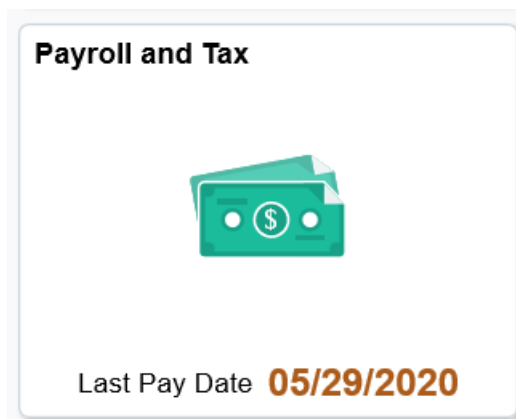
Request a New W-2

General Information:

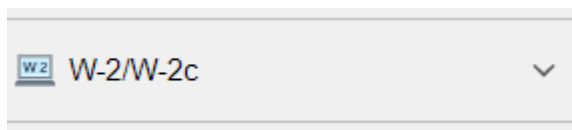
These screens can be used to request a copy of an existing W-2 Form.

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



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



4. Select **W-2 Reissue Request** from drop down menu.



W-2/W-2c

- View W-2/W-2c Forms
- W-2/W-2c Consent
- W-2 Reissue Request

- Complete the **W-2 Request for year** field and select where the W-2 should be delivered.

W-2 Reissue Request

*W2 Request for year

Select where you want your W-2 delivered

Mailing Address

Home Address

Mailing Address

Work Location

- Click the **Submit** button.
- Click the **OK** button on the submission confirmation page.

Printing a Pay Stub

General Information:

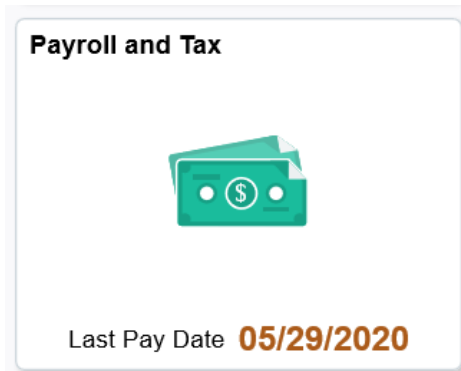
Unnecessary printing of pay stubs should be avoided. When a copy of a pay stub is necessary, use the procedures listed in this document.

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

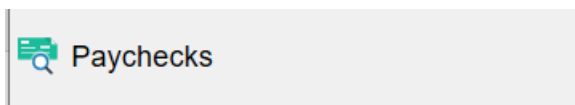
Printing a pay stub from PeopleSoft is easy and quick. Simply click the **Printable Version** button found below the Check Date at the top of the page. A PDF of the paycheck being viewed will appear. Follow the computers printing directions to print a copy of the PDF.

Step-by-Step Instructions: Printing a Pay Stub

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

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) 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.

Resources

Helpful Links

- [Payroll Deadline Schedule](#)

Relevant UVM Departments

- [Payroll Services](#)
- [Human Resource Services](#)

Related Policies

- [Staff Handbook](#)
- [University Policies and Operating Procedures](#)