

Pay Actions Overview
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Introduction

This section provides an overview of processing payroll documents in EHRP.

The Pay Actions Module covers the following:

The procedures involved with the setup and routing of the direct deposit of an employee's net check.

The processing of an employee's tax withholding information.

General deductions data, including allotments, union dues, and contributions to the Combined Federal Campaign.

Personnel Action Request (PAR) Nature of Action (NOA) codes are no longer required to process Pay Actions .

Net Direct Deposits

Introduction

In EHRP, HR staff must enter information into the **Direct Deposit** page in the **Maintain Payroll Data (USF)** module of the system so the information will be picked up by the payroll interface. NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not identified. Net Direct Deposits can not be stopped through EHRP since DFAS doesn't allow stops through the interface.

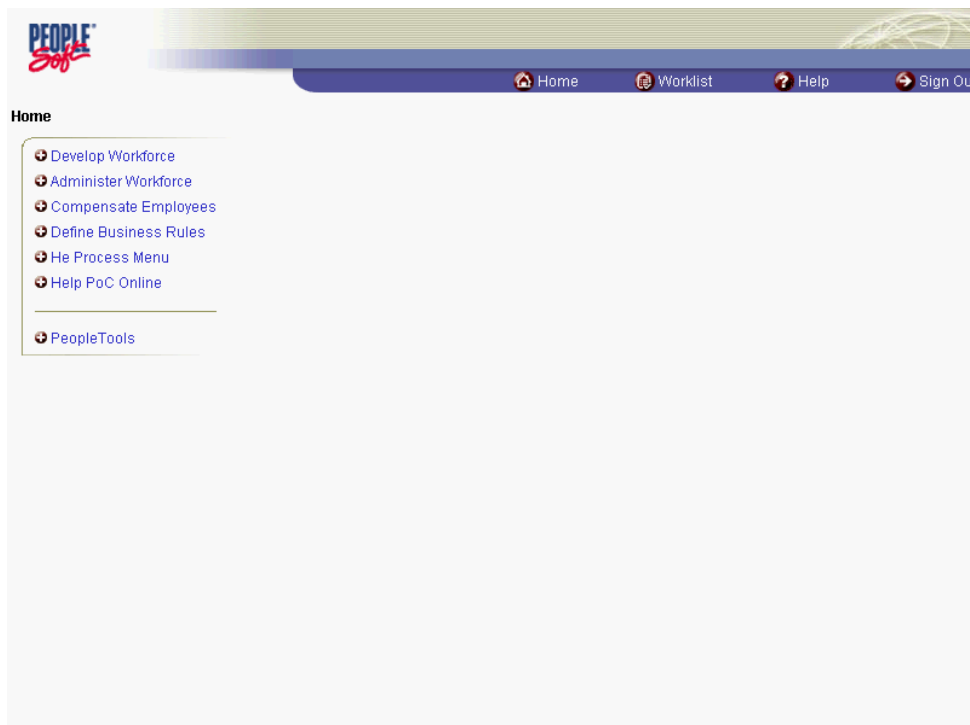
Starting an Employee's Net Direct Deposit

Introduction

In EHRP, HR staff must enter information into the **Direct Deposit** page in the **Maintain Payroll Data (USF)** module of the system so the information will be picked up by the payroll interface. NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not identified. Net Direct Deposits can not be stopped through EHRP since DFAS doesn't allow stops through the interface.




Procedure

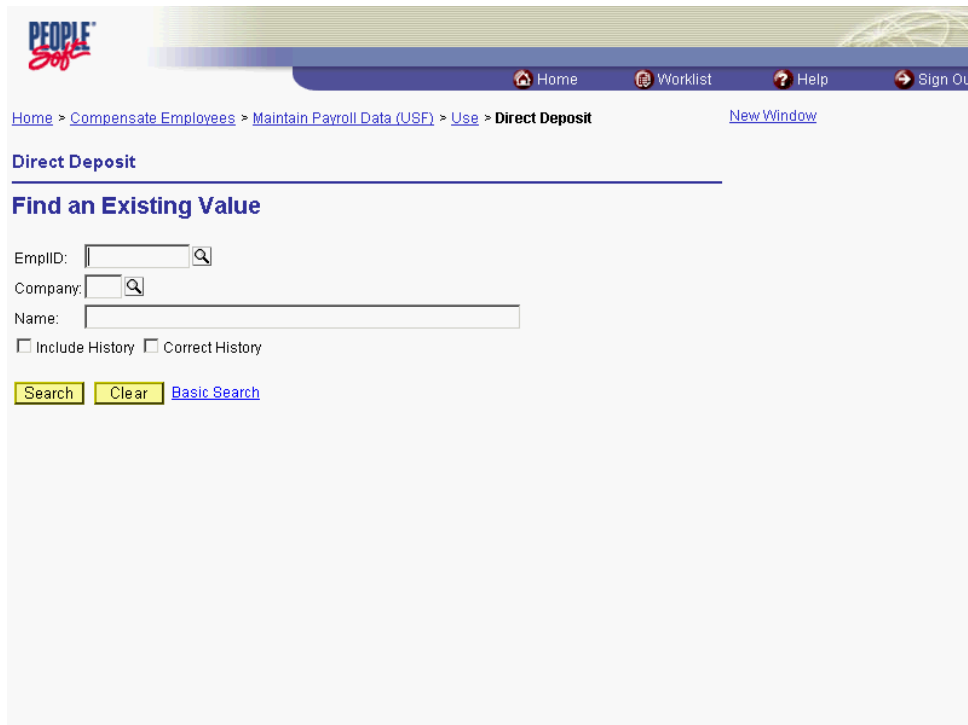
The following steps detail the procedure for starting an employee's Net Direct Deposit.




Training Guide

Pay Actions Overview

Step	Action
1.	Click the Compensate Employees link.  Compensate Employees
2.	Click the Maintain Payroll Data (USF) link.  Maintain Payroll Data (USF)
3.	Click the Use link.  Use
4.	Click the Direct Deposit link. Direct Deposit

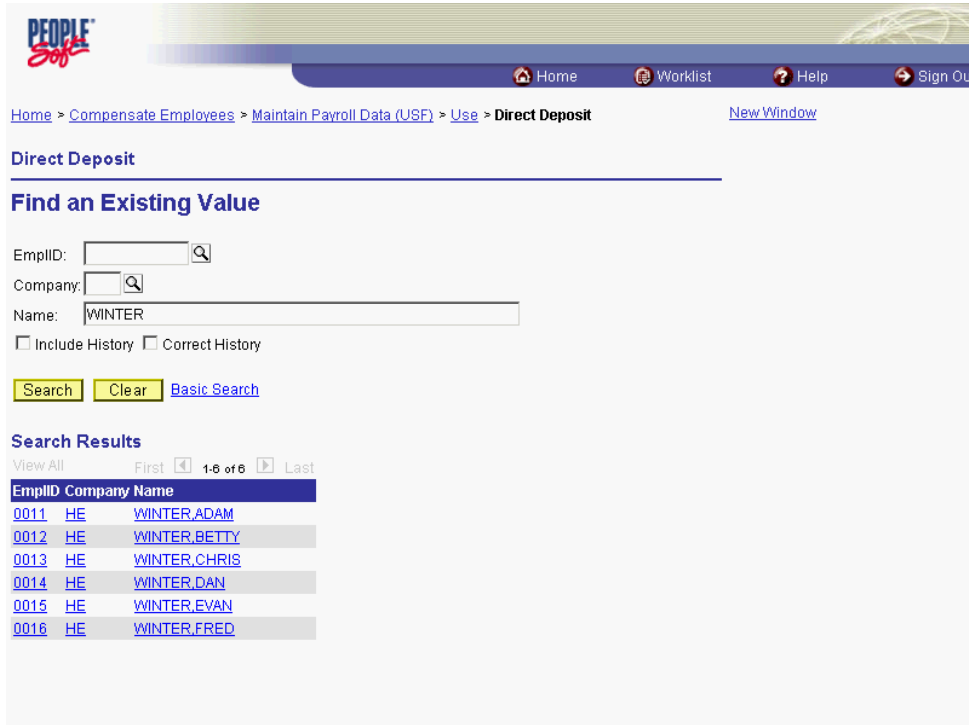




Step	Action
5.	Click in the field in which you want to search. Click in the Name field.


 The Look Up icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

Step	Action
6.	Enter the desired information into the Name field. Enter " Winter ".

Step	Action
7.	Click the Search button. 



Step	Action
8.	Click the desired entry. Click WINTER,FRED . 
9.	Click the Choose a date button. 

 The Calendar icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Direct Deposit [New Window](#)

Direct Deposit

WINTER, FRED ID: 0016

Deposit Information Find | View All First 1 of 2 Last

*Effective Date: 12/14/2003 *Status: Suppress DDP Advice Print

Distribution Information

Priority:

Bank ID:

Account#:

*Deposit Type:

% Net Pay/\$ Amount:

Prenotification Status: New

This data was last updated by _____ on _____

Count Type: Checking Savings Issue Check





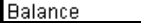
Tracking Data Prenotification req



Save Return to Search Next in List Previous in List Update/Display Include History Correct History

Step	Action
10.	Click on the desired entry. Click 15 .

NOTE: If there is previous data in the page, insert a row in the **Deposit Information** Box.

NOTE: Two actions cannot have the same effective dates. For example, the coverage will terminate at midnight on Day 1 and the new effective date will begin at 12:01 AM on the following day.

Step	Action
11.	Click the *Status list. 
12.	Select a status of Active . 
13.	Click in the Priority field. 
14.	Enter the desired information into the Priority field. Enter "01" .
15.	Press [Tab] .
16.	Enter the financial institution's routing number in the Bank ID field. Enter "011000138" .
17.	Press [Tab] .
18.	Enter the account number in the Account# field. Enter "04343587" .
19.	Click the *Deposit Type list. 
20.	Select Balance from the *Deposit Type dropdown menu. NOTE: This is the NET amount, calculated after any allotments or deductions that are being deducted for the employee. 

Step	Action
21.	Click either the Checking or Savings radio button in the Account Type area. Click the Savings option. 
22.	Click the Save button. 
23.	The procedure required to start an employee's Net Direct Deposit is completed. End of Procedure.

Changing an Employee's Net Direct Deposit

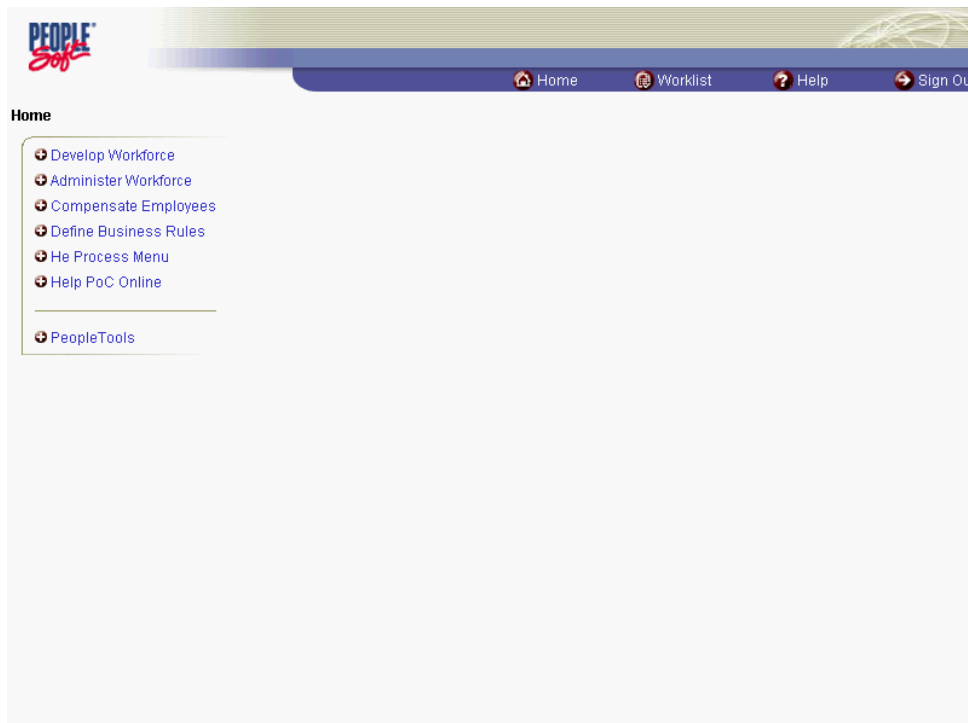
Introduction





In EHRP, HR staff must enter information into the **Direct Deposit** page in the **Maintain Payroll Data (USF)** module of the system so the information will be picked up by the payroll interface.

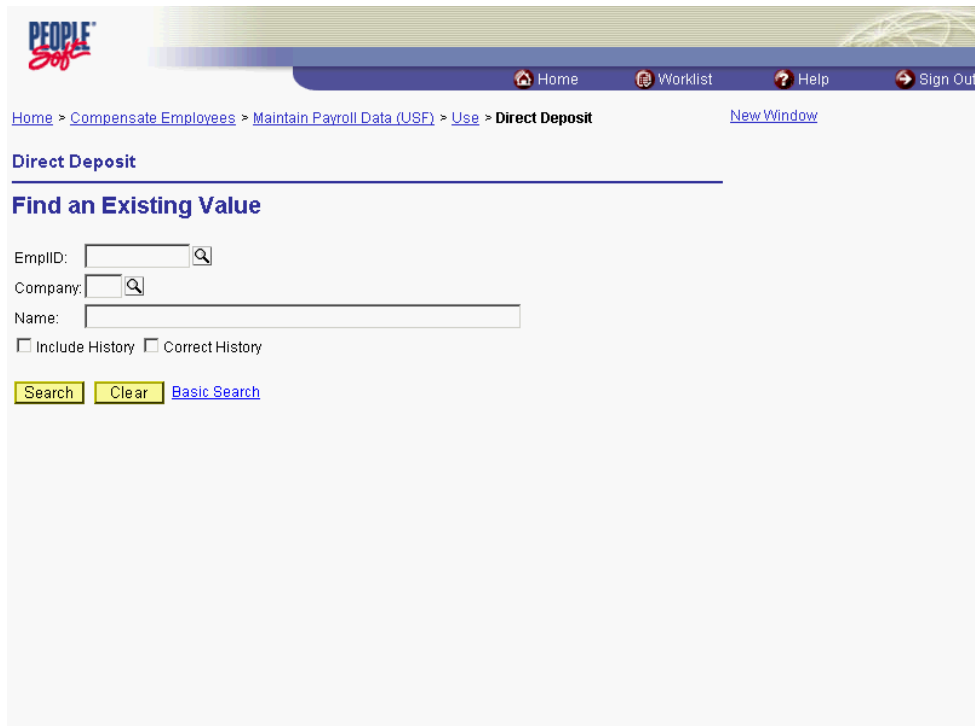
NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not identified. Net Direct Deposits can not be stopped through EHRP since DFAS doesn't allow stops through the interface.

Procedure

The following steps detail the procedure for entering net direct deposit information into EHRP for a NET Direct Deposit Change.



Step	Action
1.	Click the Compensate Employees link. 
2.	Click the Maintain Payroll Data (USF) link. 
3.	Click the Use link. 
4.	Click the Direct Deposit link. 



Step	Action
5.	Click in the field in which you want to search. Click in the Name field.



The Look Up icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

Step	Action
6.	Enter the desired information into the Name field. Enter " Winter ".

Step	Action
7.	Click the Search button.
8.	Click the desired entry. Click WINTER,FRED .

Step	Action
9.	Click the Add a new row at row 1 button in the Deposit Information box to insert a new row.
10.	Click the Choose a date button.

The Calendar icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

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Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Direct Deposit [New Window](#)

Direct Deposit

WINTER, FRED ID: 0016

Deposit Information Find | View All First 1 of 2 Last

Effective Date: 12/15/2003 Status: Active Suppress DDP Advice Print

Distribution Information Find | View All First 1 of 1 Last

Priority: 1

Bank ID: 011000138

Account#: 04343587

Deposit Type: Balance

% Net Pay/\$ Amount:

Prenotification Status: New

This data was last updated by Online Upd on 12/14/2003

December 2003

S	M	T	W	T	F	S
		1	2	3	4	5
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

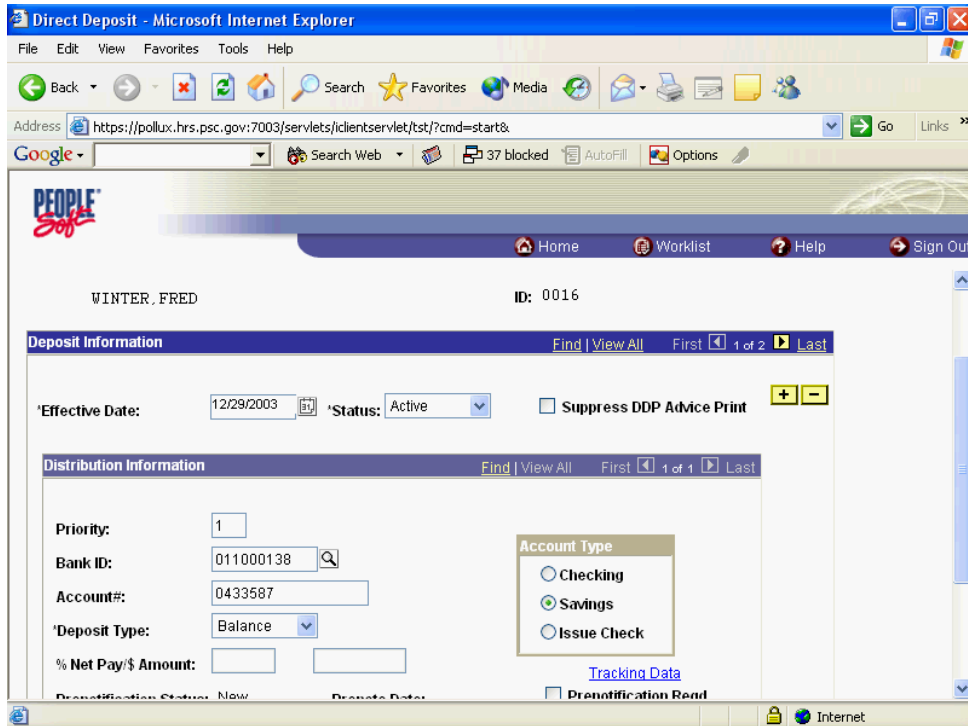
Count Type: Checking Savings Issue Check



[Tracking Data](#)

Prenotification Req

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

Step	Action
11.	Enter the Effective Date for the change to the direct deposit routing information. Click 29 .



Step	Action
12.	Click in the Account# field. 
13.	Enter the desired information into the Account# field. Enter " 11122334 ".
14.	Click the Save button. 
15.	The procedure for entering net direct deposit information into EHRP for a NET Allotment Change is completed. End of Procedure.

Taxes

HR staff must enter information into the Federal Tax Data, State Tax Data and Local Tax Data pages in the Maintain Payroll Data module of the system so the information will be picked up by the payroll interface.

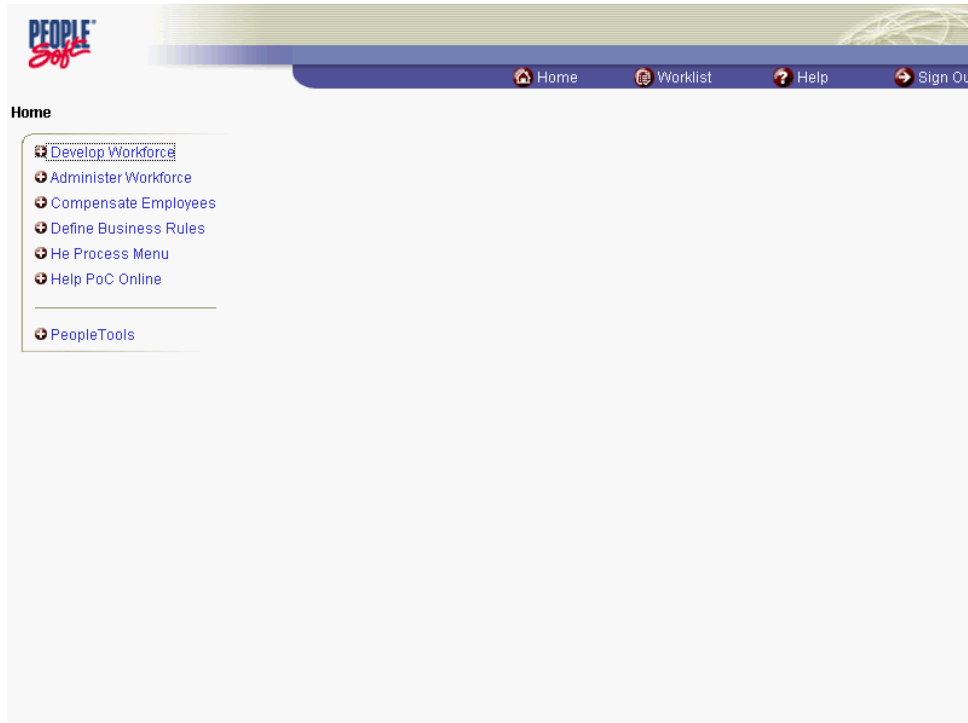
Starting an Employee's Tax Withholding

Introduction

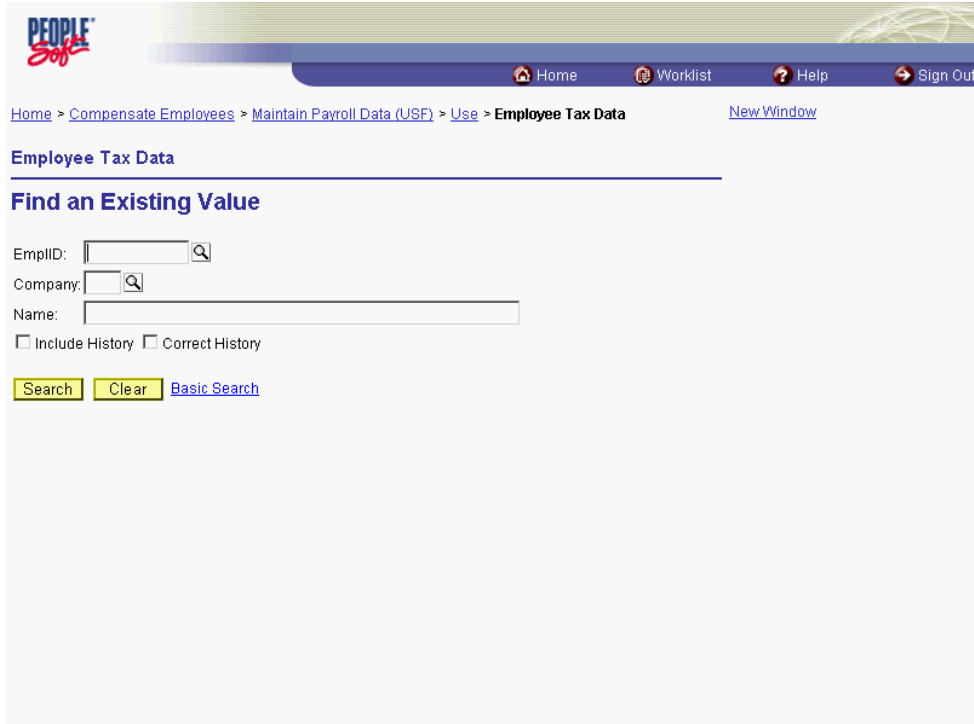
All employees are required to have a tax record for DFAS unless the employee lives and works in a non-taxable state. The system will default a tax record for all hires based on the duty location of the position. If the duty station location is in a non-taxable state, then the default will be for the employees home address. The default will be single with 0 exemptions. HR will need to process a tax change with an effective date after the hire effective date so that the change will update in DFAS. As long as the change is done in the same pay period as the hire, it will update for the entire pay period.



Procedure

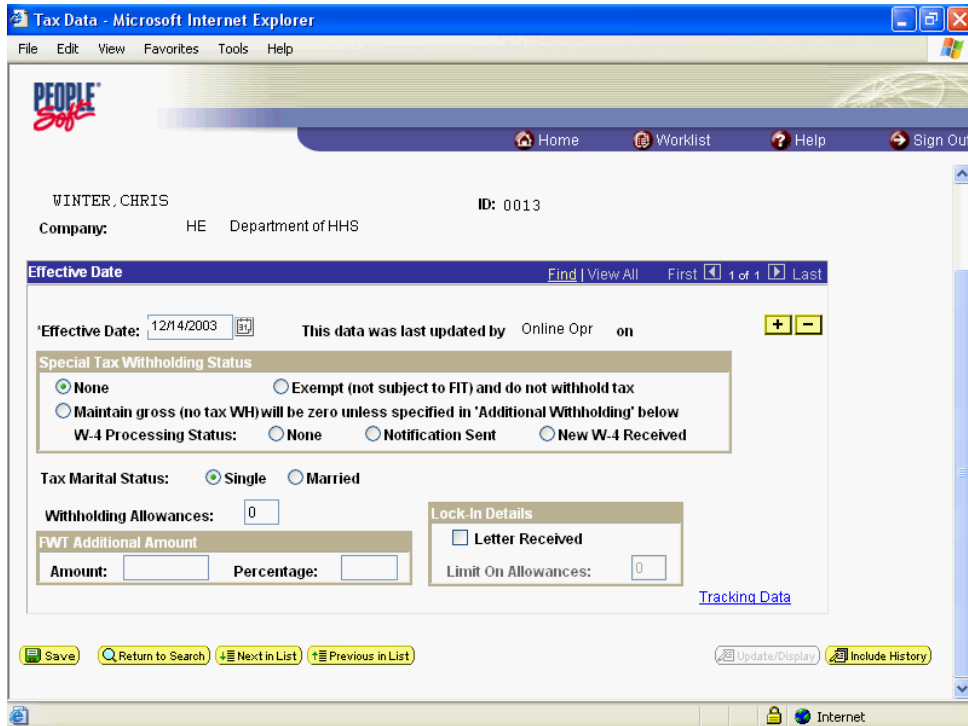
The following steps detail the procedure for starting an employee's tax withholding in EHRP. For new hires EHRP will default a federal and state tax record. The state tax record will default to the employees duty location unless that duty location is in a non-taxable state. If the duty location is in a non-taxable state but the employee's residence is in a taxable, then the employee's residence state will be defaulted. Both federal and state taxes will default to single and 0 exemptions. The effective date of the default tax records will be the employee's EOD date. HR user will need to add a row with an effective after the EOD date.





Step	Action
1.	Click the Compensate Employees link. Compensate Employees
2.	Click the Maintain Payroll Data (USF) link. Maintain Payroll Data (USF)
3.	Click the Use link. Use
4.	Click the Employee Tax Data link. Employee Tax Data



Step	Action
5.	Click in the field in which you want to search. Click in the Name field.
6.	Enter the desired information into the Name field. Enter " Winter ".
7.	Click the Search button. 
8.	Select the desired entry. Click WINTER,CHRIS . 



Step	Action
9.	Click the Add a new row at row 1 button. 
10.	NOTE: Tax Withholding information must be entered at all three levels at the same time. Once the Save button is clicked, any subsequent start data must be entered under a different and unique effective date and considered as a change. Click the Choose a date button. 

The screenshot shows the 'Employee Tax Data' form for Chris Winter (ID: 0013) at the Department of HHS. The 'Effective Date' is set to 12/14/2003. A calendar pop-up is open, showing the month of December 2003, with the 15th highlighted. The 'Special Tax Withholding Status' is set to 'None'. There are also sections for 'Tax Marital Status' and 'Withholding Allowances'.

Step	Action
11.	NOTE: This effective date must cannot be the same date as the EOD date. Enter the Effective Date . Click 15 . <input type="text" value="15"/>
12.	In the Special Tax Withholding Status area, use the radio buttons to select the category of withholding appropriate for the employee. None - No special tax withholding instructions exist for the employee. Exempt - Employee is not subject to withholding, nor are federal taxable wage figures calculated. DFAS REQUIRES THE CSR TO ENTER THIS INFORMATION INTO THE DFAS SYSTEM. PLEASE CONTACT YOUR CSR. NOTE: For the vast majority of employees, the default of None will be selected.

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Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data [New Window](#)

Federal Tax Data 1 Federal Tax Data 2 State Tax Data 1 State Tax Data 2 Local Tax Data

WINTER,CHRIS ID: 0013

Company: HE Department of HHS

Effective Date Find | View All First 1 of 1 Last

'Effective Date: 12/15/2003 This data was last updated by on

Special Tax Withholding Status

None Exempt (not subject to FIT) and do not withhold tax

Maintain gross (no tax WH) will be zero unless specified in 'Additional Withholding' below

W-4 Processing Status: None Notification Sent New W-4 Received

Tax Marital Status: Single Married

Withholding Allowances: 0

FWT Additional Amount

Amount: Percentage:

Lock-In Details

Letter Received

Limit On Allowances: 0

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

Federal Tax Data 1 | [Federal Tax Data 2](#) | [State Tax Data 1](#) | [State Tax Data 2](#) | [Local Tax Data](#)

Step	Action
13.	Select the Employee's Tax Marital Status . Click Married . <input type="radio"/>
14.	Press [Tab] .
15.	Enter the number of Withholding Allowances claimed. Enter " 1 ".
16.	Press [Tab] .
17.	If there is additional withholding, enter it in the FWT Additional Amount area. Enter " 25 ".



NOTE: This entry can be made only as an **Amount**. It must be entered in as a whole dollar amount. An employee may not claim an **FWT Additional Amount** without first claiming **Withholding Allowances**.

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Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data [New Window](#)

Federal Tax Data 1 Federal Tax Data 2 State Tax Data 1 State Tax Data 2 Local Tax Data

WINTER, CHRIS ID: 0013

Company: HE Department of HHS

Effective Date Find | View All First 1 of 1 Last

'Effective Date: 12/15/2003 This data was last updated by on

Special Tax Withholding Status

None Exempt (not subject to FIT) and do not withhold tax

Maintain gross (no tax WH) will be zero unless specified in 'Additional Withholding' below

W-4 Processing Status: None Notification Sent New W-4 Received

Tax Marital Status: Single Married

Withholding Allowances: 1

FWT Additional Amount

Amount: 25 Percentage:


Lock-In Details

Letter Received

Limit On Allowances: 0

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

Federal Tax Data 1 | [Federal Tax Data 2](#) | [State Tax Data 1](#) | [State Tax Data 2](#) | [Local Tax Data](#)

Step	Action
18.	Click the Federal Tax Data 2 tab. 

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Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data [New Window](#)

Federal Tax Data 1 Federal Tax Data 2 **State Tax Data 1** State Tax Data 2 Local Tax Data

WINTER, CHRIS ID: 0013
Company: HE Department of HHS

Effective Date Find | View All First 1 of 1 Last
Effective Date: 12/15/2003 Federal tax data last updated by on + -

Exempt from FUI Use Total Wage for Multi_State

Earned Income Credit

Not applicable
 Single, or married no sp filing
 Married, both spouses filing


W-5 Processing Status
 None Notification Sent New W-5 Received

W2-Reporting

Statutory Employee Legal Representative
 Deceased Deferred Compensation
 Pension Plan

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

[Federal Tax Data 1](#) | [Federal Tax Data 2](#) | [State Tax Data 1](#) | [State Tax Data 2](#) | [Local Tax Data](#)

Step	Action
19.	<p>Click the appropriate radio button for the Earned Income Credit. Click the Married, both spouses filing option.</p> 

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Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data [New Window](#)

Federal Tax Data 1 Federal Tax Data 2 **State Tax Data 1** State Tax Data 2 Local Tax Data

WINTER, CHRIS ID: 0013
Company: HE Department of HHS

Effective Date Find | View All First 1 of 1 Last
Effective Date: 12/15/2003 Federal tax data last updated by on + -

Exempt from FUT Use Total Wage for Multi_State

Earned Income Credit

Not applicable
 Single, or married no sp filing
 Married, both spouses filing


W-5 Processing Status
 None Notification Sent New W-5 Received

W2-Reporting

Statutory Employee Legal Representative
 Deceased Deferred Compensation
 Pension Plan

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

[Federal Tax Data 1](#) | [Federal Tax Data 2](#) | [State Tax Data 1](#) | [State Tax Data 2](#) | [Local Tax Data](#)

Step	Action
20.	Click the State Tax Data 1 tab. 

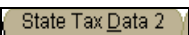

The screenshot shows the 'Employee Tax Data' form for WINTER, CHRIS (ID: 0013) at the Department of HHS. The form is for the effective date of 12/14/2003. In the 'State Info' section, the 'State' field is empty, and the 'Resident' checkbox is checked. Under 'Special Tax Status', the 'None' radio button is selected. The 'SWT Marital/Tax Status' field is empty. In the 'Withholding Allowances' section, the amount is set to 0. The 'Additional Amount Adjustment' section has empty fields for 'Amount' and 'Percentage'. The 'Lock-In Details' section has the 'Letter Received' checkbox unchecked and 'Limit On Allowances' set to 0.

Step	Action
21.	Enter the desired information into the *State field. Enter " PA ".
22.	The Resident checkbox defaults with the box checked. In the Special Tax Status area, select the appropriate radio button, if necessary. None - No special tax withholding instructions exist for the employee. Exempt - Employee is not subject to withholding, nor are state taxable wage figures calculated. DFAS REQUIRES THE CSR TO ENTER THIS INFORMATION INTO THE DFAS SYSTEM. PLEASE CONTACT YOUR CSR. NOTE: For the vast majority of employees, None will be selected.
23.	Click in the *SWT Marital/Tax Status field. <input type="text"/>
24.	Enter the desired information into the *SWT Marital/Tax Status field. Enter " N ".
25.	Press [Tab] .
26.	Enter the desired information into the Withholding Allowances field. Enter " 1 ".
27.	If there is an additional withholding, enter it in the Additional Amount Adjustment area. NOTE: This entry can be made only as an Amount . It must be entered in as a whole dollar amount. An employee may not claim an Amount without first claiming Withholding Allowances .


The screenshot shows the PEOPLE Soft web application interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Help', and 'Sign Out' buttons. Below this is a breadcrumb trail: 'Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data'. A 'New Window' link is also present. The main content area has several tabs: 'Federal Tax Data 1', 'Federal Tax Data 2', 'State Tax Data 1', 'State Tax Data 2', and 'Local Tax Data'. The 'State Tax Data 2' tab is selected. The form displays the following information:

- Employee Info:** WINTER,CHRIS; ID: 0013; Company: HE Department of HHS.
- Effective Date:** 12/14/2003.
- State Info:** State: PA; Percent of Taxable Gross.
- Resident Status:** Resident; Non-Residency Statement Filed; UI Jurisdiction.
- Special Tax Status:** None; Exempt and do not withhold tax; Maintain gross taxable; SWT will be zero unless specified in 'Additional Withholding' below.
- SWT Marital/Tax Status:** N; Not applicable.
- Withholding Allowances:** 1.
- Additional Amount Adjustment:** Amount: []; Percentage: []; Increase/Decrease buttons.
- Lock-In Details:** Letter Received; Limit On Allowances: 0.

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Update/Display', 'Include History', and 'Correct Histor'.

Step	Action
28.	Click the State Tax Data 2 tab. 
29.	Enter the number of any Addl (Additional) Allowances . NOTE: This page can only be used if the employee is a resident of Arizona, California, Mississippi or Puerto Rico.
30.	Click the Local Tax Data tab. 


Step	Action
31.	Enter the desired information into the *Locality field. Enter " 423740 ".

 As applicable for the employee, both city and county taxes are entered on the **Local Tax Data** page. In the event that an employee pays both city and county taxes simultaneously, simply insert a row and use the appropriate **Locality** for the particular tax jurisdiction.

Step	Action
32.	Click the Resident checkbox and enter an Other Work Locality , if necessary. In the Special Tax Status area, select one of the following radio buttons, if necessary. None - No special tax withholding instructions exist for the employee. Do not maintain Taxable Gross and do not withhold tax - Taxable wage figures are neither calculated nor withheld.
33.	Click in the LWT Marital/Tax Status field. <input type="checkbox"/>
34.	Enter the desired information into the LWT Marital/Tax Status field. Enter " N ".
35.	Press [Tab] .
36.	Enter the desired information into the Local Withholding Allowances field. Enter " 1 ".

Step	Action
37.	If there is an additional withholding, enter it in the Additional Withholding Amount field. NOTE: This entry can be made only as an Amount . It must be entered in as a whole dollar amount. Percentage - This field is used for variances and must be 25 to 100 without decimals.

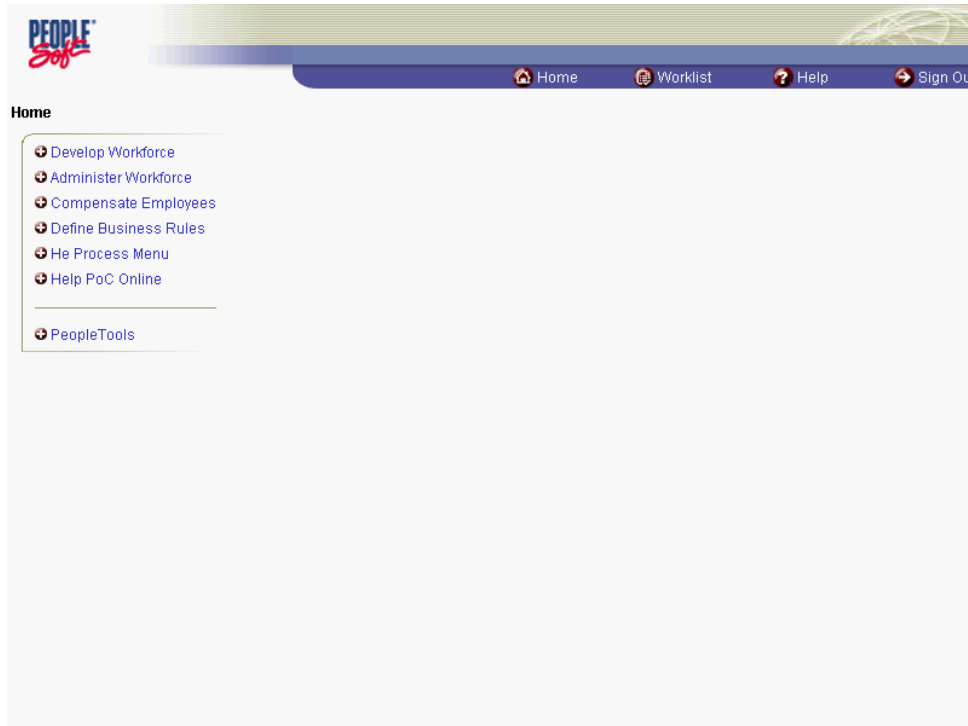
The screenshot shows the 'Employee Tax Data' form in the PEOPLE Soft application. The form is for employee WINTER, CHRIS (ID: 0013) at HE Department of HHS. The effective date is 12/14/2003. The state is PA (Pennsylvania) and the locality is 423740 (Horsham, PA). The 'Resident' checkbox is checked. The 'Special Tax Status' dropdown is set to 'None'. The 'LWT Marital/Tax Status' is 'N'. The 'Local Withholding Allowances' is '1'. The 'Additional Withholding Amount' and 'Percentage' fields are empty. The 'Save' button is highlighted in green.

Step	Action
38.	Click the Save button. 
39.	The procedure required to start an Employee's Tax Withholding is completed. End of Procedure.

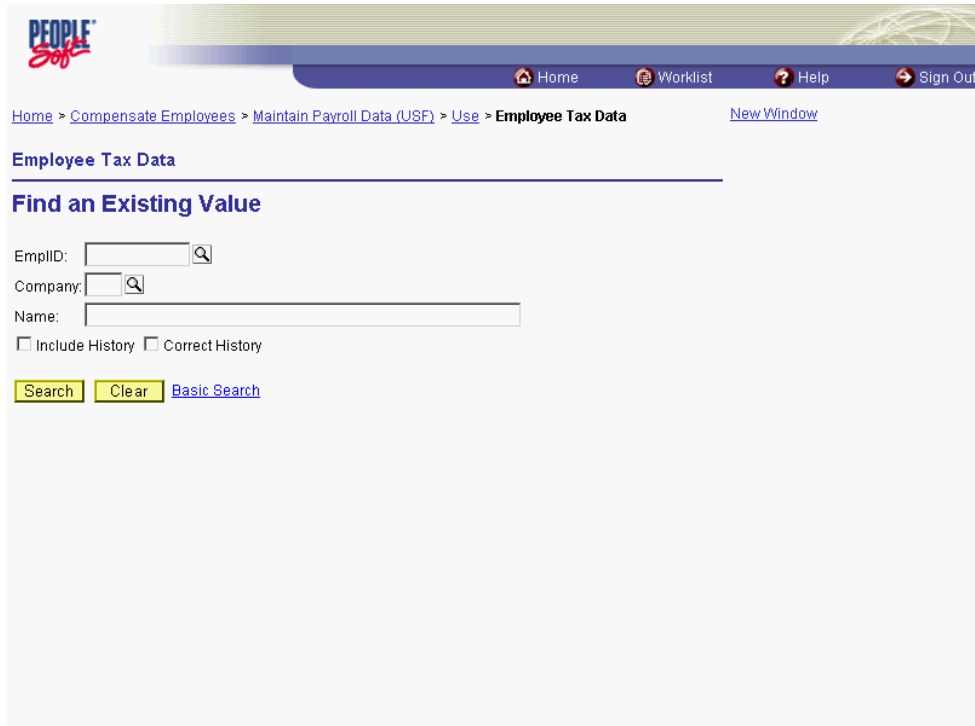
Changing an Employee's Tax Withholding

Procedure


The following steps detail the procedure for changing an employee's tax withholding information in EHRP.







Step	Action
1.	Click the Compensate Employees link. Compensate Employees
2.	Click the Maintain Payroll Data (USF) link. Maintain Payroll Data (USF)
3.	Click the Use link. Use
4.	Click the Employee Tax Data link. Employee Tax Data




Step	Action
5.	Calcic in the field in which you want to search. Click in the Name field.

 The Look Up icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

Step	Action
6.	Enter the desired information into the Name field. Enter " Winter ".
7.	Click the Search button. 
8.	Select the desired entry. Click WINTER,CHRIS . 

Step	Action
9.	Click the Add a new row at row 1 button in the Effective Date box to insert a new row. 
10.	Click the Choose a date button. 

 The Calendar icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

Step	Action
11.	Select the desired entry. Click 22 . <input type="text" value="22"/>

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data [New Window](#)

Federal Tax Data 1 Federal Tax Data 2 State Tax Data 1 State Tax Data 2 Local Tax Data

WINTER, CHRIS ID: 0013

Company: HE Department of HHS

Effective Date Find | View All First 1 of 2 Last

'Effective Date: 12/22/2003 This data was last updated by Online Opr on 12/14/2003 + -

Special Tax Withholding Status

None Exempt (not subject to FIT) and do not withhold tax

Maintain gross (no tax WH) will be zero unless specified in 'Additional Withholding' below

W-4 Processing Status: None Notification Sent New W-4 Received

Tax Marital Status: Single Married

Withholding Allowances: 0

FWT Additional Amount

Amount: Percentage:

Lock-In Details

Letter Received

Limit On Allowances: 0

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

Federal Tax Data 1 | [Federal Tax Data 2](#) | [State Tax Data 1](#) | [State Tax Data 2](#) | [Local Tax Data](#)

Step	Action
12.	Navigate to the applicable field(s) and make any necessary changes. Click the Local Tax Data tab.

The screenshot shows the 'Employee Tax Data' form for Chris Winter (ID: 0013) at the Department of HHS. The form is divided into several sections:

- Effective Date:** 12/22/2003
- States:** PA (Pennsylvania)
- Locality:** 423740 (Horsham, PA)
- Special Tax Status:**
 - None
 - Do not maintain Taxable Gross and do not withhold tax
 - Maintain Tax Gross, LWT zero in 'Additional Withholding' below
- LWT Marital/Tax Status:** N
- Local Withholding Allowances:** 1
- Additional Withholding Amount:** (empty)
- Percentage:** (empty)


Navigation buttons at the bottom include Save, Return to Search, Next in List, Previous in List, Update/Display, Include History, and Correct History.

Step	Action
13.	Navigate to the applicable field(s) and click or drag as necessary to select the field(s). Select the Locality field.
14.	Enter the desired information into the *Locality field. Enter " 426540 ".

The screenshot shows the 'Employee Tax Data' form for Chris Winter (ID: 0013) at the Department of HHS. The form is divided into several sections:

- Effective Date:** 12/22/2003
- States:** PA (Pennsylvania)
- Locality:** 426540 (Horsham, PA)
- Special Tax Status:** Radio buttons for 'None' (selected), 'Do not maintain Taxable Gross and do not withhold tax', and 'Maintain Tax Gross, LWT zero in 'Additional Withholding' below'.
- LWT Marital/Tax Status:** N
- Local Withholding Allowances:** 1
- Additional Withholding Amount:** (empty field)
- Percentage:** (empty field)

 At the bottom of the form, there are several buttons: 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Update/Display', 'Include History', and 'Correct History'. The 'Save' button is highlighted in yellow.

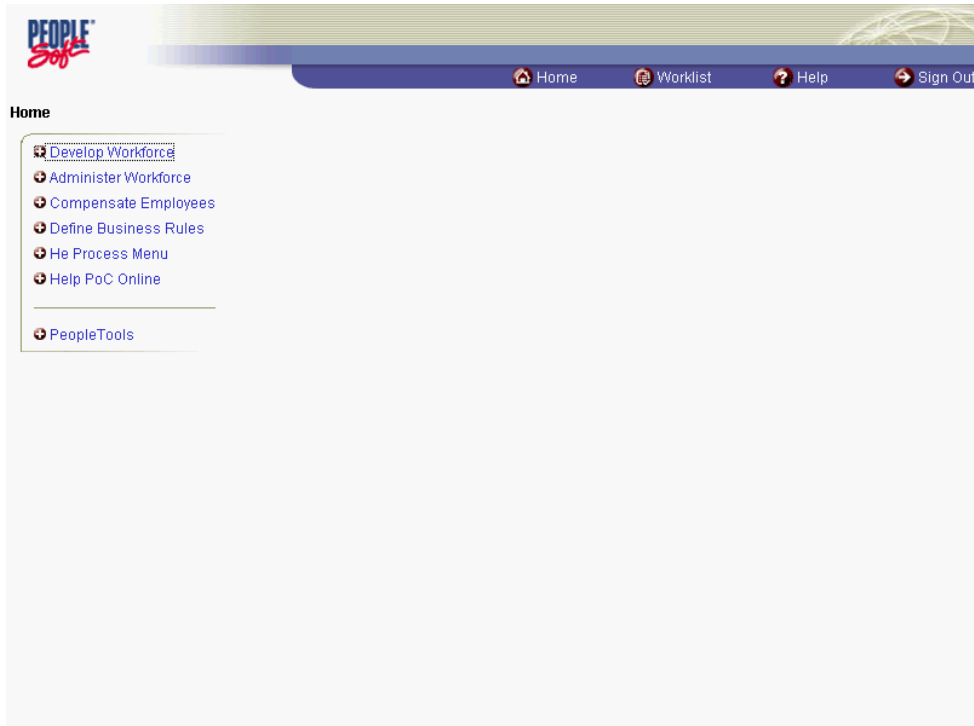
Step	Action
15.	Modify information on all Tax pages as necessary. Click the Save button. 
16.	The changes to the Employee's Tax Withholding are completed. End of Procedure.

Stopping an Employee's Tax Withholding

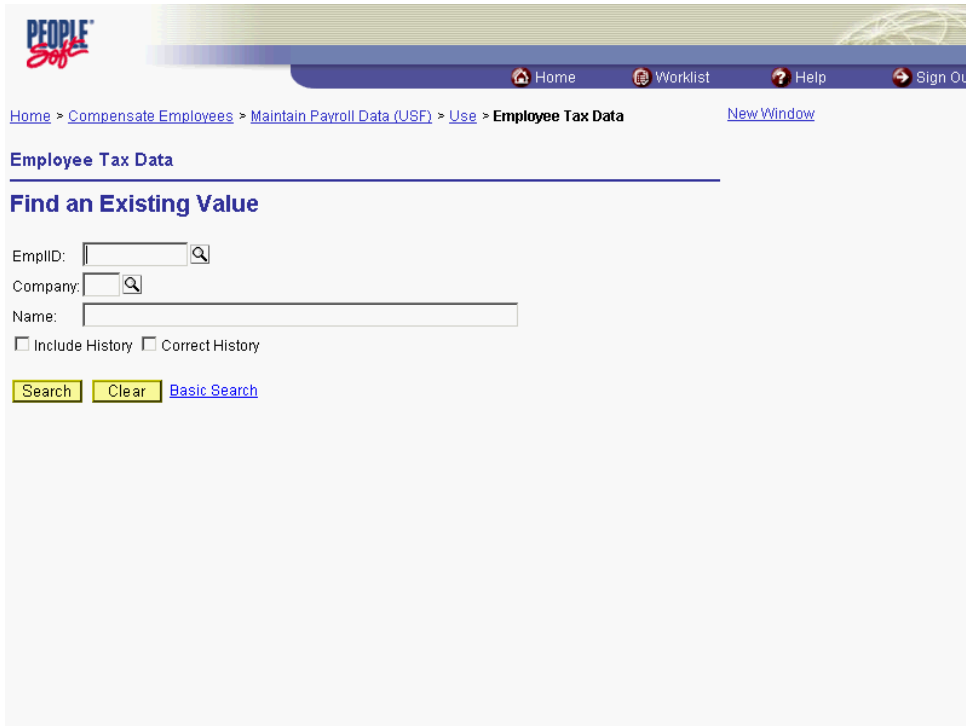
Procedure

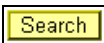
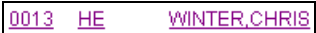
The following steps detail the procedure for stopping an employee's tax withholding information in EHRP.

PLEASE SEE YOUR CSR TO STOP TAXES.



Step	Action
1.	Click the Compensate Employees link. Compensate Employees
2.	Click the Maintain Payroll Data (USF) link. Maintain Payroll Data (USF)
3.	Click the Use link. Use
4.	Click the Employee Tax Data link. Employee Tax Data



Step	Action
5.	Click in the field in which you want to search. Click in the Name field.
6.	Enter the desired information into the Name field. Enter " Winter ".
7.	Click the Search button. 
8.	Select the desired entry. Click WINTER,CHRIS . 

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data [New Window](#)

Federal Tax Data 1 Federal Tax Data 2 State Tax Data 1 State Tax Data 2 Local Tax Data

WINTER, CHRIS ID: 0013

Company: HE Department of HHS

Effective Date Find | View All First 1 of 2 Last

'Effective Date: 12/22/2003 This data was last updated by Online Opr on 12/15/2003 + -

Special Tax Withholding Status

None Exempt (not subject to FIT) and do not withhold tax

Maintain gross (no tax WH) will be zero unless specified in 'Additional Withholding' below

W-4 Processing Status: None Notification Sent New W-4 Received

Tax Marital Status: Single Married

Withholding Allowances: 0

FWT Additional Amount

Amount: Percentage:



Lock-In Details

Letter Received

Limit On Allowances: 0

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

Federal Tax Data 1 | [Federal Tax Data 2](#) | [State Tax Data 1](#) | [State Tax Data 2](#) | [Local Tax Data](#)

Step	Action
9.	Click the Add a new row at row 1 button to insert a new row. 
10.	Click the Choose a date button. 

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data [New Window](#)

Federal Tax Data 1 Federal Tax Data 2 State Tax Data 1 State Tax Data 2 Local Tax Data

WINTER, CHRIS ID: 0013

Company: HE Department of HHS

Effective Date Find | View All First 1 of 3 Last

'Effective Date: 12/22/2003 This data was last updated by Online Opr on 12/15/2003

Special Tax Withholding Status: None Maintain gross (no tax) W-4 Processing Status

Tax Marital Status: S M

Withholding Allowances: FWT Additional Amount Amount:


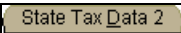


Details: Letter Received On Allowances:

Save Return to Search Next in List Previous in List Update/Display Include History Correct History

Federal Tax Data 1 | [Federal Tax Data 2](#) | [State Tax Data 1](#) | [State Tax Data 2](#) | [Local Tax Data](#)

Step	Action
11.	Select the desired entry. Click 29 . <input type="text" value="29"/>

The screenshot shows the PEOPLE Soft web application interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Help', and 'Sign Out' buttons. Below this is a breadcrumb trail: 'Home > Compensate Employees > Maintain Payroll Data (USF) > Use > Employee Tax Data'. A 'New Window' link is also present. The main content area has several tabs: 'Federal Tax Data 1', 'Federal Tax Data 2', 'State Tax Data 1', 'State Tax Data 2', and 'Local Tax Data'. The 'State Tax Data 1' tab is currently selected. The form displays the employee's name 'WINTER, CHRIS' and ID '0013'. The company is listed as 'HE Department of HHS'. There is an 'Effective Date' field set to '12/29/2003' and a note that the data was last updated by 'Online Opr' on '12/15/2003'. A 'Special Tax Withholding Status' section contains radio buttons for 'None', 'Exempt (not subject to FIT) and do not withhold tax', and 'Maintain gross (no tax WH) will be zero unless specified in 'Additional Withholding' below'. Below this is a 'W-4 Processing Status' section with radio buttons for 'None', 'Notification Sent', and 'New W-4 Received'. The 'Tax Marital Status' section has radio buttons for 'Single' and 'Married'. There are input fields for 'Withholding Allowances' (set to 0), 'FWT Additional Amount' (with 'Amount' and 'Percentage' sub-fields), and a 'Lock-In Details' section with a 'Letter Received' checkbox and a 'Limit On Allowances' field (set to 0). At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Next in List', 'Previous in List', 'Update/Display', 'Include History', and 'Correct History'. A breadcrumb trail at the very bottom reads: 'Federal Tax Data 1 | Federal Tax Data 2 | State Tax Data 1 | State Tax Data 2 | Local Tax Data'.

Step	Action
12.	Click the State Tax Data 1 tab. Mark the radio button as appropriate. 
13.	Click the State Tax Data 2 tab. Clear the radio button of Exempt as appropriate. You will need to contact your CSR to claim EXEMPT. 
14.	Click the Local Tax Data tab. Clear all fields and mark all radio buttons as Not Applicable or None as appropriate. 
15.	Click the Save button. 
16.	The procedure required for stopping an employee's tax withholding information in EHRP is completed. End of Procedure.

General Deductions

HR staff must enter information into the General Deduction Data page in the Maintain Payroll Data area of the system for purposes of the payroll interface.

This section is primarily concerned with the steps involved in entering information on the General Deduction Data page. This section contains three procedures. The first corresponds with starting general deductions, the second pertains to changing general deductions and the third is related to stopping general deductions.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

General Deduction Data Page

Start

1. Insert row if necessary
2. Enter Effective Date
3. Enter general deduction data

Change

1. Insert row
2. Enter Effective Date
3. Modify general deduction data

Note: A Change to a CFC requires a stop and then a start.

Stop

1. Insert row
2. Enter Effective Date
3. Enter Deduction End Date

Starting an Employee's General Deductions

Introduction

HR staff must enter information into the General Deduction Data page in the Maintain Payroll Data area of the system for purposes of the payroll interface.

This section is primarily concerned with the steps involved with starting general deductions.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

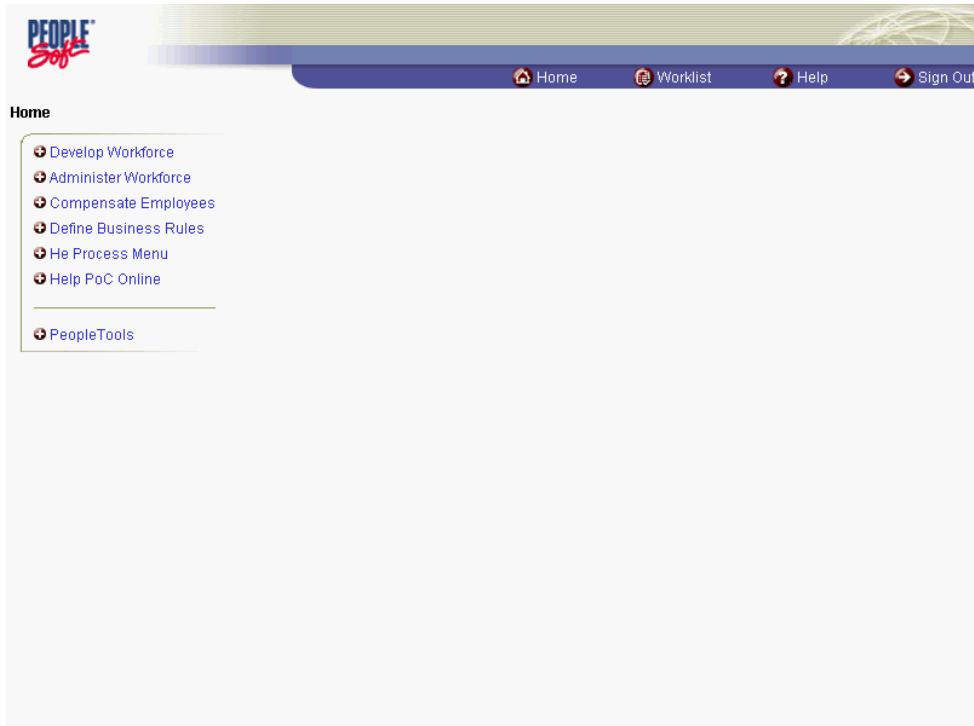
General Deduction Data Page

Start

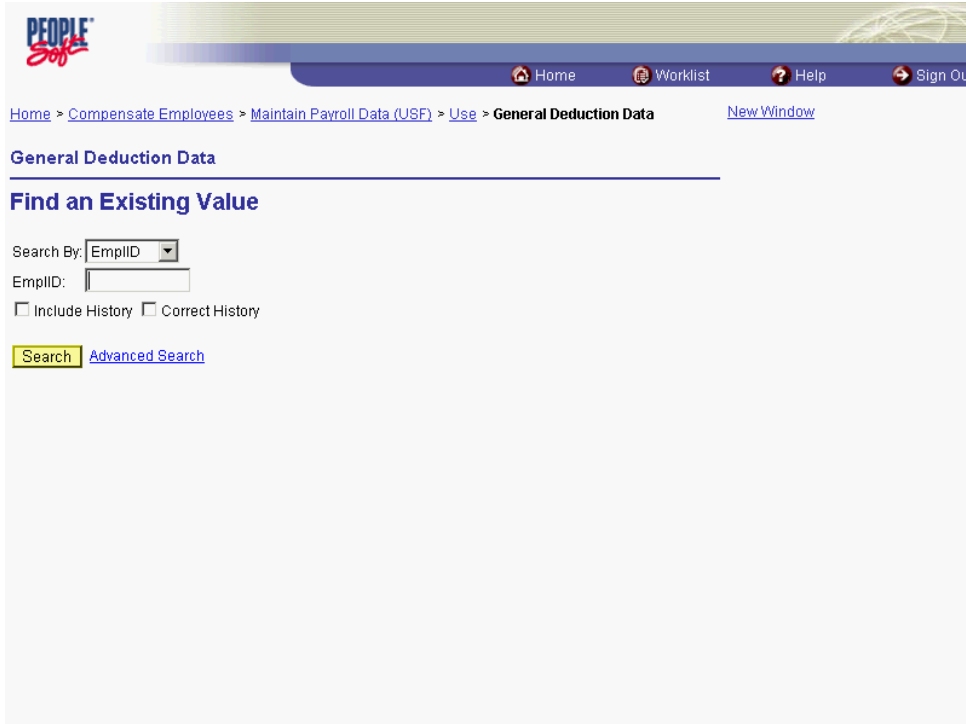
1. Insert row if necessary
2. Enter Effective Date
3. Enter general deduction data

Procedure

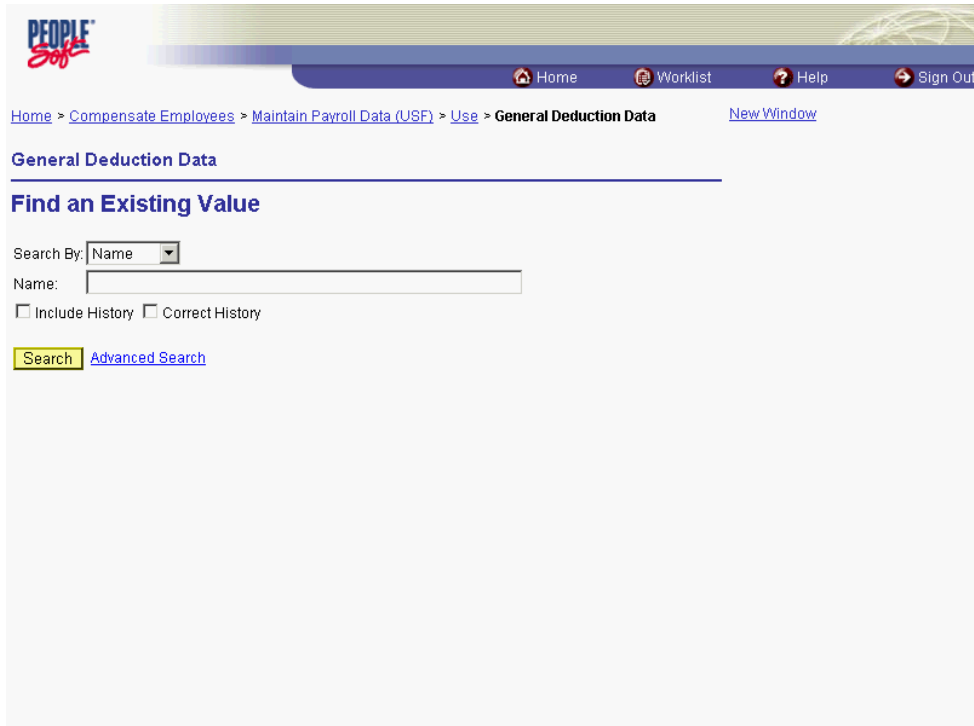
The following steps detail the procedure for starting an Employee's General Deductions.





Step	Action
1.	Click the Compensate Employees link. Compensate Employees
2.	Click the Maintain Payroll Data (USF) link. Maintain Payroll Data (USF)
3.	Click the Use link. Use
4.	Click the General Deduction Data link. General Deduction Data



Step	Action
5.	Click the Search By list. <input type="text" value="EmpID"/>
6.	Select the desired entry. Click Name . <input type="text" value="Name"/>



Step	Action
7.	Enter the desired information into the Name field. Enter " Winter ".
8.	Click the Search button. 
9.	Select the desired entry. Click WINTER,FRED . 

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > General Deduction Data [New Window](#)

General Deduction Data

WINTER, FRED ID: 0016

Company: HE Department of HHS

General Deduction Find | View All First 1 of 1 Last

*Deduction Code:

Deduction Details Find | View All First 1 of 1 Last

*Effective Date: Take on all Paygroups

Distribution Cd:

*Deduction Calculation: Default to Deduction Table Distribution Information

Routine:

Deduction End Date: Deduction Rate or %:

Loan Interest %: Flat/Addl Amount:

Goal Amount: Current Goal Balance:

This data was last updated by on

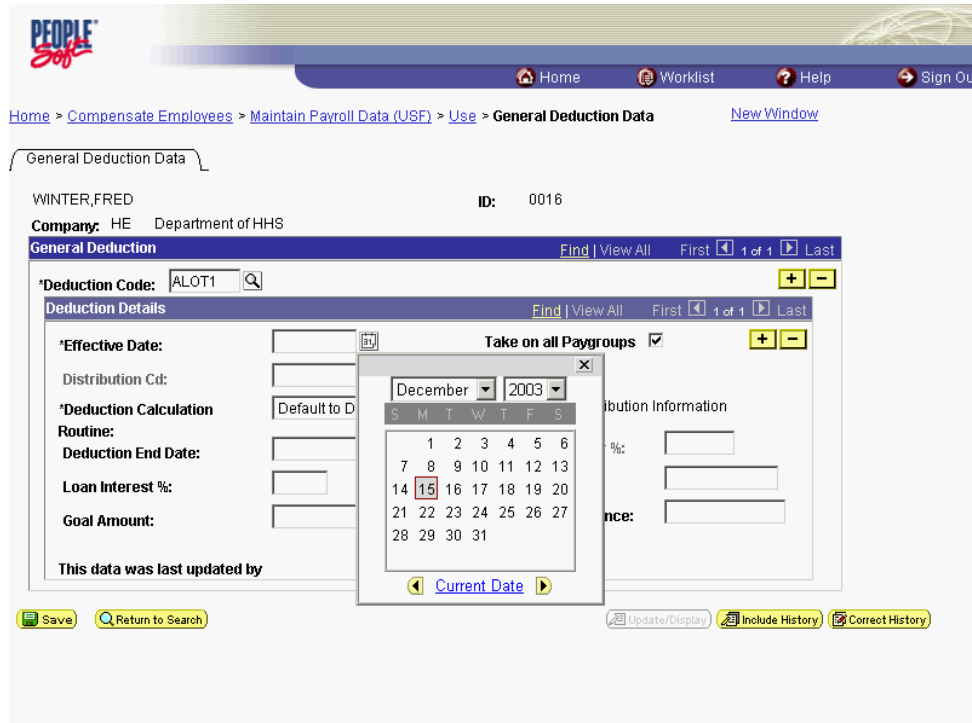
Save Return to Search Update/Display Include History Correct History

Step	Action
10.	NOTE: If there is previous data in the page, insert a row in the General Deduction Box. Enter the desired information into the *Deduction Code field. Enter " ALOT1 ".

The Look Up icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.

Step	Action
11.	Click the Calendar icon button.

The Calendar icon represents a date prompt. Clicking this button will produce a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.



Step	Action
12.	<p>In the Deduction Details area of the page, enter the Effective Date. Click 22.</p> <p>NOTE: Two actions cannot have the same effective dates. For example, the coverage will terminate at midnight on Day 1 and the new effective date will begin at 12:01 AM on the following day.</p> <p>22</p>
13.	<p>If making a Combined Federal Campaign deduction, make the appropriate entry in the Distribution Cd (Code) field.</p> <p>NOTE: These are standard OPM-delivered digit codes and are pre-printed on the enrollment form.</p>

Step	Action
14.	Click the *Deduction Calculation Routine list.
15.	Select the desired entry. Click Flat Amount .


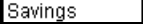

NOTE: This entry should be **Flat Amount**, except for National Union Dues, wherein the entry should be left as the default, **Default to Deduction Table**.

Step	Action
16.	Enter the desired information into the Flat/Addl Amount field. Enter " 100.00 ".
17.	Press [Tab] .
18.	Click the Distribution Information link if you are entering a TSP loan or allotment. Distribution Information

The screenshot shows the 'GVT Employee Distribution' form in the PEOPLE Soft application. The form is titled 'Employee Distribution Info.' and contains the following fields and controls:

- Payment Method:** A dropdown menu with 'EFT' selected.
- Electronic Funds Transfer Info:** A sub-section containing:
 - Routing Number:** A text input field with a search icon.
 - Account Number:** A text input field.
 - Account Type:** A dropdown menu.
- Country:** A dropdown menu with 'USA' selected and 'United States' displayed.
- Payee Name:** A text input field.
- Address 1:** A text input field.
- Address 2:** A text input field.
- City:** A text input field.
- State:** A text input field with a search icon.
- Postal:** A text input field.

At the bottom of the form, there are two buttons: 'OK' and 'Cancel'.

Step	Action
19.	EFT defaults in the Payment Method field. Press [Tab] .
20.	Enter the desired information into the Routing Number field. Enter " 011000138 ".
21.	Press [Tab] .
22.	Enter the desired information into the Account Number field. Enter " 05767788 ". NOTE: For TSP Loans, this is provided in the document provided by the Thrift Savings Board.
23.	Click the Account Type list. 
24.	For TSP loans, select Savings . For Allotments, select Savings or Checking for the Account Type . Select the desired entry. Click Savings . 
25.	Click the OK button to return to the General Deduction page. 
26.	The procedure to start an Employee's General Deductions is completed. End of Procedure.

Changing an Employee's General Deductions

Introduction

HR staff must enter information into the General Deduction Data page in the Maintain Payroll Data area of the system for purposes of the payroll interface.

This section is primarily concerned with the steps involved with changing general deductions.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

General Deduction Data Page

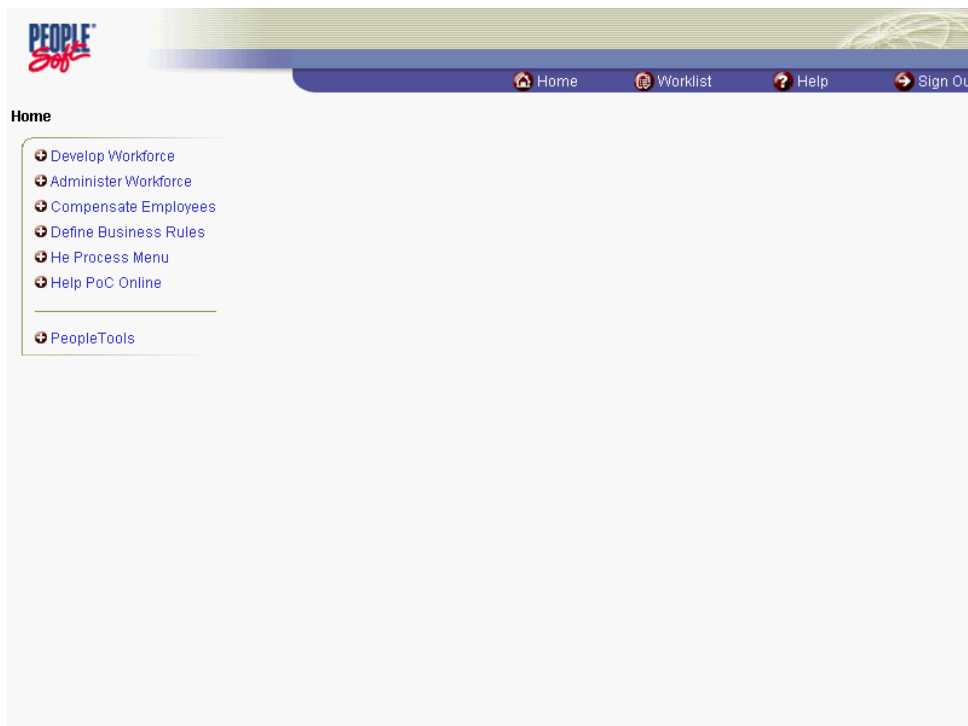
Change

1. Insert row
2. Enter Effective Date
3. Modify general deduction data




Note: A Change to a CFC requires a stop and then a start.

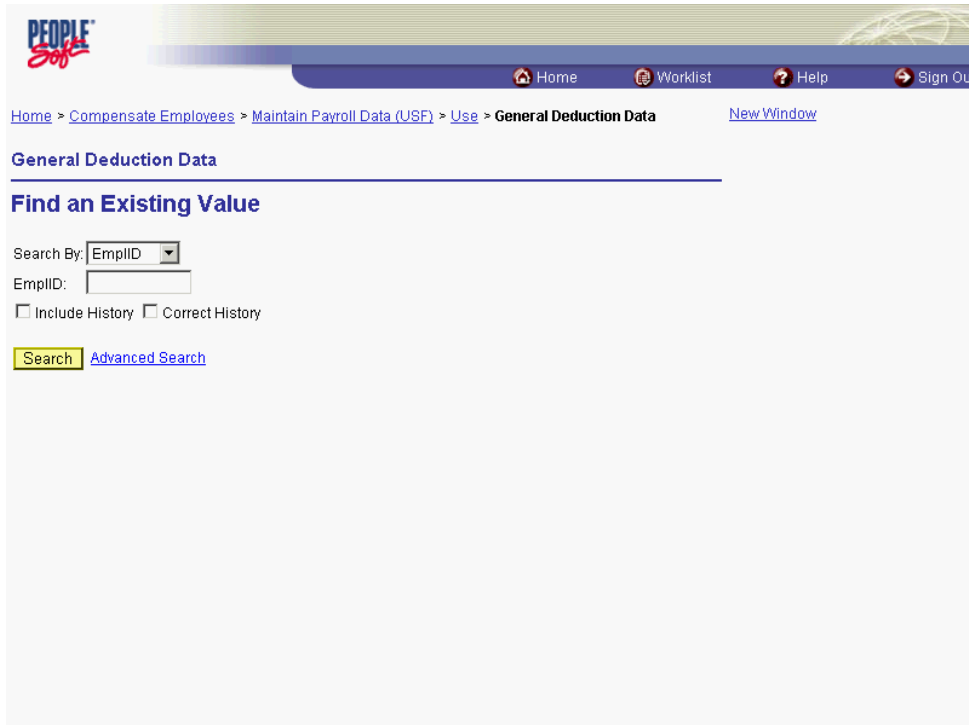
Procedure


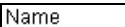
The following steps detail the procedure for changing an Employee's General Deduction.

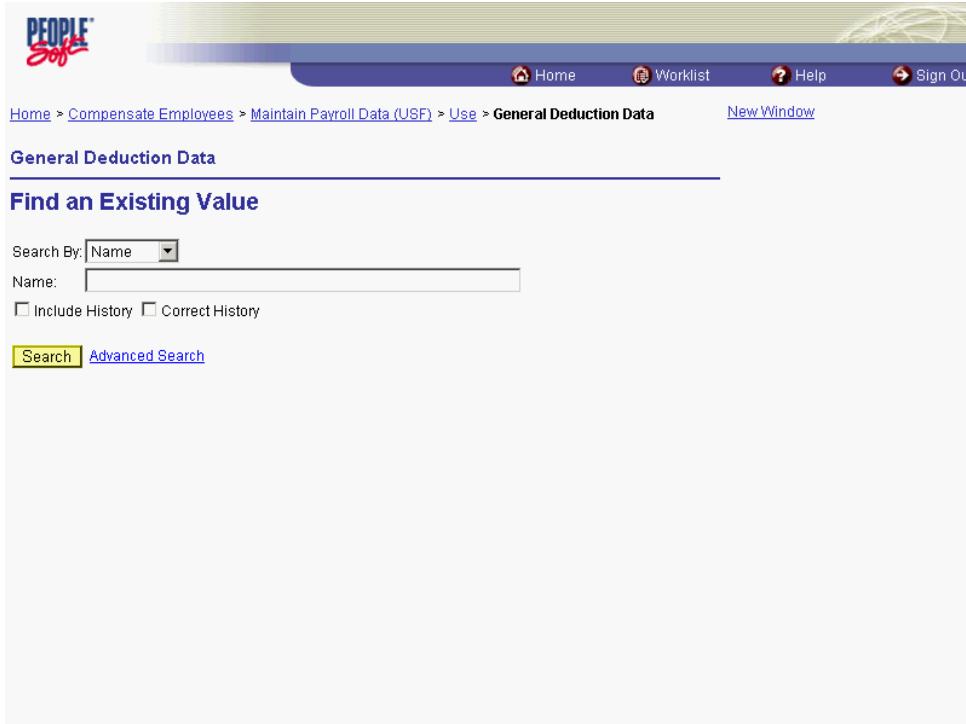


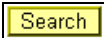

Step	Action
1.	Click the Compensate Employees link.

Step	Action
2.	Click the Maintain Payroll Data (USF) link. 
3.	Click the Use link. 
4.	Click the General Deduction Data link. 



Step	Action
5.	Click the Search By list. 
6.	Select the desired entry. Click Name . 



Step	Action
7.	Enter the desired information into the Name field. Enter " Winter ".
8.	Click the Search button. 
9.	Select the desired entry. Click WINTER,FRED . 

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > General Deduction Data [New Window](#)

General Deduction Data

WINTER,FRED ID: 0016

Company: HE Department of HHS

General Deduction Find | View All First 1 of 1 Last

*Deduction Code: ALOT1 Employee Allotment 1 + -

Deduction Details Find | View All First 1 of 1 Last

*Effective Date: 12/22/2003 Take on all Paygroups + -

Distribution Cd:

*Deduction Calculation: Flat Amount [Distribution Information](#)

Routine:

Deduction End Date: 12/22/2003 Deduction Rate or %:


Loan Interest %: Flat/Add Amount: \$75.00

Goal Amount: Current Goal Balance:

Deduction Stop Reason: No


This data was last updated by Online Opr on 12/15/2003

Save Return to Search Update/Display Include History Correct History

Step	Action
10.	Place the cursor in the Deduction Code field of the deduction that is to be changed, if necessary. Click the Add a new row at row 1 button to insert a new row. 



NOTE: There may be multiple rows of **Deduction Code** entry. If there is uncertainty as to which row is needed, click the **View All** link to see all rows at the General Deductions level on a single page.

Step	Action
11.	Click the Calendar icon button. 

Training Guide

Pay Actions Overview

The screenshot shows the PEOPLE Soft application interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Help', and 'Sign Out' buttons. Below this, the breadcrumb trail reads: 'Home > Compensate Employees > Maintain Payroll Data (USF) > Use > General Deduction Data'. The main content area is titled 'General Deduction Data' and shows the following information:

- Employee Name: WINTER, FRED; ID: 0016
- Company: HE Department of HHS
- Deduction Code: ALOT1 (Employee Allotment 1)
- Effective Date: 12/15/2003
- Deduction Calculation Routine: Flat Amount
- Deduction End Date: 12/22/2003
- Loan Interest %: [Empty]
- Goal Amount: [Empty]
- Deduction Stop Reason: No

A calendar pop-up is open, showing the month of December 2003. The date 22 is selected. The calendar has a header with days of the week (S, M, T, W, T, F, S) and a grid of dates from 1 to 31. The date 22 is highlighted with a red box. Below the calendar, there are buttons for 'Current Date' and 'Update/Display'.

Step	Action
12.	Select the Effective Date of the change. Click 22 .

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > General Deduction Data [New Window](#)

General Deduction Data

WINTER,FRED ID: 0016

Company: HE Department of HHS

General Deduction Find | View All First 1 of 1 Last

*Deduction Code: ALOT1 Employee Allotment 1 + -

Deduction Details Find | View All First 1 of 2 Last

*Effective Date: 12/22/2003 Take on all Paygroups + -

Distribution Cd:

*Deduction Calculation: Flat Amount [Distribution Information](#)

Routine:

Deduction End Date: 12/22/2003 Deduction Rate or %:

Loan Interest %: Flat/Addl Amount: \$75.00

Goal Amount: Current Goal Balance:

Deduction Stop Reason: No

This data was last updated by Online Opr on 12/15/2003

Save Return to Search Update/Display Include History Correct History

Step	Action
13.	Navigate to the appropriate field(s) and click or drag as necessary to select the data contained in the field(s). Click in the Flat/Addl Amount field to select it.
14.	Edit the field to make the appropriate change as necessary. Press [Delete] .
15.	Enter the desired information into the Flat/Addl Amount field. Enter " 100 ".

Step	Action
16.	Click the OK button.
17.	The procedure to change an Employee's General Deduction is completed. End of Procedure.

Stopping an Employee's General Deductions

Introduction

HR staff must enter information into the General Deduction Data page in the Maintain Payroll Data area of the system for purposes of the payroll interface.

This section is primarily concerned with the steps related to stopping general deductions.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

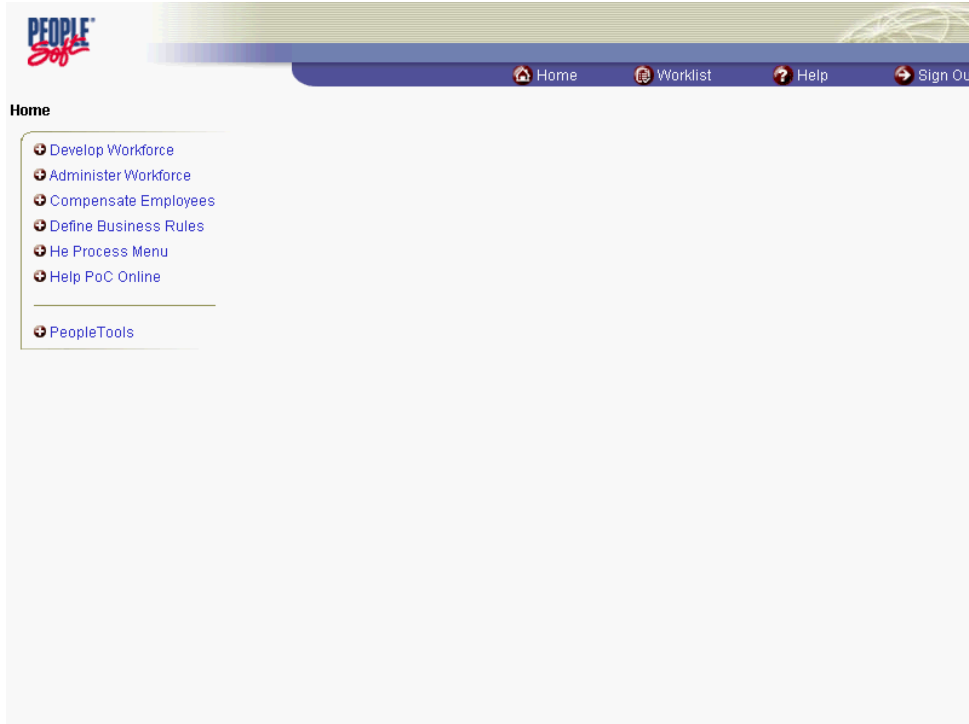
General Deduction Data Page

Stop

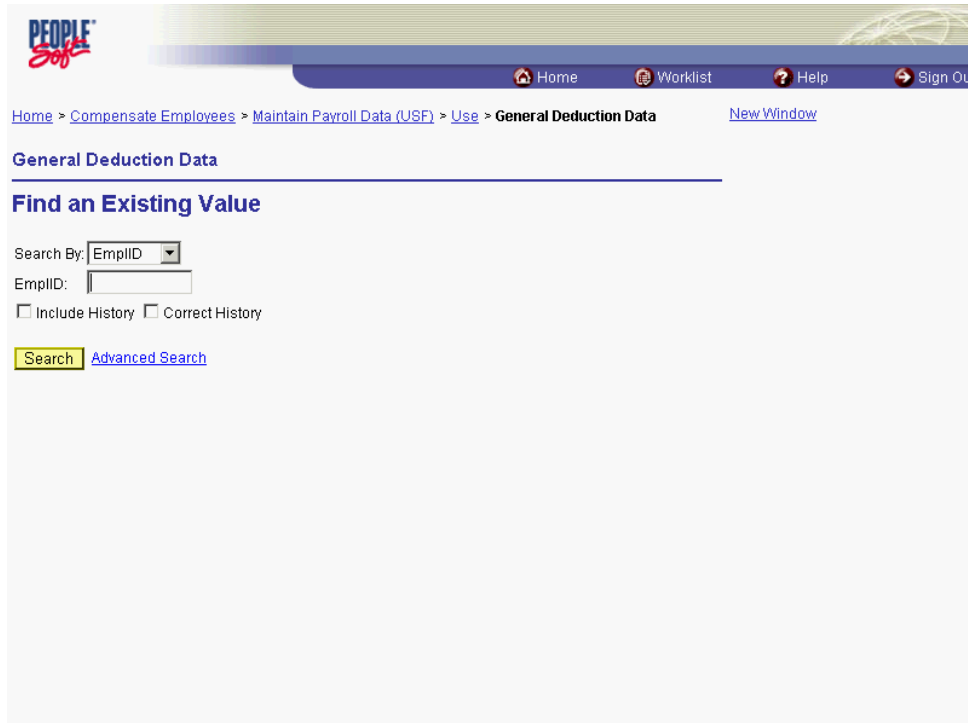
1. Insert row
2. Enter Effective Date
3. Enter Deduction End Date
4. DO NOT delete the amount of the deduction being stopped.


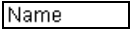
Procedure

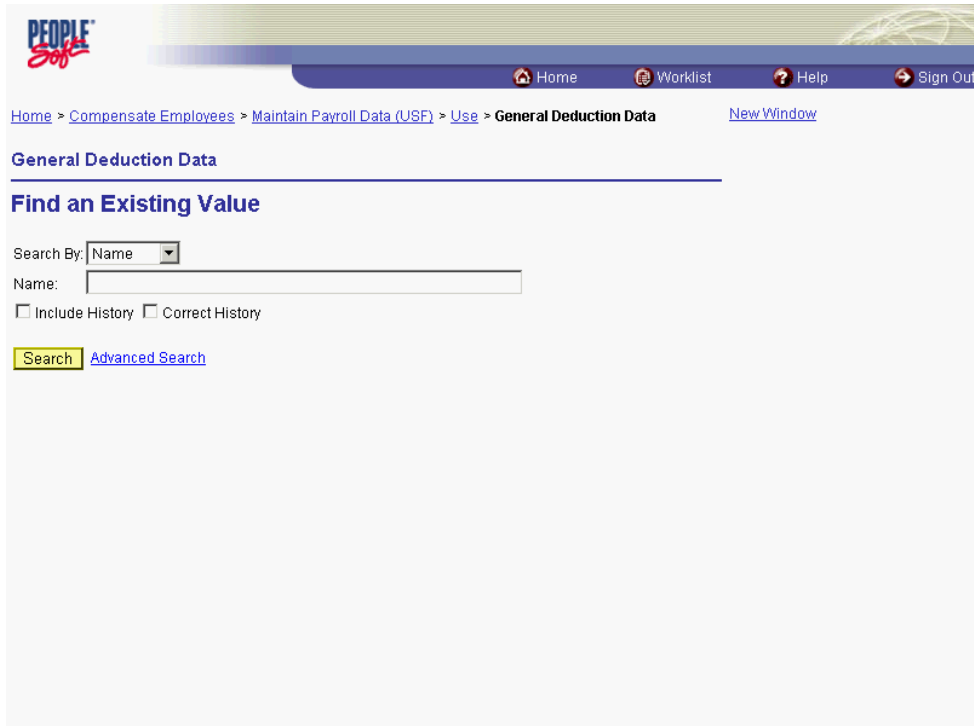
The following details the procedure for stopping an Employee's General Deductions.





Step	Action
1.	Click the Compensate Employees link. Compensate Employees
2.	Click the Maintain Payroll Data (USF) link. Maintain Payroll Data (USF)
3.	Click the Use link. Use
4.	Click the General Deduction Data link. General Deduction Data



Step	Action
5.	Click the Search By list. 
6.	Select the desired entry. Click Name . 



Step	Action
7.	Enter the desired information into the Name field. Enter " Winter ".
8.	Click the Search button. 
9.	Select the desired entry. Click WINTER,FRED . 

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > General Deduction Data [New Window](#)

General Deduction Data

WINTER, FRED ID: 0016

Company: HE Department of HHS

General Deduction Find | View All First 1 of 1 Last

*Deduction Code: ALOT1 Employee Allotment 1 + -

Deduction Details Find | View All First 1 of 1 Last

*Effective Date: 12/22/2003 Take on all Paygroups + -

Distribution Cd:

*Deduction Calculation: Flat Amount [Distribution Information](#)

Routine:

Deduction End Date: 12/22/2003 Deduction Rate or %:


Loan Interest %: Flat/Add Amount: \$75.00


Goal Amount: Current Goal Balance:


Deduction Stop Reason: No

This data was last updated by Online Opr on 12/15/2003

Save Return to Search Update/Display Include History Correct History

Step	Action
10.	Place the cursor in the Deduction Code field of the deduction that is to be stopped, if necessary. Click the Add a new row at row 1 button to insert a new row. 

 Note: There may be multiple rows of **Deduction Code** entry. If there is uncertainty as to which row is needed, click the **View All** hyperlink to see all rows at the General Deduction level on a single page.

Step	Action
11.	Click the Calendar icon button. 

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > General Deduction Data [New Window](#)

General Deduction Data

WINTER, FRED ID: 0016

Company: HE Department of HHS

General Deduction Find | View All First 1 of 1 Last

*Deduction Code: ALOT1 Employee Allotment 1

Deduction Details Find | View All First 1 of 2 Last

*Effective Date: 12/15/2003 Take on all Paygroups

Distribution Cd:

*Deduction Calculation: Flat Amount Distribution Information

Routine:

Deduction End Date: 12/22/2003 Deduction Rate or %:

Loan Interest %:

Goal Amount:

Deduction Stop Reason: No

This data was last updated by Online O

Save Return to Search

Update/Display Include History Correct History

December 2003

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Current Date

Step	Action
12.	<p>Enter or modify the Deduction End Date.</p> <p>Click 29.</p> <p>NOTE: The legacy pay system will stop the deduction in the pay period that it receives this action.</p> <p>29</p>

PEOPLE Soft

Home Worklist Help Sign Out

Home > Compensate Employees > Maintain Payroll Data (USF) > Use > General Deduction Data [New Window](#)

General Deduction Data

WINTER, FRED ID: 0016

Company: HE Department of HHS

General Deduction Find | View All First 1 of 1 Last

*Deduction Code: ALOT1 Employee Allotment 1

Deduction Details Find | View All First 1 of 2 Last

*Effective Date: 12/15/2003 Take on all Paygroups

Distribution Cd:

*Deduction Calculation: Flat Amount [Distribution Information](#)

Routine:

Deduction End Date: 12/29/2003 Deduction Rate or %:

Loan Interest %: Flat/Addl Amount: \$75.00

Goal Amount: Current Goal Balance:

This data was last updated by Online Opr on 12/15/2003

Save Return to Search Update/Display Include History Correct History

Step	Action
13.	Click the OK button.
14.	The procedure for stopping an Employee's General Deductions is completed. End of Procedure.