PeopleSoft Payroll - US Rel 9.2 Ed 3

PeopleSoft

DURATION	MODULES	COURSE CODE
5 Days	16 Lectures	—

Course Overview

PeopleSoft Payroll - US Rel 9.2 Ed 3

What You Will Learn

Course Overview

- Objectives
- Agenda

Business Process Overview

- Objectives
- Describing the Features of Payroll for North America
- (CAN) Additional Payroll for North America Features for Canada
- PeopleSoft Payroll for North America Integrations
- Describing The Steps of Payroll Processing
- Describing Sources of Information About Payroll for North America in
- Product Documentation
- Summary

Setting Up PeopleSoft HRMS Tables for Payroll Processing

- Objectives
- Identifying HRMS Tables That Impact Payroll Processing
- Describing Installation Table Setup for PeopleSoft Payroll for North America
- Describing the Role of SetID, Location, and Department in Payroll Processing
- Describing Company Table Setup
- Describing Frequency and Compensation Setup
- Summary

Setting Up Payroll Tables

- Objectives
- Identifying Payroll Setup Tables
- Setting Up Source Bank Accounts
- Creating Special Accumulators
- Setting Up Earnings Codes
- Setting Up Earnings Programs
- Describing Shift Pay Setup
- Creating a Pay Group
- Creating a Rate Code
- Setting Up Deductions
- Using Deduction Subsets
- Setting Up General Deductions
- Summary

Setting Up Payroll Tables

- Objectives
- Identifying Tax Table Maintenance Responsibility
- Describing PeopleSoft-Maintained Tax Tables
- Setting Up Customer-Maintained Tax Tables
- Describing Setup for Tax Reporting
- Summary

(CAN) Setting Up Canadian Payroll Tax Tables

- Objectives
- Identifying Tax Table Maintenance Responsibility
- Describing PeopleSoft-Maintained Tax Tables
- Setting Up Customer-Maintained Tax Tables
- Summary

Setting Up Employee Data

- Objectives
- Identifying Sources of Employee Data
- Setting Up an Employee Instance
- Entering and Viewing Employee Job Data
- Identifying Employee Pay Data
- (USA) Updating U.S. Employee Tax Data
- (CAN) Updating Canadian Employee Tax Data
- Assigning Additional Pay to Employees
- Assigning General Deductions to Employees
- Updating Payroll Options for Employees
- Setting Up Employee Direct Deposit Data
- Summary

Creating and Updating Paysheets

- Objectives
- Describing Paysheets in Payroll for North America
- Describing Balance ID Creation
- Creating Pay Calendars
- Setting Up Pay Run IDs
- Creating Paysheets
- Viewing and Updating Paysheets and Paylines
- Loading Paysheets by Rapid Entry Method
- (Optional) Loading Paysheets by Rapid Entry Method
- Describing the Payroll Unsheet Process
- Summary

Calculating Payroll

- Objectives
- Describing Payroll Calculation
- Deduction Taken Hierarchy During Pay Calculation
- Describing Payroll Calculation
- Running Preliminary Payroll Calculation
- Running Final Payroll Calculation
- Summary

Confirming Payroll and Producing Checks and Reports

- Objectives
- Confirming a Payroll
- Viewing Confirmed Payroll Results Online
- Printing Checks and Advices
- Describing Check Reprinting
- Describing Direct Deposit Transmittals and Reports
- Describing Payroll and Tax Reports
- Identifying Methods of Reversing Payroll Confirmation
- Summary

Processing Off-Cycle Payrolls

- Objectives
- Identifying Off-Cycle Payroll Processing
- Reversing a Paycheck
- Describing Reversal/Adjustment Processing
- Recording a Manual Check
- Producing an Online Check
- Describing Retroactive Processing
- Setting Up Retro Processing
- Processing Retro Pay

- Summary

Setting Up and Processing Additional Payroll Functionality

- Objectives
- Setting Up a Holiday Schedule
- Setting Up Advanced Earnings Options
- Setting Up Multiple Jobs Processing
- Setting Up and Processing Mid-period Job Changes
- (USA) Applying a Taxable Gross Definition
- Processing Gross Ups
- Summary

Setting Up and Processing Benefit Deductions in Payroll

- Objectives
- (USA) Setting Up Deductions and Earnings for Benefits Calculations
- (CAN) Setting Up Deductions and Earnings for Benefits Calculations
- Updating a Benefit Program and Enrolling Employees
- Analyzing Benefits-Related Payroll Reports
- Summary

Setting Up and Processing Garnishments

- Objectives
- Identifying Garnishment Setup Steps
- (USA) Describing PeopleSoft-Maintained U.S. Garnishment Tables
- (CAN) Describing PeopleSoft-Maintained Canadian Garnishment Tables
- Setting Up Company-Level Tables for Garnishment Processing
- Assigning an Employee Garnishment Deduction
- Setting Up Employee Garnishment Specification Data
- Reviewing Employee Garnishment History
- Summary

Describing PeopleSoft ePay

- Objectives
- Identifying ePay Transactions and Setup Requirements
- Describing ePay Security Setup
- Describing ePay Workflow Setup
- Describing Setup for the Voluntary Deduction Transaction
- Describing Setup for the View Paycheck Transaction
- (USA) Describing Setup for Paycheck Modeler
- Describing Setup for the Year End Form Transaction
- Using ePay Self-Service Transactions
- Summary

Course Review

- Objectives
- Describing PeopleSoft Payroll for North America Integrations and
- Business Processes
- Setting Up PeopleSoft HRMS Foundation Tables and Payroll Tables
- Setting Up Employee Data
- Creating and Updating Paysheets
- Processing On-cycle and Off-cycle Payrolls
- Setting Up and Processing Benefit Deductions, Garnishments, and Other
- Payroll Functionality
- Describing PeopleSoft ePay