UNIVERSITY OF MISSOURI
PeopleSoft End User Training

myHR Self Service – Payroll and Compensation
Training Participant Guide
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Welcome to Payroll and Compensation

At the end of this training, you should have the skills and knowledge to:

1. Understand the features available through the Payroll and Compensation Self Service pages.
2. View leave balances.
3. View and print pay advices.
4. View and edit direct deposit information.
5. View and edit Federal W-4 information.
6. View and edit Missouri W-4 information
7. Request a W-2 or 1099-R reissue.

Reminder: When navigating in Self Service, DO NOT use the Back button within your Internet browser window. Please use the navigation provided.

Leave Balances

Procedure

The Leave Balances page is used by employees to view current vacation, sick, personal, and compensatory time balances.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Vacation hours will display with the most current data listed first. Click the <strong>Sick Leave</strong> tab.</td>
</tr>
</tbody>
</table>
2. Sick leave hours will display similar to vacation hours.

Click the **Personal** tab.
3. Personal days will display based on the last time personal time was used and will show hours earned, adjusted, and taken.

Click the **Compensatory** tab.

![Compensatory tab](image-url)
4. Compensatory time (if applicable) will show hours earned, adjusted, used, and the remaining balance.
Step | Action
--- | ---
5. | If you are not eligible for University leave plans, no information will display upon selecting the Leave Balances menu option.
6. | This concludes the lesson on viewing leave balances. *End of Procedure.*
View Paycheck/Print Pay Advice

Procedure

The View Paycheck page is used by employees to view their current and past pay advices as well as access the print pay advice option.

**Navigation:** Self Service > Payroll and Compensation > View Paycheck

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td><strong>View Paycheck</strong>&lt;br&gt;This is the View Paycheck page.&lt;br&gt;The same information that appears on an employee's pay stub will display on this page.</td>
</tr>
</tbody>
</table>
Step | Action
---|---
2. | **Header Field Descriptions**

**Net Pay:** Amount paid to the employee.

**Pay Begin Date:** The first day of the pay period.

**Pay End Date:** The last day of the pay period.

**Check Date:** The day the employee is paid.

**View a Different Paycheck:** Click to select a different paycheck to view.
Step | Action
--- | ---
3. | **General Field Descriptions**

**Name:** Employee's name, as shown in the system.

**Employee ID:** Special identification number assigned to each employee.

**Address:** The address of the employee's department (i.e., campus mail address).

**Business Unit:** Primary campus grouping for employees (i.e., COLUM, HOSPT, KCITY, ROLLA, STLLO, UMSYS, UWIDE, or UOEXT).

**Pay Group:** Employee grouping based on pay frequency (i.e., biweekly or monthly).

**Department:** Employee's home department.

**Job Title:** Title assigned to the primary job of the employee.

**Pay Rate:** Gross pay for the pay frequency.
Step 4. Tax Data Field Descriptions

Fed Allowances: Number of allowances claimed on federal W-4.
State Marital Status: State tax filing status.
State Allowances: Number of allowances claimed on state W-4.
State Addl Amount: Additional amount withheld on state W-4.

Note: For married employees that select to have their withholding at the single rate on their Federal W-4, Single will display instead of Married in the status field.
Step | Action
--- | ---
5. | Paycheck Summary Descriptions

**Gross Earnings:** Current and Year-To-Date (YTD) amounts for the current paycheck displayed. **Note:** When viewing prior paychecks, only the current amounts display.

**Fed Taxable Gross:** Amount of taxable income for the pay period and YTD.

**Total Taxes:** Amount of taxes deducted for the pay period and YTD.

**Total Deductions:** The total amount of before and after tax deductions for the current pay period and YTD.

**Net Pay:** Amount paid to the employee for the current pay period and YTD.

6. | Scroll to the bottom of the page to continue viewing paycheck data.

Click the **vertical** scroll bar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.</td>
<td>The <strong>Earnings, Taxes, Before-Tax Deductions, After Tax Deductions, Employer Paid Benefits</strong> grids all contain descriptions of earnings and deductions for the current pay period as well as the YTD amount. Corresponding amounts display for each earning or deduction.</td>
</tr>
</tbody>
</table>
### Net Pay Distribution Field Descriptions

**Payment Type:** Method in which the employee is paid.

**Paycheck Number:** Number assigned to each advice or check.

**Account Type:** Determined by direct deposit information (i.e., checking or savings).

**Account Number:** Bank account where employee's net pay is deposited (as submitted through the paper form or Self Service). Please refer to the Direct Deposit section of this training information for more details.

**Amount:** Equal to the net pay, this is the amount deposited in the account.

9. To select a different paycheck to view, scroll back to the top of the page.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10.</td>
<td>Click the <strong>View a Different Paycheck</strong> link.</td>
</tr>
</tbody>
</table>

**View a Different Paycheck**
Step | Action
--- | ---
11. | **Click an entry in the **Pay Period End Date** column.**
**Note:** The Pay Period End Date is not necessarily the actual pay date.

For this training example, select the **2010-01-31** Pay Period End Date.

2010-01-31
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 12.  | The selected paycheck will display.  
**Note:** Manual and reversal checks are not available. |
<p>| 13.  | If you wish to view your pay advice online and discontinue receiving a paper pay advice, click the <strong>Set Pay Advice Deliver Method</strong> link and select the corresponding check box. |</p>
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.</td>
<td><strong>Print Pay Advice</strong>&lt;br&gt;Click the <strong>Print my Pay Advice</strong> link. <strong>Print my Pay Advice</strong></td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>15.</td>
<td>A new window will open. Click in the User ID field.</td>
</tr>
<tr>
<td>16.</td>
<td>Enter you Single Sign On ID into the User ID field. For this training example, enter &quot;TRAINING&quot;.</td>
</tr>
<tr>
<td>17.</td>
<td>Click in the Password field.</td>
</tr>
<tr>
<td>18.</td>
<td>Enter your password into the Password field. For this training example, enter &quot;TRAINING&quot;.</td>
</tr>
<tr>
<td>19.</td>
<td>Click the Login button.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>20.</td>
<td>Click the <strong>Expand report</strong> button (<strong>blue + sign</strong>) to view a list of your pay advices.</td>
</tr>
</tbody>
</table>

**Note:** DocumentDirect requires the most recent version of Java. If you receive an error message, use the following URL to verify your Java version and, if necessary, download a new version.

Step | Action
--- | ---
21. | A list of your pay advices will display. Click the **Blue arrow** button to view older pay advices.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>Once you have located the pay advice you wish to view, click the <strong>Expand version</strong> button (white paper icon) to open the pay advice.</td>
</tr>
<tr>
<td></td>
<td>For this training example, click the <strong>Expand version</strong> button for the <strong>Dec 31, 2007</strong> pay advice.</td>
</tr>
</tbody>
</table>
### Step 23
The pay advice will display on the right hand side of your screen.

### Step 24
Use the Acrobat Reader tool bar to save a copy to your computer or print a copy.  

**Note**: For security reasons, if you are on a public computer please do not save your pay advice to a local drive.

### Step 25
This concludes the lesson on viewing and printing pay advices.  

**End of Procedure.**
Direct Deposit

Procedure

The Direct Deposit page is used by employees and retirees to view and edit direct deposit information.

**Navigation:** Self Service > Payroll and Compensation > Direct Deposit

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This is the summary page for employee/retiree Direct Deposit information. To view account details, click an entry in the <strong>Account Type</strong> column (i.e., Checking). To make changes to direct deposit information, click <strong>Edit</strong>. For this training example, click <strong>Checking</strong>.</td>
</tr>
</tbody>
</table>
2. The Direct Deposit Detail page will display.

Click the Return to Direct Deposit link to return to the Direct Deposit page.

Return to Direct Deposit
To make changes to the existing direct deposit information, click the **Edit** button.
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Table:

<table>
<thead>
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</tr>
</thead>
</table>
| 4.   | Click the **Account Type** list.  
      | Checking |
| 5.   | Select the account type.  
      | For this training example, click the **Saving** list item.  
      | Saving |
| 6.   | Click in the **Routing Number** field.  
      | 100000001 |
| 7.   | Enter the desired information into the **Routing Number** field.  
      | For this training example, enter "555555555". |
| 8.   | Enter the desired information into the **Account Number** field.  
      | For this training example, enter "9876543". |
9. Click the **Save** button.

**Warning!** Upon saving, this change may take up to 21 days to process. **DO NOT** close your old bank account until your direct deposit is placed in your new bank account.
Step | Action
--- | ---
10. | A confirmation message will display. Click the **OK** button.

11. | This concludes the lesson on viewing and editing direct deposit information. **End of Procedure.**
Federal W-4 Tax Information

Procedure

The Federal W-4 Tax Information page is used by employees to view and edit federal W-4 information.

**Navigation:** Self Service > Payroll and Compensation > Federal W-4 Tax Information

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**Federal W-4 Tax Information**

Belum, Sara  
University of Missouri System Admin

**ATTENTION:** This statement only affects your Federal W-4.

Upon successful submission, these changes may not be reflected on the next paycheck due to timing of payroll processing.

You must complete Form W-4 so the Payroll Department can calculate the correct amount of tax to withhold from your pay. Federal income tax is withheld from your wages based on marital status and the number of allowances claimed on this form. You may also specify that an additional dollar amount be withheld. You can file a new Form W-4 anytime your tax situation changes and you choose to have more, or less, tax withheld.

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

**Name Address**

643 Mary Circle  
Columbia MO  65202-5019

**W-4 Tax Data**

Enter total number of allowances you are claiming: 

Enter Additional Amount, if any, you want withheld from each paycheck: 

Indicate Marital Status: Single  Married

[ ] Check here and select Single status if married but withholding at single rate.

[ ] Check here if your last name differs from that shown on your Social Security card.

---

**Step** | **Action**
--- | ---
1. | This is the Federal W-4 Tax Information page.
2. | Scroll to the bottom of the page.
### Step 3

For your federal W-4, make changes to the existing information in the W-4 Tax Data and/or Claim Exemption sections.

Click the **Submit** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 4.   | Because you are changing your federal withholding, you will be asked to re-enter your password as a security measure. Enter the desired information into the **Password** field.  
For this training example, enter "**TEST1**". |
| 5.   | Click the **Continue** button. |
### Step 6

**Click the OK button**

**Note:** This change may take some time to process and may not be reflected on your next paycheck.

### Step 7

This concludes the lesson on viewing and editing federal W-4 tax information. **End of Procedure.**
Missouri W-4 Tax Information

Procedure

The Missouri W-4 Tax Information page is used by employees to obtain the correct contact information for submitting changes to your Missouri W-4.

**Navigation:** Self Service > Payroll and Compensation > Missouri W-4 Tax Information

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This is the Missouri W-4 Tax Information page.</td>
</tr>
<tr>
<td>2.</td>
<td>To access the Management Services - Human Resources Web site and the Missouri Withholding Certificate, click the Link to Missouri W-4 form link.</td>
</tr>
</tbody>
</table>

[Link to Missouri W-4 form]
3. The myHR Forms Web site will display. The Missouri Withholding Certificate can be found under W-4s in the list of forms.

4. This concludes the lesson on editing Missouri W-4 tax information.

End of Procedure.
W-2 or 1099-R Reissue Request Procedure

The W-2 or 1099-R Reissue Request page is used by employees to request another copy of their W-2 or 1099-R for the most recent tax year.

Navigation: Self Service > Payroll and Compensation > W-2 or 1099-R Reissue Request

W-2 or 1099-R Reissue Request Information

Name of Employee: Betum, Sara
Employee ID Number: 12345678

Current Tax Year Request Contacts (via email or website link): The following information will help you obtain a W-2 or 1099-R available for reissue from the most recently completed tax year, please provide the Human Resource Payroll Office your Name and Employee ID. To protect your privacy, please do not include your Social Security Number in your request. All requests should include Name of the Employee and Employee ID Number, as displayed above.

University of Missouri - Columbia Payroll
10 Jesse Hall, Columbia
umopayroll@missouri.edu (Must pick up at Jesse Hall)

University of Missouri - Healthcare Payroll/Central Processing:
DC059 10, Quarterdeck 234-238, Columbia or (573) 882-7912

University of Missouri - Kansas City Human Resources/Payroll:
226 Administration Center, Kansas City

Missouri Science & Technology Human Resources/Payroll:
113 University Center, Rolla
payroll@msst.edu

University of Missouri - St. Louis Human Resources/Payroll:
211 General Services Building, St. Louis

University of Missouri - System Central Payroll Office:
121 University Hall, Columbia
CentralPayrollOffice@umsystem.edu

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>This is the W-2 or 1099-R Reissue Request Information page. Refer to the contact information on this page for W-2 and 1099-R reissue requests.</td>
</tr>
<tr>
<td>2.</td>
<td>This concludes the lesson on how to request another copy of a W-2. <strong>End of Procedure.</strong></td>
</tr>
</tbody>
</table>

THIS CONCLUDES THE TRAINING ON myHR SELF SERVICE – PAYROLL AND COMPENSATION.