

## PeopleSoft Payroll - US Rel 9.2 Training

### Course Outline

#### **Module 1 - Setting Up PeopleSoft HRMS Tables for Payroll Processing**

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

#### **Module 2 - Setting Up Payroll Tables**

- 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

#### **Module 3 - Setting Up U.S. Payroll Tax Tables**

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

#### **Module 4 - Setting Up Employee Data**

- Identifying Sources of Employee Data
- Setting Up an Employee Instance
- Entering and Viewing Employee Job Data
- Identifying Employee Pay Data

- Updating Employee Tax Data
- Assigning Additional Pay to Employees
- Assigning General Deductions to Employees
- Updating Payroll Options for Employees

#### **Module 5 - Creating and Updating Paysheets**

- 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
- Describing the Payroll Unsheet Process

#### **Module 6 - Calculating Payroll**

- Describing Payroll Calculation
- Running Preliminary Payroll Calculation
- Running Final Payroll Calculation

#### **Module 7 - Confirming Payroll and Producing Checks and Reports**

- 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

#### **Module 8 – Processing Off-Cycle Payrolls**

- Identifying Off-Cycle Payroll Processing
- Reversing a Paycheck

- Describing Reversal/Adjustment Processing
- Recording a Manual Check
- Producing an Online Check
- Describing Retroactive Processing

#### **Module 9 - Setting Up and Processing Additional Payroll Functionality**

- Setting Up a Holiday Schedule
- Setting Up Advanced Earnings Options
- Setting Up Multiple Jobs Processing
- Setting Up and Processing Mid-period Job Changes
- Processing Gross Ups

#### **Module 10 - Setting Up and Processing Benefit Deductions in Payroll**

- Setting Up Deductions and Earnings for Benefits Calculations
- Updating a Benefit Program and Enrolling Employees
- Analyzing Benefits-Related Payroll Reports

#### **Module 11 - Setting Up and Processing Garnishments**

- Identifying Garnishment Setup Steps
- Describing PeopleSoft-Maintained 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

#### **Module 12 - Describing PeopleSoft Enterprise ePay**

- 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

- Describing Setup for Paycheck Modeler
- Describing Setup for the Year End Form Transaction
- Using ePay Self-Service Transactions