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Introduction

Direct Deposit, W4 Tax Information, My Paystub, My W-2, and My Year end Deductions information are self service pages that allow Holy Cross employees the ability to maintain their bank account information for direct deposit, declare federal withholdings, view previous paychecks and W-2's.

When either Direct Deposit or W4 tax information is added or changed, an email is generated confirming what you have entered. The email is sent from hrprd@holycross.edu . If you receive an email, but have not altered your direct deposit or W4 tax information please contact Payroll at ext. 2331.

Accessing Employee Self Service

To access Employee Self Service you need to have a network id and password. The following instructions can be used with any computer.

1. Launch a web browser, such as Mozilla FireFox or Internet Explorer
2. Click the purple Log In button located in the upper right portion of the Holy Cross home page

| Calendars	Libraries		Resources For:	
		Log In	Alumni & Friends	Media
Site search	A-Z Site Index		Faculty & Staff	Parents & Families

3. Click the link for **Human Resources – Self Service** located under the Links and Quick Links on the right side of the page
4. Enter in your network id and network password and click Sign In

COLLEGE OF THE HOLY CROSS

HUMAN RESOURCES

User ID: [   ]
Password: [   ]

Sign In
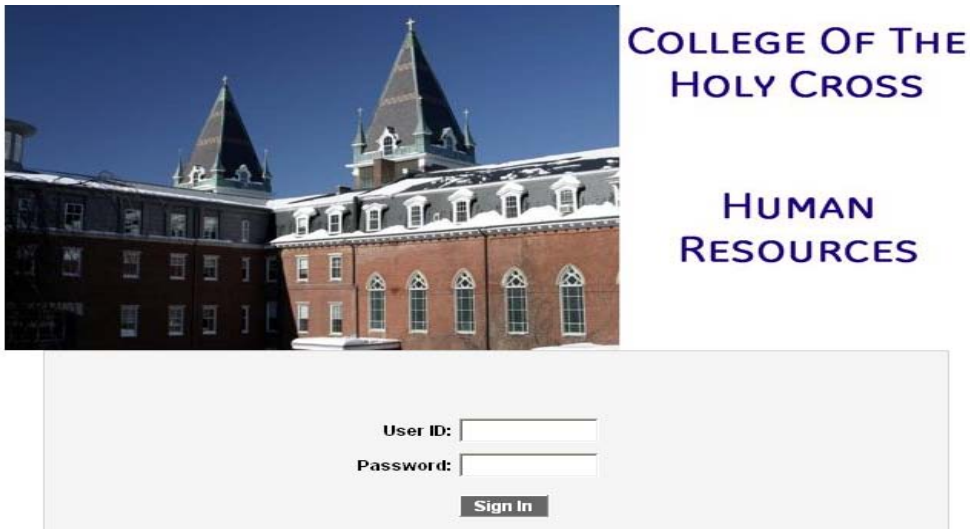
Please note: Above image may change from time to time. To ensure you are logging into the correct environment always use the link supplied from the login button on the Holy Cross home page.

Direct Deposit

From the Direct Deposit Self Service page an employee is able to add Direct Deposit accounts, edit previously added accounts or suppress printing of Direct Deposit paystubs.
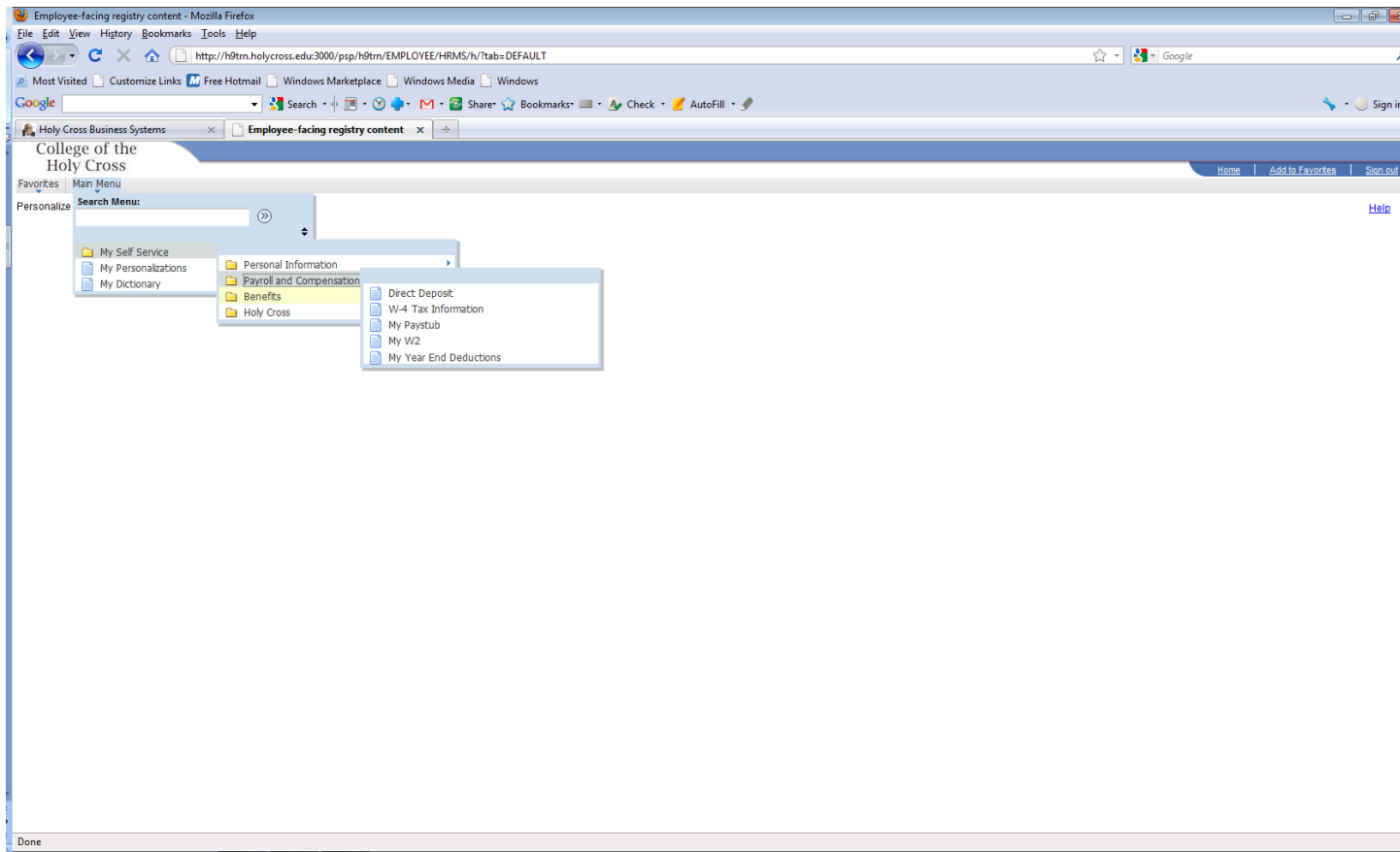
1. On the top grey bar, click Main Menu.
2. From this expanded menu, click My Self Service.
3. From this expanded menu, click Payroll and Compensation.
4. From this expanded menu, click Direct Deposit. You will then be presented with a screen that shows you any current direct deposit information that the system has on file. This example shows someone who hasn't entered in any direct deposit information.

Direct Deposit

John Doe

Review, add or update your direct deposit information.

Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order		

Add Account

5. To add a new account, click the yellow [Add Account] button.
6. You will then be presented with a screen that shows the information needed to get a direct deposit set up. Enter in the required information and click [Save]. Please note all fields except "Amount/Percent" are required.

Direct Deposit
Add Direct Deposit

John Doe

Your Bank Information

Routing Number: [   ]   View check example

Distribution Instructions

Account Number: [   ]

'Account Type: [▼]

'Deposit Type: [▼]

Amount/Percent: [   ]

Deposit Order: [   ]   (example: 1 = first account processed)

Save

Return to Direct Deposit

* Required Field

7. If you need to see an example of where to find your routing and account numbers for your bank account, click the link "View check example".

8. **If you only have one account you want money deposited to select the value of "Balance" from the Deposit Type drop down and set the deposit order to 999. If you want to put money into multiple accounts, then select either "Amount" or "Percent" from that same drop down and enter in the amount or percent in the box labeled "Amount/Percent".**

9. **Deposit order is used for when you have multiple accounts being deposited to. You specify in which order the accounts should receive funds.   Start with 1 and work your way up.**

10. **If you set up multiple accounts, the last account you specify should be set as a deposit type of "Balance" and should be a deposit order of 999. This will allows any un allocated funds not specified in 9 above to be deposited.**

11. When you are done entering in the information click [Save]. You will be shown a confirmation screen that the save was successful.

**Direct Deposit**
Save Confirmation

The Save was successful.
However, due to timing, your change may not be reflected on the next paycheck.

[OK]

12. After setting up at least one Direct Deposit account, you will have the opportunity to elect to suppress the printing of a Direct Deposit pay stub. Click on the link Pay Stub Print Option. Select the button "Do not send a paper copy of Direct Deposit Pay Statement" to my home address.

13. Click Save.

14. You will be returned to the original direct deposit screen. You can then either click [Add Account] to enter a second account or edit an existing account

Edit/Delete existing account

The following screen prints depicts an employee with two active accounts. Step 15 below describes the edit/delete function.
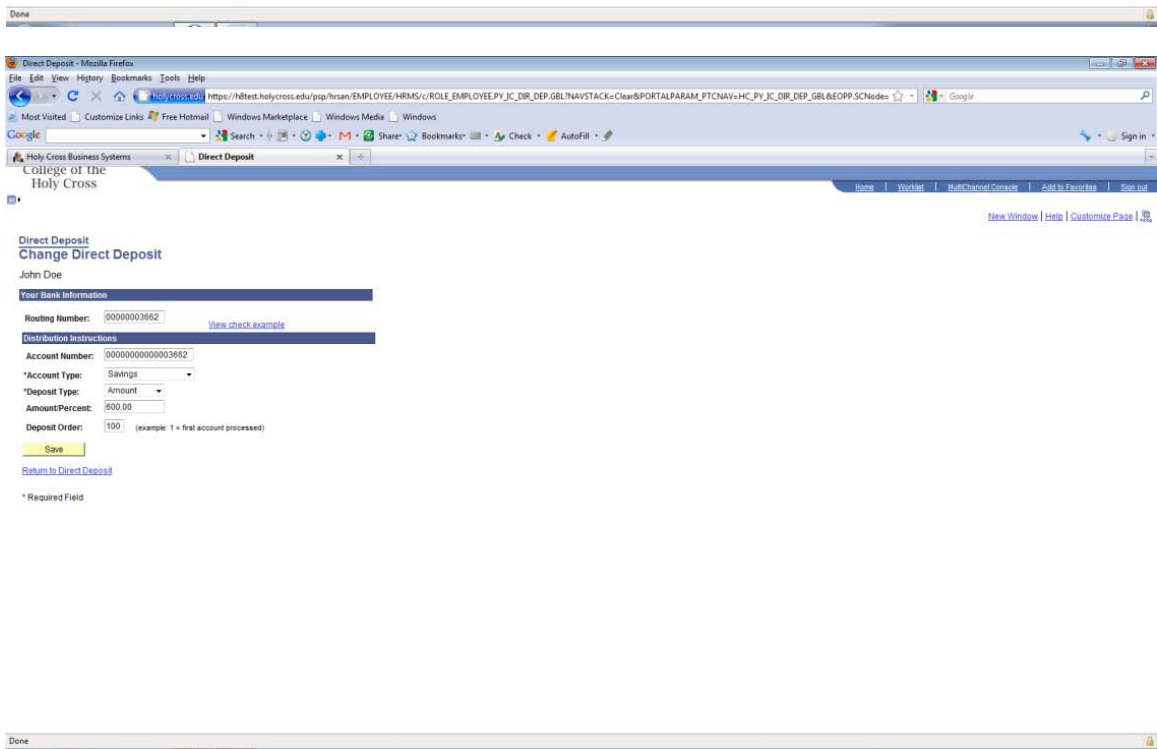
15. If you need to edit any account information click the [edit] hyper link next to the account you wish to make changes to. Type of edits would include changing the amount or percent you wish to go to an account or if your "Balance Account" has changed. if you wish to remove a non "Balance Account", select the [delete] button next to the appropriate account. A "Balance Account" should never be deleted.   If no edits are required you can either navigate to another self service page or you can <u>Sign Out</u> located in the top right corner of the page.

W4 Tax Information

From the W-4 Self Service page an employee is able to update their "Federal Filing Status". Marital status, number of exemptions, additional withheld per paycheck, or claim of exemption can all be updated. This page effects changes for Federal withholdings only. Any State withholdings changes need to be made in person in the Payroll Office, located in O'Kane 159.
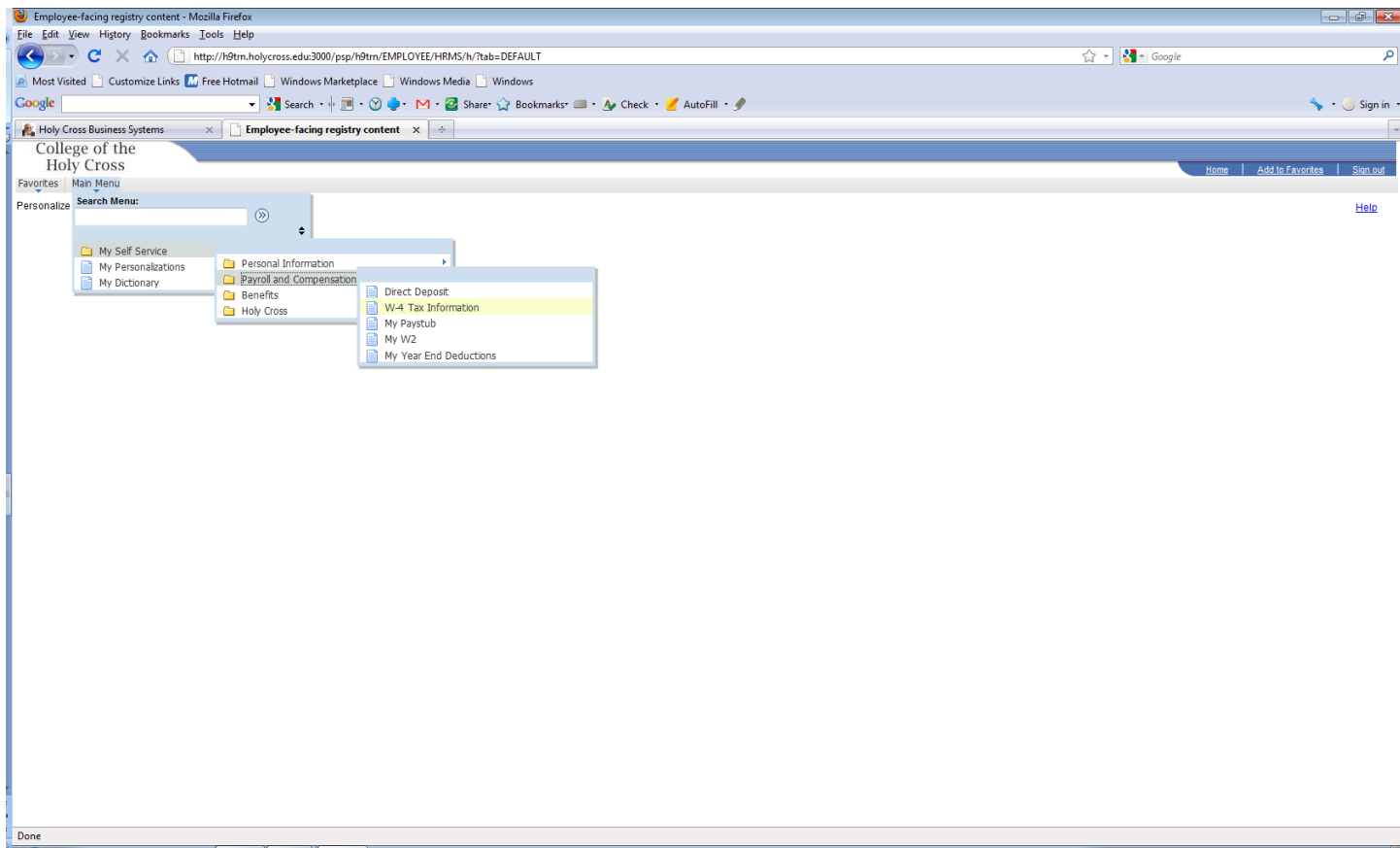
1. On the top grey bar, click Main Menu.
2. From this expanded menu, click My Self Service.
3. From this expanded menu, click Payroll and Compensation
4. From this expanded menu, click W-4 Tax Information
5. You will then be presented with a screen that shows you your current W4 selections.

W-4 Tax Information

John Doe   Social Security #:
College of the Holy Cross

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.

Home Address

Mailing Address

W-4 Tax Data

Enter total number of Allowances you are claiming: [0]

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.
Note: If married, but legally separated, or spouse is a nonresident alien, select 'Single' status.

☐ Check here if your last name differs from that shown on your social security card. You must call 1-800-772-1213 for a new card.

Claim Exemption

I claim exemption from withholding for [2011] and I certify that I meet BOTH of the following conditions for exemption:

>> Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability; AND

>> This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.

☐ Check 'Exempt' here if you meet both conditions.

[Submit]   Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

6. Enter in information that you want updated and click [Submit].

7. You will then be presented with a page asking you to re-enter your password. This is a security feature and acts as your electronic signature. Enter your password and click [Continue].

Verify Identity

To protect your privacy, verify your identity by typing your password. If you are not this user, click **Sign Out**.

User ID:
Password: _____

[Continue] [Cancel]

8. You will then be presented with a page showing you the submission was a success.

Submit Confirmation

✔ The Submit was successful.

However, due to timing, your change may not be reflected on the next paycheck.

[OK]

9. Click Ok and you will be returned to the W4 information screen. At this point you can either navigate to another self service page or you can Sign Out located in the top right corner of the page.

My Paystub

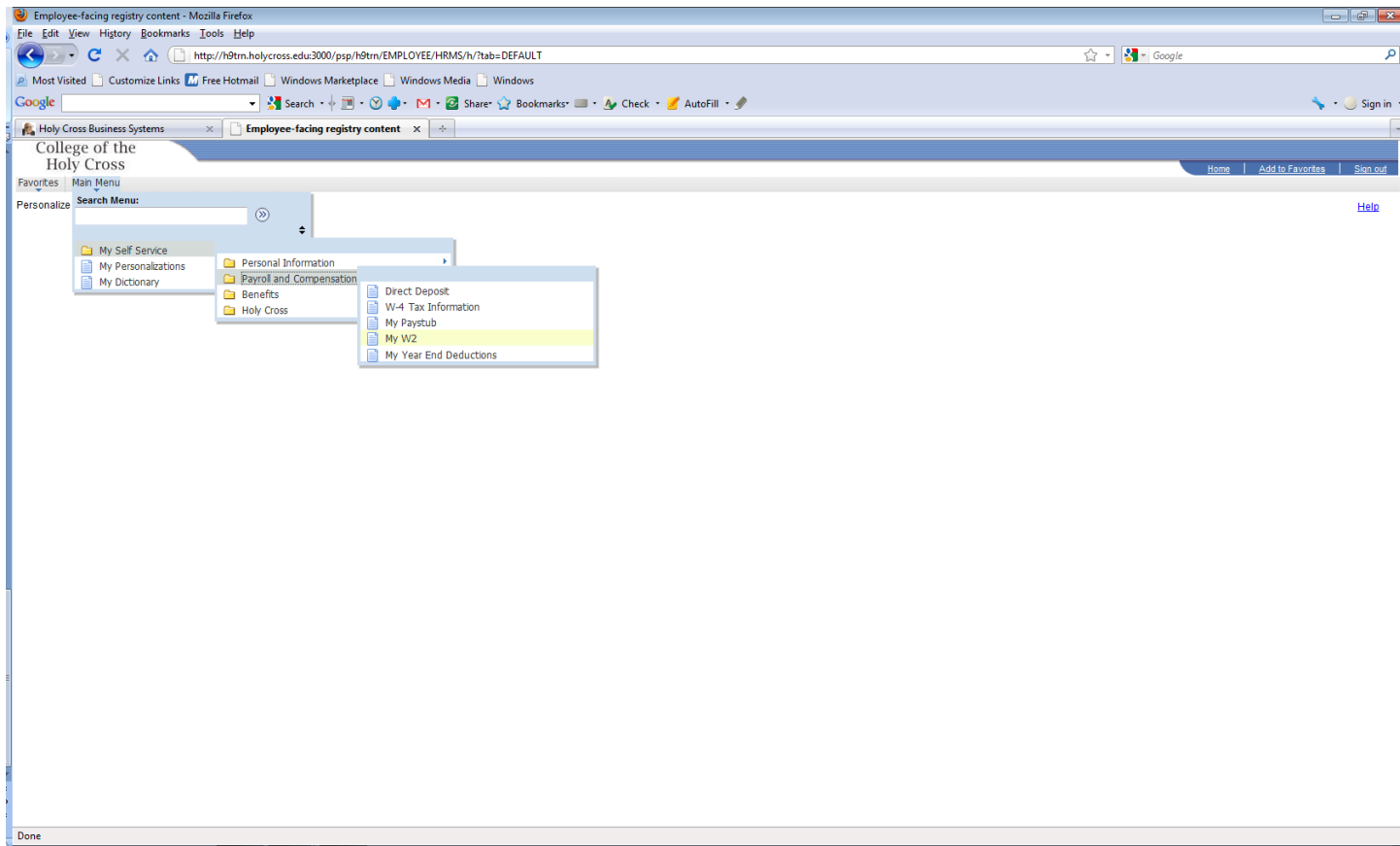From the My Paystub Self Service Page an employee is able to view any current or previous paystub. Note, when choosing previous pay stubs, Year to Date amounts will not be shown. Please take this in to account if you use your last stub in December to aid you in tax preparation.
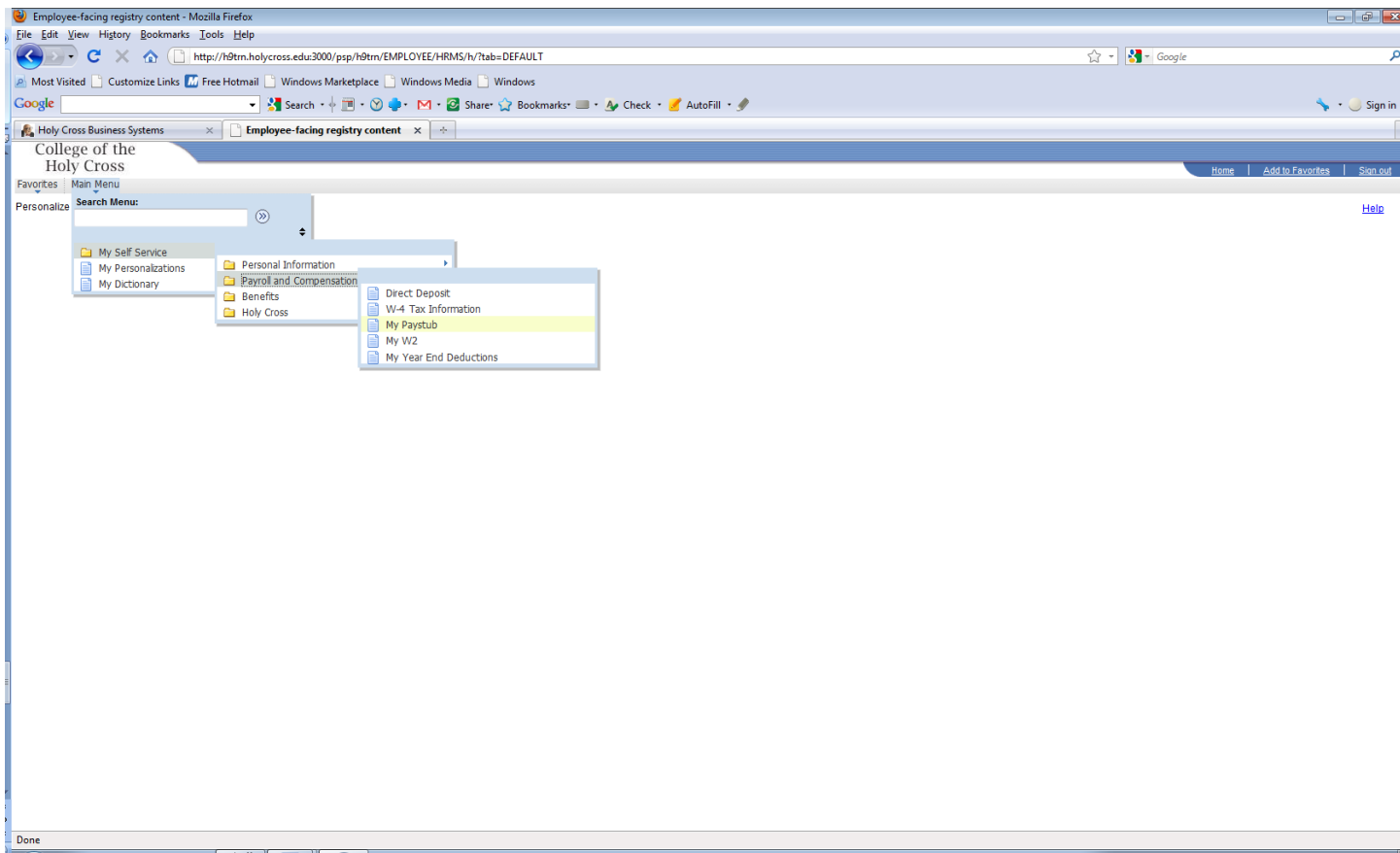
1. On the top grey bar, click Main Menu.
2. From this expanded menu, click My Self Service.
3. From this expanded menu, click Payroll and Compensation.
4. From this expanded menu,click My Paystub. You will then be presented with a screen that shows your current pay stub information that the system has on file.
5. To view a previous pay stub, click "Select another Paystub", located in the top right corner of the page.
6. Choose the date you wish to view.
7. After viewing paychecks, you can either navigate to another self service page or you can Sign Out, located in the top right corner of the page.

My W2

From the My W2 Self Service Page an employee is able to view any current or previous W2. Note, the current calendar year's W2 will not be available on this page until after January 31st of the next year. The information provided is for the employee's records only. It is not intended to be used with any personal tax filings.

Created: 27.February.2012 13.02 Revised: February 27, 2012
Document: M:\Policy and Procedure\Controller's Office\Payroll\Payroll Self Service Instructions

1. On the top grey bar, click Main Menu.
2. From this expanded menu, click My Self Service.
3. From this expanded menu, click Payroll and Compensation.
4. From this expanded menu, click My W2. You will then be presented with a screen that shows your current W2 information that the system has on file.
5. To view a previous W2, click the magnifying glass next to the calendar year.
6. Choose the year you wish to view.
7. After viewing W2's, you can either navigate to another self service page or you can <u>Sign Out</u>, located in the top right corner of the page.

My Year End Deductions

From the My Year End Deductions Self Service Page an employee is able to view any current or previous My Year End Deductions. Note, the current calendar year's My Year End Deductions will not be available on this page until after January 31st of the next year. The information provided is for the employee's records only. It is not intended to be used with any personal tax filings.
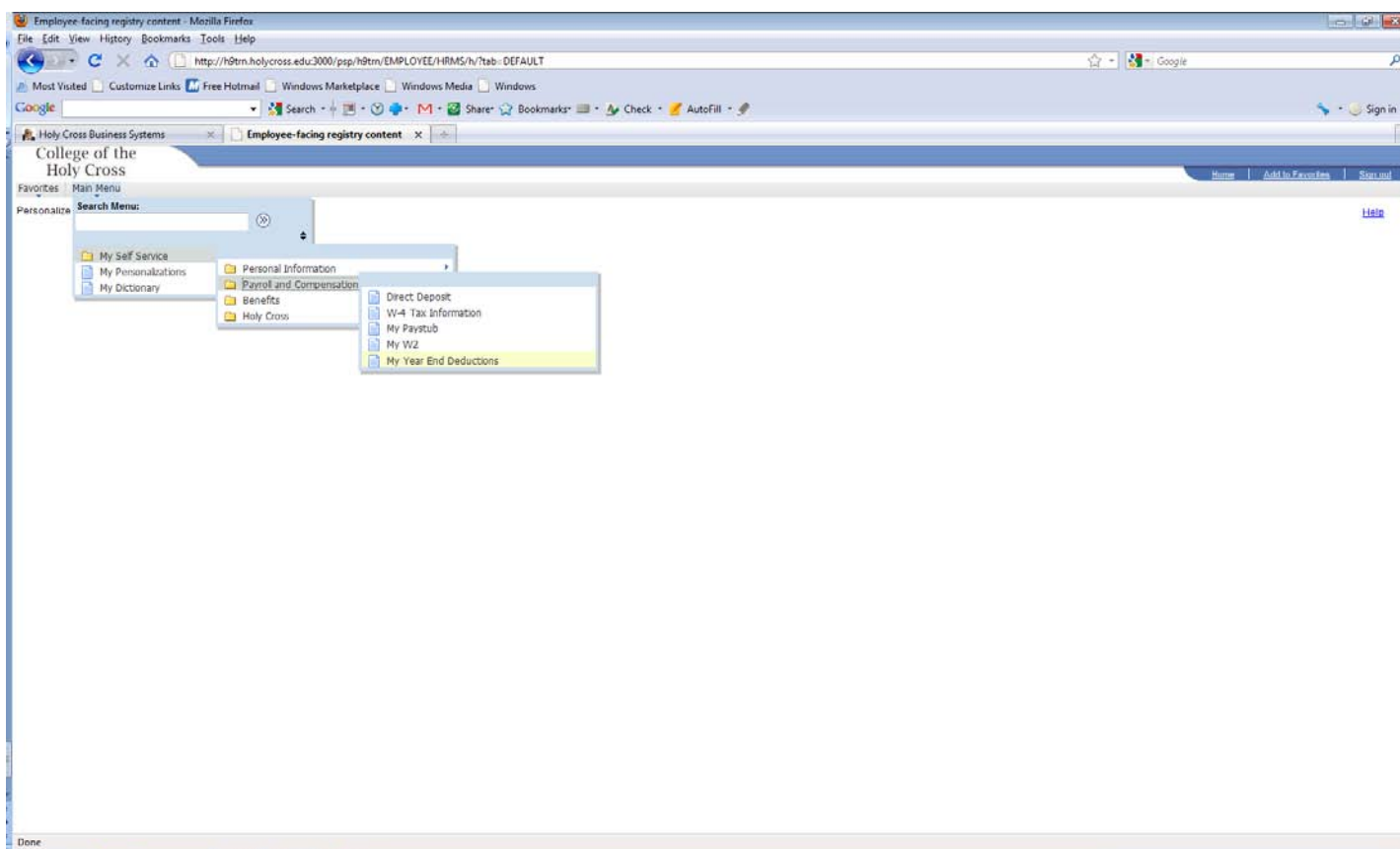
1. On the top grey bar, click Main Menu.
2. From this expanded menu, click My Self Service.
3. From this expanded menu, click Payroll and Compensation.
4. From this expanded menu click My Year End Deductions. You will then be presented with a screen that shows your current Year End Deduction totals. This information may be helpful in the preparation of your individual tax return.
5. To view a previous Year End Deductions, click the magnifying glass next to the calendar year.
6. Choose the year you wish to view.
7. After viewing your deductions, you can either navigate to another self service page or you can <u>Sign Out</u>, located in the top right corner of the page.