

ORACLE®

PeopleSoft Payroll for North America

Update & Roadmap - Reconnect 2019

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Product Strategist
Oracle PeopleSoft HCM
July 17, 2019

Safe Harbor Statement

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

Program Agenda

- 1 ➤ Catching Up
- 2 ➤ Payroll Legislation
- 3 ➤ Roadmap
- 4 ➤ Additional Resources

All Things Fluid

- Fluid Year-End Forms Consent
- Fluid Year-End Forms
- Fluid Payroll for NA WorkCenter



Workforce Administrator USA Payroll WorkCenter

Scope: All Paygroups

My Work

Common Exceptions

State Data Missing

Empl ID	Actions	Empl Record	Name	Company	Pay Group	Locality	Department	Detail Link
TWC0007		0	Lewis, Owen WC	TWC	TW4	TQ10100		
TWC0008		0	Lewis, Helen WC	TWC	TW2	TQ10100		
TWC0018		0	Lewis, Rachel WC	TWC	TW2	TQ10100		
TWC0019		0	Lewis, Sara WC	TWC	TW2	TQ10100		
TWC0060		0	Lewis, Irene WC	TWC	TW4	TQ10100		
TWC0060		0	Lewis, Irene WC	TWC	TW4	TQ10100		
TWC0061		0	Lewis, Janis WC	TWC	TW4	TQ10300		
TWC0062		0	Lewis, Judy WC	TWC	TW4	TQ11000		
TWC0064		0	Lewis, Marie WC	TWC	TW4	TQ004		
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10 rows

Workforce Administrator Canadian Payroll WorkCenter

Scope: My Scope

My Work

Common Exceptions

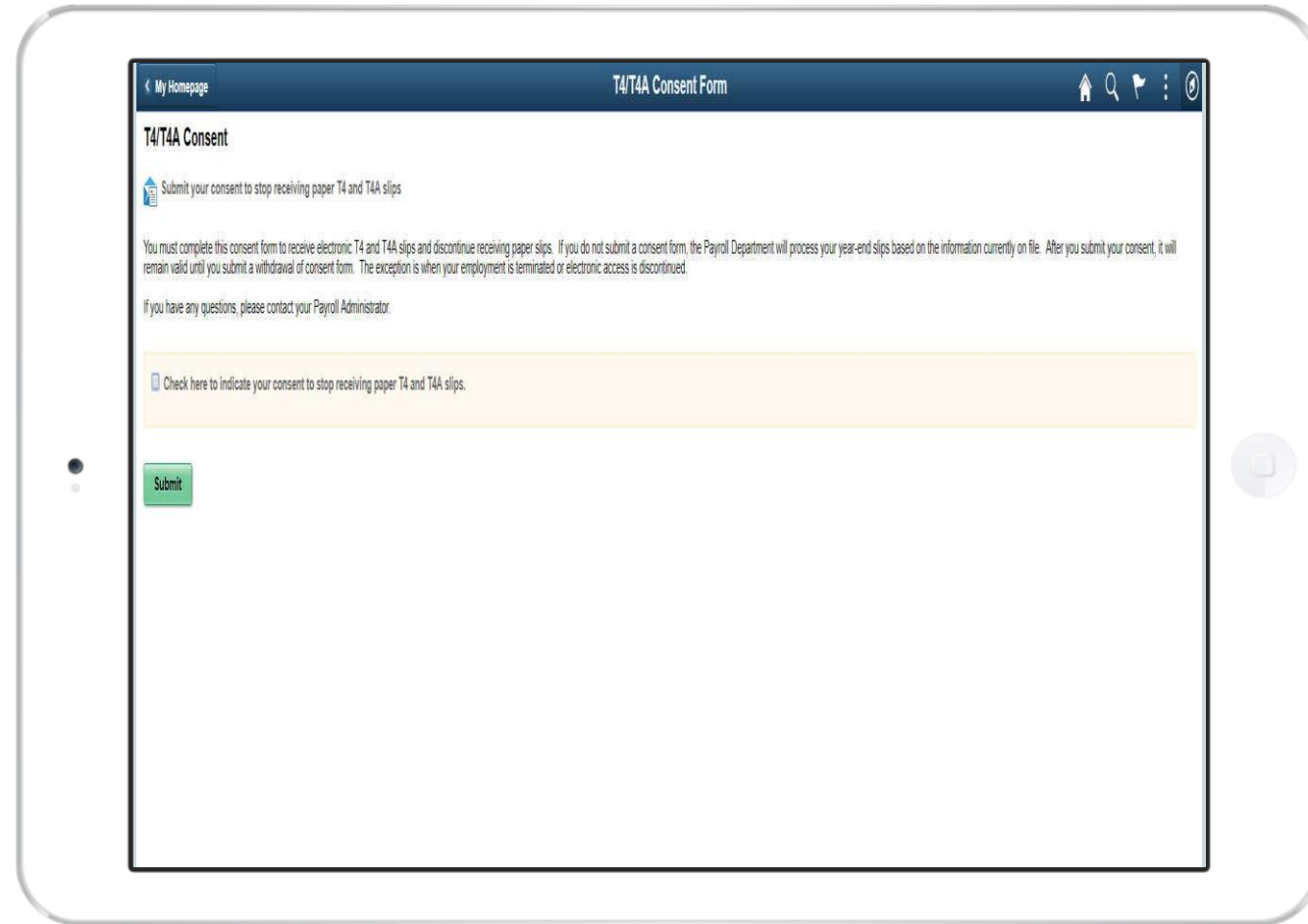
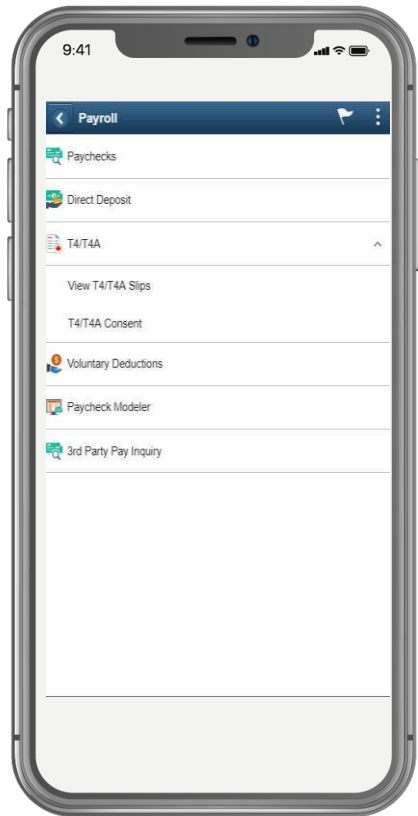
OK to Pay Turned Off

Empl ID	Actions	Empl Record	Name	Company	Pay Group	Pay Period End Date	Off cycle	Page Nbr	Line Nbr	Additional Pay Line Nbr	Province	Department	Business Unit
CPA0229		0	Peters, John	CPA	CA2	06/18/2021	N	23	3	0	ON	C20000	CPABU
CPA0218		0	Winters, Sheila	CPA	CA2	06/18/2021	N	26	2	0	QC	C20000	CPABU
CPA0109		0	Kim, Carl	CPA	CA2	06/18/2021	N	31	7	0	QC	C21700	CPABU
CWP0001		0	Tonge, Alice WC	CWP	CW2	01/15/2013	N	3	1	0	BC	C20000	CWPBU
CWP0002		1	Tonge, Belinda WC	CWP	CW2	01/15/2013	N	3	3	0	BC	C20000	CWPBU
CWP0010		0	Tonge, Jaclyn WC	CWP	CW2	01/15/2013	N	3	4	0	BC	C20000	CWPBU
CWP0071		0	Tonge, Barbara WC	CWP	CW2	01/15/2013	N	3	5	1	BC	C20000	CWPBU
CWP0075		0	Tonge, Jill WC	CWP	CW2	01/15/2013	N	3	6	0	BC	C20000	CWPBU
CWP0076		0	Tonge, Jessica WC	CWP	CW4	01/04/2013	N	1	1	0	BC	C20000	CWPBU
CWP0080		0	Tonge, Neely WC	CWP	CW4	01/04/2013	N	1	2	0	BC	C20000	CWPBU
CWP0074		0	Tonge, Willie WC	CWP	CW4	01/04/2013	N	1	3	0	BC	C20000	CWPBU
CWP0078		0	Tonge, Jessica WC	CWP	CW4	01/04/2013	Y	1	2	0	BC	C20000	CWPBU
CWP0078		0	Tonge, Jessica WC	CWP	CW4	01/04/2013	Y	1	2	1	BC	C20000	CWPBU
CWP0023		0	Wong, Clara WC	CWP	CW7	01/11/2013	Y	1	1	0	NB	C20000	CWPBU
CWP0032		0	Wong, Cindy WC	CWP	CW7	01/11/2013	Y	1	2	0	NB	C20000	CWPBU

15 rows

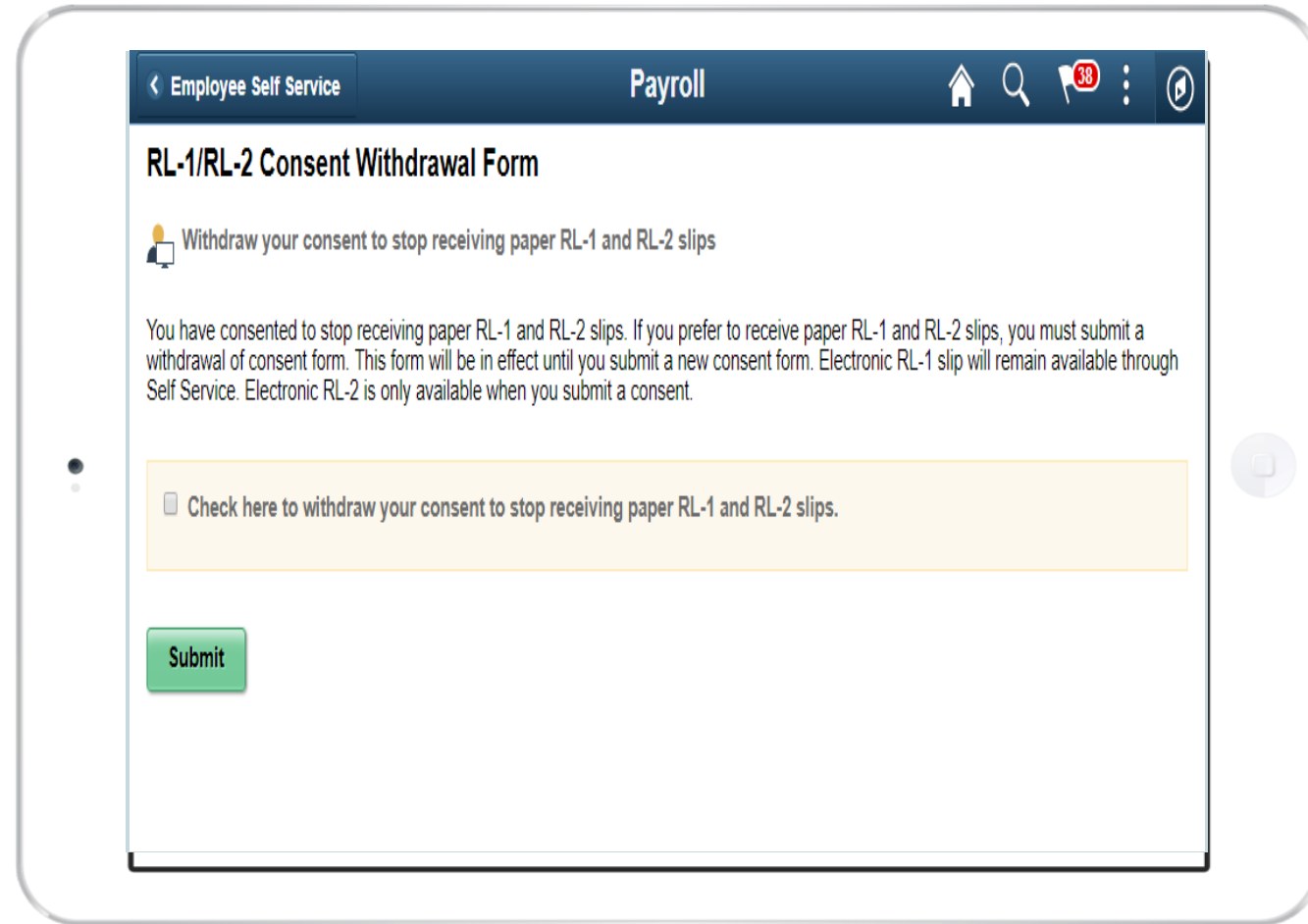
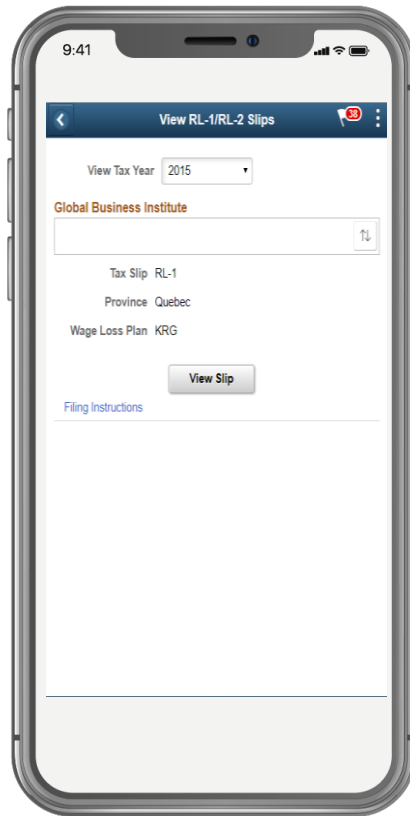
Fluid Consent for Canadian Year-End Forms

Image #27



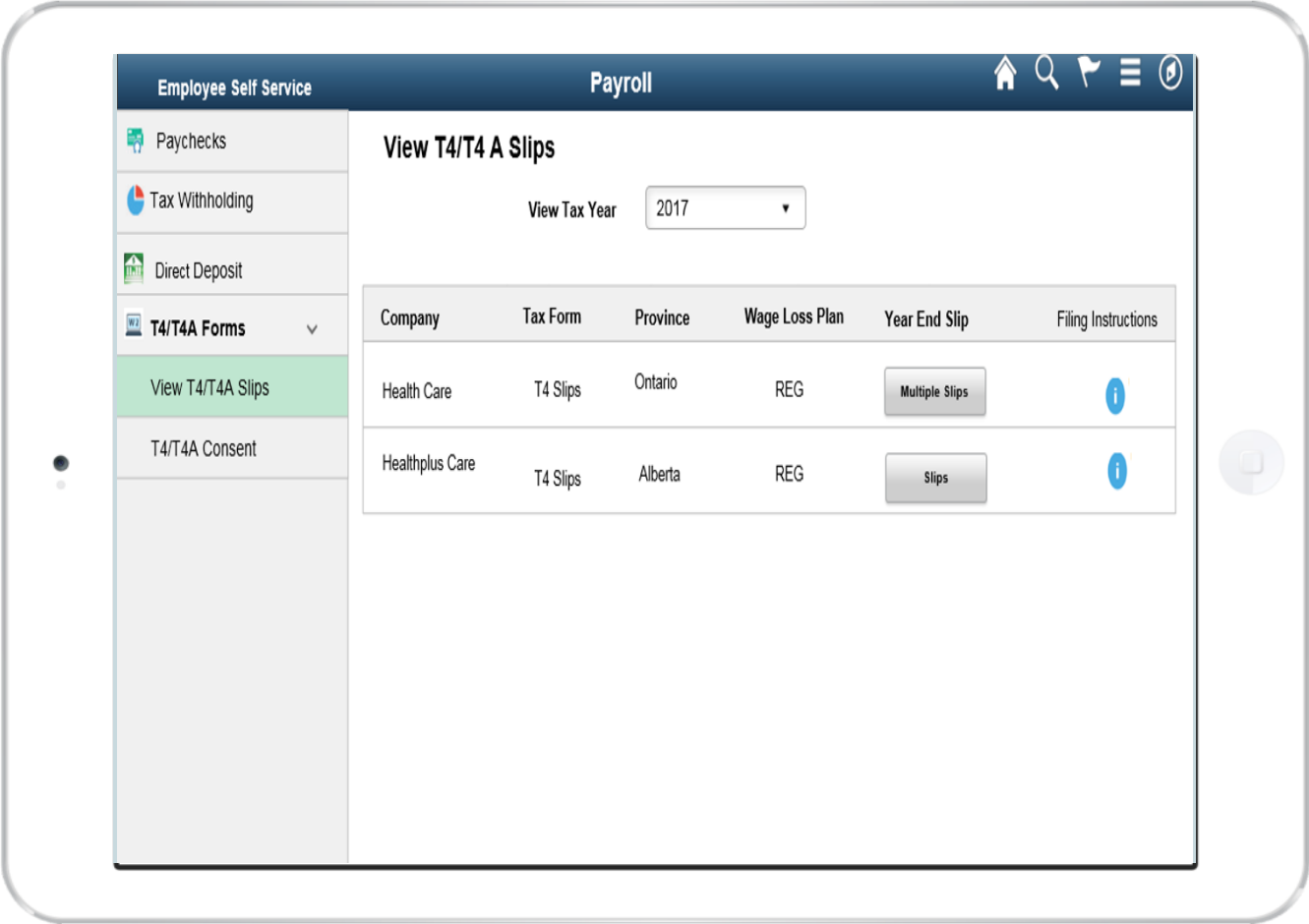
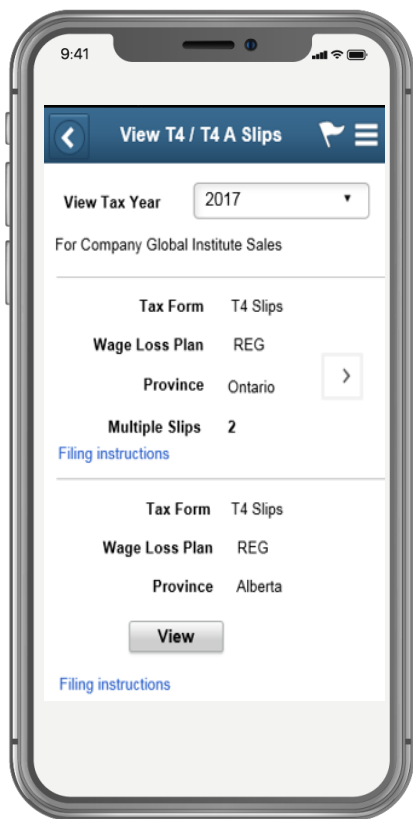
Fluid Consent for Canadian Year-End Forms

Image #27



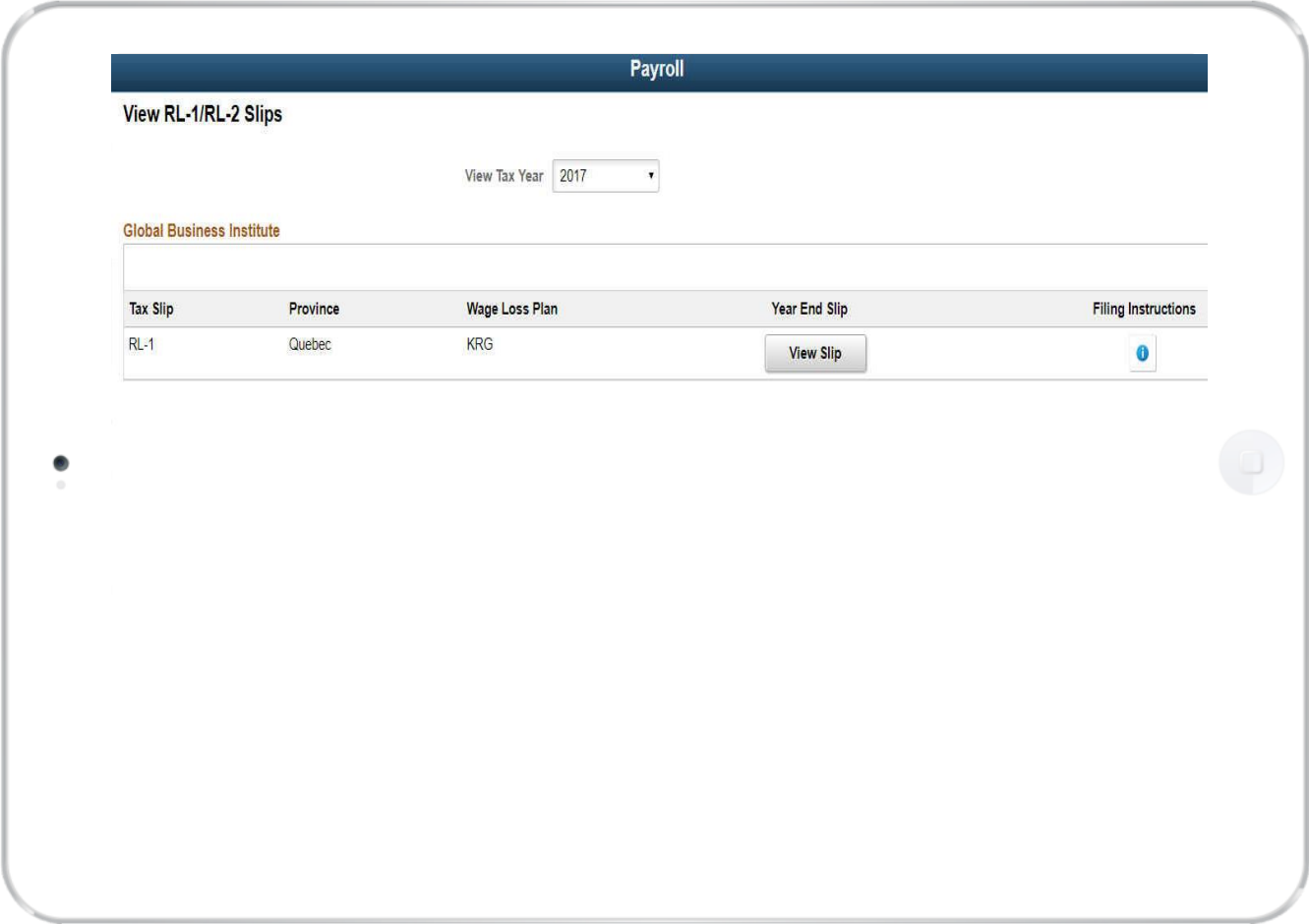
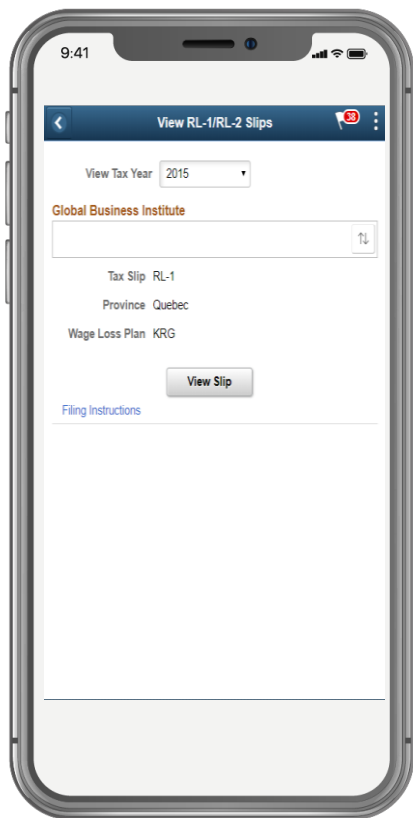
Employee Self-Service Fluid Canadian Year-End Forms

Image #27



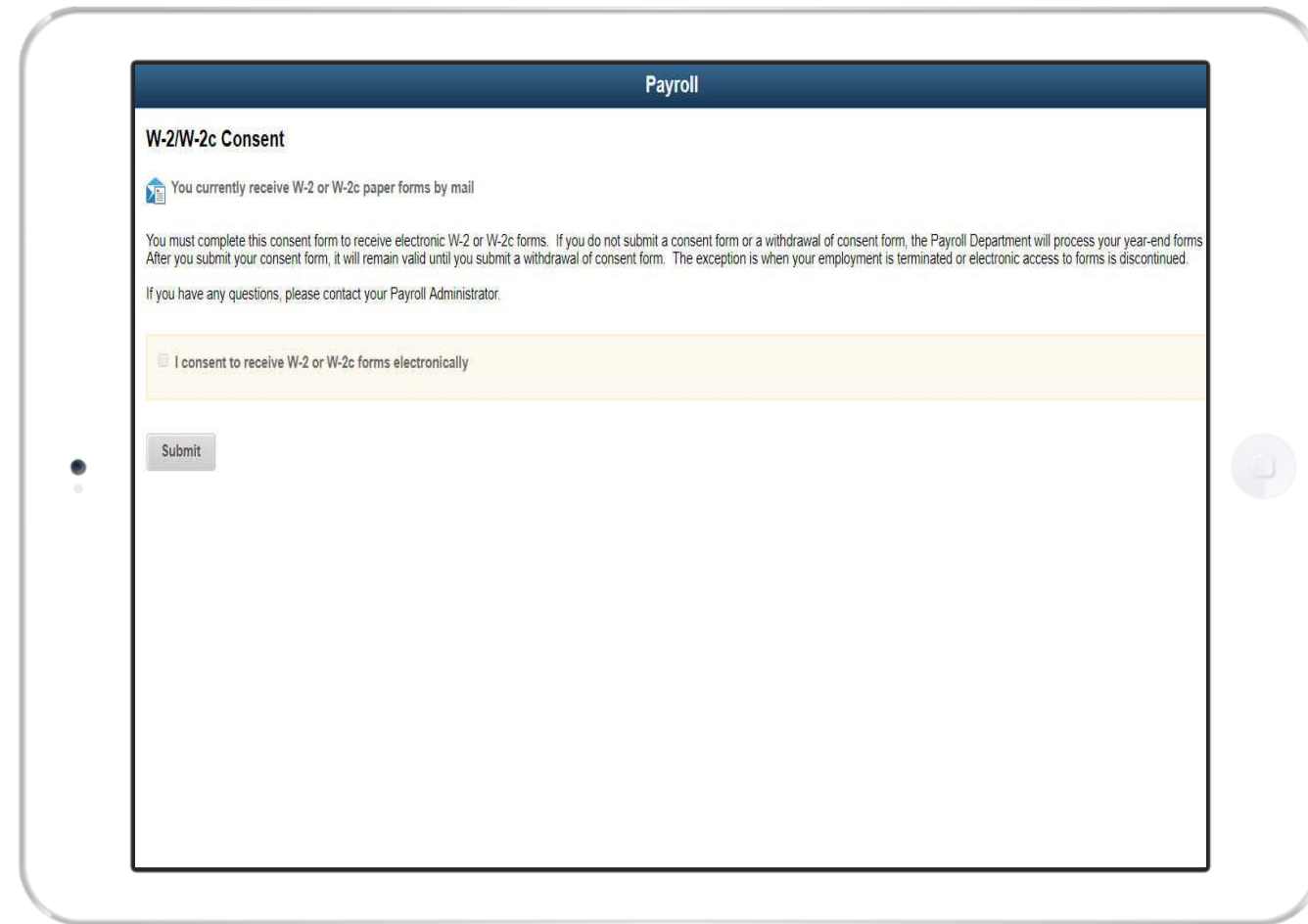
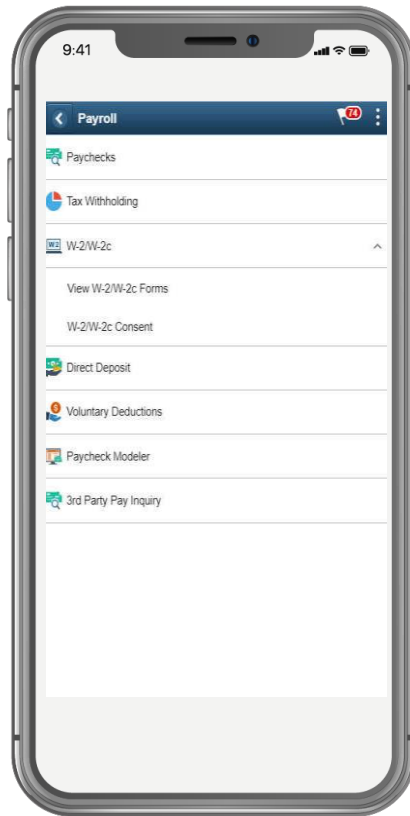
Employee Self-Service Canadian Fluid Year-End Forms

Image #27



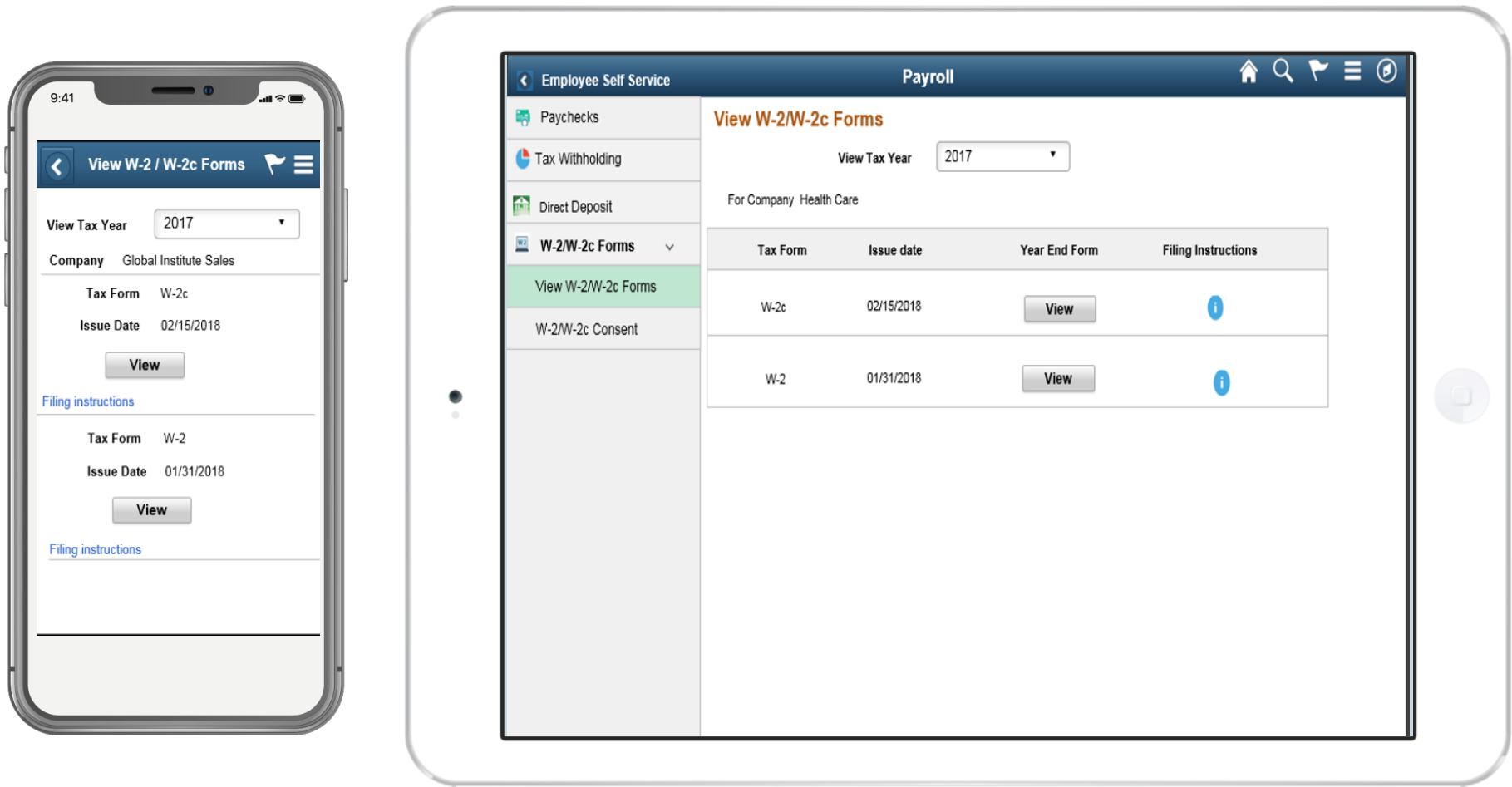
Fluid Consent for U.S. Year-End Forms

Image #28



Employee Self-Service U.S. Fluid Year-End Forms

Image #28



Accessibility for U.S. Year-End Forms

Image #28

View W-2 Form 2017

Instructions

This page has two views: Default and View All. The Default view will display all W-2 boxes and codes that contain values. The View All option will also display W-2 boxes and codes even if the value is blank. In addition, if the employee has multiple PDF forms, the data is consolidated and displayed on the online page by State.

View All Boxes

Employer Details

Name

GLOBAL BUSINESS INSTITUTE

Employer identification number (EIN)

99-4123456

Address 1

500 GEORGE WASHINGTON PKWAY

Address 2

NEW YORK NY 07666

Employee Details

Name

ROSANNA CHANNING

Employee social security number

211-15-3591

Address 1

4026 CY AVENUE

Address 2

CASPER WY 82604

W-2 Details

Box/Code

Description

Form Value

01

Wages, tips, other compensation

79345.51

02

Federal income tax withheld

9671.87

03

Social security wages

88261.67

04

Social security tax withheld

5472.22

05

Medicare wages and tips

88261.67

06

Medicare tax withheld

1279.79

Printable W-2

Payroll for North America U.S. Fluid WorkCenter

Image #28

Workforce Administrator

Scope ▾ All Paygroups ⚙

My Work

Common Exceptions ▾

State Data Missing 10

Local Data Missing 6

OK to Pay Turned Off 35

Inactive Employees With Pa... 20

Active Employees Without P... 4

Unconfirmed Checks from P... 3

Total Gross Exceed Thresho... 30

Hours Exceed Threshold-Ac... 31

Total Gross Exceed Thresho... 13

Hours Exceed Threshold-In... 12

Audit Exceptions ▾

Links

Setup Data ▾

Employee Master Data ▾

Create Payroll Data ▾

Manage Time and Labor ▾

Manage Absence Management ▾

Update Payroll Data ▾

Process Payroll ▾

USA Payroll WorkCenter

State Data Missing

10 rows

Empl ID ▾	Actions ▾	Empl Record ▾	Name ▾	Company ▾	Pay Group ▾	Locality ▾	Department ▾	Detail Link
TWC0007	✓	0	Lewis,Gwen WC	TWC	TW4		TQ10100	>
TWC0008	✓	0	Lewis,Helen WC	TWC	TW2		TQ10100	>
TWC0018	✓	0	Lewis,Rachel WC	TWC	TW2		TQ10100	>
TWC0019	✓	0	Lewis,Sara WC	TWC	TW2		TQ10100	>
TWC0060	✓	0	Lewis,Irene WC	TWC	TW4		TQ10100	>
TWC0060	✓	0	Lewis,Irene WC	TWC	TW4		TQ10100	>
TWC0061	✓	0	Lewis,Janis WC	TWC	TW4		TQ10300	>
TWC0062	✓	0	Lewis,Judy WC	TWC	TW4		TQ11000	>
TWC0064	✓	0	Lewis,Marie WC	TWC	TW4		TQ004	>
TWC0064	✓	0	Lewis,Marie WC	TWC	TW4		TQ004	>

Payroll for North America Canadian Fluid WorkCenter

Image #30

Workforce Administrator Canadian Payroll WorkCenter

Scope

- My Scope

My Work

Common Exceptions

- OK to Pay Turned Off (15)
- Inactive Employees With Pa... (27)
- Active Employees Without P... (6)
- Unconfirmed Cheques from ... (2)
- Multiple Provinces on Cheque
- Total Gross Exceed Thresho... (75)
- Hours Exceed Threshold-Ac... (79)
- Total Gross Exceed Thresho... (11)
- Hours Exceed Threshold-In... (11)

Audit Exceptions

Links

- Employee Data Maintenance
- Prepare Payroll
- Process Payroll
- Post Payroll Processing
- Off-Cycle Payrolls
- Payroll Tax Reports
- Payroll Setup

OK to Pay Turned Off

15 rows

Empl ID	Actions	Empl Record	Name	Company	Pay Group	Pay Period End Date	Off cycle	Page Nbr	Line Nbr	Additional Pay Line Nbr	Province	Department	Business Unit
CPA0229	✓	0	Peters, John	CPA	CA2	06/18/2021	N	23	3	0	ON	C20900	CPABU
CPA0218	✓	0	Winters, Sheila	CPA	CA2	06/18/2021	N	26	2	0	QC	C20900	CPABU
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CWP0002	✓	1	Tonge, Belinda WC	CWP	CW2	01/15/2013	N	3	3	0	BC	C20200	CWPBU
CWP0010	✓	0	Tonge, Jaclyn WC	CWP	CW2	01/15/2013	N	3	4	0	BC	C20200	CWPBU
CWP0071	✓	0	Tonge, Barbara WC	CWP	CW2	01/15/2013	N	3	5	1	BC	C20200	CWPBU
CWP0075	✓	0	Tonge, Jill WC	CWP	CW2	01/15/2013	N	3	6	0	BC	C20200	CWPBU
CWP0076	✓	0	Tonge, Jessica WC	CWP	CW4	01/04/2013	N	1	1	0	BC	C20200	CWPBU
CWP0060	✓	0	Tonge, Nelly WC	CWP	CW4	01/04/2013	N	1	2	0	BC	C20200	CWPBU
CWP0074	✓	0	Tonge, Willa WC	CWP	CW4	01/04/2013	N	1	3	0	BC	C20200	CWPBU
CWP0076	✓	0	Tonge, Jessica WC	CWP	CW4	01/04/2013	Y	1	2	0	BC	C20200	CWPBU
CWP0076	✓	0	Tonge, Jessica WC	CWP	CW4	01/04/2013	Y	1	2	1	BC	C20200	CWPBU
CWP0023	✓	0	Wong, Clara WC	CWP	CW7	01/11/2013	Y	1	1	0	NB	C20200	CWPBU
CWP0032	✓	0	Wong, Cindy WC	CWP	CW7	01/11/2013	Y	1	2	0	NB	C20200	CWPBU

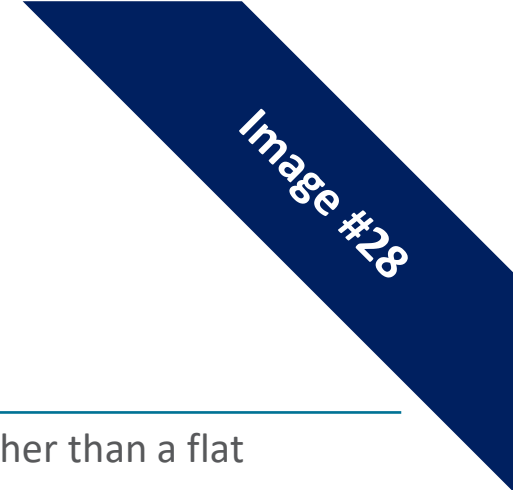
Payroll for North America Fluid WorkCenters

- WorkCenter [VFO](#)
- Quest Experience Week [Webinar](#)
- WorkCenter Red Paper – [Document 2525458.1](#)

Program Agenda

- 1 ➤ Catching Up
- 2 ➤ Payroll Legislation
- 3 ➤ Roadmap
- 4 ➤ Additional Resources

Flat Sum Bonus Calculation for California



Production Bonus	<p>Bonus is based on a percentage of production or some formula other than a flat amount.</p> <p>Regular rate of pay is found by dividing the total pay (including bonus) by the total hours worked during the period.</p> <p>Total hours worked includes overtime hours.</p> <p>OT Premium = OT hours * (0.5 * regular rate of pay)</p>
Flat Sum Bonus	<p>If the bonus is a flat sum, regular bonus rate is determined by dividing the bonus by the maximum legal regular hours worked during the period.</p> <p>Overtime hours are not included in the calculation.</p> <p>Bonus on Overtime = OT hours * regular bonus rate * multiplication factor</p>

Washington Paid Family & Medical Leave

- [Washington SB 5975](#) enacted a new Paid Family and Medical Leave Insurance program
- Effective 1/01/2019
 - Employers and employees will fund the program with a combined 0.4% premium rate on wages, up to \$132,900
 - 37% of the total premium is required to be paid by employer
 - Employer may deduct the remaining 63% from employee wages

Washington Paid Family & Medical Leave

- Quarterly reporting deadline for Q1 and Q2 extended until 8/31/2019
 - PRP for [Base Bug 29450664](#)
 - Single employers provide CSV file
 - Third party agents provide ICESA file
 - Two SQRs, run control changes, menu changes, permission list changes
 - Lower releases delivered in special posting after Tax Update 19-C

DC Universal Paid Leave

- Employer only
 - Covered employers required to contribute 0.62% of taxable wages
 - Unemployment no-limit gross wages
- Original implementation date was 7/01/2019
 - After posting, DC clarified that first employer tax payment would be based on wages paid 4/01/2019 through 6/30/2019
 - 4/01/2019 row delivered with Tax Update 19-C
 - COBOL modified to remove hard-coded date

Massachusetts Paid Family & Medical Leave

- Employee tax + employer contribution
- Total premium is 0.63% of unemployment no limit gross wages *
- Up to Social Security maximum (\$132,900 for 2019)
- Premiums allocated separately
- Family leave is 17.5% of total premium
- Medical leave is 82.5% of total premium
- Employers with < 25 employees in Massachusetts are exempt from employer contribution

Massachusetts Paid Family & Medical Leave

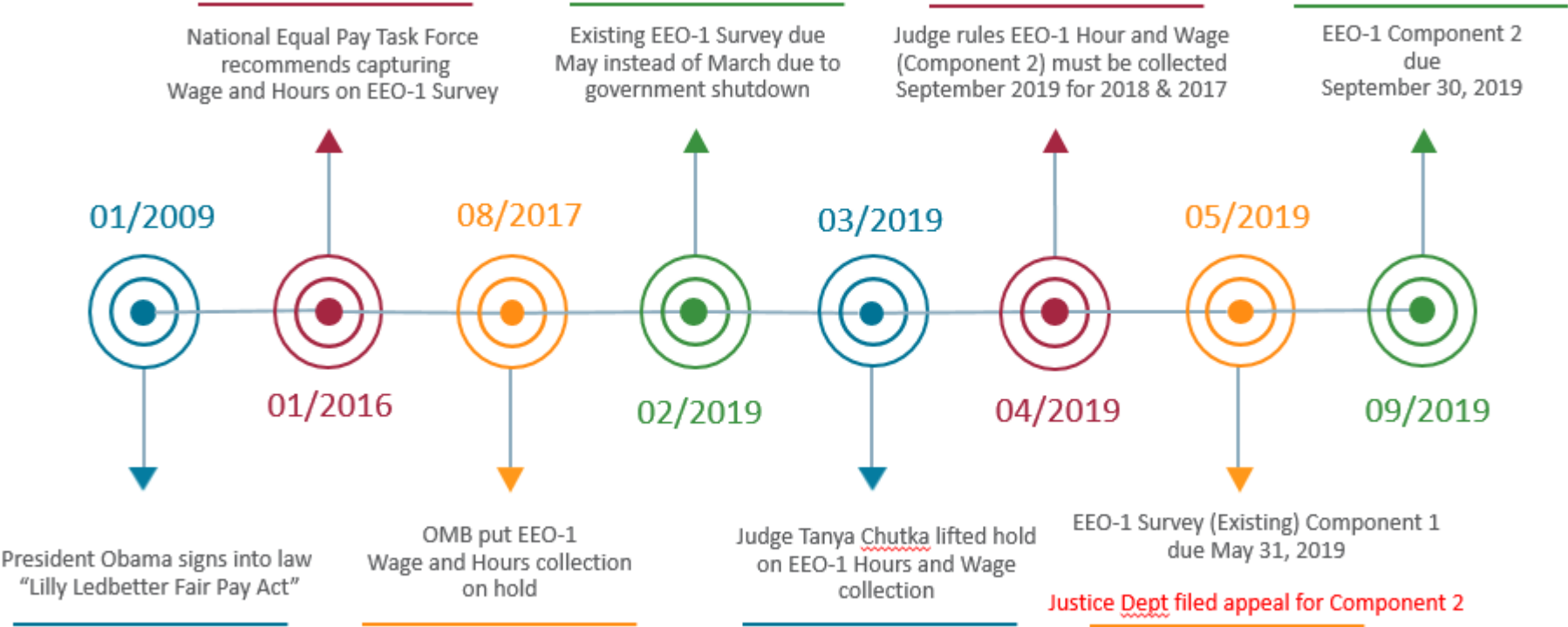
- After posting, Massachusetts delayed implementation of PFL until October 1, 2019
 - <https://www.mass.gov/news/notice-to-massachusetts-employers-about-pfml-delay>
 - * This also includes a change to total premium rate for rest of 2019
 - 0.007500 instead of 0.006300
- Workaround on [Payroll Hot Topics Document](#)

Massachusetts Paid Family & Medical Leave

PRP
Image #31
Image #32

- [Base Bug 29963137](#) delivered as PRP
 - Removes 7/01/2019 rows
 - Will be delivered in Image 32

Component 2 for EEO-1 Reporting



Component 2 for EEO-1 Reporting

Coming Soon

Job Categories	Salary Compensation Band	Number of Employees (Report employees in only one category)														Total Col. A-N	
		Race/Ethnicity															
		Hispanic or Latino		Non-Hispanic or Latino								Female					
				Male													
		Male	Female	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races	White	Black or African American	Native Hawaiian or Pacific Islander	Asian	Native American or Alaska Native	Two or more races		
		A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1 Executive/ Senior Level Officials and Managers	1. \$19,239 and under																
	2. \$19,240 - \$24,439																
	3. \$24,440 - \$30,679																
	4. \$30,680 - \$38,999																
	5. \$39,000 - \$49,919																
	6. \$49,920 - \$62,919																
	7. \$62,920 - \$80,079																
	8. \$80,080 - \$101,919																
	9. \$101,920 - \$128,959																
	10. \$128,960 - \$163,799																
	11. \$163,800 - \$207,999																
	12. \$208,000 and over																

Sample Form

Component 2 for EEO-1 Reporting

- [EEOC Component 2 Online Filing System](#)
- [More Info](#)
- [FAQs](#)
- Electronic [file specs](#) received July 11

2020 Federal W-4

- Multiple form changes
 - Employee self-service changes
 - Administrative page changes
 - Tax Table changes
 - COBOL modifications
- IRS does not require a new form
 - Payroll process must recognize form and use appropriate calculation method
 - Targeted for PRP/Tax Update 19-E
 - 12/06/2019

2020 Federal W-4

- New employee status
 - Head of Household

Form W-4 **Employee's Withholding Allowance Certificate** OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

► Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
► Give Form W-4 to your employer.
► Your withholding is subject to review by the IRS.

2020

Step 1: Enter Personal Information

1a First name and middle initial Last name
Home address (number and street)
City or town, state, and ZIP code

1b Social security number
► Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

1c ☐ Single or Married filing separately ☐ Married filing jointly
☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Complete Steps 2 through 4 if they apply to you; otherwise, skip to Step 5. See instructions on page 2.

Step 2: Account for Multiple Jobs

Caution: The correct amount of withholding depends on income earned from all jobs in the household. If you:

- Hold more than one job at a time, or
- Are married filing jointly and both you and your spouse work, account for this below or you may owe additional tax when filing your tax return. (If you and/or your spouse have income from self-employment, see page 2.)

2 Multiple jobs. Do only one of the following.

- Use the calculator at www.irs.gov/W4App for most accurate withholding; or
- Use Worksheet 1 on page 3 and enter the result on line 4c below for roughly accurate withholding; or
- If there are only two jobs in your household, you may check here. Do the same on Form W-4 for the other job. With this option, more tax than necessary may be withheld from your wages, but you generally won't have too little tax withheld.

Complete lines 3 through 4b on Form W-4 for only one job in the household. (Your withholding will be most accurate if you do this on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

3 Dependents. If your income will be \$200,000 or less (\$400,000 or less if married filing jointly) (see instructions):

- Multiply the number of qualifying children under age 17 by \$2,000 ► \$
- Multiply the number of other dependents by \$500 ► \$

Add the amounts above and enter the total here **3** \$

Step 4: Other Adjustments (optional)

4a Other income. If you want tax withheld for other income you expect this year that will not have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs . . . **4a** \$

b Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use Worksheet 2 on page 3 and enter the result here . . . **4b** \$

c Enter any additional amount you want withheld each pay period **4c** \$

d Exemption. You can claim exemption from withholding for 2020 if:

- For 2019, you had **no** federal income tax liability; and
- For 2020, you expect to have **no** federal income tax liability.

If you meet both of these conditions, certify by writing "Exempt" here **4d**

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.) **Date**

Employers Only

5 Employer's name and address **6** First date of employment **7** Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 10220Q Form **W-4** (2020)

Coming Soon

2020 Federal W-4

- Checkbox for multiple jobs
 - Impacts higher tax withholding rates

Form W-4 **Employee's Withholding Allowance Certificate** OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

► Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
► Give Form W-4 to your employer.
► Your withholding is subject to review by the IRS.

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1c ☐ Single or Married filing separately ☐ Married filing jointly
☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Complete Steps 2 through 4 if they apply to you; otherwise, skip to Step 5. See instructions on page 2.

Step 2: Account for Multiple Jobs

Caution: The correct amount of withholding depends on income earned from all jobs in the household. If you:

- Hold more than one job at a time, or
- Are married filing jointly and both you and your spouse work,

account for this below or you may owe additional tax when filing your tax return. (If you and/or your spouse have income from self-employment, see page 2.)

2 Multiple jobs. Do only one of the following.

- Use the calculator at www.irs.gov/W4App for most accurate withholding; or
- Use Worksheet 1 on page 3 and enter the result on line 4c below for roughly accurate withholding; or
- If there are only two jobs in your household, you may check here. Do the same on Form W-4 for the other job. With this option, more tax than necessary may be withheld from your wages, but you generally won't have too little tax withheld. ☐

Complete lines 3 through 4b on Form W-4 for only one job in the household. (Your withholding will be most accurate if you do this on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

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- Multiply the number of qualifying children under age 17 by \$2,000 ► \$
- Multiply the number of other dependents by \$500 ► \$

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4a Other income. If you want tax withheld for other income you expect this year that will not have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs . . . **4a** \$

b Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use Worksheet 2 on page 3 and enter the result here . . . **4b** \$

c Enter any additional amount you want withheld each pay period **4c** \$

d Exemption. You can claim exemption from withholding for 2020 if:

- For 2019, you had **no** federal income tax liability; and
- For 2020, you expect to have **no** federal income tax liability.

If you meet both of these conditions, certify by writing "Exempt" here **4d**

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.) **Date**

Employers Only

5 Employer's name and address **6** First date of employment **7** Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 10220Q Form **W-4** (2020)

Coming Soon

2020 Federal W-4

- Dependent allowance amounts
 - Different multiplier for children vs. other dependents
 - Total amounts

Form W-4 **Employee's Withholding Allowance Certificate** OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

► **Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.**
► **Give Form W-4 to your employer.**
► **Your withholding is subject to review by the IRS.**

2020

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1a First name and middle initial Last name

1b Social security number

Home address (number and street)

City or town, state, and ZIP code

1c ☐ Single or Married filing separately ☐ Married filing jointly
☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

► Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

Complete Steps 2 through 4 if they apply to you; otherwise, skip to Step 5. See instructions on page 2.

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- Hold more than one job at a time, or
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- Use Worksheet 1 on page 3 and enter the result on line 4c below for roughly accurate withholding; or
- If there are only two jobs in your household, you may check here. Do the same on Form W-4 for the other job. With this option, more tax than necessary may be withheld from your wages, but you generally won't have too little tax withheld.

Complete lines 3 through 4b on Form W-4 for only one job in the household. (Your withholding will be most accurate if you do this on the Form W-4 for the highest-paying job.)

Step 3: Claim Dependents

3 Dependents. If your income will be \$200,000 or less (\$400,000 or less if married filing jointly) (see instructions):

- Multiply the number of qualifying children under age 17 by \$2,000 ► \$
- Multiply the number of other dependents by \$500 ► \$

Add the amounts above and enter the total here **3** \$

Step 4: Other Adjustments (optional)

4a Other income. If you want tax withheld for other income you expect this year that will not have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs . . . **4a** \$

b Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use Worksheet 2 on page 3 and enter the result here . . . **4b** \$

c Enter any additional amount you want withheld each pay period **4c** \$

d Exemption. You can claim exemption from withholding for 2020 if:

- For 2019, you had **no** federal income tax liability; and
- For 2020, you expect to have **no** federal income tax liability.

If you meet both of these conditions, certify by writing "Exempt" here ► **4d**

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.) **Date**

Employers Only

5 Employer's name and address **6** First date of employment **7** Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 10220Q Form **W-4** (2020)

Coming Soon

2020 Federal W-4

- Optional other adjustments
 - Additional income
 - Additional deductions

Form W-4 **Employee's Withholding Allowance Certificate** OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

► **Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.**
► **Give Form W-4 to your employer.**
► **Your withholding is subject to review by the IRS.**

2020

Step 1: Enter Personal Information

1a First name and middle initial Last name

1b Social security number

Home address (number and street)

City or town, state, and ZIP code

1c ☐ Single or Married filing separately ☐ Married filing jointly
☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

► Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

Complete Steps 2 through 4 if they apply to you; otherwise, skip to Step 5. See instructions on page 2.

Step 2: Account for Multiple Jobs

Caution: The correct amount of withholding depends on income earned from all jobs in the household. If you:

- Hold more than one job at a time, or
- Are married filing jointly and both you and your spouse work,

account for this below or you may owe additional tax when filing your tax return. (If you and/or your spouse have income from self-employment, see page 2.)

2 Multiple jobs. Do only one of the following.

- Use the calculator at www.irs.gov/W4App for most accurate withholding; or
- Use Worksheet 1 on page 3 and enter the result on line 4c below for roughly accurate withholding; or
- If there are only two jobs in your household, you may check here. Do the same on Form W-4 for the other job. With this option, more tax than necessary may be withheld from your wages, but you generally won't have too little tax withheld ☐

Complete lines 3 through 4b on Form W-4 for only one job in the household. (Your withholding will be most accurate if you do this on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

3 Dependents. If your income will be \$200,000 or less (\$400,000 or less if married filing jointly) (see instructions):

- Multiply the number of qualifying children under age 17 by \$2,000 ► \$
- Multiply the number of other dependents by \$500 ► \$

Add the amounts above and enter the total here **3** \$

Step 4: Other Adjustments (optional)

4a Other income. If you want tax withheld for other income you expect this year that will not have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income. You should not include income from any jobs . . . **4a** \$

b Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use Worksheet 2 on page 3 and enter the result here . . . **4b** \$

c Enter any additional amount you want withheld each pay period **4c** \$

d Exemption. You can claim exemption from withholding for 2020 if:

- For 2019, you had **no** federal income tax liability; and
- For 2020, you expect to have **no** federal income tax liability.

If you meet both of these conditions, certify by writing "Exempt" here **4d**

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it.) **Date**

Employers Only

5 Employer's name and address **6** First date of employment **7** Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 10220Q Form **W-4** (2020)

Coming Soon

2020 Federal W-4

- All releases
 - Administrative pages
 - Employee Tax Data
 - Employee self-service
 - PDF for updatable Federal Tax Withholding
 - Classic Employee Self Service
 - Tax Table changes
 - COBOL modifications

Other Legislative Changes

- Oregon withholding tax calculation changes
- Minnesota wage theft
 - Already compliant
- Accessibility for Ontarian with Disability Act

Program Agenda

- 1 ➤ Catching Up
- 2 ➤ Payroll Legislation
- 3 ➤ Roadmap
- 4 ➤ Additional Resources

Planned Features and Enhancements

- [MOS Document ID 1966243.2](#)


★ PeopleSoft Planned Features and Enhancements (Doc ID 1966243.2)

To Bottom

PeopleSoft Planned Features and Enhancements Technology HCM FSCM Campus Solutions

Search This Document

Print



PeopleSoft Planned Features and Enhancements

This information center outlines the PeopleSoft Planned Features and Enhancements. With PeopleSoft Selective Adoption and its continuous delivery model, PeopleSoft will deliver new enhancements as soon as they are built, and customers apply them the same way that they apply fixes. This will allow customers to select the features and enhancements that benefit their business as soon as they are available. New features and enhancements are delivered throughout the year in PeopleSoft Update Images. These update images contain new features and enhancements as well as fixes needed to maintain your PeopleSoft environment. In addition, PeopleTools continues to innovate and release new features and enhancements in classic releases.

This information center provides a high-level view of planned new features and enhancements for the PeopleSoft product line. The content found on this site replaces the content that was previously published in our Release Value Propositions, PeopleSoft Pre-Release Notes, and the PeopleSoft Statement of Direction. The features and enhancements listed in this site, are planned to be delivered through PeopleSoft Update Images within the next 12 to 18 months. Each time an Update Image is released, we will update this site with the new features planned for the subsequent Update Images. In other words, this site will be continuously updated to reflect the latest upcoming planned new features and enhancements. New features and enhancements to the PeopleTools product line will also be listed on this site. Once the feature has been delivered, it will be removed from this page and added to your pillar's Feature Overview document and the [Cumulative Feature Overview Tool](#), available on the PeopleSoft Update Manager home page.

This information center is broken down by application suite. Features and enhancements for PeopleSoft ELM and CRM are grouped with the PeopleSoft HCM content. To find a specific feature by name, use the "Search this Document" field on the top of the page.

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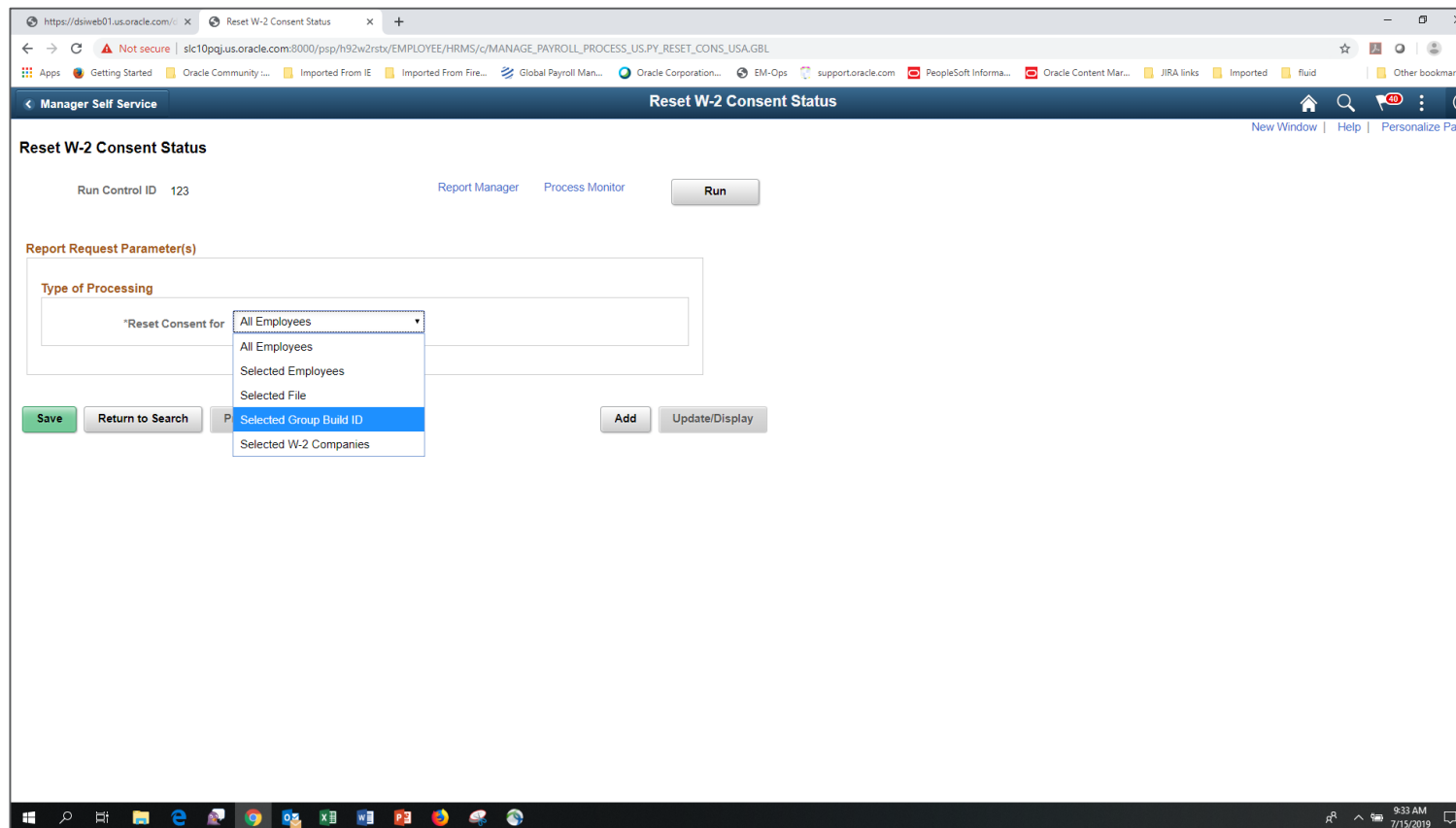
DUE TO THE NATURE OF THE PRODUCT ARCHITECTURE, IT MAY NOT BE POSSIBLE TO SAFELY INCLUDE ALL FEATURES DESCRIBED IN THIS DOCUMENT WITHOUT RISKING SIGNIFICANT DESTABILIZATION OF THE CODE.

Planned Features and Enhancements

- Year-end forms consent reset for terminated employees
 - Current functionality allows reset all, reset by company, or reset by employee
 - Many customers have written their own routines to perform this task
 - Needed for both U.S. and Canada

Planned Features and Enhancements

- Year-end forms consent reset for terminated employees



Paysheet Update Load for Inactive Employees

- #1 on Idea Space
- Proposed configurable setup allows customers to define their own parameters
 - Allowable employee inactive statuses
 - Define PSHUP_TXN sources for inactive employees
 - Define earnings that can be paid to inactive employees
 - Define allowable deductions that can be taken from inactive employees
 - Define company/paygroup eligible for program

Paysheet Update Load for Inactive Employees

Program Definition Employee Status Definition Paysheet Update Source Earnings Definition Deductions Definition Assign Program ID

Paysheet Update Program ID KU01

Paysheet Update 1 of 1 View All

*Effective Date 01/01/1980

*Status Active

*Description PSSHUP Inactive EE Program

Short Description PSSHUP

- Program definition

Program Definition Employee Status Definition Paysheet Update Source Earnings Definition Deductions Definition Assign Program ID

Paysheet Update Program ID KU01

Paysheet Update 1 of 1 View All

Effective Date 01/01/1980 Description PSSHUP Inactive EE Program Status Active

Employee Status Definition 1-3 of 3 View All

* Employee Status	Description			
T	Terminated	+	-	
R	Retired	+	-	
S	Leave of Absence	+	-	

- Allowable inactive statuses
 - Can allow all or specify specific

Paysheet Update Load for Inactive Employees

Program Definition | Employee Status Definition | **Paysheet Update Source** | Earnings Definition | Deductions Definition | Assign Program ID

Paysheet Update Program ID KU01

Paysheet Update 1 of 1 View All

Effective Date 01/01/1980 Description PSSHUP Inactive EE Program Status Active

☐ Allow All Paysheet Update Sources

Paysheet Update Sources

Paysheet Update Source		
Other Source Incentive Pay	+	-
OT Source Sick Pay	+	-
Expenses	+	-

- Allowable paysheet sources
 - Can allow all or specify

Program Definition | Employee Status Definition | Paysheet Update Source | **Earnings Definition** | Deductions Definition | Assign Program ID

Paysheet Update Program ID KU01

Paysheet Update 1 of 1 View All

Effective Date 01/01/1980 Description PSSHUP Inactive EE Program Status Active

☐ Allow all Earnings

Earnings Code(s)

*Earnings Code	Description		
SIP	Annual Incentive Plan	+	-
EXP	Expense Reimbursement	+	-
BNS	Bonus	+	-

- Allowable earnings
 - Can allow all earnings or specify

Paysheet Update Load for Inactive Employees

Program Definition Employee Status Definition Paysheet Update Source Earnings Definition **Deductions Definition** Assign Program ID

Paysheet Update Program ID KU01

Paysheet Update

Effective Date 01/01/1980 Description PSSHUP Inactive EE Program Status Active

☐ Allow All Deductions

Deduction Code(s)

*Plan Type	*Deduction Code	Description		
00	TGARN	ST-Garnishment	+	-
00	TPK	ST - Parking	+	-
00	TSTOCK	ST - Stock Purchase Plan	+	-
10	TYHMO1	ST Kaiser HMO	+	-
11	TYDEN1	ST - Smilewell Dental Employee	+	-
40	TY401K	ST - 401(k) Plan ER Match	+	-

- Allowable deductions
 - Can allow all deductions or specify
 - Can leave blank to not allow deductions

Program Definition Employee Status Definition Paysheet Update Source Earnings Definition Deductions Definition **Assign Program**

Paysheet Update Program ID KU01

Paysheet Update

Effective Date 01/01/1980 Description PSSHUP Inactive EE Program Status Active

☐ Use this Program to All Companies and Paygroups

Company Paygroup

Company	Paygroup		
TQW	TQ1	+	-
TQW	TQ2	+	-
		+	-

- Allowable company / paygroups
 - Can allow all or specific paygroups

Planned Features and Enhancements

- Direct deposit for off-cycle payroll calculations
 - By default DISABLE_DIR_DEP = Y for all off-cycle paysheets
 - Need ability to select off-cycles attached to on-cycle calendars or off-cycle calendars

Planned Features and Enhancements

- COBOL log file display enhancements
 - Troubleshooting/debugging tool
 - Include 'calc all' or 'calc where needed' option
 - Include preliminary or final calc option

Planned Features and Enhancements

- On-demand calculation for on-cycle checks
 - Get immediate results of paysheet activity without waiting for batch run
 - Similar to online check functionality

Program Agenda

- 1 ➤ Catching Up
- 2 ➤ Payroll Legislation
- 3 ➤ Roadmap
- 4 ➤ Additional Resources

Payroll Hot Topics ([Doc ID 1348833.1](#))

★ **EPY: PeopleSoft Payroll for North America Hot Topics (Doc ID 1348833.1)**

Modified: 16-Mar-2018 Type: FAQ

To Bottom

+

APPLIES TO:

PeopleSoft Enterprise HCM Payroll for North America - Version 8.8 SP1 to 9.2 [Release 8.8 to 9]
Information in this document applies to any platform.

PURPOSE

This document contains hot topics and announcements for Payroll for North America. It will be updated on a regular basis.

PeopleSoft Payroll for North America: [Hot Topics](#) [Information Center](#) [Tax Update Information Center](#) [Community](#)

Click the star to the left of this document title to add to your Favorites list.

QUESTIONS AND ANSWERS

SC QUARTERLY WAGE EFW2 FORMAT CHANGES EFFECTIVE FOR Q1 2018 REPORTING
Last updated March 16, 2018

The effective date of the new specifications is Q1 2018 file due April 30, 2018. This is targeted for a special posting on March 23, 2018.

We are tracking this with Base [Bug 27266443](#). Watch Hot Topics for the release.

SASKATCHEWAN PROVINCIAL SALES TAX CHANGE
Last updated March 9, 2018

Saskatchewan government (Canada) has announced on Feb 26, 2018 that effective immediately Life and Health insurance premiums are being exempted from Provincial Sales Tax.

A bug has been created for Development to address this issue which will be targeted for Tax Update 18-B/PI #26.

For manual instructions on making the change now See EPY: Saskatchewan Provincial Sales Tax Change Announced on February 26, 2018 [Document 2371581.1](#)

WHEN WILL THE NEW W4 TEMPLATES BE DELIVERED?
Last updated March 7, 2018

We are tracking this under the following Bugs:

[BUG 27222427](#) W4 PDF: DELIVER UPDATED TEMPLATES FOR FEDERAL FORM W-4 (& STATES THAT USE FED)
[BUG 27222553](#) W4 PDF: DELIVER UPDATED W-4 PDF TEMPLATES FOR VARIOUS STATES FOR 2018

Development plans on delivering these with PUM 26 April 20, 2018

NORTH DAKOTA ISSUES UPDATED TAX RATES FOR 2018
Last Update March 6, 2018

North Dakota has announced tax rate changes for 2018. We are tracking these changes on [Bug 27617510](#), with delivery targeted for Tax Update 18-B. Manual instructions for entering the rate changes, can be found on the [North Dakota Master Tax Document](#),



Payroll for North America Info Center ([Doc ID 1348831.2](#))

Information Center: PeopleSoft Enterprise Payroll for North America (Doc ID 1448831.2)

Overview

Use

Troubleshoot

Hot Topics | Resources

Late-Breaking News

View up-to-date information on high-impact topics

Payroll for North America Hot Topics

News & Announcements

1-5 of 8

Show All

Read recently published news and announcements.

EPY: Tax Update 17-D Master Solution for HCM 9.1 [Updated: 01/30/2018]

EPY: PeopleSoft Payroll for North America Tax Update 18-A Master Solution for HCM 9.1 [Updated: 01/24/2018]

EPY: Tax Update 18-A Posting Information [Updated: 01/19/2018]

EPY: PeopleSoft Payroll for North America - 2018 Tax Update Master Solution for HCM Releases 9.0, 8.9, & 8.81 [Updated: 01/17/2018]

EPY: 2017 Tax Update Posting and FAQ Documents [Updated: 01/17/2018]

New and Recently Updated Knowledge Documents

1-5 of 25

Show All

Here are our most recently updated documents.

EPY: PeopleSoft Payroll for North America Hot Topics [Updated: 03/16/2018]

Oracle's North American Payroll Update Package [Updated: 03/12/2018]

PeopleTools Fix for PSIDE Related Issues in PeopleSoft Update Images [Updated: 03/11/2018]

EPY: PeopleSoft Payroll for North America FLSA Processing Advisor [Updated: 03/07/2018]

EPY: (YEMaster) 1042-S Territories Year-End Tax Form [Updated: 02/26/2018]

Didn't find what you are looking for?

Ask in Community...

Related

Products

PeopleSoft Enterprise > Human Capital Management > North American Payroll > PeopleSoft Enterprise HCM Payroll for North America

Keywords

PRODUCT INFORMATION CENTER; PSFTINFOCTR

Important Documents

Handy Reference Documents

Tax Update Information Center

Year-End Information Center

Federal Tax Changes Master Document

State Tax Changes Master Listings

Local Tax Changes Master Listings

Recently Answered Community Discussions

View recently answered discussion threads from our My Oracle Support Community

Earnings Budget Override Account Mapping not found for Budget Department [Updated: 01/29/2018]

'Not authorized (90,6)' error when trying to run App Engine PY_W4_EE [Updated: 12/12/2017]

2017 Tax Update Schedule [Updated: 12/06/2017]

tax update 15-E compile error [Updated: 11/29/2017]

Tax Update for 2017 - posting Information [Updated: 11/07/2017]

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PNA Tax Update Info Center ([Doc ID 1316011.2](#))

☆ Information Center: EPY: PeopleSoft Payroll for North America Tax Update (Doc ID 1316011.2)

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4/5

Overview

Hot Topics | Resources

PeopleSoft Payroll for North America Tax Update Information Center

Tax Update 18-A Posting Information

- [18-A Posting Document \[Document 2347522.1\]](#)

Tax Update FAQ Information

- [2018 Tax Update Master FAQ Document for Release 9.2 \[Document 2347501.1\]](#)
- [2018 Tax Update Master FAQ Document for Release 9.1 \[Document 2347505.1\]](#)
- [2018 Tax Update Master FAQ Document for Releases 9.0, 8.9, & 8.81 \[Document 2347521.1\]](#)

PeopleSoft HCM 9.2 Image & Tax Update Posting Information

- [PUM Home Page - Links to 9.2 Image #25 \[Document 1641843.2\]](#)
- [Payroll for North America Tax Updates and PeopleSoft 9.2 HCM Update Images \[Document 1566194.1\]](#)
- [PUM Image Documentation \(Including Tax Update Notes\) \[Document 1917096.2\]](#)

Advisor Webcast Information

Join us Tuesday, January 23 for our Tax Update 18-A General Information Advisor Webcast

- [18-A Advisor Webcast Schedule & Registration](#)
- [Archived Webcasts](#)

Schedules & Posting Announcements

- [2018 HCM Maintenance Schedule \[Document 2317124.1\]](#)
- [2017 HCM Maintenance Schedule \[Document 2188421.1\]](#)
- [2016 HCM Maintenance Schedule \[Document 2053590.1\]](#)
- [2016 Tax Update Posting and FAQ Docs \[Document 1969529.1\]](#)
- [2015 Tax Update Posting and FAQ Docs \[Document 1997870.1\]](#)

Didn't find what you are looking for?

Ask in Community...

Related

Products

- PeopleSoft Enterprise > Human Capital Management > North American Payroll > PeopleSoft Enterprise HCM Payroll for North America > Tax Updates and Upgrades

Keywords

PSFTTOPDOCS; TAX UPDATE

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Advisor Webcast ([Doc ID 1456265.1](#))

Advisor Webcasts for PeopleSoft

Why attend the Oracle Advisor Webcast Program

The Oracle Advisor Webcast Program brings interactive expertise straight to your desktop using Oracle Web Conferencing technology, at no cost. This technology brings you and Oracle experts together to access information about support services, products, technologies, best practices and more.

Archives

Select the Year Tabs to view archive content. Select Column Headers to sort the table content.



Current Schedule

Archived 2018

2017

2016

2015

2014

Prior Webcasts

Product Family	Title	Your Local Time	Register
PeopleSoft Tools And Technology	PeopleSoft: Embracing the Oracle Cloud (LIVE repeat of March 14th)	Mar 27, 2018 11:00 AM (Tue)	REGISTER
PeopleSoft Human Capital Management	Advisor Webcast: PeopleSoft Payroll for North America Tax Update 18-B General Information Session	Apr 24, 2018 12:00 PM (Tue)	REGISTER

For more information regarding the advisor webcast program, please contact [Oracle](#).

Payroll Community on My Oracle Support

My Oracle Support Community (MOSC)

Space List

GO DIRECTLY TO | CREATE | |

Payroll for NA and Time & Labor - PSFT (MOSC)

in PeopleSoft (MOSC)

FOLLOW

Overview

Content

People

Subspaces

Actions

About

SPACES YOU FOLLOW

Spaces

Advanced Benefits - PSFT (MOSC)

PeopleSoft (MOSC)

Find Space

CATEGORIES

Payroll

Time & Labor

Webcasts

TOP PARTICIPANTS THIS YEAR

1st

Rick DeLa...

3,930 Points

2nd

Sarah Hill

1,365 Points

3rd

Ashoks-Or...

1,075 Points

4th

Kandi

885 Points

5th

JohannaR...

850 Points

ASK PAYROLL FOR NA AND TIME & LABOR - PSFT (MOSC)

Type your question

ASK IT

News

Recently Updated Documents

Troubleshooting Documents

Tips & Tricks

Welcome to the MOS Community space for PeopleSoft Payroll for North America and Time & Labor

PAYROLL USERS - Looking for the latest information on available patches, webcasts, and product documentation? See Payroll Hot Topics, **Document 1348833.1**.

HELP YOUR FELLOW COMMUNITY MEMBERS - Our goal for the PeopleSoft Payroll for NA and Time & Labor community is for every question to get a **CORRECT** answer. Be a hero and help us by marking responses to your questions as correct or helpful. This will be a great tool for other community users looking for quick answers.

PEOPLESOFT INFORMATION PORTAL

- Payroll for North America Data Sheet
- Time and Labor Data Sheet

FEATURED CONTENT

PeopleSoft Payroll for North America Tax Update 17-D General Information Session

7 days ago

by DauneO-Oracle

Presentation slides for Tax Update 17-C Advisor Webcast

2 months ago

by Pushpa Baikady-Oracle

ADVISOR WEBCAST: PeopleSoft Payroll for North America Tax Update 17-C General Information Session - CHAT QUESTIONS ADDED

1 month ago

by Rick DeLaney-Oracle

Give Feedback...

ACTIONS

Start a discussion

Write a document

Upload a file

View feeds

Create an idea

APP ACTIONS

Search Oracle User

TOP IDEAS

1,260

Paysheet Update Enhancement

Created by Rick DeLaney-Oracle

710

Want the ability to run direct deposit (DDP001.sqr) periodically for an off-cycle run.

Created by user4300943

460

On-demand Pay Calc by Employee-Id

Created by user10466117

440

W-2 Consent Status Reset

Created by user10466117



PeopleSoft NOW!

Now Showing

PeopleSoft Now! A new and innovative web show from Oracle PeopleSoft. PeopleSoft Now! Keeps you in the know about PeopleSoft. This topic of recent happenings with PeopleSoft, and a bit of fun.

Watch NOW! →



NEW RELEASES

Find the latest PeopleSoft Spotlight Series video-based learning

Managing Bank Reconciliation

HCM Activity Guide Composer

Administering and Using Simplified Analytics

Developing Fluid Applications (Updated for PeopleTools 8.56)

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Looking to expand your PeopleSoft usage?
Need help with PeopleSoft licenses?

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For North America: licenseassess_usa@oracle.com
For Europe: licenseassess_eu@oracle.com



PeopleSoft Update Manager Home Page

Welcome to the PeopleSoft Update Manager Home Page. This is the central location for all things related to PeopleSoft Update Manager (PUM) and PeopleSoft Update Images (PIs). Here you can find information about selective adoption, update image home pages, troubleshooting information, best practices, and more.

This list outlines some of the information in this home page and where you can find it:

- Just getting started? Use the links on the left to learn all about PeopleSoft Update Manager.
- Looking for your application's image home page? Use the PeopleSoft Update Manager Image Home Pages tab.
- Want to know about the Known Issues for your current image? See the Known Issues section on the PeopleSoft Update Manager Image Home Pages tab.
- Installing or upgrading to PeopleSoft 9.2? See the Install and Upgrade tab.
- Need help with your maintenance process? See the Best Practices tab.
- Having problems with your PeopleSoft Update Image? See the Troubleshooting tab for answers.

BREAKING NEWS

04/19/2019

Now Showing on the PeopleSoft Video Channel:
[PeopleSoft Now! Episode 2](#)

04/18/2019

New PeopleSoft Blog posted:
[PeopleSoft Innovators Rapidly Deploy New Capabilities and Deliver Value](#)

04/11/2019

Now showing on the PeopleSoft Video Channel:
[PeopleSoft Mobile Asset Inspections Video Feature Overview](#)

04/05/2019

It is important you stay in the know about key technology announcements and changes that PeopleSoft customers.
"Tech Updates" on My Oracle Support are Oracle PeopleSoft's official communication avenue.

04/03/2019

New PeopleSoft Blog posted:
[PeopleSoft Asset Management and PeopleSoft Lease Administration: Introducing Leasing F GSB 87](#)

03/29/2019

Now Showing on the PeopleSoft Video Channel:
[PeopleSoft Drop Zones Video Feature Overview](#)

03/26/2019

Just a couple weeks until the PeopleSoft Partner Summit. Register Now.

03/14/2019

Now showing on the PeopleSoft Video Channel:
[How to Take Advantage of Quest's PeopleSoft](#)

03/12/2019

Now showing on the PeopleSoft Video Channel:
[PeopleSoft FSCM Update](#)



Cumulative Feature Overview

Decide which new features will have the biggest impact on your business.

GET STARTED

Upload data from PeopleSoft Update Manager (PUM) to see which features you have and haven't already applied. Then select the features you want to apply and create a report that you can import back into PUM to define a change package.

A free Oracle account is required. To create an account, click the Upload an Applied Bug Report button below.

See which features have been added between different releases or update images using the original Cumulative Feature Overview (CFO) tool.



HUMAN CAPITAL MANAGEMENT

[Human Capital Management 9.2 Online Help \(through Update Image 30\)](#)



PEOPLETOOLS

[PeopleTools Release 9.07 Online Help \(PT\)](#)

[PeopleTools Release 9.10 Online Help \(PT\)](#)

[PeopleTools Release 9.12 Online Help \(PT\)](#)

[PeopleTools Release 9.13 Online Help \(PT\)](#)



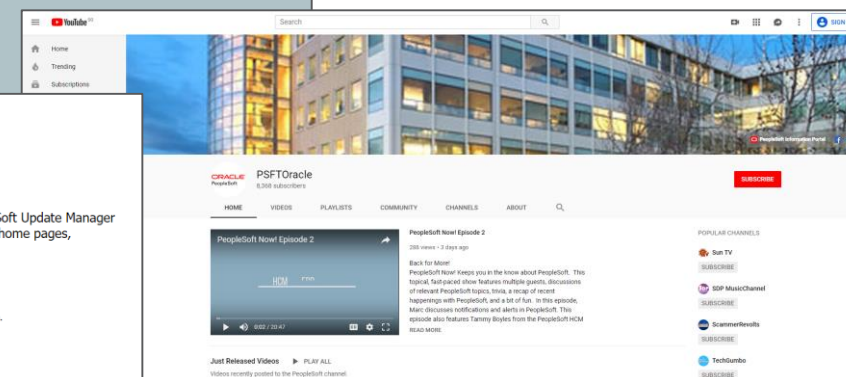
FINANCIALS AND SUPPLY CHAIN MANAGEMENT

[PeopleSoft Financials and Supply Chain Management 9.2 Online Help \(through Update Image 31\)](#)



ENTERPRISE LEARNING MANAGEMENT

[PeopleSoft Enterprise Learning Management 9.2 Online Help \(through Update Image 18\)](#)



YouTube channel page for PSFTOracle. The page shows a video player for "PeopleSoft Now! Episode 2" and a list of popular channels including Sun TV, SAP MusicChannel, StreamerMedia, and TechJumbo.

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