
UNIVERSITY OF ALBERTA

PeopleSoft HCM

Employee Payroll Information



Prepared by: HR Operations

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Employee Payroll Information

Overview

This section will provide an understanding of the payroll related features and functions available through PeopleSoft HCM Employee Self Service.

Objectives

Upon completion of this section you will have a general understanding of:

- How to View Your Paycheque
- How to View and Update Your Direct Deposit Information
- How to View Your T4/T4A Tax Slip
- How to Request an Electronic Version of Your T4/T4A Tax Slip

Related Reference Material

All related reference material is stored on the Learning Reference Materials (<http://www.hrs.ualberta.ca/Learning/LearningPeopleSoft/LearningSupportMaterials>) web page within the Human Resource Services website.

Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.

What Are Employee Self Service applications?

The PeopleSoft Employee Self Service section provides access to view your employee information as well as your personal information and works in tandem with Bear Tracks.

Your Employee Information is housed in PeopleSoft HCM and includes information such as your pay, vacation time, etc.

Your Personal Information is housed in PeopleSoft Campus Solutions, or more commonly known as Bear Tracks, and includes demographic type information such as Address, Date of Birth, Alberta Health Care number etc.

In some cases you will have access to change or update your personal information without having to submit a change form. This information includes the following:


- Address
- Phone Number
- Email Address
- Emergency Contacts

Viewing Your Paycheck

In this topic you will learn how to view your online pay statement.

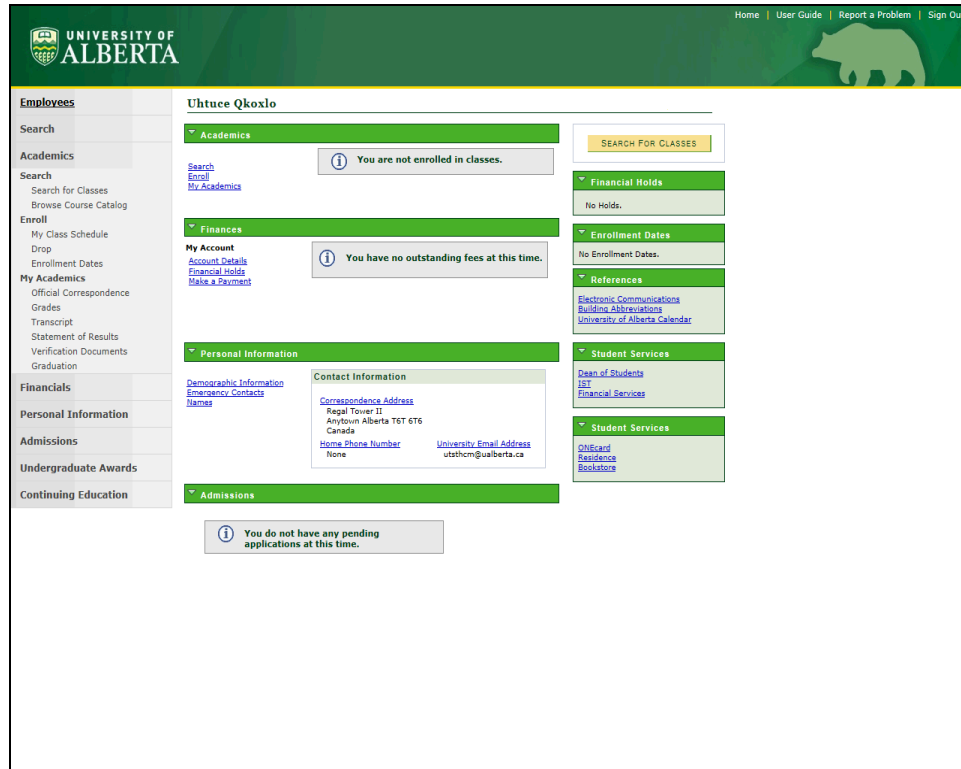


To Begin the Online Tutorial:

- Click the  button located in the top left of the screen and follow the instructions provided.
-

Procedure

Navigation Path: [Sign In to Bear Tracks](#)



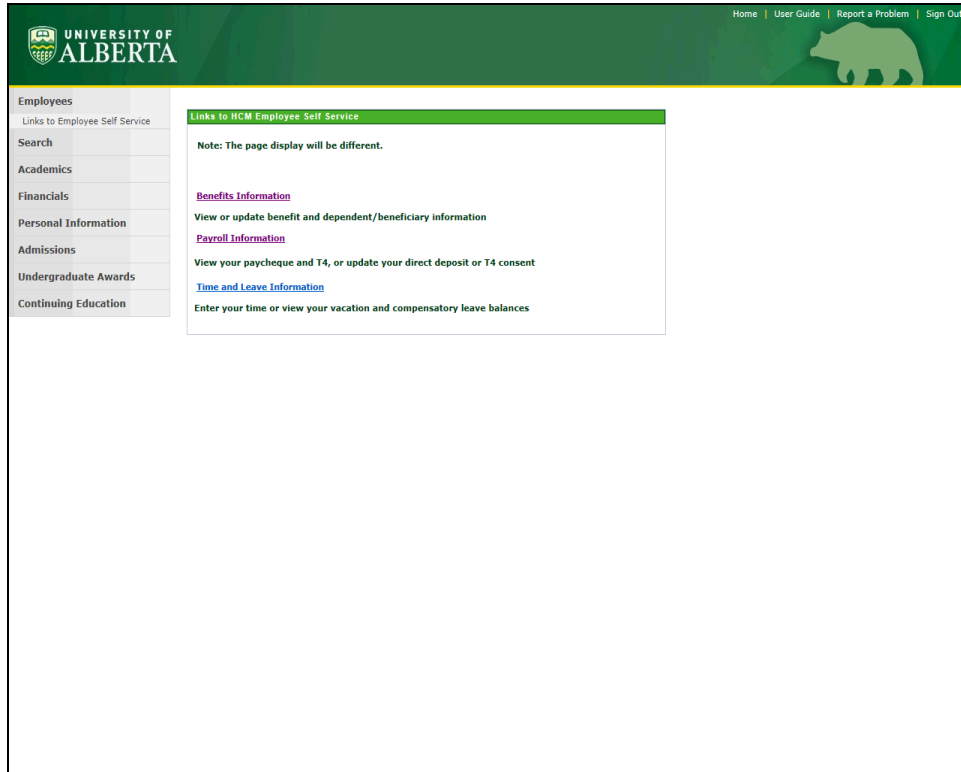
The screenshot displays the 'Employees' section of the University of Alberta's Bear Tracks portal. The user is logged in as 'Uhtuee Qkoxlo'. The main content area is divided into several sections: 'Academics' (with a message: 'You are not enrolled in classes.'), 'Financials' (with a message: 'You have no outstanding fees at this time.'), 'Personal Information' (with a 'Contact Information' box), and 'Admissions' (with a message: 'You do not have any pending applications at this time.'). A search bar for classes is located at the top right. The left sidebar contains navigation links for various services.

1. Once you have signed in to Bear Tracks, Click the **Employees** link.

Employees

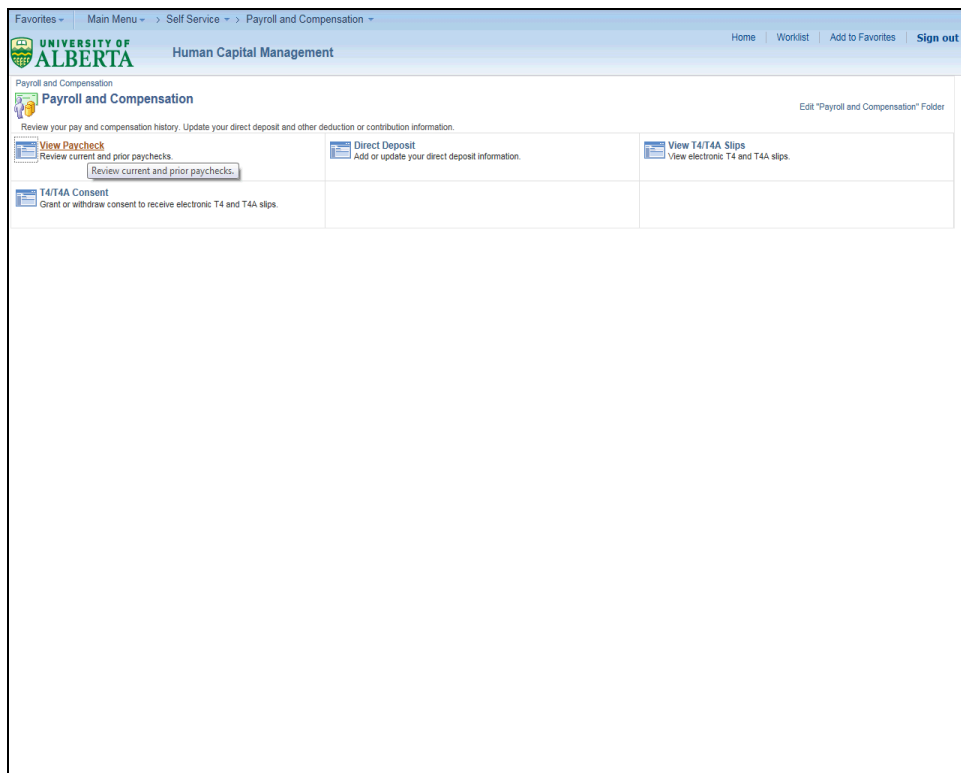
2. Click the **Links to Employee Self Service** link.

Links to Employee Self Service



3. Click the **Payroll Information** link.

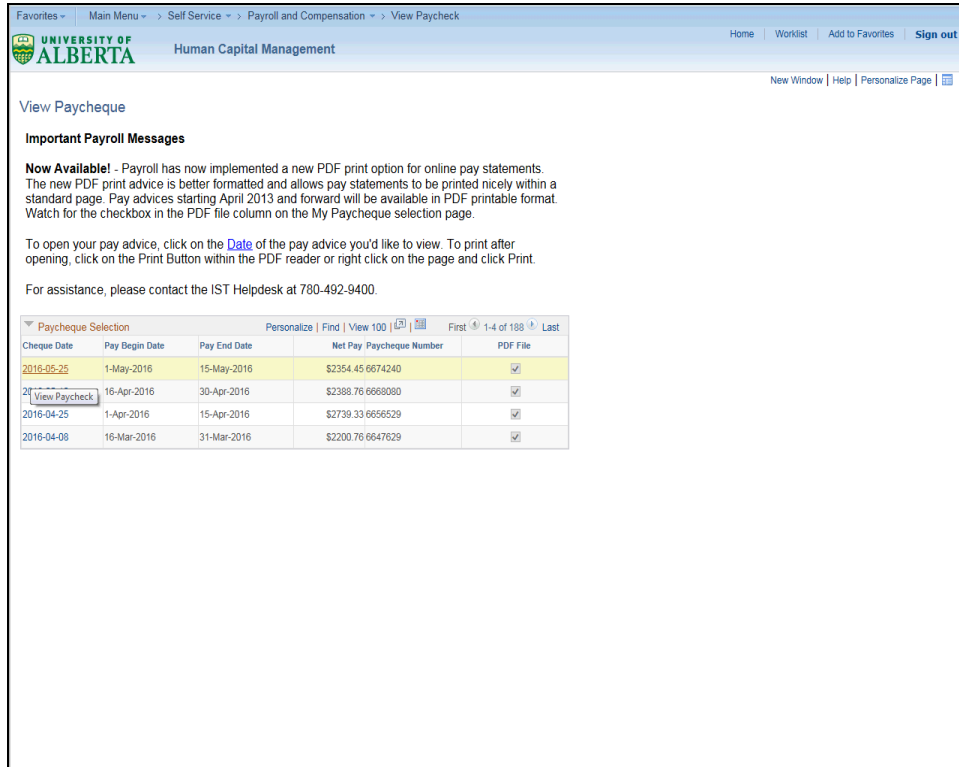
Payroll Information



- The [Payroll Information](#) link in Bear Tracks will open PeopleSoft HCM and take you directly to the **Payroll and Compensation** Page.

Click the **View Paycheck** link.

[View Paycheck](#)



View Paycheque

Important Payroll Messages

Now Available - Payroll has now implemented a new PDF print option for online pay statements. The new PDF print advice is better formatted and allows pay statements to be printed nicely within a standard page. Pay advices starting April 2013 and forward will be available in PDF printable format. Watch for the checkbox in the PDF file column on the My Paycheque selection page.

To open your pay advice, click on the [Date](#) of the pay advice you'd like to view. To print after opening, click on the Print Button within the PDF reader or right click on the page and click Print.

For assistance, please contact the IST Helpdesk at 780-492-9400.

Cheque Date	Pay Begin Date	Pay End Date	Net Pay	Paycheque Number	PDF File
2016-05-25	1-May-2016	15-May-2016	\$2354.45	6674240	<input checked="" type="checkbox"/>
View Paycheck	16-Apr-2016	30-Apr-2016	\$2388.76	6668080	<input checked="" type="checkbox"/>
2016-04-25	1-Apr-2016	15-Apr-2016	\$2739.33	6656529	<input checked="" type="checkbox"/>
2016-04-08	16-Mar-2016	31-Mar-2016	\$2200.76	6647629	<input checked="" type="checkbox"/>

- Click the **Cheque Date** link.

A PDF version of your Pay Statement will appear on your screen.

[2016-05-25](#)

- Note:** You can also navigate to the **View Paycheck** page directly within PeopleSoft HCM as shown in the Breadcrumbs.

Navigation Path: **Main Menu > Self Service > Payroll and Compensation > View Paycheck**

- Congratulations! You have completed the training on how to View your Paycheck.

End of Procedure.


Viewing and Updating Your Direct Deposit Information

In this topic you will learn how to view and update your Direct Deposit information.



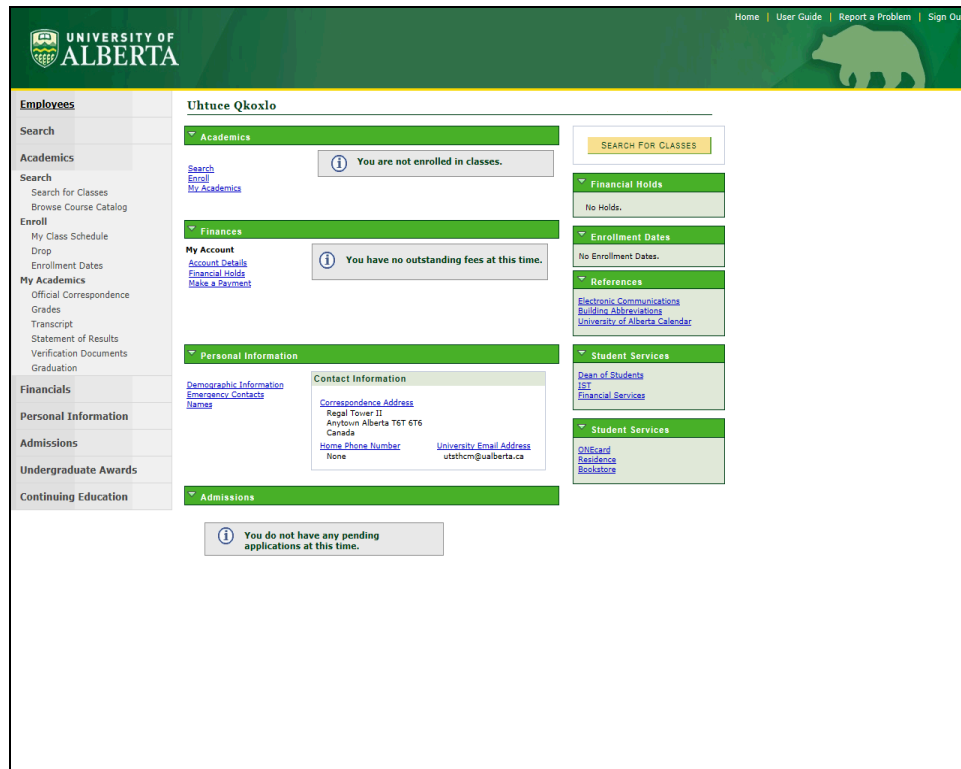
To Begin the Online Tutorial:



- Click the  button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: **Sign in to Bear Tracks**



The screenshot displays the University of Alberta HCM portal for user Uhtuce Qkoxlo. The page features a navigation menu on the left and a main content area with several sections:

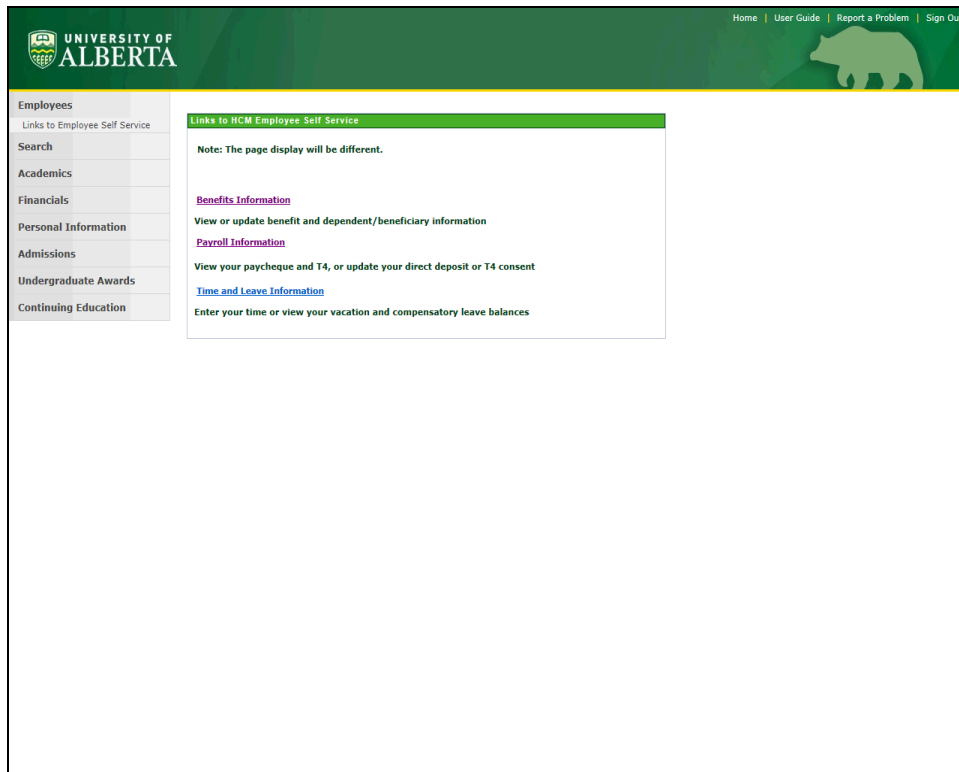
- Academics:** A message states "You are not enrolled in classes." with a "SEARCH FOR CLASSES" button.
- Financials:** A message states "You have no outstanding fees at this time." with links for "Account Details", "Financial Holds", and "Make a Payment".
- Personal Information:** A "Contact Information" box shows details for Uhtuce Qkoxlo, including correspondence address, home phone number, and university email address.
- Admissions:** A message states "You do not have any pending applications at this time."
- Other Sections:** Financial Holds (No Holds), Enrollment Dates (No Enrollment Dates), References, Student Services, and Admissions.

1. Once you have signed in to Bear Tracks, Click the **Employees** link.

Employees

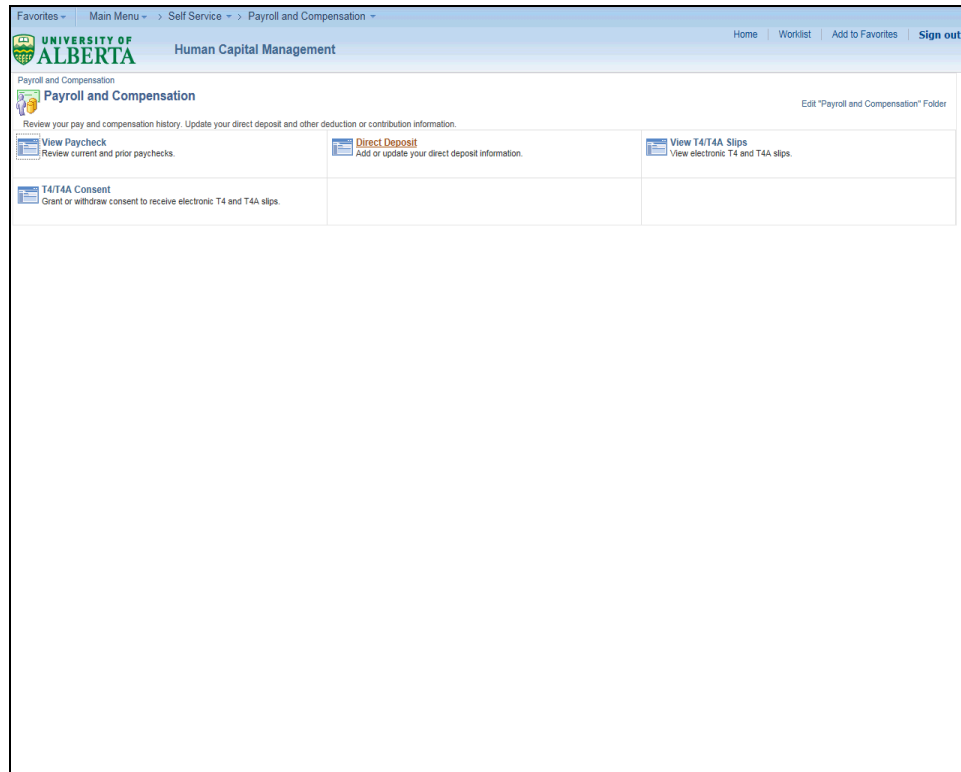
2. Click the **Links to Employee Self Service** link.

Links to Employee Self Service



3. Click the **Payroll Information** link.

Payroll Information



4. The Payroll Information link in Bear Tracks will open PeopleSoft HCM and take you directly to the **Payroll and Compensation** Page.

Click the **Direct Deposit** link.

Direct Deposit

Favorites > Main Menu > Self Service > Payroll and Compensation > Direct Deposit

UNIVERSITY OF ALBERTA Human Capital Management Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

Givvofe Mett

Direct Deposit

Use this page to edit your current direct deposit information or set-up direct deposit to more than one bank account. Direct deposit is MANDATORY for all Payroll and Travel & Expense payments.

PLEASE NOTE:
Each employee MUST have at least one bank account set up below for MANDATORY Direct Deposit. The bank account with a Deposit Type of 'Balance' will also be shared with the Travel & Expense (T&E) module for payment of travel/expense claims. T&E payments will only be made to the 'Balance' account.

Please ensure that you verify all account information you enter here to ensure that your deposits go to your valid account. You can find your account information at the bottom of your personal cheque or by contacting your financial institution.

For instructions on using this page, please refer to the help guide available on the Human Resource Services website at <http://www.hrs.ualberta.ca/SelfService.aspx>

Direct deposits can only be made to recognized Canadian financial institutions. Deposits cannot be made to a 'Line of Credit' or foreign bank accounts.

Chequing	Bank ID	Branch ID	Account Number	Deposit Type	Amount or Deposit Percent	Order	
Chequing	999	99999	1234567890	Balance	999		Edit

Please click the **Add Account** button to begin new setup.

ADD ACCOUNT

Effective Date of Change - new or edited direct deposit information has to be entered 7 calendar days prior to pay day to take effect in the current pay period.

- In the **Direct Deposit** page, Click the **Chequing** link.

[Chequing](#)

- Note:** You can also navigate to the Direct Deposit page directly within PeopleSoft HCM as shown in the Breadcrumbs.

Navigation Path: **Main Menu > Self Service > Payroll and Compensation > Direct Deposit**

Favorites - Main Menu - > Self Service - > Payroll and Compensation - > Direct Deposit

UNIVERSITY OF ALBERTA Human Capital Management Home Worklist MultiChannel Console Add to Favorites Sign out

Direct Deposit

Direct Deposit Detail

Verify your direct deposit banking information from a personal cheque or contact your financial institution. Incorrect banking information can result in payment delays.

Your Bank Information

Bank ID	999	View cheque example
Branch ID	99999	Invalid Bank or Branch ID!!

Distribution Instructions

Account Number	1234567890
Account Type	Chequing
Deposit Type	Balance
Amount or Percent	
Deposit Order	999 (Example: 1 = First Account Processed)

Effective Date of Change - new or edited direct deposit information has to be entered 7 calendar days prior to pay day to take effect in the current pay period.

[Return to Direct Deposit](#)

7. Within the **Direct Deposit Detail** page you can review and verify your Direct Deposit information.

Click the **Return to Direct Deposit** link.

[Return to Direct Deposit](#)

Training Guide

Employee Payroll Information

Human Capital Management

Givvofe Mett

Direct Deposit

Use this page to edit your current direct deposit information or set-up direct deposit to more than one bank account. Direct deposit is MANDATORY for all Payroll and Travel & Expense payments.

PLEASE NOTE:
Each employee MUST have at least one bank account set up below for MANDATORY Direct Deposit. The bank account with a Deposit Type of 'Balance' will also be shared with the Travel & Expense (T&E) module for payment of travel/expense claims. T&E payments will only be made to the 'Balance' account.

Please ensure that you verify all account information you enter here to ensure that your deposits go to your valid account. You can find your account information at the bottom of your personal cheque or by contacting your financial institution.

For instructions on using this page, please refer to the help guide available on the Human Resource Services website at <http://www.hrs.ualberta.ca/SelfService.aspx>

Direct deposits can only be made to recognized Canadian financial institutions. Deposits cannot be made to a 'Line of Credit' or foreign bank accounts.

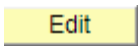
Chequing	Bank ID	Branch ID	Account Number	Deposit Type	Amount or Deposit Percent	Order	
Chequing	999	99999	1234567890	Balance	999		Edit

Please click the Add Account button to begin new setup.

[ADD ACCOUNT](#)

Effective Date of Change - new or edited direct deposit information has to be entered 7 calendar days prior to pay day to take effect in the current pay period.

8. To update your Direct Deposit information, Click the **Edit** button.



Human Capital Management

Direct Deposit

Change Direct Deposit

Verify your direct deposit banking information from a personal cheque or contact your financial institution. Incorrect banking information can result in payment delays.

Your Bank Information

Bank ID [View cheque example](#)
Invalid Bank or Branch ID!!

Branch ID

Distribution Instructions

Account Number

*Account Type

*Deposit Type

Amount or Percent

*Deposit Order (Example: 1 = First Account Processed)

[Submit](#)

* Required Field

Effective Date of Change - new or edited direct deposit information has to be entered 7 calendar days prior to pay day to take effect in the current pay period.

[Return to Direct Deposit](#)

9. In the **Change Direct Deposit** page, make your changes and Click the **Submit** button.



10. Your submission will be confirmed.

To finish the change process,
Click the **OK** button.



11. Congratulations! You have completed the training on Viewing and Updating your Direct Deposit information.


End of Procedure.

Viewing Your T4/T4A Tax Slips

In this topic you will learn how to view your T4/T4A Tax Slips.

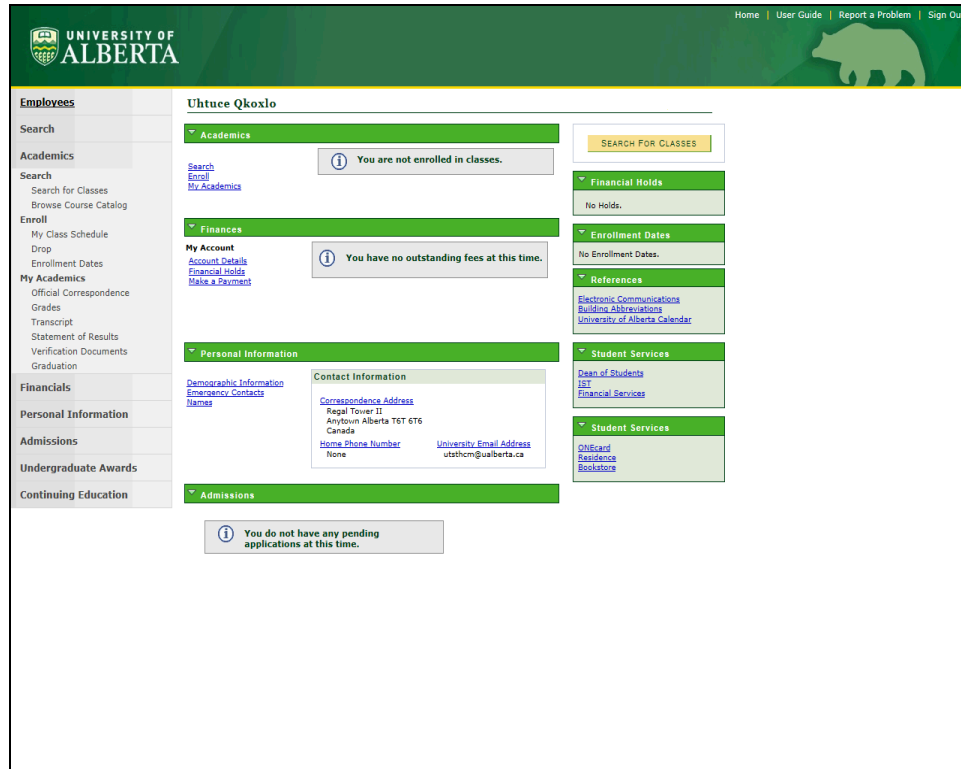


To Begin the Online Tutorial:

- Click the  button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: **Sign In to Bear Tracks**

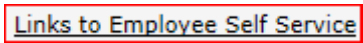


The screenshot displays the 'Employees' section of the University of Alberta's Bear Tracks portal. The user is identified as 'Uhtuee Qkoxlo'. The page features a navigation menu on the left with categories like Search, Academics, Finances, Personal Information, Admissions, Undergraduate Awards, and Continuing Education. The main content area is divided into several informational panels: 'Academics' (You are not enrolled in classes), 'Finances' (You have no outstanding fees at this time), 'Personal Information' (Contact Information), 'Admissions' (You do not have any pending applications at this time), 'Financial Holds' (No Holds), 'Enrollment Dates' (No Enrollment Dates), 'References', 'Student Services', and 'Student Services'. A search bar is located at the top right of the main content area.

1. Once you have signed in to Bear Tracks, Click the **Employees** link.

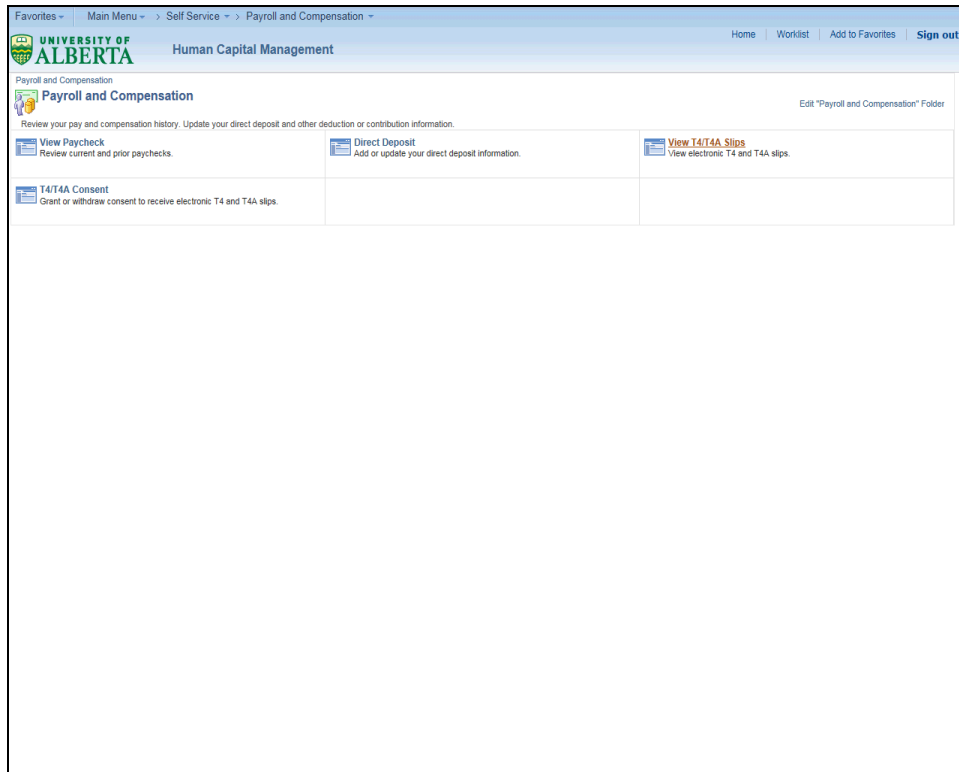


2. Click the **Links to Employee Self Service** link.



3. Click the **Payroll Information** link.

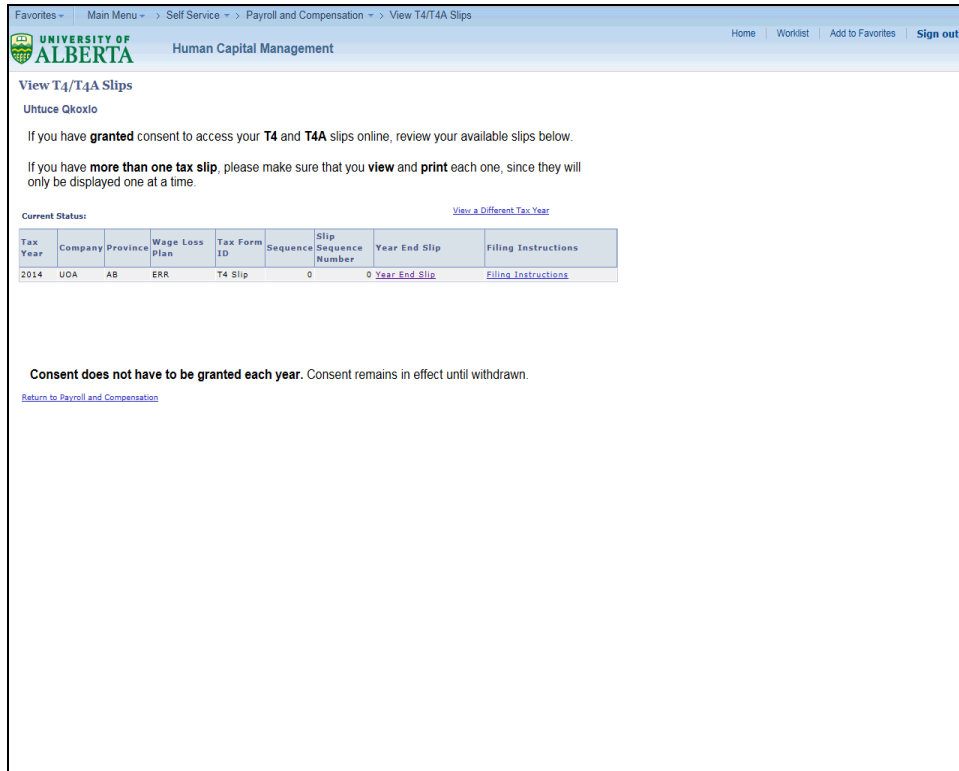




4. The Payroll Information link in Bear Tracks will open PeopleSoft HCM and take you directly to the **Payroll and Compensation** Page.

Click the **View T4/T4A Slips** link.

View T4/T4A Slips



View T4/T4A Slips

Uhtuce Qkoxio

If you have **granted** consent to access your **T4** and **T4A** slips online, review your available slips below.

If you have **more than one tax slip**, please make sure that you **view** and **print** each one, since they will only be displayed one at a time.

Current Status: [View a Different Tax Year](#)

Tax Year	Company	Province	Wage Loss Plan	Tax Form ID	Sequence	Slip Sequence Number	Year End Slip	Filing Instructions
2014	UCA	AB	ERR	T4 Slip	0	0	Year End Slip	Filing Instructions

Consent does not have to be granted each year. Consent remains in effect until withdrawn.

[Return to Payroll and Compensation](#)

- In the **View T4/T4A Slips** page, Click the **Year End Slip** link.

[Year End Slip](#)

- To view your Tax Slip for a different year Click the **View a Different Tax Year** link.

[View a Different Tax Year](#)

- Note:** You can also navigate to the View T4/T4A Slips page directly within PeopleSoft HCM.

Navigation Path: **Main Menu > Self Service > Payroll and Compensation > View T4/T4A Slips**

- Congratulations! You have completed the training on Viewing your T4/T4A Tax Slips.

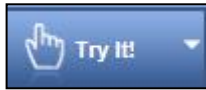
End of Procedure.

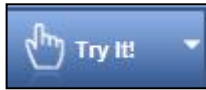
Requesting an Electronic Version of your T4/T4A Tax Slips

In this topic you will learn how to grant or withdraw your consent to receive an electronic version of your T4/T4A Tax Slips.



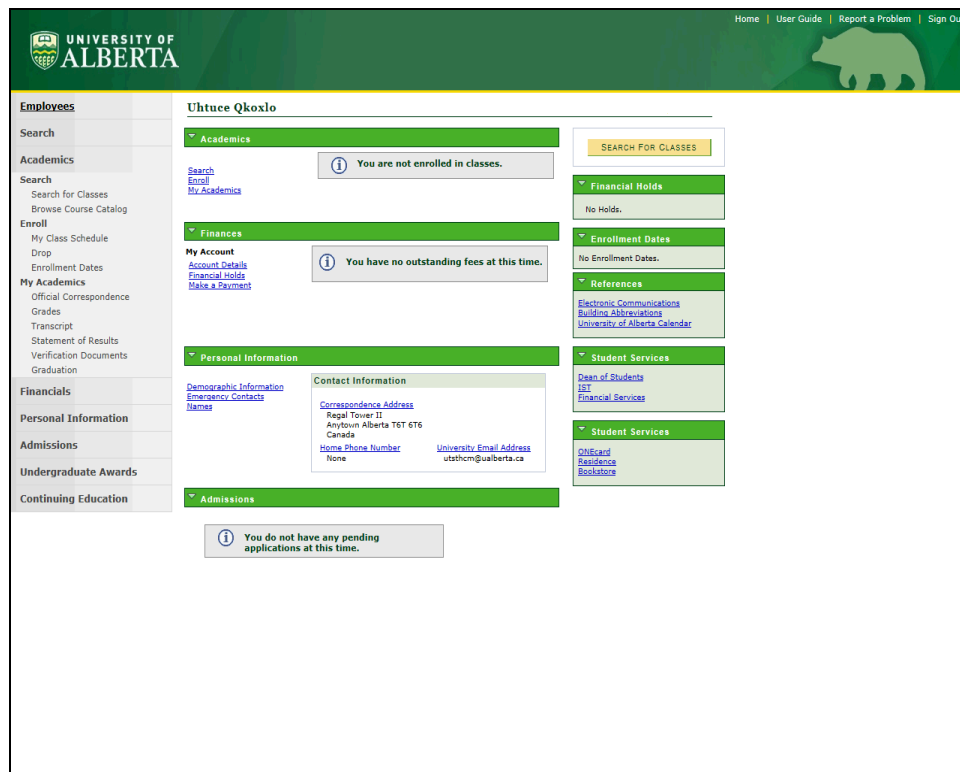
To Begin the Online Tutorial:



- Click the  button located in the top left of the screen and follow the instructions provided.

Procedure

Navigation Path: [Sign In to Bear Tracks](#)



The screenshot shows the University of Alberta Bear Tracks portal. The user is logged in as 'Uhtuee Qkoxlo'. The 'Employees' section is active, showing a navigation menu on the left with options like Search, Academics, Enroll, My Account, My Academics, Financials, Personal Information, Admissions, Undergraduate Awards, and Continuing Education. The main content area displays several sections: Academics (with a message 'You are not enrolled in classes.'), Finances (with a message 'You have no outstanding fees at this time.'), Personal Information (with contact details for Regal Tower II), and Admissions (with a message 'You do not have any pending applications at this time.'). There are also sections for Financial Holds, Enrollment Dates, References, and Student Services.

- Once you have signed in to Bear Tracks, Click the **Employees** link.

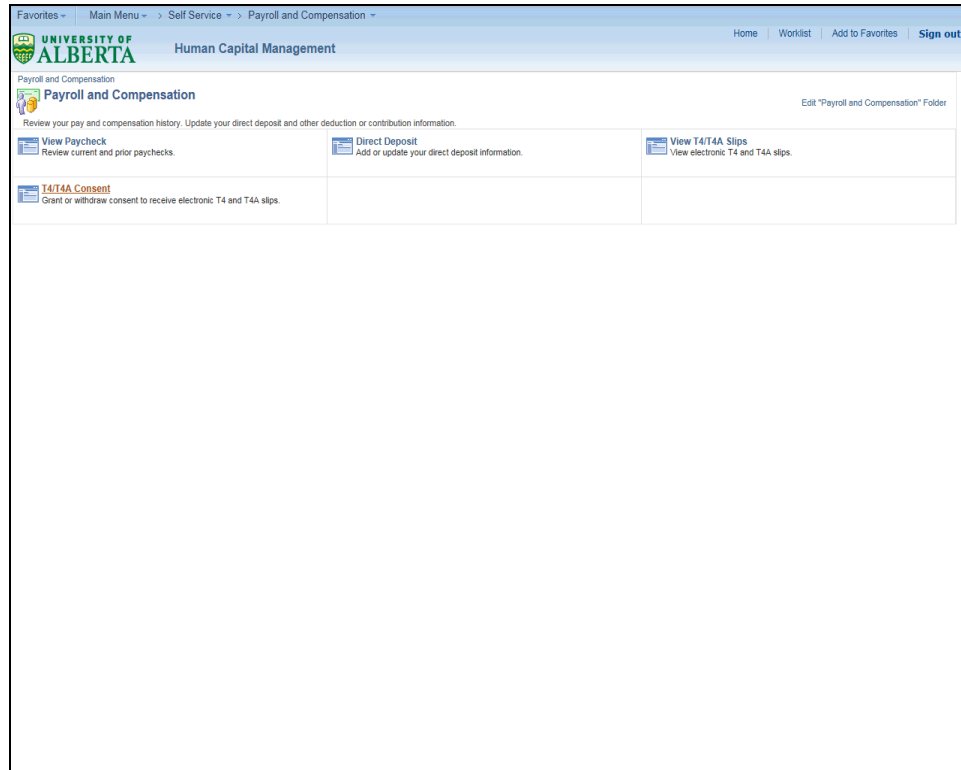


2. Click the **Links to Employee Self Service** link.

[Links to Employee Self Service](#)

3. Click the **Payroll Information** link.

[Payroll Information](#)



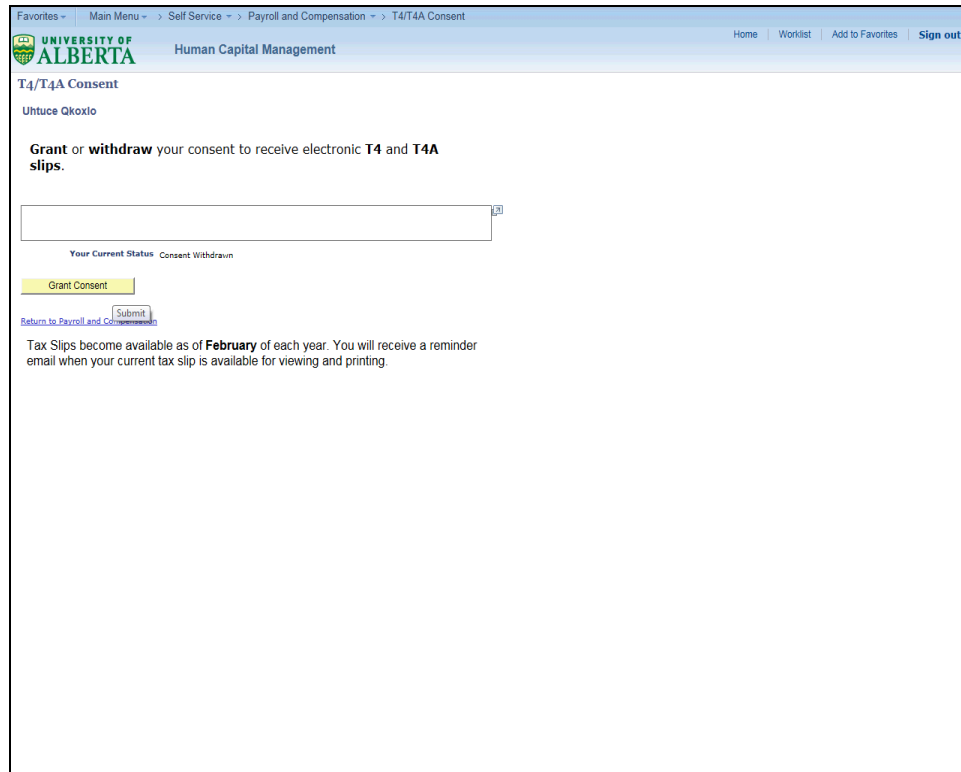
4. The [Payroll Information](#) link in Bear Tracks will open PeopleSoft HCM and take you directly to the **Payroll and Compensation** Page.

Click the **T4/T4A Consent** link.

[T4/T4A Consen](#)

5. **Note:** You can also navigate to the T4/T4A Consent page directly within PeopleSoft HCM.

Navigation Path: **Main Menu > Self Service > Payroll and Compensation > T4/T4A Consent**



University of Alberta Human Capital Management T4/T4A Consent page. The page displays the user's current status as 'Consent Withdrawn' and a 'Grant Consent' button. The page also includes a 'Return to Payroll and Compensation' link and a note about tax slips becoming available in February.

6. To receive an electronic version of your tax slips, Click the **Grant Consent** button.

Grant Consent

7. A message verifying your status change will be provided.

8. To withdraw your consent Click the **Withdraw Consent** button.

Withdraw Consent

9. A message verifying your status change will be provided.

10. Click the **Return to Payroll and Compensation** link.

Return to Payroll and Compensation

11. Congratulations! You have completed the training on Updating the T4/T4A Consent Page.

End of Procedure.