IT User Guide:

Viewing/Changing Personal Information In PeopleSoft HR

VITAS® Healthcare

January, 2016

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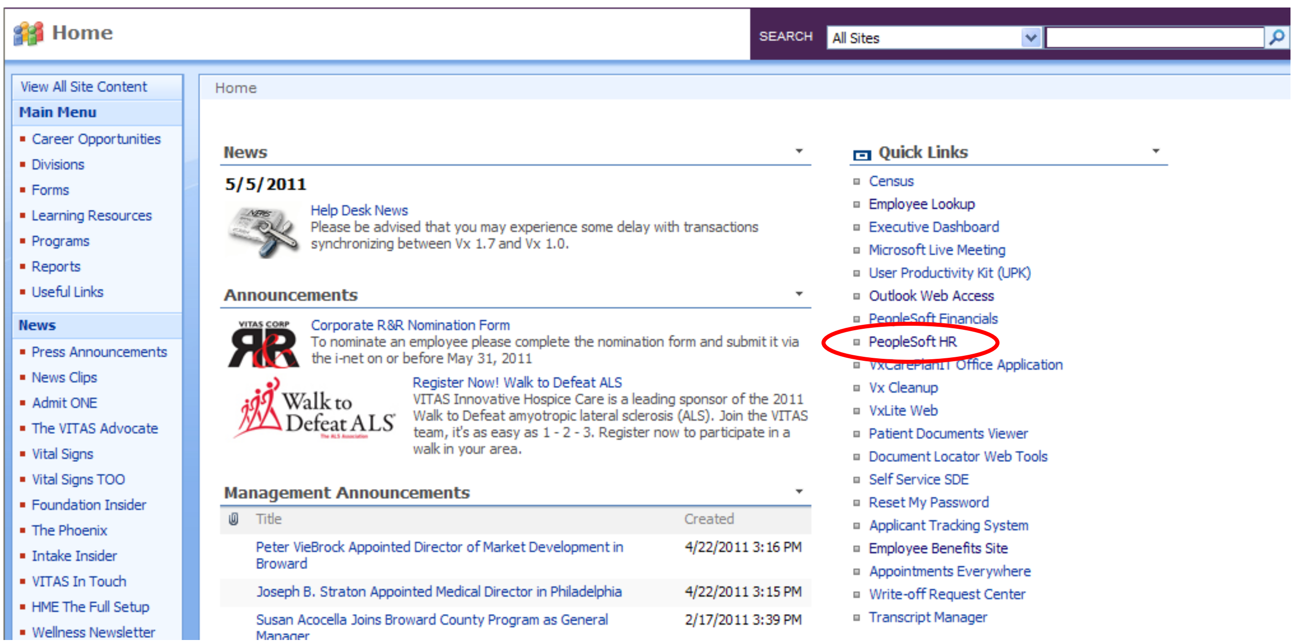
Overview

VITAS employees can change their personal and payroll information in PeopleSoft HR. Functionality exists to perform the following tasks:

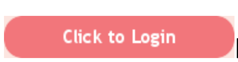
- Review/change home and mailing address, telephone numbers, email addresses (except for business email), and emergency contacts
- View paycheck information for earnings, taxes, deductions, and net pay distribution
- View/print your earnings history for a date range
- View your PTO balances
- View/edit direct deposit information
- Change tax withholding information (except when claiming exempt from withholding)

Accessing the System

1. If you are connected to the VITAS network, click the PeopleSoft HR link on the i-net Home page (**Quick Links** menu):



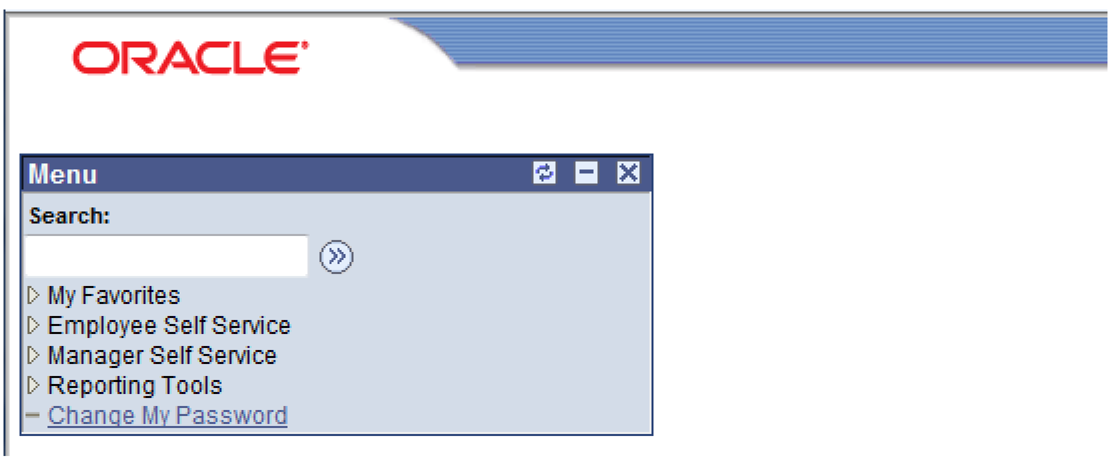
If you are not connected to the VITAS network, you can type the link www.vitas.com/benefits in your web browser. If you use this method, the **VITAS Benefits** home page will open:

Then, click the 

button to proceed to PeopleSoft HR (see step 2 below).

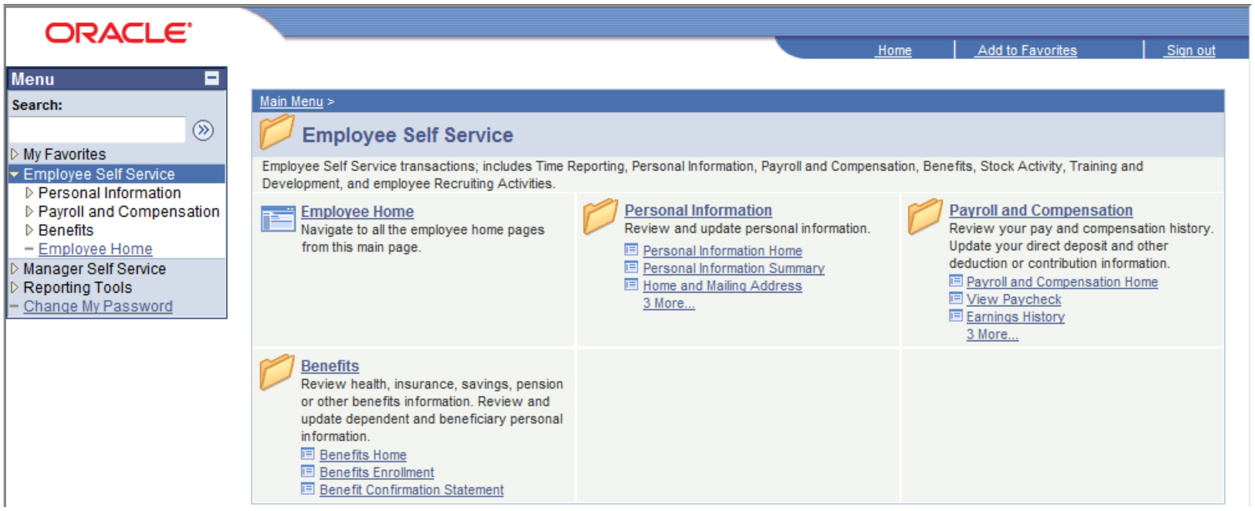
2. The PeopleSoft login page will open:

3. Enter the **User ID** and **Password** that were provided to you when you started working at VITAS (ask your manager if you need help with obtaining/locating these), and click the [**Sign In**] button to open the **Employee Self-Service** options:



Note that if this is the first time that you are logging in to the PeopleSoft HR system, you will be required to change your password. To do this, click the Change My Password link in the menu above and follow the prompts.

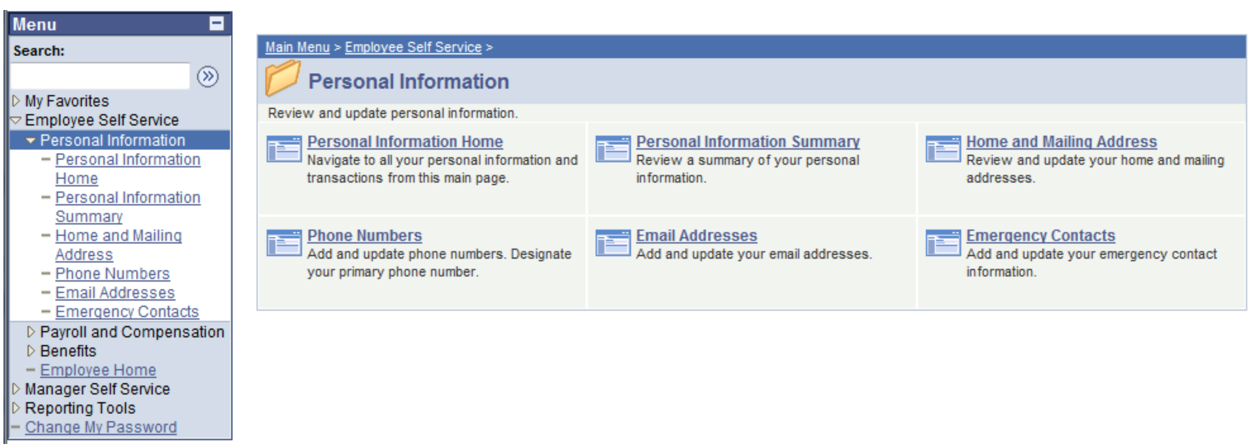
4. Click the **Employee Self Service** option to expand the menu and display all the sub options to choose from:



Viewing/Updating Personal Information

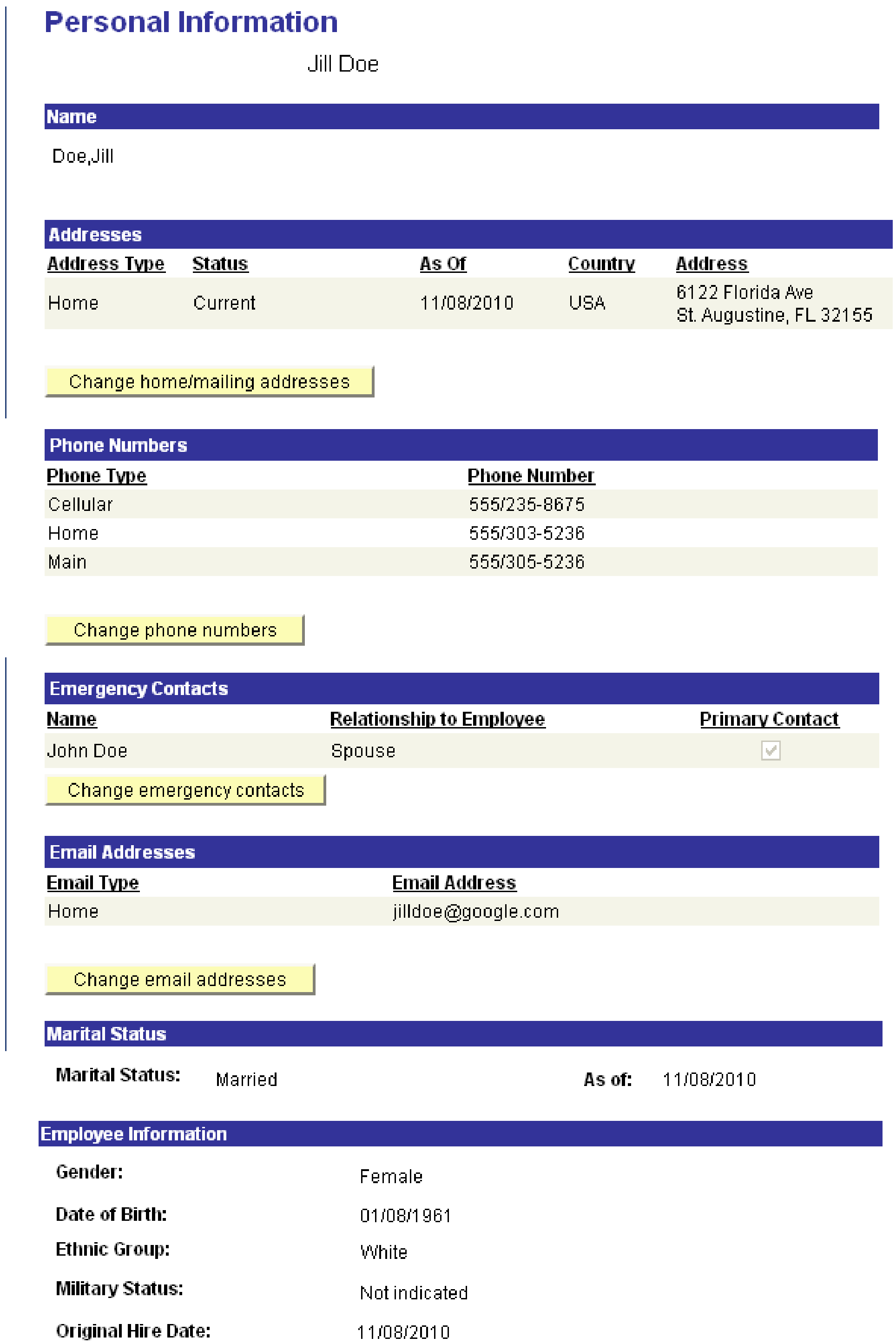
This section describes how to change your personal information, such as addresses, phone numbers, email addresses, and emergency contacts.

1. From the PeopleSoft menu, click on the **Personal Information** option to display all the related sub options:



2. The **Personal Information Home** link displays a description of the sub options. You can access the information to view/edit from that screen, or you can just click on the sub option you want to review/update.

   To view a summary page of all of your personal information, click the **Personal Information Summary** link in the left menu:



Personal Information

Jill Doe

Name

Doe,Jill

Addresses

Address Type	Status	As Of	Country	Address
Home	Current	11/08/2010	USA	6122 Florida Ave St. Augustine, FL 32155

Change home/mailing addresses

Phone Numbers

Phone Type	Phone Number
Cellular	555/235-8675
Home	555/303-5236
Main	555/305-5236

Change phone numbers

Emergency Contacts

Name	Relationship to Employee	Primary Contact
John Doe	Spouse	☑

Change emergency contacts

Email Addresses

Email Type	Email Address
Home	jilldoe@google.com

Change email addresses

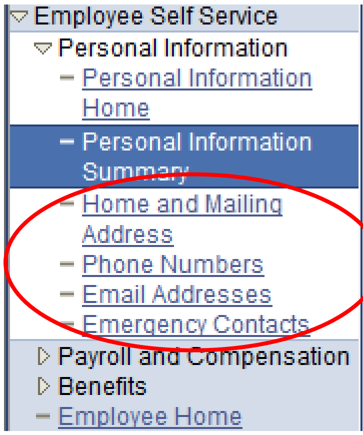
Marital Status

Marital Status:	Married	**As of:**	11/08/2010

Employee Information

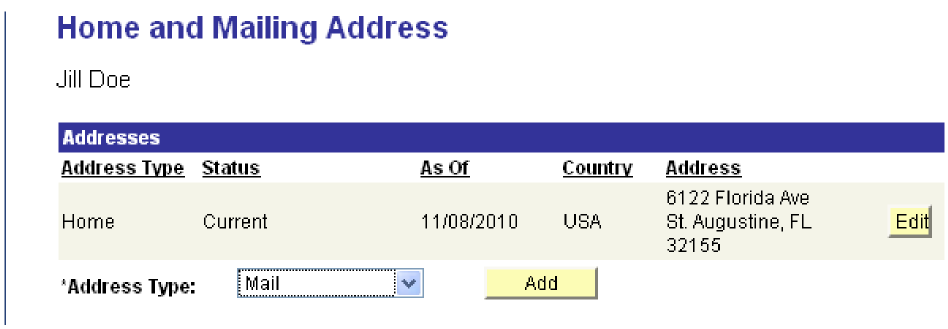
Gender:	Female
Date of Birth:	01/08/1961
Ethnic Group:	White
Military Status:	Not indicated
Original Hire Date:	11/08/2010

3. To view or change your home/mailing address, phone numbers, emergency contacts, or email addresses from this screen, click the corresponding button at the bottom of each section. Otherwise, click the corresponding link in the **Personal Information** menu on the left to go directly to the information you want to view/change:



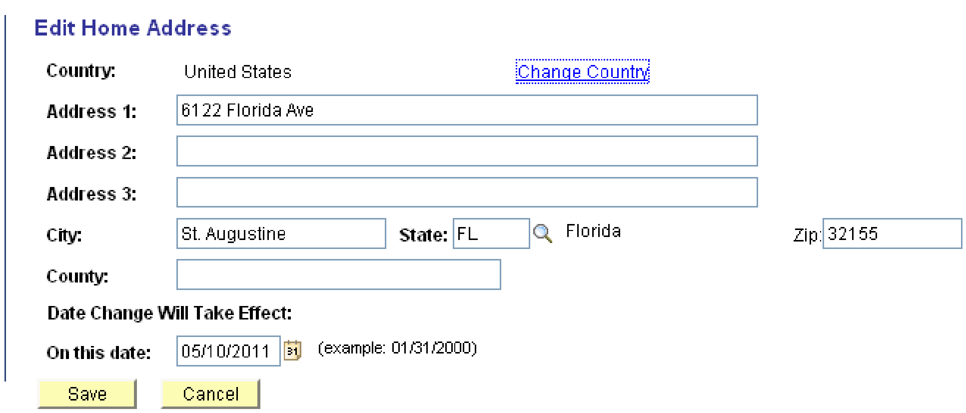
Updating Address Information

1. Click Home and Mailing Address to change/add an address:



2. There are only two address types: **Home** and **Mail**. You can either edit an address or you can add another address type.

3. To edit an address, click the [**Edit**] button to open the **Edit "*Type*" Address** window, which in this example, is the **Home** address:



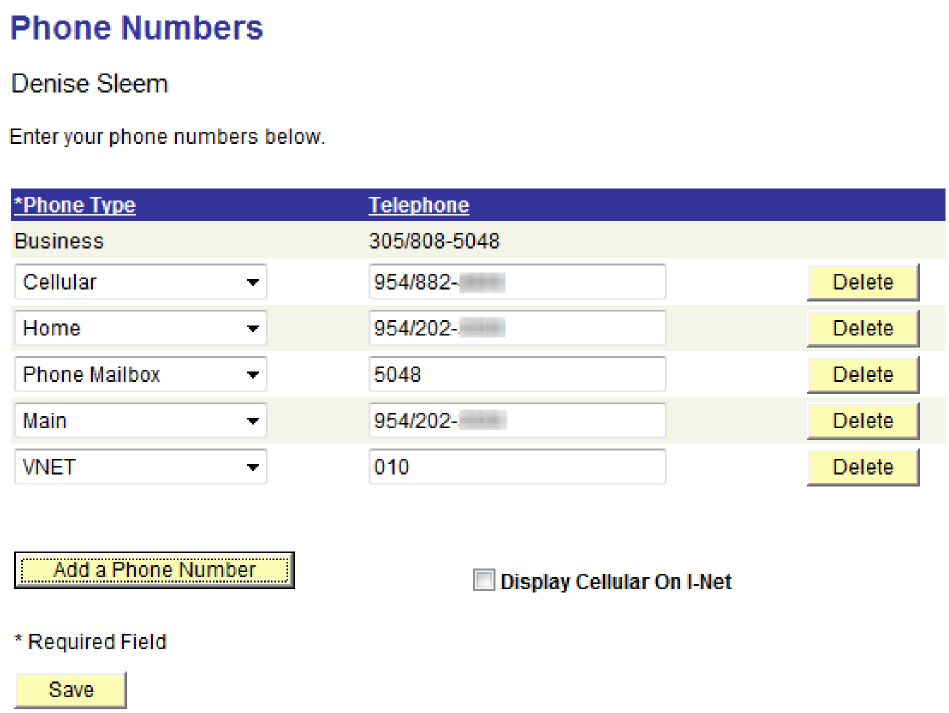
4. To add another address, which in this example will be the **Mail** address, select the type from the **Address Type** drop-down menu and then click the [**Add**] button to complete the address information in a window similar to the one above.

5. Click [**Save**] to save the address details, or you can click [**Cancel**] to exit from this screen without saving your changes.

Updating Phone Number(s)

Note that you can only add a Business phone number if it is not already present, and you cannot change your Business phone number once it is entered. If you need to change it, contact your Business Manager or the Human Resources department.

1. Click Phone Numbers to change/add a phone number:



2. Here, you can edit, delete, or add a phone number.
   - To edit a number, just type the new number directly in the **Telephone** field for the appropriate number.
   - To delete a phone number, click the [**Delete**] button next to the one you want to delete.
   - To add a new phone number, click [**Add a Phone Number**] to insert a new row below the current phone numbers to enter the new phone information.

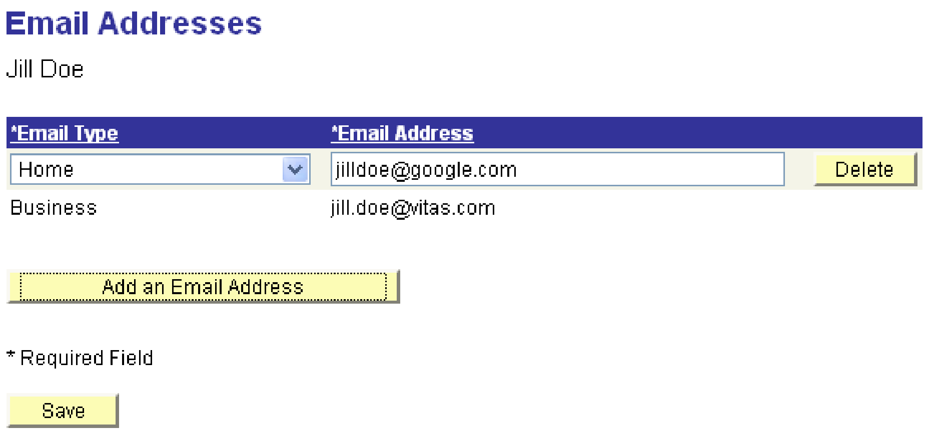
3. You can check the **Display Cellular On I-Net** checkbox if you would like your cell phone number to be included in the **Employee Lookup** results on i-Net.

4. Be sure to click the [**Save**] button to save your changes before leaving the screen as the system will not prompt you to save your changes.

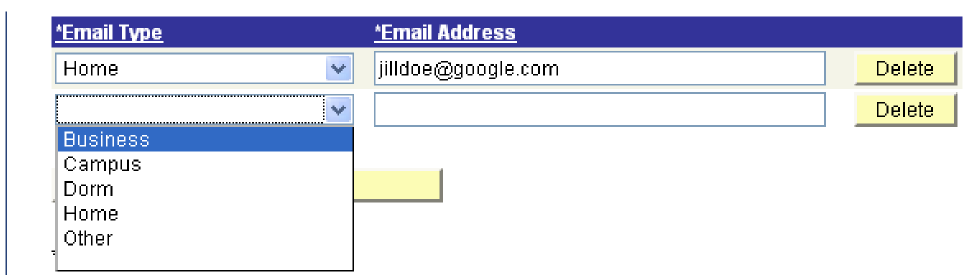
Updating Email Address(es)

Note that you cannot change your Business email address.

1. Click Email Addresses to change/add an email address.



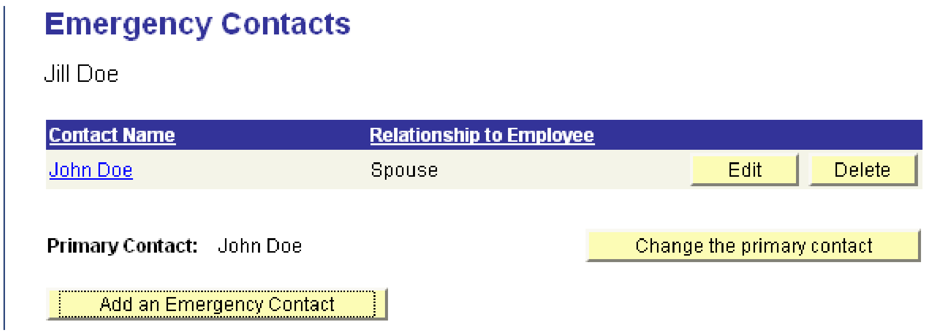
2. Here, you can edit, delete, or add an email address (except for the Business address).
   - To edit an email address, just type the new address directly in the **Email Address** field.
   - To delete an email address, click the [**Delete**] button next to the one you want to delete.
   - To add a new email address, click [**Add an Email Address**] to insert a new row below the current email address(es). Select the new email type from the **Email Type** drop-down menu then enter the new email information in the **Email Address** field:



5. Be sure to click the [**Save**] button to save your changes before leaving the screen as the system will not prompt you to save your changes.

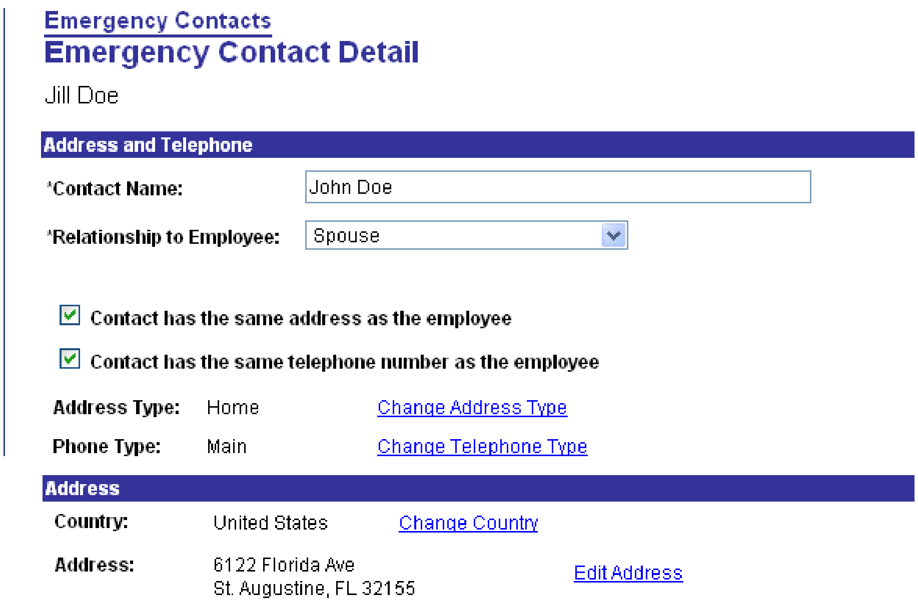
Updating Emergency Contact(s)

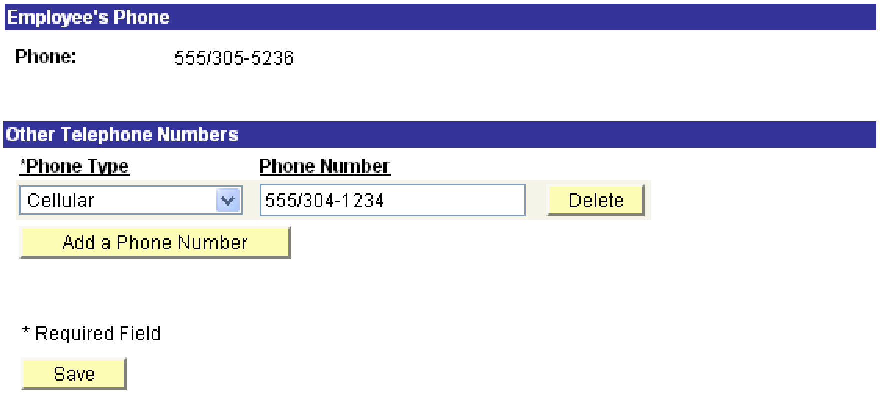
1. Click Emergency Contacts to change/add an emergency contact.



Here, you can edit, delete, or add an emergency contact.

2. To edit a contact, click the [**Edit**] button to open the **Emergency Contact Detail** window, where you can make changes to any of the displayed information:





3. Click the [**Save**] button to save your changes.

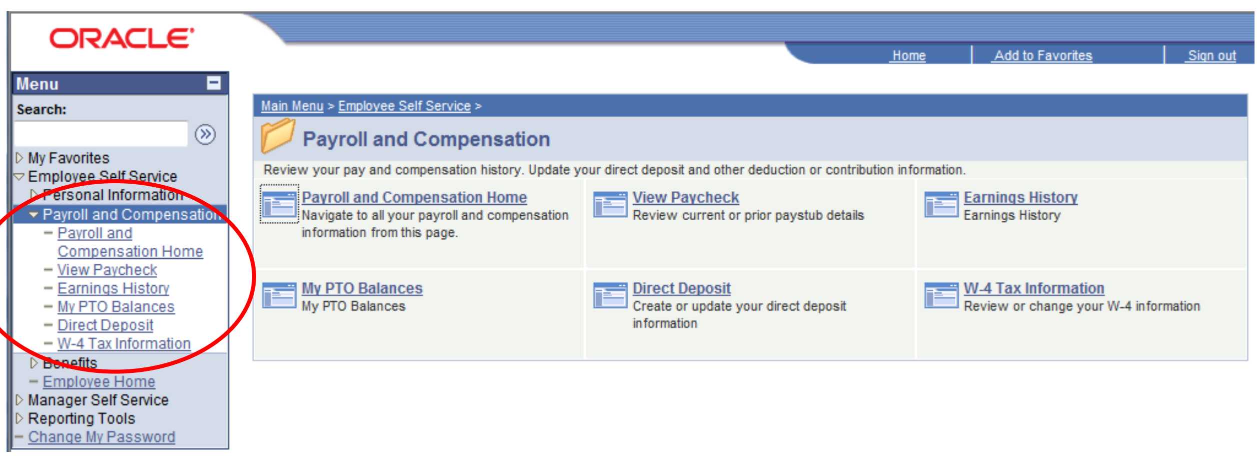
4. To delete an emergency contact, on the main Emergency Contacts page (see step 1), click the [**Delete**] button next to the one you want to delete.

5. To add a new emergency contact, click [**Add an Emergency Contact**] on the main Emergency Contacts page to open the **Emergency Contact Detail** window where you can complete the contact information in a window similar to the one in step 2 above. Then click [**Save**] to save the new contact information.

Viewing/Updating Payroll and Compensation Information

This section describes how to view/change your payroll and compensation information, such as your paycheck, direct deposit accounts, and W-4 tax information.

1. From the PeopleSoft menu, click on the **Payroll and Compensation** option to display all the sub options:



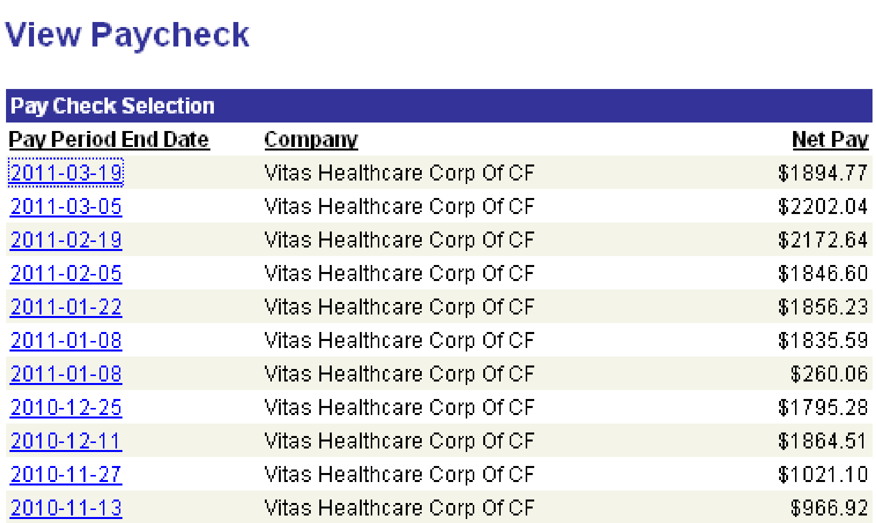
2. The **Payroll and Compensation Home** link displays a description of the related sub options. You can access the information to view/edit from that screen, or you can just click on the sub option you want to review/update.

3. To view or change your payroll information from this screen, click the corresponding link in the **Payroll and Compensation** menu to go directly to the information you want to view/change:

Viewing/Printing Paycheck Information

1. Click View Paycheck to view your latest paycheck. Note that you cannot view future pay check information until the pay calendar check date for your pay cycle.

2. If you want to view a previous paycheck (dating back several years), click View a Different Payment to open a screen similar to the one below, listing the links to the paychecks available for viewing:


View Paycheck

Pay Check Selection

Pay Period End Date	Company	Net Pay
2011-03-19	Vitas Healthcare Corp Of CF	$1894.77
2011-03-05	Vitas Healthcare Corp Of CF	$2202.04
2011-02-19	Vitas Healthcare Corp Of CF	$2172.64
2011-02-05	Vitas Healthcare Corp Of CF	$1846.60
2011-01-22	Vitas Healthcare Corp Of CF	$1856.23
2011-01-08	Vitas Healthcare Corp Of CF	$1835.59
2011-01-08	Vitas Healthcare Corp Of CF	$260.06
2010-12-25	Vitas Healthcare Corp Of CF	$1795.28
2010-12-11	Vitas Healthcare Corp Of CF	$1864.51
2010-11-27	Vitas Healthcare Corp Of CF	$1021.10
2010-11-13	Vitas Healthcare Corp Of CF	$966.92

3. If you want to print a pay statement, select the pay statement you want to print from the **View Paycheck** screen (if it is not the one already displayed) and click the [**Printer Friendly**] button. The pay period detail statement will print to your default printer, unless you select another printer in the **Print** window.

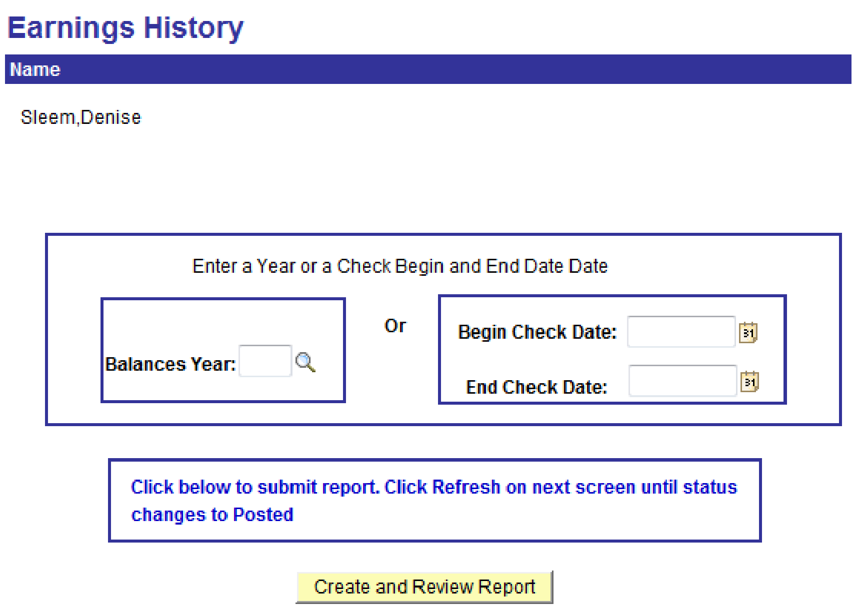
   Note that the statement will print on two pages. If you want to fit the statement to print on a single page, you must use the browser's Print Preview option (on the Print menu of the browser window). First, minimize the left panel menu, then select **Print Preview** from the **Print** menu. Then, in the **Print Preview** window, select 70% in the far right drop-down menu:

   Once your pay statement displays in full in this window, click the **Printer** button to print the statement to your default printer (or select another printer in the **Print** window).

Viewing/Printing Your Earnings History

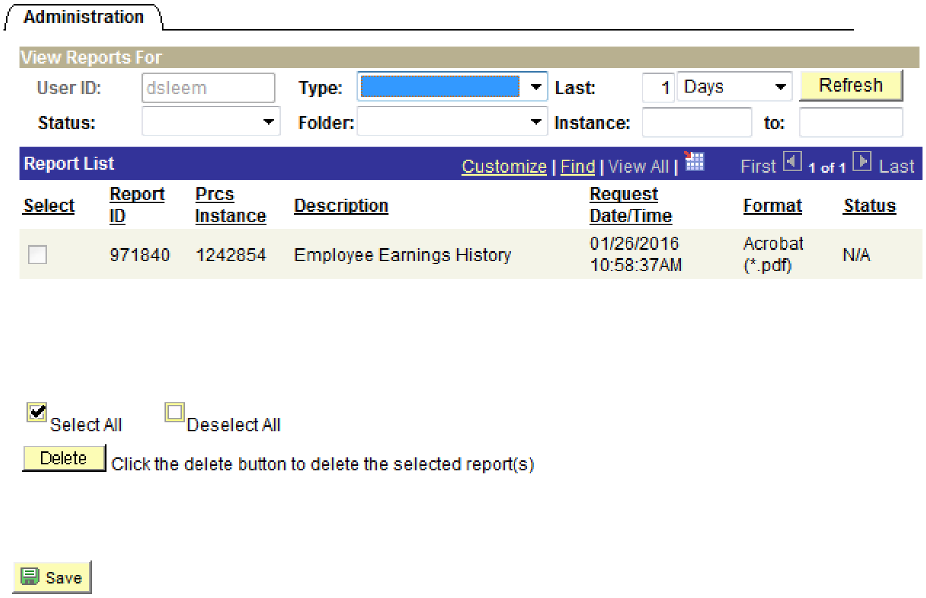
Use this option to view your earnings history for a specific year or check date range, and to print a report of this information.

1. Click Earnings History to open the screen below:

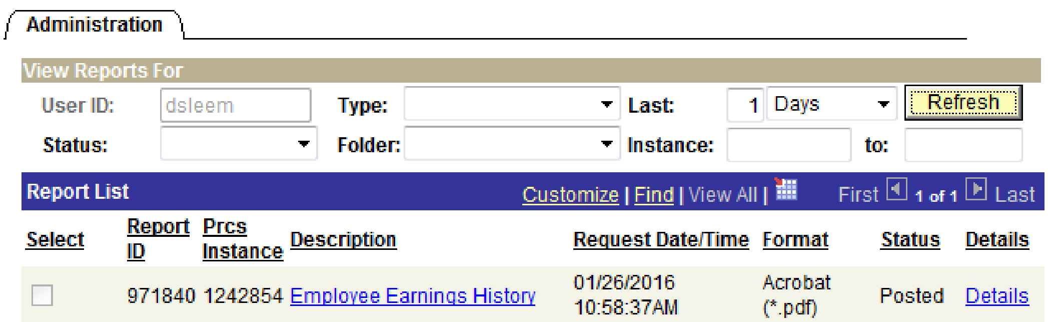


2. Enter either a year (in **Balances Year**) or a date range (**Begin/End Check Date**) for the information you want to view/print.

3. Click [**Create and Review Report**] to go to the next page, which will present the status information for the report you requested in a separate window:



4. Click the [**Refresh**] button in the top right of this screen until the **Status** column displays **Posted**, and the **Details** column now appears:



5. Click on the link Employee Earnings History to open a PDF report of the earnings data in the date range you requested. This data includes (per paycheck in the range) your regular and PTO hours and earnings, gross pay, taxes, deductions, and net pay.

6. You can print or save the PDF report. You can also delete it from the list in the **Earnings History** screen by selecting it from the **Report List** and then clicking the [**Delete**] button.

Viewing Your PTO Balances

You can view your PTO information for the current calendar year (i.e., already used, earned as of "yesterday", and potentially available for the rest of the year). Click My PTO Balances to display this screen:

My PTO Balances

Name

Sleem,Denise

Total PTO Paid in Calendar Year	32.00
PTO Balance as of Yesterday	28.94
Potential PTO amount available by 12/31	260.00

Balances not available for Employees that are Termed

You cannot edit this screen. If you have any questions regarding your PTO balances, please contact your Human Resources department or Business Manager.

Viewing/Editing Direct Deposit Accounts

Use the Direct Deposit option to view or make changes to your Direct Deposit accounts.

Direct Deposit

Denise Sleem

Direct Deposit Detail

Account Type	Routing Number	Account Number	Deposit Type	Amt/Pct	Deposit Order		
Savings	06[illegible]4	123456789000	Percent	10%	1	Edit	Delete
Checking	06[illegible]7	13579086420	Amount	$500	2	Edit	Delete
Checking	06[illegible]7	22[illegible]7	Balance		999	Edit	Delete

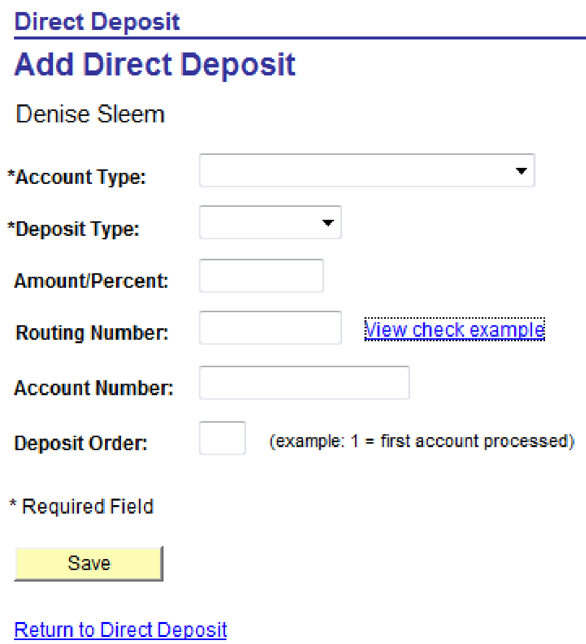
Add Account

Note that the **Deposit Type** column describes the amount/percentage displayed in the **Amt/Pct** column. In this example, 10% (**Percent**) is deposited to the Savings account on top; $500 (**Amount**) is deposited to the Checking account on the second line; and the **Balance** (whatever that amount is) is deposited to the Checking account on the third line.

The **Deposit Order** indicates the priority that you have selected for your paycheck to be deposited in multiple accounts. The priority is blank, 1, 2, 3, etc. If you have only one deposit account, the order will be blank.

To add a direct deposit account:

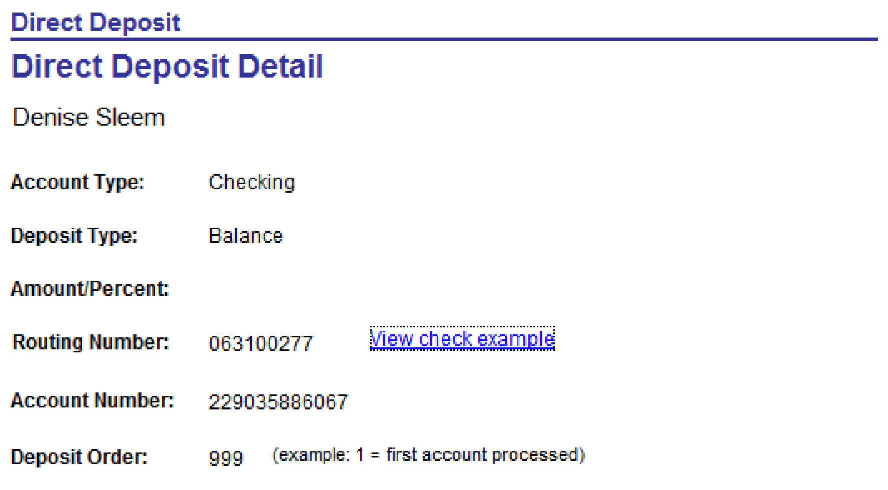
1. Click the [**Add Account**] button to open this screen:



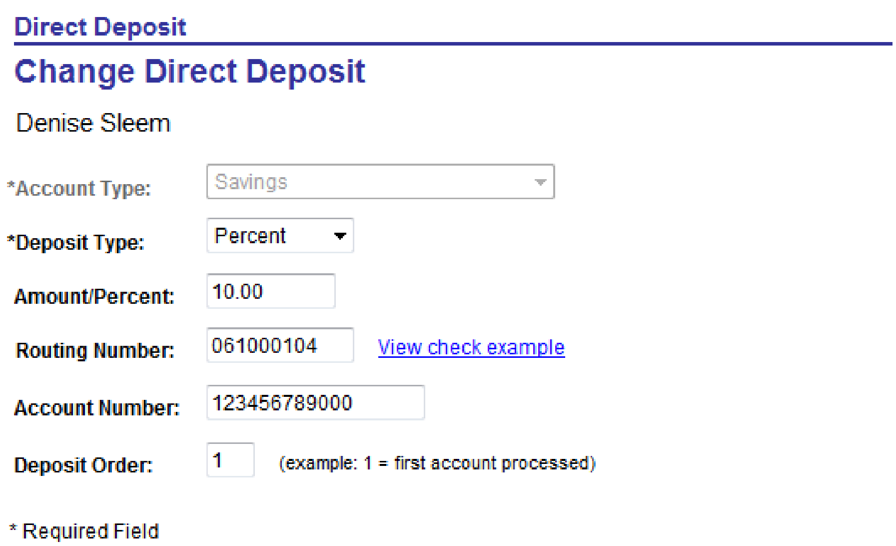
2. Complete the necessary information:
   a. Select from the **Account Type** (Checking or Savings; you cannot add a Pay Card – contact the Payroll department to do this for you) and **Deposit Type** (Amount, Percent, or Balance) drop-down menu.
   b. In the **Amount/Percent** field, enter the dollar amount or percent to deposit from your pay check (based on the **Deposit Type** selected above). If you are using percentages only (for all accounts), they must add up to 100%.
   c. Enter both the **Routing Number** and **Account Number** for this direct deposit account. Note that the routing number must be 9 digits long (including leading zeros, if any).
   d. Enter the **Deposit Order** (i.e., the priority in which to make the deposit in this account). The priority is blank, 1, 2, 3, etc. If you have only one deposit account, leave the order blank.

3. Click [**Save**] to save this new deposit account and return to the main **Direct Deposit** screen, where the account details will be displayed.

   On this screen, you may also click on the link for the account type (i.e., **Savings** or **Checking**) for which you want to view the details:

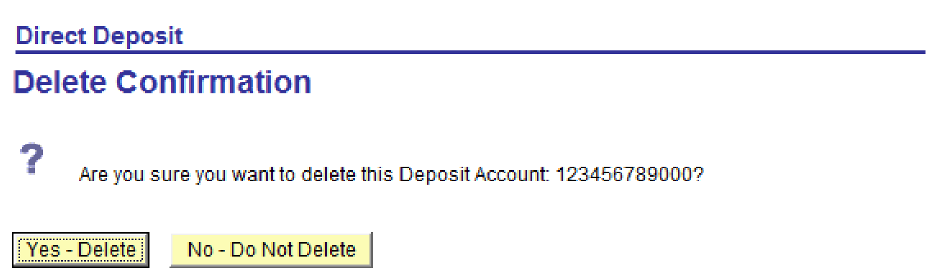


To edit a direct deposit account, click the [**Edit**] button for the account you want to edit to open the **Change Direct Deposit** screen, where you can edit any of the information for this account (except the account type):



For a Pay Card, you can change any field except the account number and routing number.

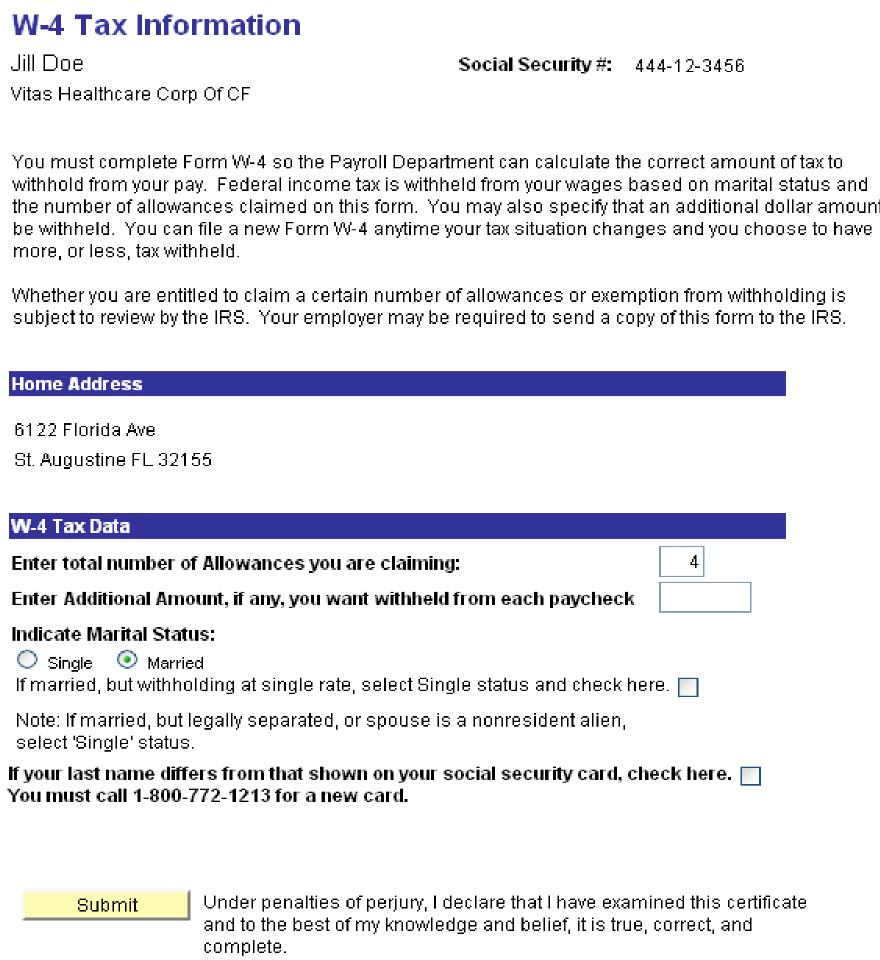
To delete a direct deposit account, click the [**Delete**] button for the account you want to delete to open the **Delete Confirmation** screen, where you can select the option to delete the account:



Viewing/Updating W-4 Tax Information

Note that you cannot claim Exempt from withholding in the PeopleSoft Employee Self Service system. If you need to claim Exempt, you must complete a paper W-4 Form and send it to your Human Resources department or Business Manager. Also, these changes only affect federal withholding. Any state withholding change still needs to be done by completing a W-4 Form and submitting it to your Business Manager.

1. Click W-4 Tax Information to view your current withholding information and to update your number of allowances, any extra amount to withhold from your paycheck, and your marital status.



W-4 Tax Information

Jill Doe
Vitas Healthcare Corp Of CF

Social Security #: 444-12-3456

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

6122 Florida Ave
St. Augustine FL 32155

W-4 Tax Data

Enter total number of Allowances you are claiming: 4

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

Indicate Marital Status:

Single Married

If married, but withholding at single rate, select Single status and check here.

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

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

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.

2. You may change/enter information in any of the displayed fields.