



PeopleSoft HCM

Payroll 9.2

Instructor Demonstration Agenda

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PeopleSoft HCM Instructor Demonstration Agenda

Purpose: This instructor demonstration provides a high-level overview of design, configuration and set-up aspects of the Payroll module in PeopleSoft HCM.

Payroll (2 Days)

Day 1*:

8:30 – 12:00

Course Overview

- Agenda

Business Process Overview

- Describing the Features of Payroll for North America
- Describing Payroll for North America Integration
- Describing The Steps of Payroll Processing
- Describing Sources of Information About Payroll for North America in Product Documentation

Setting Up PeopleSoft HRMS Tables for Payroll Processing

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

12:00 – 1:00 Lunch Break

1:00 – 5:30

Setting Up Payroll Tables

- Identifying Payroll Setup Tables
- Setting Up Source Bank
- Creating Special Accumulators
- Setting Up Earnings Codes
- Setting Up Earnings Programs
- Describing Shift Pay Setup
- Creating a Pay Group
- Creating a Rate Code
- Setting Up Deductions
- Using Deduction Subsets
- Setting Up General Deductions

Setting Up U.S. Payroll Tax Tables

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

**There will be a 10 minute break in the morning and afternoon at instructor discretion.*

Day 2*:

8:30 – 12:00

Creating and Updating Paysheets

- Describing Paysheets in Payroll for North America
- Describing Balance ID Creation
- Creating Pay Calendars
- Setting Up Pay Run IDs
- Creating Paysheets
- Viewing and Updating Paysheets and Paylines
- (Optional) Loading Paysheets by Rapid Entry Method
- Describing the Payroll Unsheet Process

Setting Up and Processing Additional Payroll Functionality

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

12:00 – 1:00 Lunch Break

1:00 – 5:30

Setting Up and Processing Benefit Deductions in Payroll

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

Setting Up and Processing Garnishments

- Identifying Garnishment Setup Steps
- Describing PeopleSoft-Maintained U.S. Garnishment Tables
- Setting Up Company-Level Tables for Garnishment Processing
- Assigning an Employee Garnishment Deduction
- Setting Up Employee Garnishment Specification Data
- Reviewing Employee Garnishment History

Course Review

- Describing PeopleSoft Payroll for North America Integrations and Business Processes
- Setting Up PeopleSoft HRMS Foundation Tables and Payroll Tables
- Setting Up Employee Data
- Creating and Updating Paysheets
- Processing On-cycle and Off-cycle Payrolls
- Setting Up and Processing Benefit Deductions, Garnishments, and Other Payroll Functionality
- Describing PeopleSoft ePay

**There will be a 10 minute break in the morning and afternoon at instructor discretion.*