Human Capital Management

Image 44 Overview

CONTENTS

Introduction

The Image/Upgrade Overview Document is intended to provide ctcLink users with a summary of the changes that will be made in the system as a result of the upcoming image or PeopleTools upgrade implementation. Oracle releases multiple PeopleSoft updates, called images, for each pillar every year. Each Image contains bug fixes and features that are important for PeopleSoft to work well. PeopleTools upgrades update the underlying framework of the system. There are minimal changes that are noticeable to the end users. Below is an overview of the changes that you can expect to see as part of this upgrade.

Payroll

Updated Federal / State Tax Table

HI - A new table entry effective-dated 10/01/2022 includes the increase in the Hawaii state minimum wage from $10.10 to $12.00 per hour.

https://labor.hawaii.gov/wsd/minimum-wage/

ID - The table entry effective-dated 06/15/2022, which was delivered in Tax Update 22-C, is updated to include an increase in the Idaho withholding allowance amount from $3,154.00 to $3,417.00 as published by the Idaho State Tax Commission on June 15th, 2022.

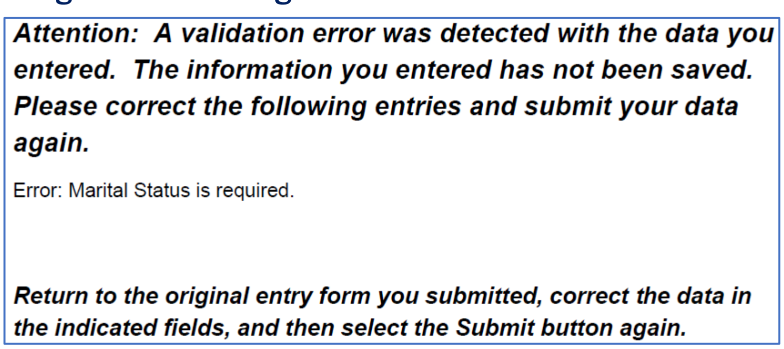
https://tax.idaho.gov/i-1026.cfm?seg=compute

Updated Federal W-4 PDF in ESS

The 2022 Federal W-4 Form has been modified to set tax status to Exempt when employee claims exemption.

Prior to Image 44, the following error message was issued when an employee selected "Exempt" (Exemption from withholding) on Federal W-4 PDF in Employee Self Service.

Image: Error Message Before



Navigation

Employee Self Service > Payroll Tile > Tax Withholding

Image: W-4 PDF – Before Submit

Step 4 (optional): Other Adjustments

(a) **Other income (not from jobs).** If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income . . . . **4(a)** $

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

(c) **Extra withholding.** Enter any additional tax you want withheld each **pay period** . . **4(c)** $

Exemption from withholding. By claiming exemption from withholding, you certify that you owed no Federal income tax in 2021, and that you expect to owe no Federal income tax in 2022. If you claim exemption from withholding, no income tax will be withheld from your paycheck. Exempt

Image: W-4 PDF – After Submit

The changes you have made to your Employee Withholding Allowance Certificate have been successfully submitted on 2022-11-29. You can scroll to the next page to view your saved data or print/save a copy of this document for your records.

Please be advised when you close this document the original PDF document remains open for your reference. To exit the application process, you will need to close both the original and the updated PDF documents.

If you need to make additional changes, you must navigate back to the Tax Withholding Forms page and begin the process again.

Image: Employee Federal Tax Data – Admin view after W-4 PDF was submitted via ESS

Federal Tax Data | State Tax Data | Local Tax Data

[redacted] Person ID [redacted]

Tax Data

1 of 6 View All

Company [redacted]

*Effective Date 11/29/2022

Updated By Emp Sf Svc Date Last Updated 11/29/2022

Federal Form Version

*Form Version W-4 - 2020 or Later

Federal Withholding Elements

*Special Withholding Tax Status Maintain taxable gross

*Tax Status Exempt

QRG

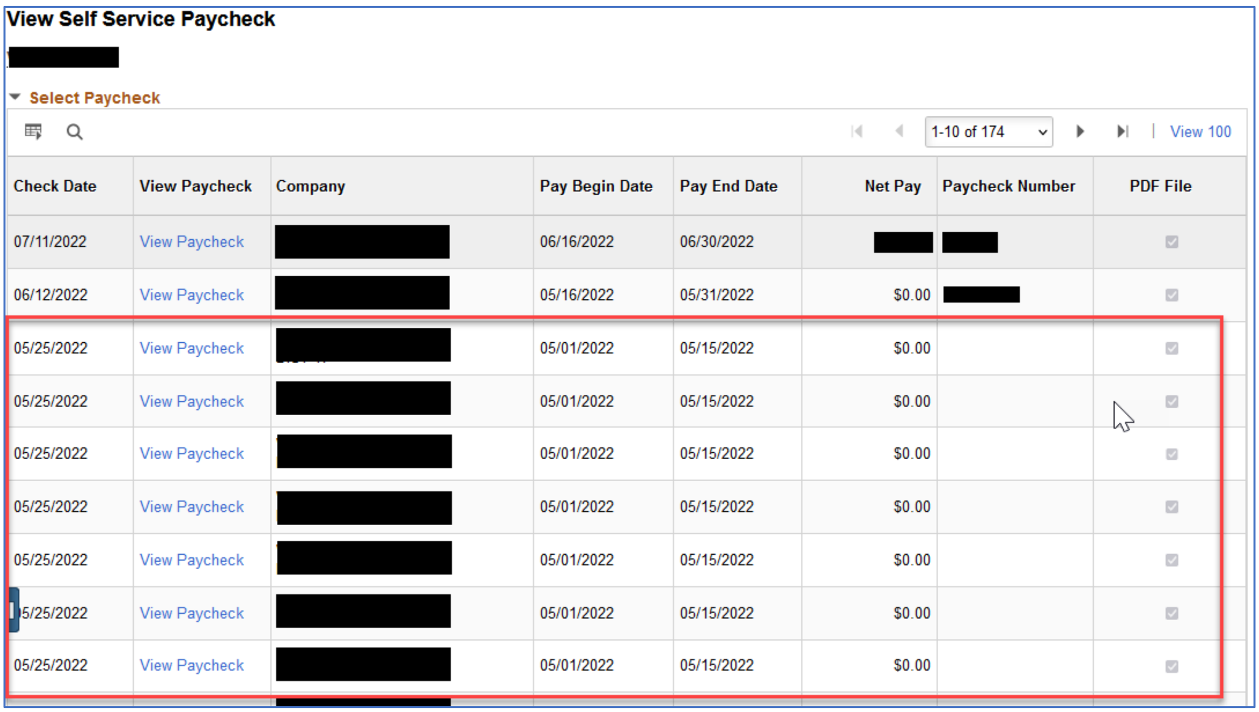
[9.2 ESS W-4 Withholding]

Changes to View Self Service Paycheck

Modifications have been made to prevent listing zero net pay paychecks multiple times in View Paycheck. This applies to both the viewing self-service paychecks as an employee and as an administrator.

Prior to the modifications, if a multi-job employee had a zero net pay for the pay period, the paychecks were erroneously displayed as duplicates.

Image: View Self Service Paycheck Before



View Self Service Paycheck

[redacted]

Select Paycheck

1-10 of 174 | View 100

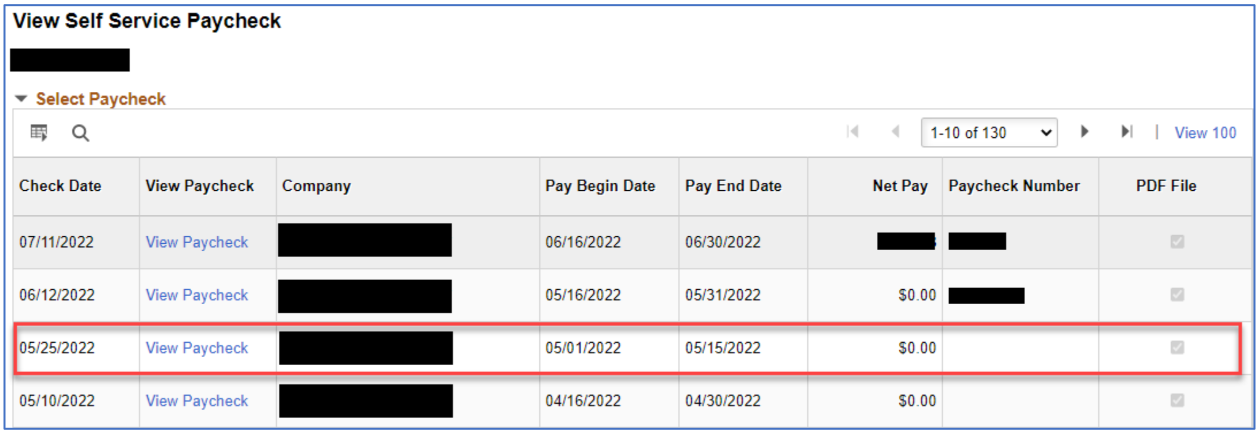
Check Date	View Paycheck	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
07/11/2022	View Paycheck	[redacted]	06/16/2022	06/30/2022	[redacted]	[redacted]	
06/12/2022	View Paycheck	[redacted]	05/16/2022	05/31/2022	$0.00	[redacted]	
05/25/2022	View Paycheck	[redacted]	05/01/2022	05/15/2022	$0.00		
05/25/2022	View Paycheck	[redacted]	05/01/2022	05/15/2022	$0.00		
05/25/2022	View Paycheck	[redacted]	05/01/2022	05/15/2022	$0.00		
05/25/2022	View Paycheck	[redacted]	05/01/2022	05/15/2022	$0.00		
05/25/2022	View Paycheck	[redacted]	05/01/2022	05/15/2022	$0.00		
05/25/2022	View Paycheck	[redacted]	05/01/2022	05/15/2022	$0.00		
05/25/2022	View Paycheck	[redacted]	05/01/2022	05/15/2022	$0.00		

Navigation

Employee Self Service > Payroll Tile > Paychecks

NavBar > Navigator > Payroll for North America > Payroll Processing USA > Produce Payroll > Review Self Service Paycheck

Image: View Self Service Paycheck



View Self Service Paycheck

[redacted]

Select Paycheck

1-10 of 130 | View 100

Check Date	View Paycheck	Company	Pay Begin Date	Pay End Date	Net Pay	Paycheck Number	PDF File
07/11/2022	View Paycheck	[redacted]	06/16/2022	06/30/2022	[redacted]	[redacted]	
06/12/2022	View Paycheck	[redacted]	05/16/2022	05/31/2022	$0.00	[redacted]	
05/25/2022	View Paycheck	[redacted]	05/01/2022	05/15/2022	$0.00		
05/10/2022	View Paycheck	[redacted]	04/16/2022	04/30/2022	$0.00		

QRG

N/A

ESS W-2/W-2C View Detail

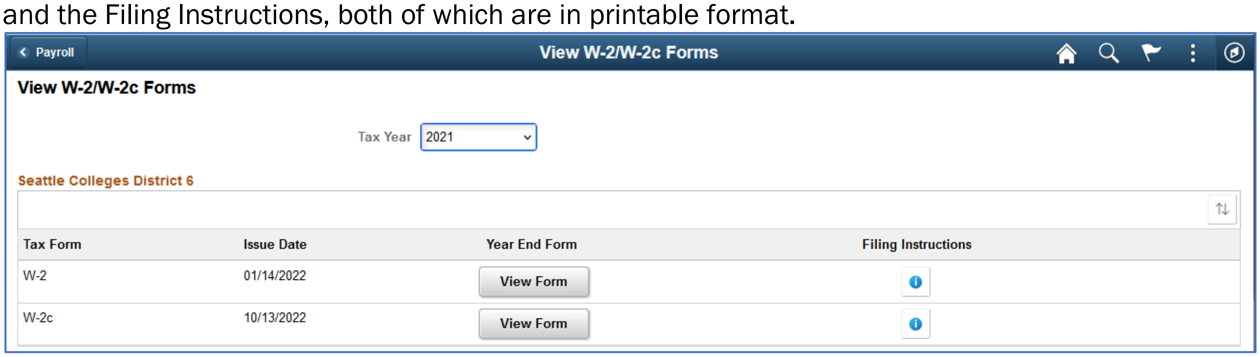
The view W-2/W-2c year-end forms detail that was available only in screen reader mode is now made available to all users, without enabling screen reader mode for themselves individually.

Navigation

Employee Self Service > Payroll Tile > View W-2/W-2c Forms

Image: View W-2/W-2c Forms Before

Prior to the modifications, the employee is able to view, download and print their W-2/W-2c Form and the Filing Instructions, both of which are in printable format.



Payroll

View W-2/W-2c Forms

View W-2/W-2c Forms

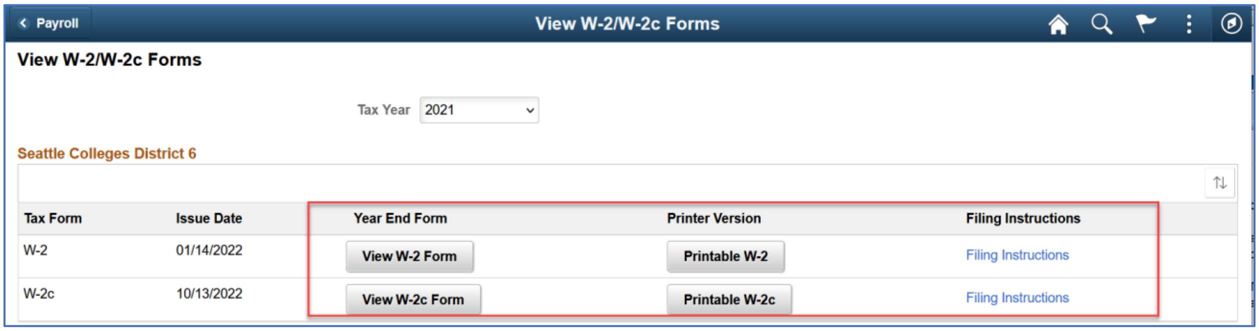
Tax Year 2021

Seattle Colleges District 6

Tax Form	Issue Date	Year End Form	Filing Instructions
W-2	01/14/2022	View Form	
W-2c	10/13/2022	View Form	

After HCM Image 44 is deployed, the employee has the additional options to view detailed W-2/W-2c Tax Form information and read through the Filing Instructions text page.

Image: View W-2/W-2c Forms After

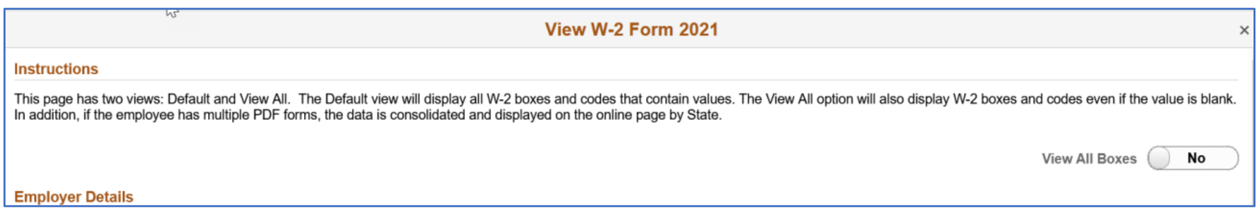


View W-2/W-2c Form – this option takes the employee to a detailed sub-page that offers two views: Default and View All.

Closing the sub-page by selecting [**x**] will return the employee back to the View W-2/W-2c Forms page. View W-2 Form details page and View W-2c Form details page provide links to the Printable W-2 and Printable W-2c, respectfully.

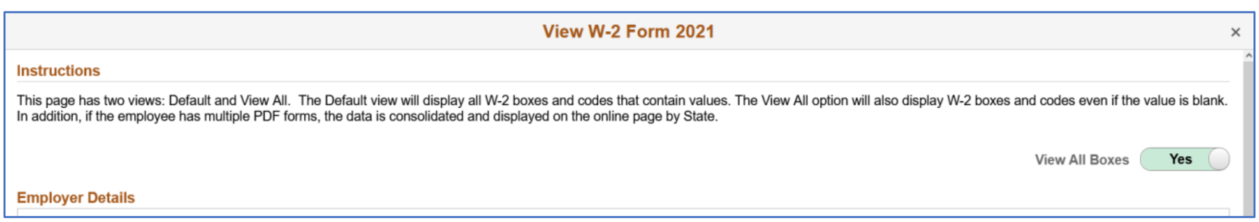
The Default view (View All Boxes = No) will display all W-2 boxes and codes that contain values.

Image: Default View W-2 Form 2021



The View All option (View All Boxes = Yes) will display all W-2 boxes and codes, even if the value is blank.

Image: View All Option W-2 Form 2021



Printer Version – Printable W-2/W-2c option will open the respective PDF Form on a separate tab of the Internet browser, which the employee is able to view and/or print.

Image: View W-2 Form

View W-2 Form 2021

×

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 No

Employer Details

Employer identification number (EIN)	[redacted]
Name	
Address 1	
Address 2	
City, State, Country & Zip Code	
Employer identification number (EIN)	
Name	
Address 1	
Address 2	
City, State, Country & Zip Code	

Employee Details

Social security number	[redacted]
Name	
Social security number	
Address 1	
Address 2	
Name	
Address 1	
Address 2	

W-2 Details

Box/Code	Description	Form Value
01	Wages, tips, other compensation	[redacted]
02	Federal income tax withheld	
03	Social security wages	
04	Social security tax withheld	
05	Medicare wages and tips	
06	Medicare tax withheld	

Printable W-2

The Filing Instructions text page also provides a link to the respective Printer Version.

Image: Filing Instructions

Filing Instructions ×

Credit for excess taxes. If you had more than one employer in 2021 and more than $8853.60 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than $5203.80 in Tier 2 RRTA tax was withheld, you may also be able to claim a credit. See the Instructions for Forms 1040 and 1040-SR and Pub. 505, Tax Withholding and Estimated Tax.

Instructions for Employee(See also Notice to Employee on the back of Copy B.)

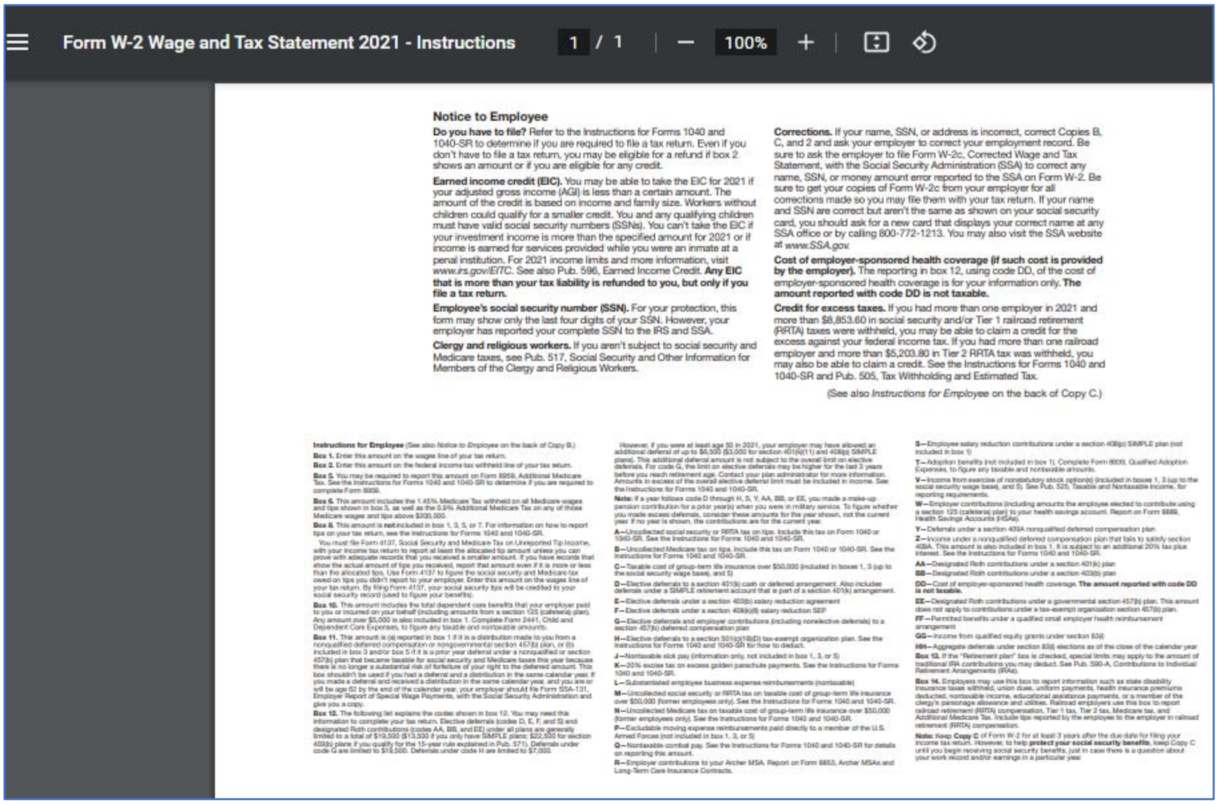
Box 1. Enter this amount on the wages line of your tax return.
Box 2. Enter this amount on the federal income tax withheld line of your tax return.
Box 5. You may be required to report this amount on Form 8959, Additional Medicare Tax. See the Instructions for Forms 1040 and 1040-SR to determine if you are required to complete Form 8959.
Box 6. This amount includes the 1.45% Medicare Tax withheld on all Medicare wages and tips shown in box 5, as well as the 0.9% Additional Medicare Tax on any of those Medicare wages and tips above $200000.
Box 8. This amount is not included in box 1, 3, 5, or 7. For information on how to report tips on your tax return, see the Instructions for Forms 1040 and 1040-SR.
You must file Form 4137, Social Security and Medicare Tax on Unreported Tip Income, with your income tax return to report at least the allocated tip amount unless you can prove with adequate records that you received a smaller amount. If you have records that show the actual amount of tips you received, report that amount even if it is more or less than the allocated tips. Use Form 4137 to figure the social security and Medicare tax owed on tips you didn't report to your employer. Enter this amount on the wages line of your tax return. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).
Box 10. This amount includes the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over $5000 is also included in box 1. Complete Form 2441, Child and Dependent Care Expenses, to figure any taxable and nontaxable amounts.
Box 11. This amount is (a) reported in box 1 if it is a distribution made to you from a nonqualified deferred compensation or nongovernmental section 457(b) plan or (b) included in box 3 and/or box 5 if it is a prior year deferral under a nonqualified or section 457(b) plan that became taxable for social security and Medicare taxes this year because there is no longer a substantial risk of forfeiture of your right to the deferred amount. This box shouldn't be used if you had a deferral and a distribution in the same calendar year. If you made a deferral and received a distribution in the same calendar year, and you are or will be age 62 by the end of the calendar year, your employer should file Form SSA-131, Employer Report of Special Wage Payments, with the Social Security Administration and give you a copy.
Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F, and S) and designated Roth contributions (codes AA, BB, and EE) under all plans are generally limited to a total of $19500 ($13500 if you only have SIMPLE plans; $22500 for section 403(b) plans if you qualify for the 15-year rule explained in Pub. 571). Deferrals under code G are limited to $19,500. Deferrals under code H are limited to $7000.
However, if you were at least age 50 in 2021, your employer may have allowed an additional deferral of up to $6500 ($3000 for section 401(k)(11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the Instructions for Forms 1040 and 1040-SR.
Note: If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.

A Uncollected social security or RRTA tax on tips. Include this tax on Form 1040 or 1040-SR. See the Instructions for Forms 1040 and 1040-SR.
B Uncollected Medicare tax on tips. Include this tax on Form 1040 or 1040-SR. See the Instructions for Forms 1040 and 1040-SR.
C Taxable cost of group-term life insurance over $50000 (included in boxes 1, 3 (up to social security wage base), and 5)
D Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.
E Elective deferrals under a section 403(b) salary reduction agreement.
F Elective deferrals under a section 408(k)(6) salary reduction SEP.
G Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan
H Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See the Instructions for Forms 1040 and 1040-SR for how to deduct.
J Nontaxable sick pay (information only, not included in box 1, 3, or 5)
K 20% excise tax on excess golden parachute payments. See the Instructions for Forms 1040 and 1040-SR.
L Substantiated employee business expense reimbursements (nontaxable)
M Uncollected social security or RRTA tax on taxable cost of group-term life insurance over $50000 (former employees only). See the Instructions for Forms 1040 and 1040-SR.
N Uncollected Medicare tax on taxable cost of group-term life insurance over $50000 (former employees only). See the Instructions for Forms 1040 and 1040-SR.
P Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces (not included in box 1, 3, or 5)
Q Nontaxable combat pay. See the Instructions for Forms 1040 and 1040-SR for details on reporting this amount.
R Employer contributions to your Archer MSA. Report on Form 8853, Archer MSAs and Long-Term Care Insurance Contracts.
S Employee salary reduction contributions under a section 408(p) SIMPLE plan (not included in box 1)
T Adoption benefits (not included in box 1). Complete Form 8839, Qualified Adoption Expenses, to figure any taxable and nontaxable amounts.
V Income from exercise of nonstatutory stock option(s) (included in boxes 1, 3 (up to social security wage base), and 5). See Pub. 525, Taxable and Nontaxable Income, for reporting requirements.
W Employer contributions (including amounts the employee elected to contribute using a section 125 (cafeteria) plan) to your health savings account. Report on Form 8889, Health Savings Accounts (HSAs).
Y Deferrals under a section 409A nonqualified deferred compensation plan.
Z Income under a nonqualified deferred compensation plan that fails to satisfy section 409A. This amount is also included in box 1. It is subject to an additional 20% tax plus interest. See the Instructions for Forms 1040 and 1040-SR.
AA Designated Roth contributions under a section 401(k) plan
BB Designated Roth contributions under a section 403(b) plan
DD Cost of employer-sponsored health coverage. The amount reported with Code DD is not taxable.
EE Designated Roth contributions under a governmental section 457(b) plan. This amount does not apply to contributions under a tax-exempt organization section 457(b) plan.
FF Permitted benefits under a qualified small employer health reimbursement arrangement.
GG Income from qualified equity grants under section 83(i).
HH Aggregate deferrals under section 83(i) elections as of the close of the calendar year.
Box 13 If the "Retirement plan" box is checked, special limits may apply to the amount of traditional IRA contributions you may deduct. See Pub. 590-A, Contributions to Individual Retirement Arrangements (IRAs).
Box 14 Employers may use this box to report information such as state disability insurance taxes withheld, union dues, uniform payments, health insurance premiums deducted, nontaxable income, educational assistance payments, or a member of the clergy's parsonage allowance and utilities. Railroad employers use this box to report railroad retirement (RRTA) compensation, Tier 1 tax, Tier 2 tax, Medicare tax, and Additional Medicare Tax. Include tips reported by the employee to the employer in railroad retirement (RRTA) compensation.

Note: Keep Copy C of Form W-2 for at least 3 years after the due date for filing your income tax return. However, to help protect your social security benefits, keep Copy C until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year.

Printer Version

Image: Form W-2 Wage and Tax Statement - Instructions


Form W-2 Wage and Tax Statement 2021 - Instructions

Notice to Employee

Do you have to file? Refer to the Instructions for Forms 1040 and 1040-SR to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.

Earned income credit (EIC). You may be able to take the EIC for 2021 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if your investment income is more than the specified amount for 2021 or if income is earned for services provided while you were an inmate at a penal institution. For 2021 income limits and more information, visit *www.irs.gov/EITC*. See also Pub. 596, Earned Income Credit. **Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.**

Employee's social security number (SSN). For your protection, this form may show only the last four digits of your SSN. However, your employer has reported your complete SSN to the IRS and SSA.

Clergy and religious workers. If you aren't subject to social security and Medicare taxes, see Pub. 517, Social Security and Other Information for Members of the Clergy and Religious Workers.

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the Social Security Administration (SSA) to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but aren't the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 800-772-1213. You may also visit the SSA website at *www.SSA.gov*.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in box 12, using code DD, of the cost of employer-sponsored health coverage is for your information only. **The amount reported with code DD is not taxable.**

Credit for excess taxes. If you had more than one employer in 2021 and more than $8,853.60 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than $5,203.80 in Tier 2 RRTA tax was withheld, you may also be able to claim a credit. See the Instructions for Forms 1040 and 1040-SR and Pub. 505, Tax Withholding and Estimated Tax.

(See also *Instructions for Employee* on the back of Copy C.)

QRG

9.2 ESS View W-2/W-2c Form

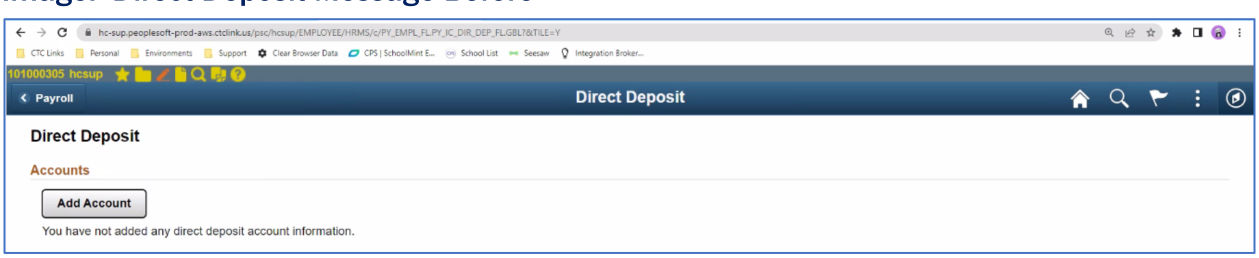
ESS Direct Deposit Updates

The Direct Deposit functionality in Employee Self Service has been enhanced to support additional setup options, such as requiring employees to create a remaining balances account, removing check as a payment method in Self Service, setting the default option for suppressing direct deposit advice print, and specifying the maximum account number limit. Other enhancements include text and message updates to support the improved Direct Deposit process.

Adding a new direct deposit account for the first time:

Prior to HCM Image 44, the following message is displayed to the employee: "You have not added any direct deposit account information."

Image: Direct Deposit Message Before



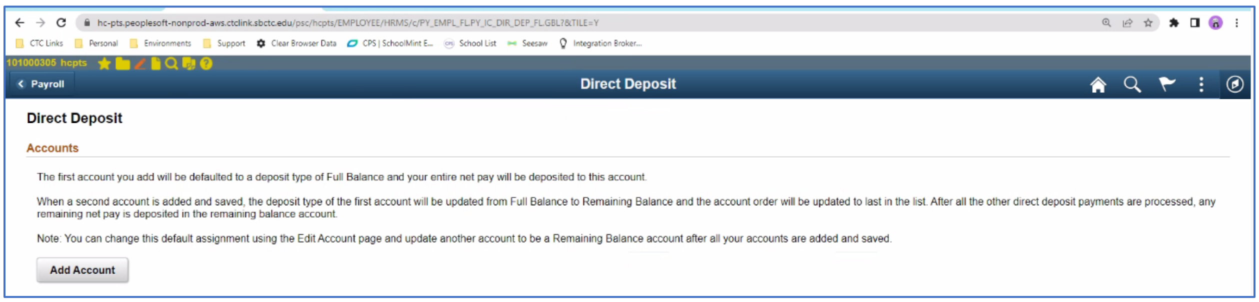
After HCM Image 44 is deployed, the employee will see this message:

"The first account you add will be defaulted to a deposit type of Full Balance and your entire net pay will be deposited to this account.

When a second account is added and saved, the deposit type of the first account will be updated from Full Balance to Remaining Balance and the account order will be updated to last in the list. After all the other direct deposit payments are processed, any remaining net pay is deposited in the remaining balance account.

Note: You can change this default assignment using the Edit Account page and update another account to be a Remaining Balance account after all your accounts are added and saved.”

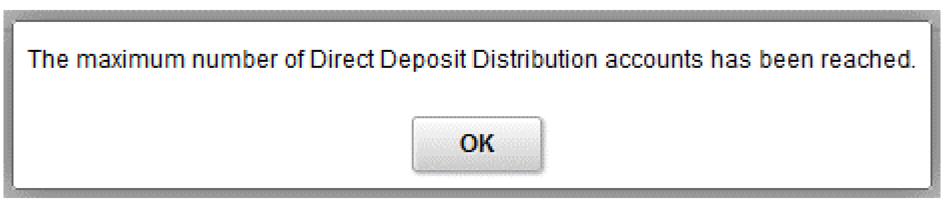
Image: Direct Deposit Message After



Adding a new direct deposit account that reaches the maximum account number limit:

After HCM Image 44 is deployed, a limit of 10 accounts per person is enforced. Attempting to add a new direct deposit account that exceeds the limit will trigger this message: “The maximum number of Direct Deposit Distribution accounts has been reached.”

Image: Maximum Number of Direct Deposit Accounts Message



Require Remaining Balance Account:

After HCM Image 44 is deployed, the employees will be required to set up a direct deposit account where the remaining balance can be deposited.

- If the employee has only one account, they will be able to remove it via ESS without restriction.
- In the case of a multiple direct deposit accounts, if the employee removes the Remaining Balance account, they will be forced to assign one of their existing accounts as a remaining balance account. If only one account is left, it will be defaulted to a deposit type of Full Balance.

Navigation

Employee Self Service > Payroll Tile > Direct Deposit

Image: ESS Direct Deposit – One Account

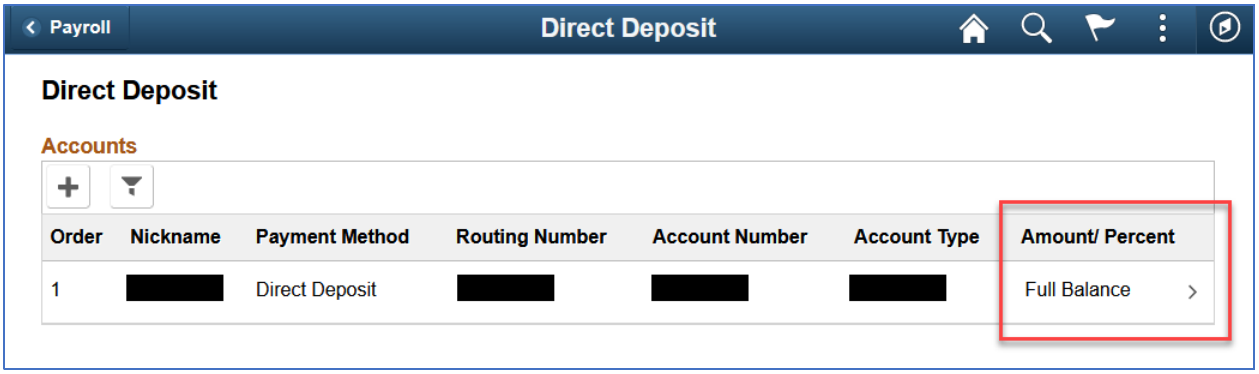
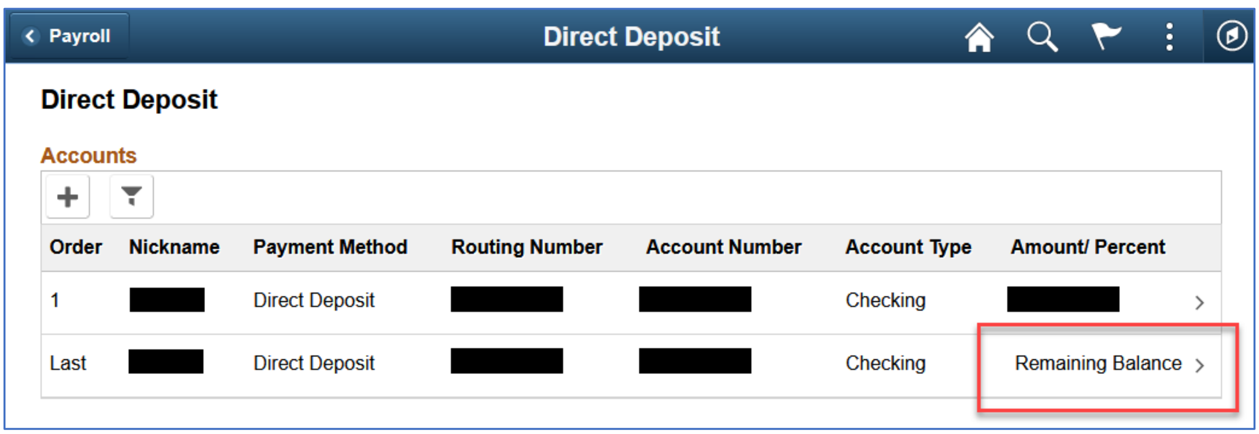


Image: ESS Direct Deposit – Two Accounts



QRG

[9.2 Adding Direct Deposit Account via ESS]

[9.2 Viewing or Updating Direct Deposit Information in ESS]

Updated Request Direct Deposit

The Request Direct Deposit functionality has been enhanced to guide the administrators through setting up the employee's direct deposit information in order to help them make sure the process works as expected. The system will issue warning messages to alert the administrator in several new situations, such as if they failed to designate a remaining balance account or did not select the option to suppress the direct deposit advice print.

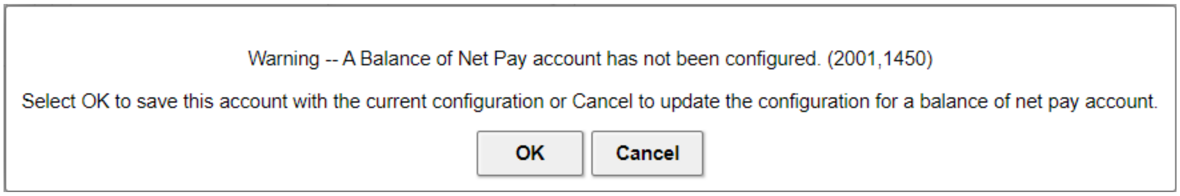
Remaining Balance Account / Balance of Net Pay:

If the administrator attempts to save an employee's direct deposit information without designating a remaining balance account, the following warning message will be displayed:

"Warning -- A Balance of Net Pay account has not been configured. (2001,1450)

Select OK to save this account with the current configuration or Cancel to update the configuration for a balance of net pay account."

Image: Balance of Net Pay Warning Message

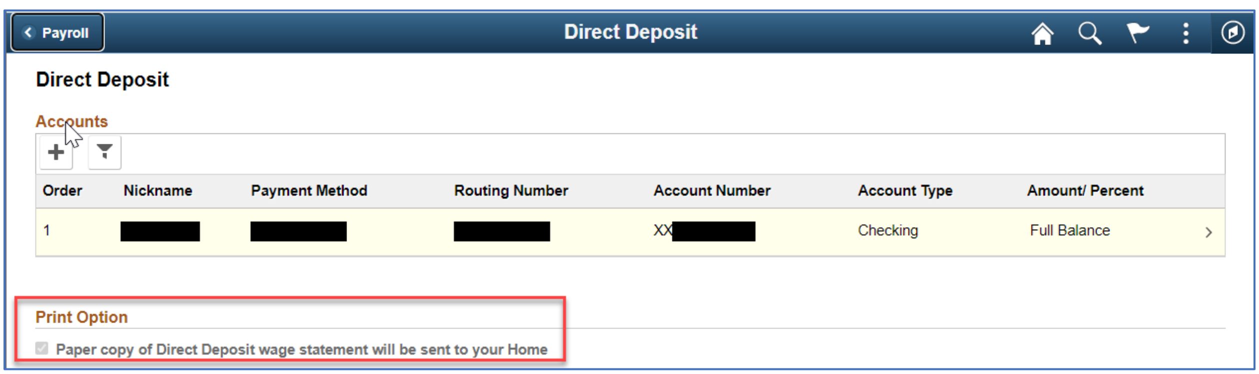


Suppress Printing of Direct Deposit Advices:

The Print Option check box does not appear on the Direct Deposit page if the employee creates a direct deposit account for the first time (in this case, the print option is defaulted from the system-level configuration), or if the employee has an existing direct deposit setup and the Suppress DDP Advice Print option is selected on the Request Direct Deposit page.

The Print Option check box is preselected and not editable on the Direct Deposit page in ESS if the Suppress DDP Advice Print option is not selected for the employee on the Request Direct Deposit page.

Image: Print Option Check Box

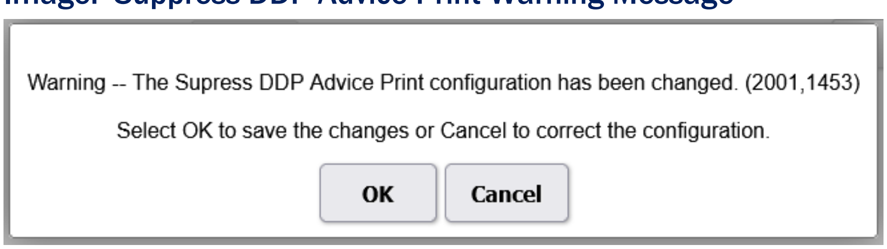


If the administrator attempts to save an employee's direct deposit information without selecting the checkbox Suppress DDP Advice Print, the following warning message will be displayed:

"Warning -- The Suppress DDP Advice Print configuration has been changed. (2001,1453)

Select OK to save the changes or Cancel to correct the configuration."

Image: Suppress DDP Advice Print Warning Message



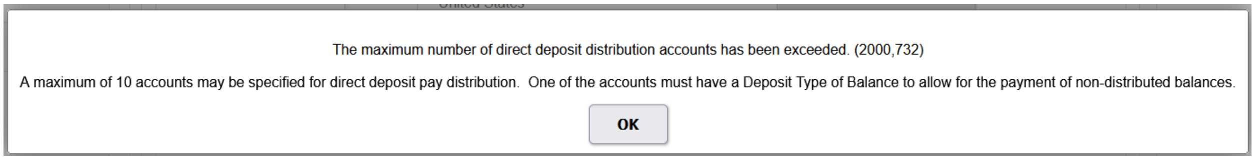
Adding a new direct deposit account that reaches the maximum account number limit:

After HCM Image 44 is deployed, the administrator will receive a warning message if they set up the employee with a number of direct deposit accounts that exceeds the limit:

"The maximum number of direct deposit distribution accounts has been exceeded. (2000,732)

A maximum of 10 accounts may be specified for direct deposit pay distribution. One of the accounts must have a Deposit Type of Balance to allow for the payment of non-distributed balances."

Image: Maximum Number of Direct Deposit Accounts Message



Distribution Priority:

Direct Deposit distribution priority is automatically assigned when the employee adds their account via self-service. For the payroll administrator, an error message will be issued depending on the deposit type.

Image: Balance of Net Pay Account (also called: remaining balance account) Warning Message

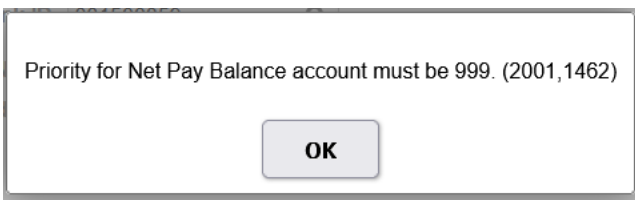
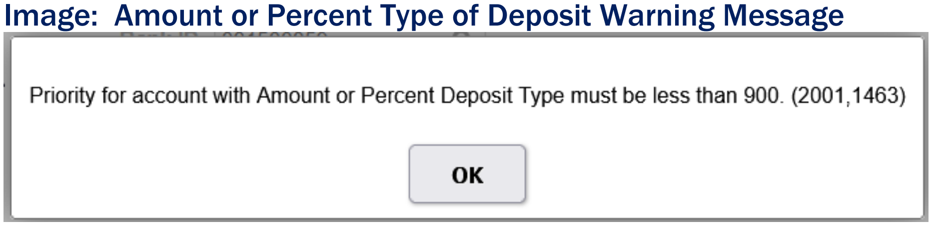


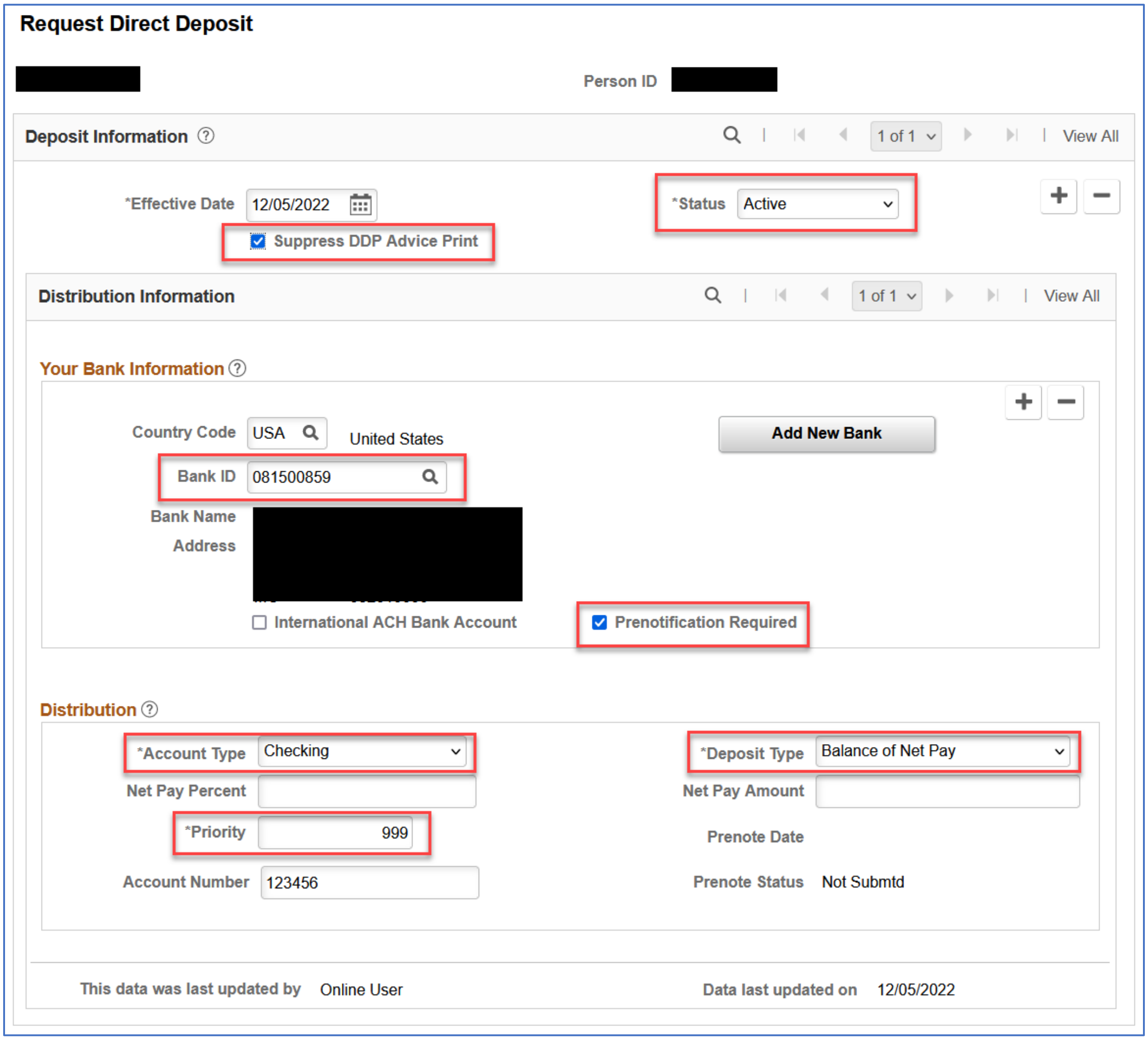
Image: Amount or Percent Type of Deposit Warning Message



Navigation

NavBar > Navigator > Payroll for North America > Employee Pay Data USA > Request Direct Deposit

Image: Request Direct Deposit



QRG

[9.2 Entering US Direct Deposit Information]

Washington State Board for Community and Technical Colleges