

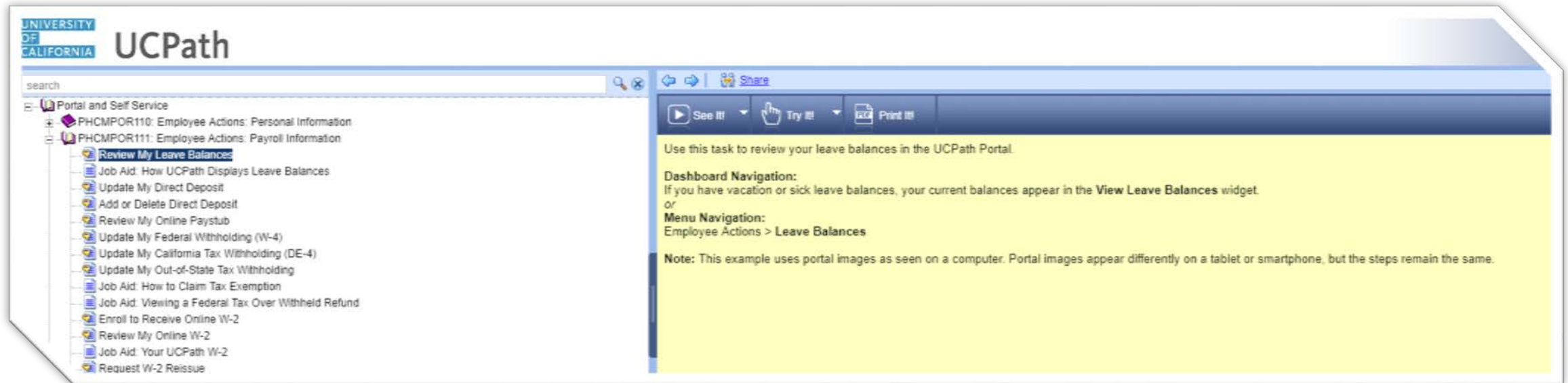


UNIVERSITY OF CALIFORNIA
UC RIVERSIDE 
FOM|UCPath Training

Employee Actions: Payroll Information

Resources

https://sp.ucop.edu/sites/ucpathhelp/Pilot_Portal/PORplayer/data/toc.html



Agenda

- Review My Leave Balance
- Update My Direct Deposit
- Add or Delete Direct Deposit
- Review My Online Paystub
- Update My Federal Withholding (W-4)
- Update My California Tax Withholding (DE-4)
- Update My Out-of-State Tax Withholding
- Enroll to Receive Online W-2
- Review My Online W-2
- Request W-2 Reissue

Review My Leave Balance -

<https://goo.gl/zX1r8r>

The screenshot shows the UCPATH dashboard for Charles Weiss. The user's profile is on the left, displaying their name, title (RSCH ADM 3), employee ID (10000021), and service date (04/01/2013). The main dashboard area features several tiles: 'Next Paycheck June 1' with a 'View Paycheck' button, 'View Benefits' button, 'View Retirement Info' button, and 'View Leave Balances' button (highlighted with a red box). A tooltip points to the 'View Leave Balances' button, stating: 'Click the View Leave Balances button to review the details for your current balances and view leave balances as of a different date.' The dashboard also shows 'VACATION HOURS ACCRUED' at 232.59 and 'SICK HOURS ACCRUED' at 151.35. The bottom of the dashboard includes 'Personal Information' and 'Health and Welfare' sections. The footer contains the University of California logo and 'FOM|UCPath Training'.

Charles Weiss
Primary Title: RSCH ADM 3
Employee ID: 10000021
Service Date: 04/01/2013

UCPath

Log out

Ask UCPATH Center

Next Paycheck
June 1
View Paycheck

View Benefits

View Retirement Info

View Leave Balances

232.59 VACATION HOURS ACCRUED

151.35 SICK HOURS ACCRUED

Personal Information

Health and Welfare

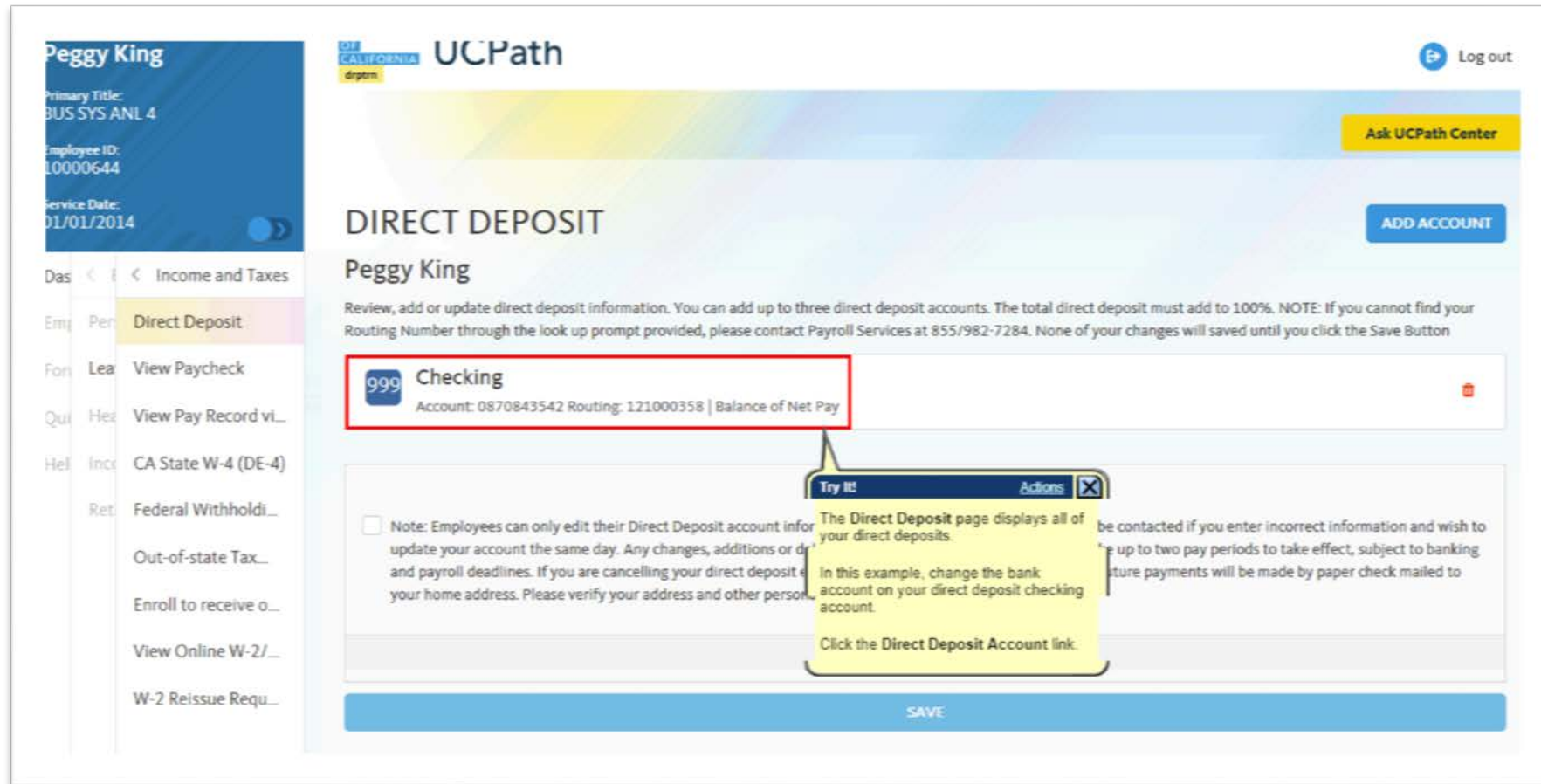
Try It! Actions X

Click the View Leave Balances button to review the details for your current balances and view leave balances as of a different date.

Terms of Use University of California

Update My Direct Deposit-

<https://goo.gl/1mgaNc>



Peggy King
Primary Title: BUS SYS ANL 4
Employee ID: 10000644
Service Date: 01/01/2014

UCPath

Log out

Ask UCPATH Center

ADD ACCOUNT

DIRECT DEPOSIT

Peggy King

Review, add or update direct deposit information. You can add up to three direct deposit accounts. The total direct deposit must add to 100%. NOTE: If you cannot find your Routing Number through the look up prompt provided, please contact Payroll Services at 855/982-7284. None of your changes will be saved until you click the Save Button

999 Checking
Account: 0870843542 Routing: 121000358 | Balance of Net Pay

☐ Note: Employees can only edit their Direct Deposit account information once per pay period. Any changes, additions or deletions must be made by the 15th of the month and payroll deadlines. If you are cancelling your direct deposit account, please verify your address and other personal information. If you are cancelling your direct deposit account, future payments will be made by paper check mailed to your home address.

Try It! **Actions** **X**

The Direct Deposit page displays all of your direct deposits. In this example, change the bank account on your direct deposit checking account. Click the Direct Deposit Account link.

SAVE

Add or Delete Direct Deposit -

<https://goo.gl/wkPPMK>

Laura Engman
Primary Title: PROJECT POLICY ANL 3
Employee ID: 10000152
Service Date: 07/01/2014

UCPath

DIRECT DEPOSIT
Laura Engman

Review, add or update direct deposit information. You can add up to three direct deposit accounts. The total direct deposit must add to 100%. NOTE: If you cannot find your Routing Number through the look up prompt provided, please contact Payroll Services at 855/982-7284. None of your changes will be saved until you click the Save Button.

1 Checking
Account: 9662966812 Routing: 121042882 | 80.00%

999 Checking
Account: 1405225796 Routing: 121042882 | Balance of Net Pay

☐ Note: Employees can only edit their Direct Deposit account information once per day. UCPC ES will need to be contacted if you enter incorrect information and wish to update your account the same day. Any changes, additions or deletions to direct deposit information may take up to two pay periods to take effect, subject to banking and payroll deadlines. If you are cancelling your direct deposit entirely, once the cancellation is effective, all future payments will be made by paper check mailed to your home address. Please verify your address and other personal information using Employee Self-Service.

Try It! The Direct Deposit page displays all of your direct deposits. In this example, delete the first checking account and add a savings account. Press [Enter] to [continue](#).

Log out **Ask UCPath Center** **ADD ACCOUNT**

Das < < Income and Taxes
Em Per **Direct Deposit**
For Lea View Paycheck
Qui Hee View Pay Record vi...
Hel Incr CA State W-4 (DE-4)
Ret Federal Withholdi...
Out-of-state Tax...
Enroll to receive o...
View Online W-2/...
W-2 Reissue Requ...

Review My Online Paystub-

<https://goo.gl/LE7uU4>

The screenshot displays the UCPath web application interface for user Charles Weiss. The left sidebar contains a navigation menu with items: Dashboard, bookmarks, Employee Actions, Forms Library, Quicklinks, and Help / FAQ. The main content area features a header with the UCPath logo, a search bar, and links for Log out and Bookmark. Below the header, a 'Next Paycheck' section highlights 'June 1' with a 'View Paycheck' button. To the right, there are three circular icons representing 'View Benefits', 'View Retirement Info', and 'View Leave Balances'. The 'View Leave Balances' section shows a progress bar and two values: 232.59 VACATION HOURS ACCRUED and 151.35 SICK HOURS ACCRUED. Below these are three expandable sections: Personal Information, Health and Welfare, and Income and Taxes. A 'Try It!' callout box points to the 'View Paycheck' button with the text 'Click the View Paycheck button.' At the bottom, a 'Notices & Updates' section features a notice titled 'Eight reasons to sign up for direct deposit' dated Oct 03, 2017.

Charles Weiss
Primary Title: SCH ADM 3
Employee ID: 0000021
Service Date: 4/01/2013

UCPath

Search

Log out Bookmark

Ask UCPath Center

Next Paycheck
June 1
View Paycheck

View Benefits View Retirement Info View Leave Balances

232.59 VACATION HOURS ACCRUED
151.35 SICK HOURS ACCRUED

Personal Information Health and Welfare Income and Taxes

Try It! Actions
Click the View Paycheck button.

Notices & Updates

Eight reasons to sign up for direct deposit
Still getting a paper paycheck? You might want to consider these eight advantages of direct deposit:
•On payday, your pay is already in your account for you to use, without having to visit a bank or ATM.
•Your pay will never get lost or misplaced like a paper check might.
Oct 03, 2017

Update My Federal Withholding (W-4) - <https://goo.gl/Fhrehr>

Christopher Phan
Primary Title: ADMIN MGR 1
Employee ID: 10003127
Service Date: 03/06/2017

Das < < Income and Taxes

Emj Pen Direct Deposit

For Lea View Paycheck

Qui Hec View Pay Record vi...

Hel Incr CA State W-4 (DE-4)

Ret Federal Withholdi...

Edit profile

Log out

UCPath

Log out

FEDERAL W-4 TAX INFORMATION

Christopher Phan
University of California

Christopher Phan
SSN: XXX-XX-8012
Federal Worksheet

Home Address
300 Lakeside Dr
Dummy 100
Oakland CA 94612

W-4 Tax Data

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.

Enter total number of Allowances you are claiming

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

IRS regulation requires a dollar amount and not percent.

Try It! Use the **Federal W-4 Tax Information** page to review and update your current withholding information for Federal income tax. In this example, update your Federal W-4 tax information to married and 2 allowances. Press [Enter] to [continue](#)

Ask UCPATH Center

Update My California Tax Withholding (DE-4) - <https://goo.gl/VPmJZG>

The screenshot shows the UCPATH interface for Christopher Phan. On the left is a navigation menu with options like 'Direct Deposit', 'View Paycheck', and 'CA State W-4 (DE-4)'. The main content area is titled 'CA STATE W-4 TAX INFORMATION' and includes a 'Try It!' pop-up, a 'Copy Federal W-4' section with a checkbox, and a 'CA State W-4 Tax Data' section with radio buttons for 'SINGLE', 'MARRIED', and 'HEAD OF HOUSEHOLD'. A 'Log out' link is in the top right corner.

Christopher Phan
Primary Title: ADMIN MGR 1
Employee ID: 00003127
Service Date: 03/06/2017

UCPath Log out

CA STATE W-4 TAX INFORMATION
Christopher Phan
University of California
Social Security #: XXX-XX-8012

Try It! Actions X
Use the CA State W-4 Tax Information page to review and update your current CA State W-4 tax details.
Press [Enter] to [continue](#)

Ask UCPATH Center

Das < < Income and Taxes
Emp Per Direct Deposit
For Lea View Paycheck
Qui Hea View Pay Record vi...
Hel Inc **CA State W-4 (DE-4)**
Ret Federal Withholdi...
Out-of-state Tax...
Enroll to receive o...
View Online W-2/...
W-2 Reissue Requ...

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.

Copy Federal W-4

☐ Check this box if you would like your marital status and allowances claimed (including any additional allowances) on the federal Form W-4 used to populate your CA state.

CA State W-4 Tax Data

Indicate Tax Status

SINGLE MARRIED HEAD OF HOUSEHOLD

Edit profile
Log out

Update My Out-Of-State Tax Withholding

- <https://goo.gl/Z5Wo1w>

The screenshot displays the UCPath portal interface. On the left, a sidebar shows the user's profile (Jerry Chin) and a list of navigation links under 'Income and Taxes', including 'Direct Deposit', 'View Paycheck', 'View Pay Record', 'CA State W-4 (DE-4)', 'Federal Withholding', and 'Out-of-state Tax...'. The main content area is titled 'OTHER STATE W-4 TAX INFORMATION' and includes the user's name, university, and social security number. A red-bordered button labeled 'OTHER STATE WORKSHEET' is highlighted. A yellow callout box with a 'Try It!' header and an 'Actions' button provides instructions: 'If you live in the US but outside of California, submit your State Tax form to UCPC using Ask UCPath Center. Click the Other State Worksheet button.'

<https://goo.gl/zUsX44>

[illegible]

Review My Online W-2 - <https://goo.gl/2aHFmA>

The screenshot shows the UCPath interface for user Charles Weiss. On the left is a navigation menu with options like 'Income and Taxes', 'Direct Deposit', 'View Paycheck', 'View Pay Record', 'CA State W-4 (DE-4)', 'Federal Withholding', 'Out-of-state Tax', 'Enroll to receive o...', 'View Online W-2/...', and 'W-2 Reissue Requ...'. The 'View Online W-2/...' option is highlighted. The main content area is titled 'VIEW W-2/W-2C FORMS Charles Weiss' and includes a message: 'Review your available W-2 and W-2c forms. Select the year end form that you would like to review.' Below this is a 'Select Year End Form' section with the following details: Tax Year: 2016, W-2 Reporting Company: UCS, Tax Form ID: W-2, and Issue Date: 01/20/2017. To the right of these details are two buttons: 'YEAR END FORM' and 'FILING INSTRUCTIONS'. A yellow 'Try It!' callout box states: 'This feature is available after your first W-2 is issued in UCPath. W-2s from previous payroll systems are not available in UCPath. Year after year, as W-2s are issued for tax purposes, you have access to each tax year W-2. Press [Enter] to continue.' The top right of the page has a search bar, 'Log out', 'Bookmark', and an 'Ask UCPath Center' button.

Charles Weiss
Primary Title: RSCH ADM 3
Employee ID: 0000021
Service Date: 04/01/2013

UCPath

Search Log out Bookmark

Try It! Actions

This feature is available after your first W-2 is issued in UCPath. W-2s from previous payroll systems are not available in UCPath. Year after year, as W-2s are issued for tax purposes, you have access to each tax year W-2. Press [Enter] to [continue](#).

Ask UCPath Center

VIEW W-2/W-2C FORMS

Charles Weiss

Review your available W-2 and W-2c forms. Select the year end form that you would like to review.

Select Year End Form

[View a Different Tax Year](#)

Tax Year: 2016
W-2 Reporting Company: UCS
Tax Form ID: W-2
Issue Date: 01/20/2017

YEAR END FORM
FILING INSTRUCTIONS

Edit profile

Request W-2 Reissue - <https://goo.gl/xfJCB8>

The screenshot shows the UCPath interface for a W-2 Reissue Request. On the left is a navigation menu with options like 'Income and Taxes', 'Direct Deposit', 'View Paycheck', 'View Pay Record', 'CA State W-4 (DE-4)', 'Federal Withholding', 'Out-of-state Tax', 'Enroll to receive o...', 'View Online W-2/...', and 'W-2 Reissue Request'. The user's profile is shown at the top left: Charles Weiss, Primary Title: RSCH ADM 3, Employee ID: 10000021, Service Date: 04/01/2013. The main heading is 'W-2 REISSUE REQUEST Charles Weiss'. A yellow callout box explains that this feature is only available after the first online W-2 is issued in UCPath. The form requires the user to complete their Home Address (300 Lakeside Dr, Dummy 100, Oakland CA 94612), select the W-2 Request year (2016), and choose where the W-2 should be delivered (Mailing Address). A blue 'SUBMIT' button is at the bottom. The footer includes 'Edit profile' and 'Terms of Use University of California'.

Charles Weiss
Primary Title: RSCH ADM 3
Employee ID: 10000021
Service Date: 04/01/2013

UCPath

Log out

Try It! Actions X

This feature is available after your first online W-2 is issued in UCPath. W-2s from previous payroll systems are not available in UCPath. Year after year, as W-2s are issued for tax purposes, you have access to each tax year W-2.

Press [Enter] to [continue](#).

Ask UCPath Center

W-2 REISSUE REQUEST

Charles Weiss

Complete the following information to request a reissue of your W-2 form.

Home Address
300 Lakeside Dr
Dummy 100
Oakland CA 94612

* W2 Request for year
2016

Select where you want your W-2 delivered
Mailing Address

SUBMIT

Edit profile

Terms of Use University of California

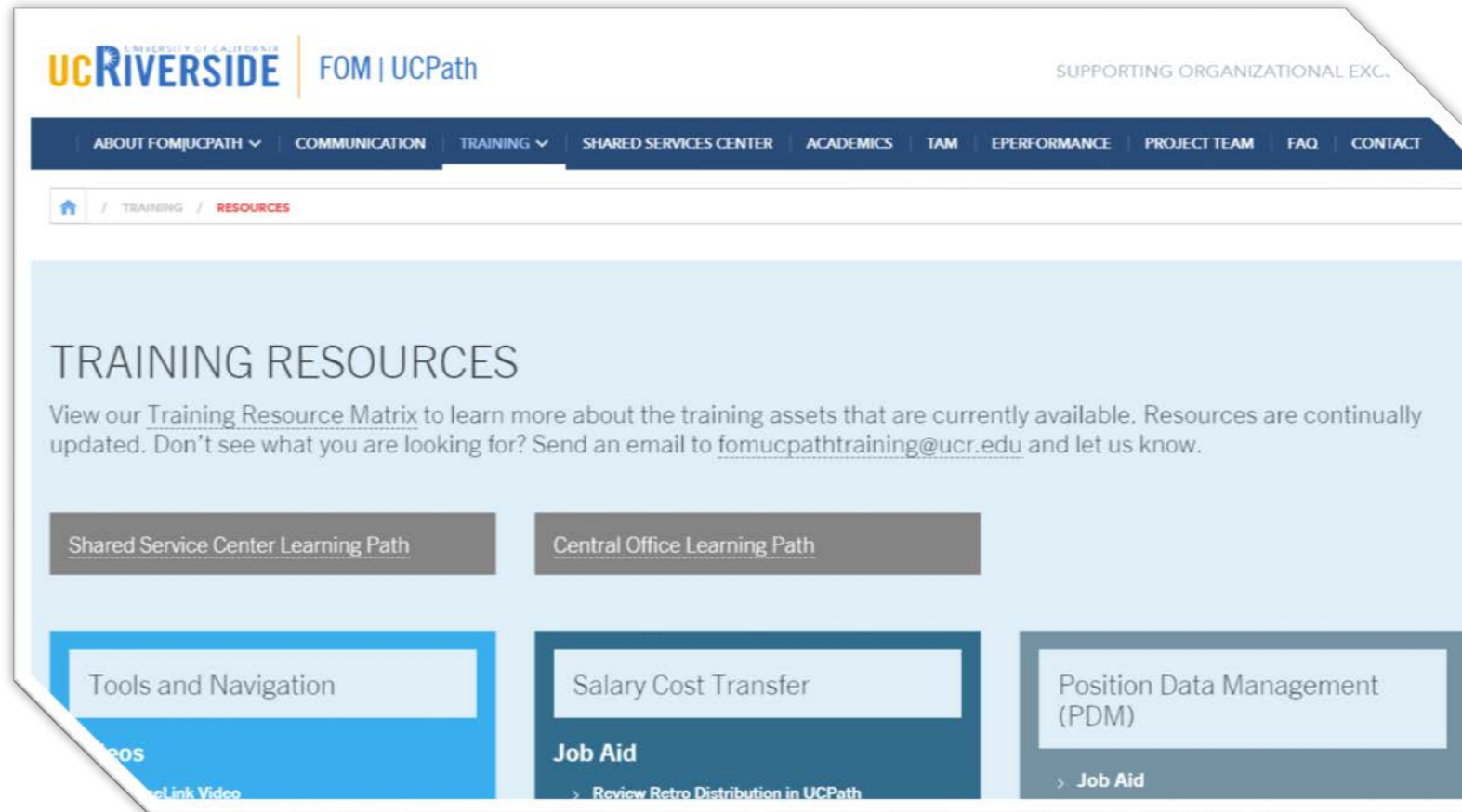


FOM|UCPath Training Team Email

FOMUCPathtraining@ucr.edu

Training Resources

<http://fomucpath.ucr.edu/training/resources.html>



Thank You