

RELEASE NOTES

April 19, 2017

Powerpay, Powerpay Self Service
5.1

Overview

These release notes describe the new functionality, pages, enhancements, and defect fixes incorporated into the latest release of Powerpay.

This document is for Powerpay version 5.1.

For questions, please contact your Ceridian representative.



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New Functionality Powerpay

Print/View the Back Side of the Tax Forms

The back side of Canadian tax forms (T4, T4A, Relevé 1, Relevé 2 and NR4) are now available for print so employees can receive both sides of the form.

A new section, **Back of Tax Form**, is available at the top of the *Year-End Reports* page (Reports → Year-End Reports) that provides access to the back of the tax forms that are part of the reports package. The pdf report package contained in the Tax Forms – Employee Copy file does not include the back of the page.

► **To print the back of the tax form:**

1. Navigate to the *Year-End Reports* page (Reports → Year-End Reports).

Reports ► Year-End Reports

Year-End Reports - Select Report



2. Select the back of the tax form to print from the **Tax Form** drop-down list in the **Back of Tax Form** section.

§ It is recommended that the information portion of the tax form be printed and distributed to each employee with the portion contained in the Tax Forms - Employee Copy file.

3. Click **Go!**

A pdf file of the back of the selected form opens in a new browser window. English and French are available.



Report these amounts on your tax return.

- 14 – Employment income – Enter on line 101.
- 16 – Employee's CPP contributions – See line 308 in your tax guide.
- 17 – Employee's QPP contributions – See line 308 in your tax guide.
- 18 – Employee's EI premiums – See line 312 in your tax guide.
- 20 – RPP contributions – Includes past service contributions. See line 207 in your tax guide.
- 22 – Income tax deducted – Enter on line 437.
- 37 – Employee home-relocation loan deduction – Enter on line 248.
- 39 – Security options deduction 110(1)(d) – Enter on line 249.
- 41 – Security options deduction 110(1)(d.1) – Enter on line 249.
- 42 – Employment commissions – Enter on line 102. This amount is already included in box 14.
- 43 – Canadian Forces personnel & police deduction – Enter on line 244. This amount is already included in box 14.
- 44 – Union dues – Enter on line 212.
- 46 – Charitable donations – See line 349 in your tax guide.
- 52 – Pension adjustment – Enter on line 206.
- 55 – Provincial parental insurance plan (PPIP) – Residents of Quebec, see line 375 in your tax guide. Residents of provinces or territories other than Quebec, see line 312 in your tax guide.
- 66 – Eligible retiring allowances – See line 130 in your tax guide.

- 67 – Non-eligible retiring allowances – See line 130 in your tax guide.
- 72 – Section 122.3 income – Employment outside Canada – See Form T626.
- 73 – Number of days outside Canada – See Form T626.
- 74 – Past service contributions for 1989 or earlier years while a contributor
- 75 – Past service contributions for 1989 or earlier years while not a contributor – See line 207 in your tax guide.
- 77 – Workers' compensation benefits repaid to the employer – Enter on line 229.

78 – Fishers – Gross income	See Form T2121.
79 – Fishers – Not partnership amount	Do not enter on line 101.
80 – Fishers – Shareperson amount	

81 – Placement or employment agency workers	Gross income
82 – Taxi drivers and drivers of other passenger-carrying vehicles	See Form T2125.
83 – Barbers or hairdressers	Do not enter on line 101.

- 84 – Public transit pass – See line 364 in your tax guide.
- 85 – Employee-paid premiums for private health services plans – See line 330 in your tax guide.
- 87 – Emergency services volunteer exempt amount – See "Emergency services volunteers" at line 101, and the information at lines 362 and 395 in your tax guide.

Do not report these amounts on your tax return. For Canada Revenue Agency use only. (Amounts in boxes 30, 32, 34, 36, 38, 40, and 86 are already included in box 14.)

- | | |
|---|--|
| 30 – Board and lodging | 40 – Other taxable allowances and benefits |
| 31 – Special work site | 68 – Indian (exempt income) – Eligible retiring allowances |
| 32 – Travel in a prescribed zone | 69 – Indian (exempt income) – Non-eligible retiring allowances |
| 33 – Medical travel assistance | 70 – Municipal officer's expense allowance |
| 34 – Personal use of employer's automobile or motor vehicle | 71 – Indian (exempt income) – Employment |
| 36 – Interest-free and low-interest loans | 86 – Security options election |
| 38 – Security options benefits | 88 – Indian (exempt income) – Self-employment |

Privacy Act, personal information bank numbers CRA PPU 005 and CRA PPU 047

Veillez déclarer ces montants dans votre déclaration de revenus.

- 14 – Revenus d'emploi – Inscrivez à la ligne 101.
- 16 – Cotisations de l'employé au RPC – Lisez la ligne 308 de votre guide d'impôt.
- 17 – Cotisations de l'employé au RRQ – Lisez la ligne 308 de votre guide d'impôt.
- 18 – Cotisations de l'employé à l'AE – Lisez la ligne 312 de votre guide d'impôt.
- 20 – Cotisations à un RPA – Comprend les cotisations pour services passés. Lisez la ligne 207 de votre guide d'impôt.
- 22 – Impôt sur le revenu retenu – Inscrivez à la ligne 437.

- 67 – Allocations de retraite non admissibles – Lisez la ligne 130 de votre guide d'impôt.
- 72 – Revenu selon l'article 122.3 – Emploi hors du Canada – Consultez le formulaire T626.
- 73 – Nombre de jours hors du Canada – Consultez le formulaire T626.
- 74 – Services passés pour 1989 et les années précédentes pendant que l'employé cotisait
- 75 – Services passés pour 1989 et les années précédentes pendant que l'employé ne cotisait pas – Lisez la ligne 207 de votre guide d'impôt.
- 77 – Indemnités pour accidents du travail remboursées à l'employeur – Inscrivez à la ligne 229.

4. Use the browser print option to print the file.

Powerpay Self Service Configuration Updates

Field Level Control Configuration

Field Level Control is now available for companies using Powerpay Self Service to specify the type of access employees have within Self Service. This feature allows you to enforce corporate policy, and define:

- which fields to display,
- which fields are view only,
- which fields are editable,
- notifications based on specific events.

The field level control feature is configured on the *Field Selections* page (Company → Self Service → Field Selections).


Field Selections

Profile

Users must be set up to receive Self Service notifications on the User & Contact Mgmt page.


Set all to

Contact Information

* Address Information 

* Phone (with Area Code)

* Email

* Emergency Contact 

Personal Information


* Social Insurance Number

* Earnings Statement & Year End Form Language

* Birth Date

* Gender

Work Information

* Direct Deposit 

* Earnings Statement Delivery

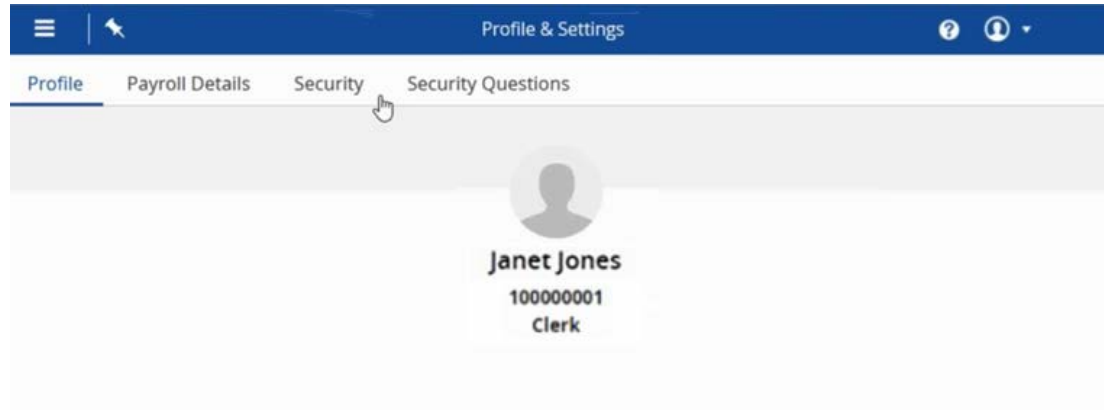
* Year End Form Delivery

You can define the settings for your instance of Self Service that controls specific behaviors and which items are available to employees to view and edit. These settings can have a large impact on the application's functionality.

Note: The Emergency Contact option only displays when Self Service and the HR features are enabled for your company in Powerpay.

Each item in the Profile section includes four options:

- **Hide** – When selected, the item does not display in Powerpay Self Service. If all of the fields are set to Hide the Profile page in Self Service will be blank. Employees will be unable to view or edit any Profile information.



However, even if all selections are sent to Hide, if the option to **Activate Self Service Pay Statements & Tax Forms** is selected on the *Self Service Security Options* page:

Company ► Self Service ► Security Options

Self Service Security Options

Force All Users to Change Password

Application Security Options

* Specifies a required field

Suppress Masking on Personal Information

Activate Self Service Pay Statements & Tax Forms

Enforce Employee Deadline for Self Service Changes

Deadline for Changes on Submit For Processing Day (Central Time)

* Auto-Generate Username Format

Save


the **Work Information** section displays in the **Earnings Statement & Year End Form Delivery** section.



Work Information

Earnings Statement & Year End Form

Delivery

 Edit

Electronic year end forms must be selected a minimum of 10 business days prior to the last pay date of the current year. If you have any questions please contact your payroll administrator.

Earnings Statement Delivery Electronic only

Year End Form Delivery Electronic Only

- **View** – When selected, the item is view only in Powerpay Self Service and cannot be modified.
- **Edit** – When selected, the item can be modified and in some cases deleted in Powerpay Self Service. The edits made in Powerpay Self Service flow back to Powerpay. This allows employees to modify their own personal information, such as address and emergency contacts as it changes.
- **Notify** – When selected, a message indicating any changes/edits is sent to the Powerpay inbox when a Self Service user edits information in Self Service for a field set to Notify.

When you select Notify you should also define who should receive the notifications. For information on defining users to receive notifications see, “Users to Receive Self Service Notifications,” page 11.

For more information on receiving notifications, see “Powerpay Inbox,” page 11.

Regardless of the Field Level setting, information is view only in Self Service for terminated employees.

► **To set field selections:**

1. Navigate to the *Field Selections* page (Company → Self Service → Field Selections).


Field Selections

Profile

Users must be set up to receive Self Service notifications on the User & Contact Mgmt page.


Set all to

Contact Information

* Address Information 

* Phone (with Area Code)

* Email

* Emergency Contact 

Personal Information


* Social Insurance Number

* Earnings Statement & Year End Form Language

* Birth Date

* Gender

Work Information



* Direct Deposit 

* Earnings Statement Delivery

* Year End Form Delivery

2. Make selections appropriate for your payroll.

Use the **Set all to** field to set all fields to the same value, or select individual values as appropriate. All fields are mandatory.

-
-  The Direct Deposit selection can only be set to View or Hide.
 -  Hide is not available for the Earnings Statement Delivery and Year End Form Delivery selections.
-

3. Click **Save**.

Users to Receive Self Service Notifications

You can control which users receive notifications and the type of notifications they receive in their Powerpay Inbox. For example, when an employee makes a change to their address information in Self Service and the address field is set to **notify** on the *Field Selections* page (Company → Self Service → Field Selections), you need to define which Powerpay users receive the notification.

This functionality is only available for payrolls with Self Service.

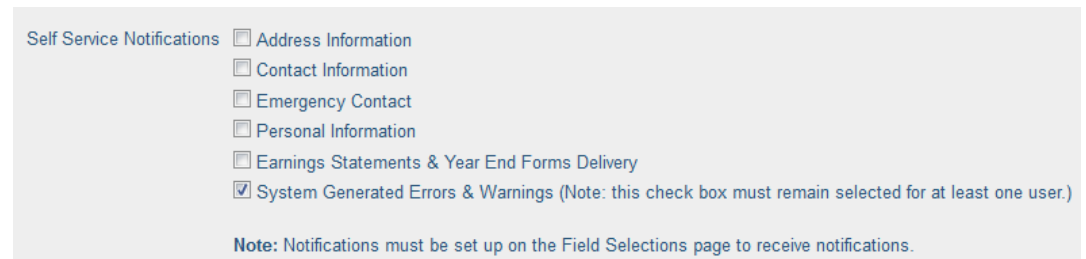
Emergency Contact notifications are only available for payrolls with HR Data functionality enabled.

► **To enable notifications for a Powerpay user:**

1. Navigate to the *User & Contact Mgmt* page (Company → User & Contact Mgmt).
2. In the list of users, click the **Edit** link in the row for the user to receive notifications.

The **Contact Information** section displays.

3. In the **Self Service Notifications** section select the types of notifications the user should receive.





ⓘ At least one Powerpay User must be selected to receive **System Generated Errors & Warnings**.

4. Click **Submit**.

Powerpay Inbox

The Powerpay Inbox is used to read Powerpay messages, notifications and actions.

-  **Messages** include targeted information for your payroll.
-  **Notifications** include information about changes and updates made in Self Service. Notification are sent for the items set to Notify on the *Field Selections* page (Company → Self Service → Field Selections).

ⓘ Note: The Powerpay Inbox displays notifications based on the Security Role settings defined for the Powerpay user. For example, if the Powerpay user

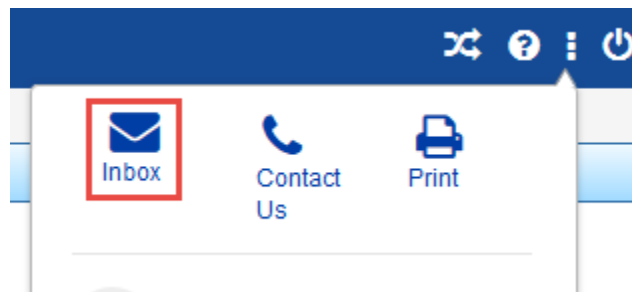
only has access to salaried employee information, notifications for hourly employees do not display.

- **⚠ Actions** pertain to data synchronization issues, such as a Self Service user and a payroll administrator updating the same information at the same time. They also include notifications on users who have locked themselves out of Self Service due to invalid password attempts or users who have incorrectly answered their security question.

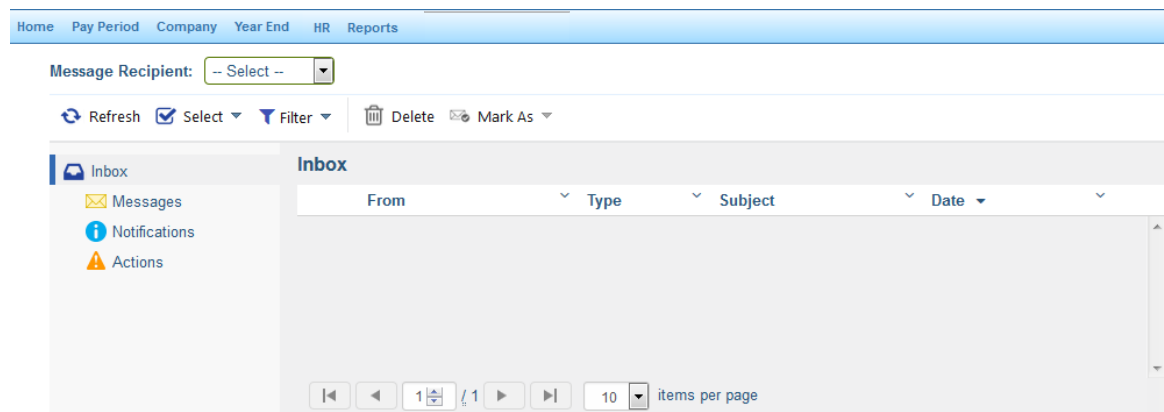
Users set to receive System Generated Errors & Warnings on the *User & Contact Mgmt* page receive Action messages.

► **To view your messages, alerts and notifications:**

1. Click the Inbox button on the toolbar.



The Powerpay Inbox opens.



2. By default, all messages (including notifications and alerts) display. The messages display by date received with the most recent at the top. The messages can be sorted by Sender, Subject or Date Received and if necessary, you can click one of the filter buttons beneath the Inbox to view a specific type of message.

For example, to view only notifications, click **Notifications**. All other items in the Inbox are hidden and only the notifications display:

3. Click on the message subject to open the message.

Home Pay Period Company Year End HR Reports

Refresh Select Filter Delete Mark As

Inbox 15

From	Type	Subject	Date
Robert H	Edit	Address Information change for Robert H - 000000004	08-Mar-2017 04:55 PM
Robert H	Edit	Contact Information change for Robert H - 000000004	08-Mar-2017 04:55 PM
Robert H	Edit	Personal Information change for Robert H - 000000004	08-Mar-2017 04:55 PM
Robert H	Edit	Address Information change for Robert H - 000000004	08-Mar-2017 04:54 PM
Robert H	Edit	Contact Information change for Robert H - 000000004	08-Mar-2017 04:54 PM
Robert H	Edit	Personal Information change for Robert H - 000000004	08-Mar-2017 04:54 PM
Robert H	Edit	Address Information change for Robert H - 000000004	08-Mar-2017 04:53 PM
Robert H	Edit	Contact Information change for Robert H - 000000004	08-Mar-2017 04:53 PM
Robert H	Edit	Personal Information change for Robert H - 000000004	08-Mar-2017 04:53 PM
Osborne R	Edit	Address Information change for Osborne R - 000000...	07-Mar-2017 04:32 PM

1 - 10 of 13 items

Self Service Changes Deadline

To temporarily stop the flow of data from Self Service and provide Powerpay payroll administrators with the ability to balance, audit and preview their payrolls before submitting the payroll for processing, without additional updates coming in from Self Service, two new options are available on the *Security Options* page (Company → Self Service → Security Options).

Without the change deadline in place, Self Service changes continue to flow to Powerpay that may impact the payroll, so the final Preview could appear different than the final register if additional changes flow from Service after the Preview. Use the change deadline to stop the flow of data from Self Service to Powerpay for a specific time, for example you can set it so that there is no information flow for the hour before the payroll run is processed. Once the payroll is processed, the information flow resumes and any changes are updated in Powerpay in the next pay period.

► **To set a Self Service change deadline:**

1. Navigate to the *Security Options* page (Company → Self Service → Security Options).

Self Service Security Options

Force All Users to Change Password

Application Security Options

* Specifies a required field

Suppress Masking on Personal Information

Activate Self Service Pay Statements & Tax Forms

Enforce Employee Deadline for Self Service Changes

Deadline for Changes on Submit For Processing Day (Central Time)

* Auto-Generate Username Format

Save

2. Select the **Enforce Employee Deadline for Self Service Changes** checkbox.
3. In the **Deadline for Changes on Submit For Processing Date** field, select the time to stop the data flow from Self Service to Powerpay. The time is based on the day of the “Submit for Processing by...” date in the Calendar View for the open Pay Period.
4. Click **Save**.

When a preview is requested during the time that the data flow from Self Service is being held, a message displays on the *Payroll Preview* page indicating that Self Service changes are being held until the payroll is submitted and processed.

Process ► Payroll Preview

Preview - Payroll Preview

i Information

Preview

Click Request to review your preliminary payroll information and verify that your employees' payments are calculated correctly before submitting the payroll for processing.

- Your preview request is placed in the queue.
- Requests are processed in the order received even if you logoff of Powerpay.
- Processed preview results are available on the Preview Request page. You may return at any time to review them.
- **Self Service changes are being held until the payroll has been submitted and processed.**

Request

If a preview is requested prior to the data flow deadline, a message displays on the *Payroll Preview* page indicating that Self Service changes are being processed until the deadline.



Process ► Payroll Preview

Preview - Payroll Preview



Information

Preview

Click Request to review your preliminary payroll information and verify that your employees' payments are calculated correctly before submitting the payroll for processing.

- Your preview request is placed in the queue.
- Requests are processed in the order received even if you logoff of Powerpay.
- Processed preview results are available on the Preview Request page. You may return at any time to review them.
- **Self Service changes will be processed until 9:00 AM Central Time on Tuesday, January 10, 2017.**

Request

Audit Emergency Contact Information

The Employee Information section on the *Audit Trail* page (Pay Period → View), now includes an audit for HR - Emergency Contact information. This section displays if you have emergency contact changes (additions, deletions and edits), and are sorted by employee. The audit also includes information on if the changes were made in Powerpay or Self Service. When the information is edited in Self Service, "ESS" is appended to the user's name in the **Keyed By** column.

3. Employee Information - 00000002 Reynolds, Osborne (Active)

HR - Emergency Contact				
Description	New Value	Old Value	Keyed By	Date & Time
Smith, Jane P				
Contact Priority	Primary		9N00102 - ESS	2017-01-04 14:55:30
Last Name	Smith		9N00102 - ESS	2017-01-04 14:55:30
First Name	Jane		9N00102 - ESS	2017-01-04 14:55:30
Middle Initial	P		9N00102 - ESS	2017-01-04 14:55:30
Relation	friend		9N00102 - ESS	2017-01-04 14:55:30
Language Spoken	English		9N00102 - ESS	2017-01-04 14:55:30
Phone Numbers - Home	222-222-2222		9N00102 - ESS	2017-01-04 14:55:30
Phone Numbers - Home	111-111-1111	222-222-2222	nsc	2017-02-02 10:11:14
Phone Numbers - Work	444-444-4444		nsc	2017-02-02 10:03:43
Phone Numbers - Cellular	333-333-3333		9N00102 - ESS	2017-01-04 14:55:30
Jane, Holliday				
Contact Priority	Secondary		nsc	2017-02-02 10:03:17
Last Name	Jane		nsc	2017-02-02 10:03:17
First Name	Holliday		nsc	2017-02-02 10:03:17
Relation	friend		nsc	2017-02-02 10:03:17
Language Spoken	English		nsc	2017-02-02 10:03:17
Phone Numbers - Home	666-666-6666		nsc	2017-02-02 10:03:17


New Functionality Powerpay Self Service

Payroll Details Page

Use the *Payroll Details* page (Profile & Settings → Payroll Details) to view your work, pay and taxation information and verify the dates and information that the employer has on file is correct.

All of the information that displays is view only.

[Profile](#)
 [Payroll Details](#)
 [Security](#)
 [Security Questions](#)



Janet Jones
100000001
Clerk

Employer Information

Employer Number B5	Next Scheduled Payment Date Wednesday, January 25, 2017
Employer Name Basic Company Setup - B5 Company Setup - B5	

Employee Information

First Day Worked Tuesday, June 08, 2004	Pay Type Hourly Pay Rate \$\$\$\$\$ View
--	---

Taxation

Province of Employment Nova Scotia	CPP/QPP Status Subject to CPP/QPP
Federal Tax Exemption Amount \$11,327	E.I. Category Deducts EI
Provincial Tax Exemption Amount \$8,481	Provincial Payroll/Health Tax Indicator Exempt
Tax Status Subject to Fed. & Prov. Tax	QPIP (Quebec Parental Insurance Plan) Not Applicable

Employer Information

You can review your employer number, name and your next scheduled payment date in the **Employer Information** section. The information displayed is the information available in Powerpay.



Employer Information

Employer Number B5	Next Scheduled Payment Date Wednesday, January 25, 2017
Employer Name Basic Company Setup - B5 Company Setup - B5	

Employee Information

The **Employee Information** section displays:

- First Day Worked,
- Employment type (Full-time, Part-time),
- Pay Type (Hourly, Salary) and
- Pay Rate.

The information displayed is the information available in Powerpay.

Employee Information

First Day Worked Tuesday, June 08, 2004	Pay Type Hourly Pay Rate \$\$\$\$\$ View
--	---

To view the Pay Rate unmasked, click the **View** link. To hide the unmasked data, click the **Hide** link.

Taxation

The **Taxation** section displays:

- Province of Employment,
- Federal Tax Exemption Amount,
- Provincial Tax Exemption Amount,
- Tax Status,
- CPP/QPP Status,
- E.I. Category - Deducts EI or Exempt from EI,
- Provincial Payroll/Health Tax Indicator, and
- QPIP (Quebec Health Insurance Plan) - Not Applicable, Subject to QPIP, or Exempt from QPIP.

The information displayed is the information available in Powerpay.

Taxation

Province of Employment Nova Scotia	CPP/QPP Status Subject to CPP/QPP
Federal Tax Exemption Amount \$11,327	E.I. Category Deducts EI
Provincial Tax Exemption Amount \$8,481	Provincial Payroll/Health Tax Indicator Exempt
Tax Status Subject to Fed. & Prov. Tax	QPIP (Quebec Parental Insurance Plan) Not Applicable

Taxation Option


The **Taxation Option** section displays statutory deduction information. The information displayed is the information available in Powerpay. If none of the information is available, this section does not display.

Taxation Options	
Federal Tax - Specific dollar amount to be taken \$123.00	Amount entered will reduce Federal taxable income (CRA letter) \$4.00
Provincial Tax - Specific dollar amount to be taken \$234.00	Amount entered will reduce Provincial taxable income \$5.00
Tax percentage to be applied to OTHER MONIES for both Federal tax & Provincial tax (if applicable) 1.00%	Amount entered will be treated as a Federal tax credit (K3 value) \$6.00
For commission employees, estimated annual earnings to be used for Federal tax & Provincial tax (if applicable) \$2.00	Amount entered will be treated as a Provincial tax credit (K3P value) \$7.00
For commission employees, estimated annual expenses to be used for Federal tax & Provincial tax (if applicable) \$3.00	Amount entered will be treated as a labour-sponsored tax credit \$8.00

Contact Information

View and Edit Your Address and Contact Information

You can review and edit address and contact records in the **Contact Information** section on the *Profile* page (Profile & Settings → Profile).



Janet Jones
100000001
Clerk

Contact Information

<p>Address Information ✎ Edit</p> <p>Street Lakeview Ave City Winnipeg Province/State Manitoba Country Canada Postal/Zip Code R2K2</p>	<p>Contact Information</p> <p>Phone (with Area Code) E-mail</p>	<p>Emergency Contact ➕ Add</p> <p>Emergency Contact information is not available.</p>
--	---	---

Note: The Emergency Contact section only displays when Self Service and the HR features are enabled for your company in Powerpay.

Edit Your Address

If the application is configured to use the **Edit Address Information** control, the **Edit** button displays in the **Address Information** section on the *Profile* page (Profile & Settings → Profile):



► **To edit your address:**

1. Navigate to the *Profile* page (Profile & Settings → Profile).
2. Click **Edit**.

The **Address Information** page displays.

Address Information ✕

Street

City

Province/State

Postal/Zip Code

Country

3. Edit your address as required.
4. Click **Save**.

Edit Your Contact Information

If the application is configured to use the **Edit Contact Information** control, the **Edit** button displays in the **Contact Information** section on the *Profile* page (Profile & Settings → Profile):

Contact Information

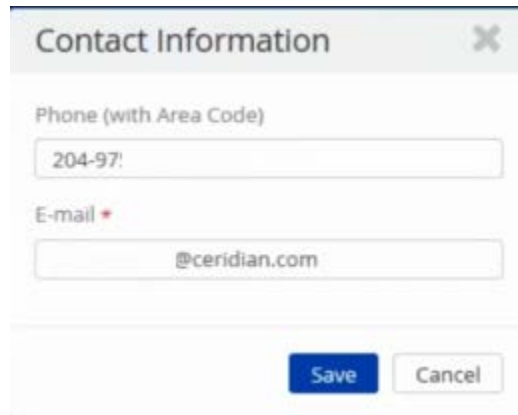
Phone (with Area Code)
204-97

E-mail
@ceridian.com

► **To edit your contact information:**

1. Navigate to the *Profile* page (Profile & Settings → Profile).
2. Click **Edit**.

The **Contact Information** page displays.



A screenshot of a 'Contact Information' form. The form has a title bar with 'Contact Information' and a close button (X). It contains two input fields: 'Phone (with Area Code)' with the value '204-97!' and 'E-mail *' with the value '@ceridian.com'. At the bottom, there are two buttons: 'Save' (blue) and 'Cancel' (grey).

3. Edit your phone number and E-mail address as required.
4. Click **Save**.

Add, View, Edit and Delete Your Emergency Contacts




You can review, edit, add and delete emergency contact records in the **Emergency Contact** section on the *Profile* page (Profile & Settings → Profile & Settings).

Note: The Emergency Contact section only displays when Self Service and the HR features are enabled for your company in Powerpay.

Emergency Contact + Add

Emergency Contact information is not available.

Emergency Contact

 Edit  Add  Delete

Name

James B Jones

Contact Priority

Primary

Home Phone

204-555-5555


Work Phone

480-555-5555

Mobile Phone

[More...](#)

If the application is configured to use the **Edit Emergency Contact Details** control, the **Add**, **Edit** and **Delete** buttons display in the **Emergency Contact** section on the *Profile* page (Profile & Settings → Profile).

 The Edit and Delete buttons display when at least one emergency contact is available.

► To add an emergency contact:

1. Navigate to the *Profile* page (Profile & Settings → Profile).
2. Click **Add**.

The **Emergency Contact Details** page displays.

Emergency Contact Detail ✕

Contact Priority	Last Name *	First Name *	Middle Initial	
<input type="text" value="Select"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Home Phone	Work Phone	Ext.	Mobile Phone	
<input type="text" value="- -"/>	<input type="text" value="- -"/>	<input type="text"/>	<input type="text" value="- -"/>	
Relation	Language Spoken			
<input type="text" value="Select"/>	<input type="text" value="Select"/>			
Address Information				
Street	City	Province/State	Country	Postal/Zip Code
<input type="text"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>	<input type="text"/>
Comments				
<input style="height: 30px;" type="text"/>				

3. Complete the fields with your emergency contact details. Required fields are marked with a red asterisk *.
4. Click **Save**.

► **To edit an emergency contact:**

1. Navigate to the *Profile* page (Profile & Settings → Profile).
2. Select the contact to edit from the **Name** drop-down list.
3. Click **Edit**.

The **Emergency Contact Details** page displays.

Emergency Contact Detail
✕

<small>Contact Priority</small>	<small>Last Name *</small>	<small>First Name *</small>	<small>Middle Initial</small>
<input type="text" value="Primary"/>	<input type="text" value="Jones"/>	<input type="text" value="James"/>	<input type="text" value="B"/>
<small>Home Phone</small>	<small>Work Phone</small>	<small>Ext.</small>	<small>Mobile Phone</small>
<input type="text" value="204-555-5555"/>	<input type="text" value="480-555-5555"/>	<input type="text"/>	<input type="text" value="- -"/>
<small>Relation</small>	<small>Language Spoken</small>		
<input type="text" value="Father"/>	<input type="text" value="English"/>		
<small>Address Information</small>			
<small>Street</small>	<small>City</small>	<small>Province/State</small>	<small>Country</small>
<input type="text"/>	<input type="text"/>	<input type="text" value="Select"/>	<input type="text" value="Select"/>
<small>Postal/Zip Code</small>			
<input type="text"/>			
<small>Comments</small>			
<input style="height: 30px;" type="text"/>			

4. Edit the fields as required.
5. Click **Save**.

► **To delete an emergency contact:**

1. Navigate to the *Profile* page (Profile & Settings → Profile).
2. Select the contact to delete from the **Name** drop-down list.
3. Click **Delete**.

The **Confirmation** message displays.

Confirmation
✕

Are you sure you want to delete ?

4. Click **OK**.

Personal Information

View and Edit Your Personal Information

You can review and edit your information in the **Personal Information** section on the *Profile* page (Profile & Settings → Profile).

Personal Information

Social Insurance Number	Earnings Statements & Tax Form Language	Birth Date
XXX.XXX.788 View	English	11-Jan-XXXX View

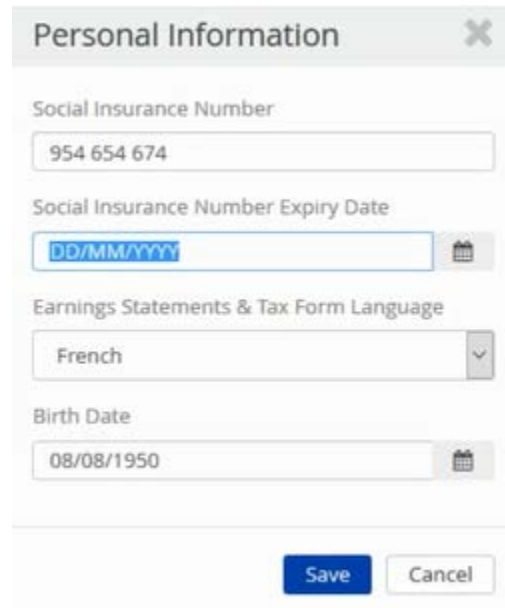
If the application is configured to use the **Edit Personal Information** control, the **Edit** button display in the **Personal Information** section on the *Profile* page (Profile & Settings → Profile).

The **Social Insurance Number Expiry Date** field only displays for temporary Social Insurance Numbers (SINs beginning with a 9). The **Gender** field only displays for payrolls set up with Group Retirement Plans.

► **To edit your personal information:**

1. Navigate to the *Profile* page (Profile & Settings → Profile).
2. Click **Edit**.

The **Personal Information** page displays.



The screenshot shows a modal window titled "Personal Information" with a close button (X). It contains the following fields:

- Social Insurance Number:** A text input field containing "954 654 674".
- Social Insurance Number Expiry Date:** A date picker field showing "DD/MM/YYYY" and a calendar icon.
- Earnings Statements & Tax Form Language:** A dropdown menu currently set to "French".
- Birth Date:** A date picker field showing "08/08/1950" and a calendar icon.

At the bottom of the form are two buttons: "Save" (in blue) and "Cancel".

3. Edit your information as required.
4. Click **Save**.



Earnings Statements & Year End Form Delivery

View and Edit Your Earnings Statements & Year End Form Delivery Options

You can review and edit your earning statement and year end form delivery options in the **Work Information** section on the *Profile* page (Profile & Settings → Profile).

Work Information

Direct Deposit

Name of Financial Institution

003 - Royal Bank

Transit No. 01357

Account No. XXXXXX079 [View](#)

Enable Deposit Yes

Earnings Statement & Year End Form Delivery [Edit](#)

Electronic year end forms must be selected a minimum of 10 business days prior to the last pay date of the current year. If you have any questions please contact your payroll administrator.

Earnings Statement Delivery Electronic only

Year End Form Delivery Printed (Paper Copy)

If the application is configured to use the **Edit Earnings Statement & Year End Form Delivery** control, the **Edit** button displays.

Earning statement and year end form delivery options cannot be edited for employees with a pending number change in Powerpay.

- ▶ **To edit your earning statement & year end form delivery options:**
 1. Navigate to the *Profile* page (Profile & Settings → Profile).
 2. Click **Edit** in the Earnings Statement & Year End Form Delivery section.
The **Earnings Statement & Year End Form Delivery** page displays.

Earnings Statement & Year End Form Delivery

Earnings Statement Delivery

Electronic only
 Printed (Paper Copy)

Year End Form Delivery

Consent for employer to distribute year-end tax forms electronically (stop receiving paper tax forms)

Employers must obtain employee consent before they can distribute year-end electronic tax forms in lieu of a paper copy.

Please read this entire notice and follow the instructions below.

Employees who wish to receive their year-end tax forms electronically must:

1. Select 'Electronic Only'.
2. Click 'Save'.

Consent will be effective immediately and for all subsequent tax years, unless revoked.
Consent will apply to any corrected/amended tax forms.
Consent will only be effective for this username.

When employees are no longer employed, they will be issued paper tax forms.

Printed (Paper Copy)
 Electronic Only

3. Select an earnings statement delivery option (electronic or printed).
4. Select a year end form delivery option (electronic or printed).
5. Click **Save**.

Terminated Employees

Terminated employees with Self Service maintain access to Self Service for 45 days after the Processed Date of the Pay Period that they were terminated, so that they can view, print, and download their pay stubs and tax forms. After the 45 days, the employee no longer has access to Self Service.

Terminated employee access is view only. Any changes made in Self Service including changes to personal information, such as an address change, are not saved.

Enhancements to Powerpay

Security Questions

To improve user experience, the following enhancements are now available on the Security Questions page:

- **Four question minimum** – Powerpay now requires only four security questions.
- **New security question choices** – The security question list now includes ten new questions.
- **New question sort order** – The security question list now displays the most popular questions first, reducing the need to scroll through the list to find appropriate questions.

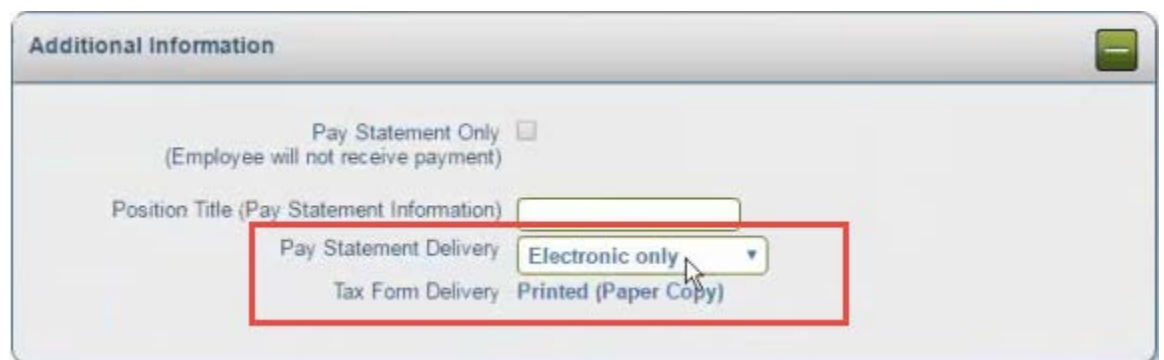
Password Recovery

The password recovery process now requires only a single security question be answered correctly. Previously, two questions were required.

Pay Statement and Tax Form Delivery Options

For payrolls with Self Service enabled, and employees with Self Service accounts only.

To allow payroll administrators to view/edit an employee's pay statement delivery option without logging into Self Service, Powerpay displays the selected delivery option in the **Additional Information** section on the *Employee Profile* page in Powerpay.



The Tax Form Delivery option selected in Self Service by the employee displays. It cannot be edited.

Quick links for Compensation

When the Compensation feature is enabled for your payroll:

- the *Employee Profile* page now includes a quick link to the *Work Assignments* page.

Payroll ► Hire/Profile ► Employee Profile Quick Links ▼

Employee Name **John, Doe** | Number **000000001** Pay Type **Salary EE** Pay Rate **1331.25** | Current amount in Vacat

General Information

* Specifies a required field

Status **Active**

Employee Number **000000001**

* Last Name

* First Name

Middle Initial

SIN

Quick Links

- Add a new employee
- Direct Deposit
- Employee Timesheet
- Employee Timesheet - Second Payment
- Deductions & Contributions
- Emergency Contact
- Statutory Deductions
- Work Assignments

- the *Work Assignments* page now includes a quick link to the *Employee Profile* page.

Payroll ► Hire/Profile ► **Employee Profile** ► Work Assignments Quick Links ▼

Employee Name **John, Doe** | Number **000000001** Pay Type **Salary EE** Pay Rate **1331.25** | Current amount in Vacat: Employee Profile

Work Assignments

+ Add Work Assignment
✕ Delete All

Position	Primary	GL - ID Dept - Department	GL - ID Y - Province	GL - ID Z - Type	GL - ID X - City	Rate
HR Assistant Manager	<input checked="" type="checkbox"/>		Manitoba	Full Time	Winnipeg	
Marketing Assistant Manager	<input type="checkbox"/>	Marketing	Manitoba	Full Time	Winnipeg	

- the *Pay Grades* page now includes a quick link to the *Jobs & Positions* page.

Company ► Compensation Setup ► **Jobs & Positions** ► Pay Grades Quick Links ▼

Pay Grades Jobs & Positions

+ Add Pay Grade

Name	Pay Grade Type	Pay Type Group
Associates	Pay Range	Hourly EE

- the *Jobs & Positions* page now includes a quick link to the *Pay Grades* page.



Company ▶ Compensation Setup ▶ Jobs & Positions

Jobs & Positions

Quick Links ▼

Pay Grades

Add Job

Add Position

Copy

Delete

Job Details

* Specifies a required field


* Name - English Assistant Manager

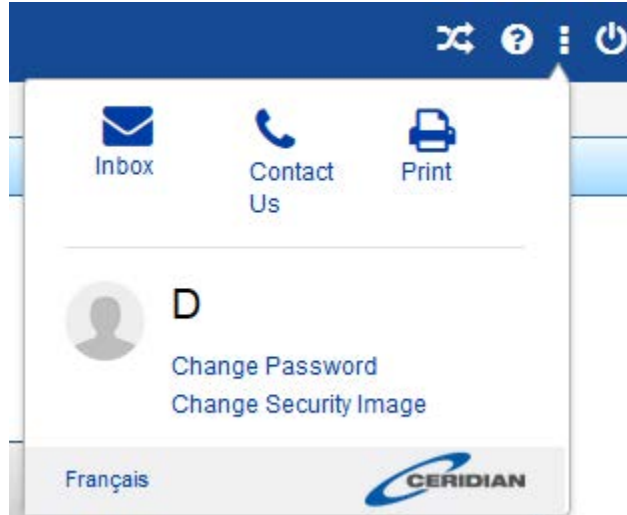
User Interface Updates


Updated Header Design

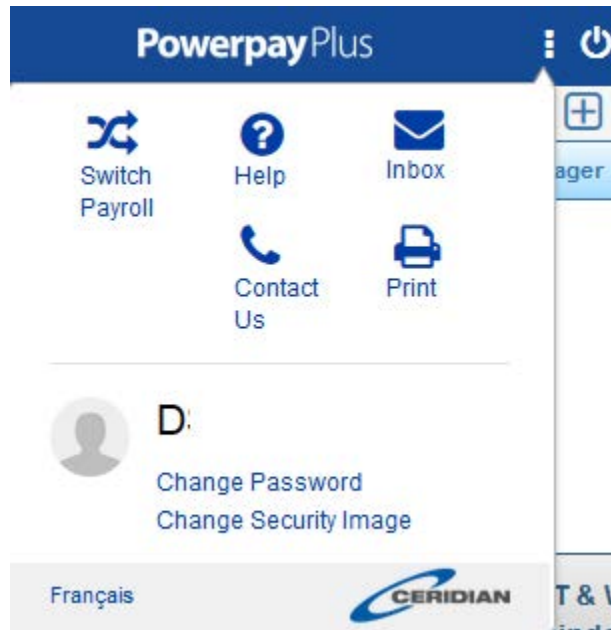
The Powerpay header now has a cleaner, simpler, friendlier look. All of the buttons display in the top right hand corner.



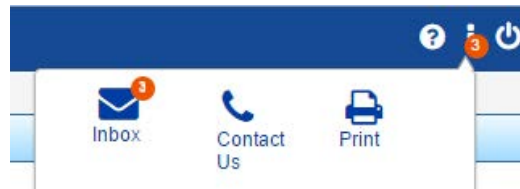
The Inbox, **Contact Us**, **Print**, **Change Password**, **Change Security Image** and language options are available by clicking on the  button.



The new design is also responsive to screen size. On smaller screens, such as mobile devices, the buttons are available by clicking on the  button.

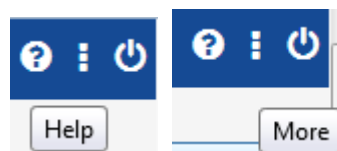


When there are new unread messages in the Inbox, a counter displays indicating the number of unread messages.



Tool Tips

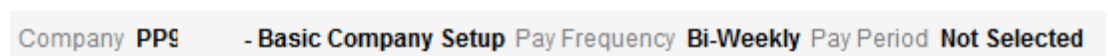
Tool tips are now available for the buttons on the header.



Updated Company Information Bar Design

The Company Information bar is now designed and structured to work well on a variety of screen sizes, including iPhone, iPad, and Android in addition to desktop.

Large screen (desktop):



Medium screen (tablet):



Company	PP9	- Basic Company Setup	Pay Frequency	Bi-Weekly
Pay Period	Not Selected			

Small screen (mobile):

Company	PP9	↓ - Basic Company Setup	
---------	-----	-------------------------	--

Company	PP	↓ - Basic Company Setup	
Pay Frequency	Bi-Weekly		
Pay Period	Not Selected		

Updated Employee Information Bar Design

The Employee Information bar is now designed and structured to work well on a variety of screen sizes, including iPhone, iPad, and Android in addition to desktop, and the colors have been updated to improve readability.

Large screen (desktop):

Employee Name	John, Doe		Number	000000001	Pay Type	Salary EE	Pay Rate	1331.25	Position	HR Assistant Manager	Status	Active	GL - ID Dept - Department	001 - HR
Current amount in Vacation Pay Accumulator														
\$0.00														

Medium screen (tablet):

Employee Name	John, Doe													
Number	000000001	Pay Type	Salary EE	Pay Rate	1331.25	Position	HR Assistant Manager	Status	Active	GL - ID Dept - Department	001 - HR			
Current amount in Vacation Pay Accumulator														
\$0.00														

Small screen (mobile):

Employee Name	John, Doe	Number	000000001	
---------------	-----------	--------	-----------	--

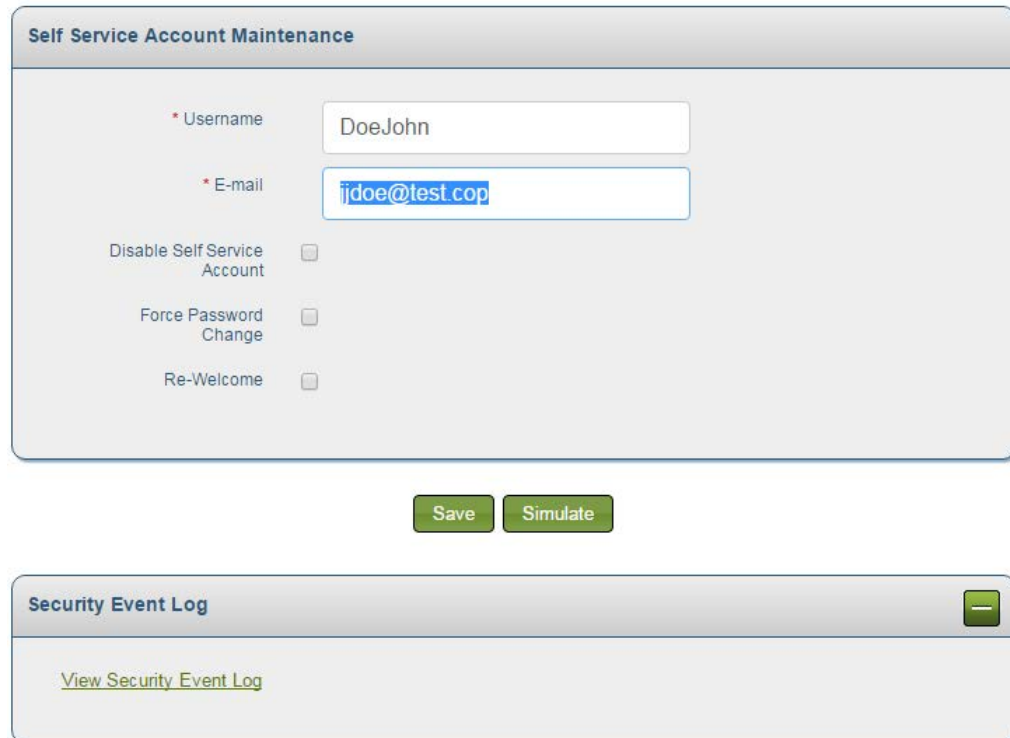
Employee Name	John, Doe	Number	000000001	
Pay Type	Salary EE			
Pay Rate	1331.25			
Position	HR Assistant Manager			
Status	Active			
GL - ID Dept - Department	001 - HR			
Current amount in Vacation Pay Accumulator			\$0.00	

User Maintenance Page

Edit E-mail on Self Service User Maintenance Page

To improve user experience, employee e-mail addresses can now be edited directly on the *User Maintenance* page (Company → Self Service → User Maintenance).

Self Service User Maintenance



The screenshot shows a web form titled "Self Service Account Maintenance". It contains the following fields and options:

- * Username:** A text input field containing "DoeJohn".
- * E-mail:** A text input field containing "jdoe@test.cop".
- Disable Self Service Account:** A checkbox that is currently unchecked.
- Force Password Change:** A checkbox that is currently unchecked.
- Re-Welcome:** A checkbox that is currently unchecked.

Below the form are two green buttons: "Save" and "Simulate".

Below the buttons is a "Security Event Log" section with a minus sign icon in the top right corner. It contains a link: [View Security Event Log](#).


Terminated Employees on the Self Service User Maintenance Page




To ensure that terminated employee's needs are being met, including over year-end, Powerpay now includes employees with Self Service who were terminated in a previous year in the Employee List on the *User Maintenance* page (Company → Self Service → User Maintenance).

Terminated employees with Self Service maintain access to Self Service for 45 days after the Processed Date of the Pay Period that they were terminated, so that they can view, print, and download their pay stubs and tax forms. After the 45 days, the employee no longer has access to Self Service and the terminated employee's information on *User Maintenance* page (Company → Self Service → User Maintenance) becomes read-only (except for Simulation).




Employee List

The employees terminated in the previous year display with an icon  to the left of their name in the Employee List on the *User Maintenance* page (Company → Self Service → User Maintenance).

A 4 LAWTON, FLOYD
T 5 SCHOTT, WINSLOW_PERCIVAL
T 6 CORBEN, JOHN 
T 7 SHUGEL, GERARD 
T 8 EDGE, MORGAN 
T 9 HAMILTON, EMIL 

Employee Information Bar

When an employee who was terminated in a previous year is selected on the on the *User Maintenance* page (Company → Self Service → User Maintenance), the  **Terminated in 2014** icon and message display, with the year the employee was terminated, in the Employee Information Bar.

Employee Name SH, GER | Number 00000007 Pay Type Hourly EE Pay Rate 18.000 | Current amount in Vacation Pay Accumulator \$0.00 |  **Terminated in 2014**

Employee List Filter

The Employee List on the *User Maintenance* page (Company → Self Service → User Maintenance) includes the additional filter selection “Terminated in previous years”.

- Active
- On Leave
- Terminated
- Terminated in previous years

Self Service and Security Roles

Self Service configuration features are not available for Powerpay users set up with security roles with the following access restrictions:

- Page Access – Regular Payment - Statutory Deductions
- Page Access – Hire/Profile – Employee Profile
- Page Access – Hire/Profile – Direct Deposit
- HR – Emergency Contact
- Reports - Payroll Reports
- Reports - Year End Reports



- Reports - Advanced Reporting
- Control Access – Pay Rate
- Employee Level Access

Powerpay Self Service User Name Format Configuration

The new Username Format option enables you to configure the default format for Powerpay Self Service usernames. Use this feature to ensure that the usernames comply with your company's policies and that employee usernames are easy for them to remember.

The default format selected will apply to all future Self Service usernames generated on the *User Maintenance* page (Company → Self Service → User Maintenance) and the *Multiple User Create* (Company → Self Service → Multiple User Create). Previously created usernames are not updated if the format is changed.

-
- ⓘ Duplicate usernames are not allowed. To ensure a unique username, a number is appended to the end of the username in the case of a duplicate. For example: John.Doe, John.Doe1, John.Doe2. However, for the auto-generate format option 5charactersFirstName5charactersLastName, the number is added between the two names. For example, MichaJohns, Micha1Johns, Micha2Johns.
 - ⓘ The username must be a minimum of six characters. If the auto-generated username is less than six characters, a four digit number is appended to the end of the username.
-

- ▶ **To set the default format for Powerpay Self Service usernames:**
 1. Navigate to the *Security Options* page (Company → Self Service → Security Options)
 2. Select a default username format from the **Auto-Generate Username Format** drop-down list.

Self Service Security Options

Force All Users to Change Password

Application Security Options

* Specifies a required field

Suppress Masking on Personal Information

Activate Self Service Pay Statements & Tax Forms

Enforce Employee Deadline for Self Service Changes

Self Service Change Deadline Time (Central Time)

* Auto-Generate Username Format

- FirstName.LastName (Michael.Johnson)
- 5charactersFirstName5charactersLastName (MichaJohns)
- FirstNameInitial.LastName (MJohnson)
- FirstNameInitial.LastName (M.Johnson)
- FirstNameLastName (MichaelJohnson)
- FirstName.LastName (Michael.Johnson)
- LastName.FirstName (Johnson.Michael)

3. Click **Save**.

Editable Self Service Username

Self Service Usernames can now be edited on the *User Maintenance* page (Company → Self Service → User Maintenance).

Self Service User Maintenance

Self Service Account Maintenance

* Username

* E-mail

Disable Self Service Account

Force Password Change

Re-Welcome

► **To update a Self Service username:**

1. Navigate to the *User Maintenance* page (Company → Self Service → User Maintenance).

2. Select the employee whose username to update from the Employee List.
3. Update the username as required.
4. Click **Save**.

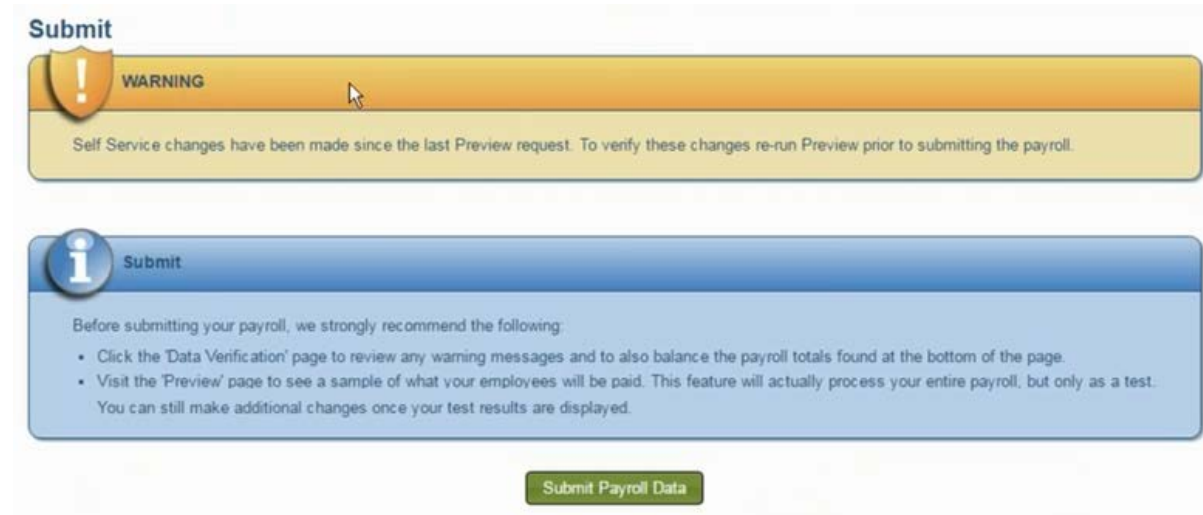
An e-mail is sent to the employee with their new username.

Equivalent Pay Period Salary Outside Pay Range

When a salaried employee is assigned a Position associated with a Job, Powerpay now properly compares the annual salary for employee with the pay range set for the position. If the salary is outside of the pay range for the position the proper error and warning messages are produced.

Submit Page Warning Message

If a change is made in Self Service that flows to Powerpay after a Preview is run, a warning message displays on the Submit page.



The screenshot shows the 'Submit' page interface. At the top, there is a yellow warning banner with a shield icon containing an exclamation mark and the word 'WARNING'. The text in the banner reads: 'Self Service changes have been made since the last Preview request. To verify these changes re-run Preview prior to submitting the payroll.' Below the warning banner is a blue information banner with an 'i' icon and the word 'Submit'. The text in the information banner reads: 'Before submitting your payroll, we strongly recommend the following:' followed by two bullet points: 'Click the 'Data Verification' page to review any warning messages and to also balance the payroll totals found at the bottom of the page.' and 'Visit the 'Preview' page to see a sample of what your employees will be paid. This feature will actually process your entire payroll, but only as a test. You can still make additional changes once your test results are displayed.' At the bottom of the page, there is a green button labeled 'Submit Payroll Data'.

Security Event Log for Self Service Updates

The Security Event log now includes two events when a Forgot user name request is submitted.

1st – a Forgot user name request had been submitted for a particular email address.

2nd – an email is sent

Security Event Log

View Security Events from Last 60 days

Log Date	Changed by Username	Target Username	IP Address	Log Info
Jan 10, 2017 09:12 AM	B	B	10.68.48.11	Username Email Sent
Jan 10, 2017 09:12 AM	B	B	10.68.48.11	Selected Forgot User ID
Jan 10, 2017 09:11 AM	B	B	10.68.48.11	Logoff - Successful
Jan 10, 2017 08:49 AM	B	B	10.68.48.11	Privacy - Accept

Audit Trail Self Service Indicator

The *Audit Trail* page (Pay Period → View), now includes an indicator when a change is made to employee information through Self Service. When employee information is edited in Self Service, “ESS” is appended to the user’s name in the **Keyed By** column.

3. Employee Information - 000000005 G., Jeffrey (Active)

Description	New Value	Old Value	Keyed By	Date & Time
Street	126 Garry Street	125 Garry Street	jeff ESS	2016-12-12 14:08:30
Street	125 Garry Street	126 Garry Street	jeff ESS	2016-12-13 09:29:30
Street	105 Garry Street	125 Garry Street	jeff ESS	2017-01-23 14:36:30

Company Cheque No. on Manual Page

The **Company Cheque No.** field in the Summary section on the *Manual* page (Payroll → Adjustments → Manual) is now an optional field.

Mass Organizational Update Pay Range Validation

Pay Range validation is now available on the *Mass Organizational* page (Payroll → Mass Edit Tools → Mass Organizational Update) when employees are assigned a new position. If the employee’s pay rate that falls outside of the Pay Range defined for the new position, a warning or error message displays in the Preview.

Employee List

Manual Update

Employee Number	Employee Name	Old Position	New Position
1	John, Doe	HR Assistant Manager	Marketing Assistant Manager
2	Duke, Daisy	-	Marketing Assistant Manager Employee pay rate is outside the Pay Range.
3	Jones, James	-	Marketing Assistant Manager Employee pay rate is outside the Pay Range.
4	Smith, John	-	Marketing Assistant Manager Employee pay rate is outside the Pay Range.
15	Smith, James	-	Marketing Assistant Manager Employee pay rate is outside the Pay Range.

Number of Employees = 5
Number of Employees Selected = 5

Sort/Filter Defaults

The options in the **Filter employees within Powerpay by** section on the *Sort/Filter* page (Company → Defaults → Sort/Filter) now match the options available in the employee list. All three options are selected by default. The Active option is not editable and is always selected.

Filter employees within Powerpay by:

Active

On Leave

Terminated

When the Terminated checkbox is selected, the Terminated in previous years checkbox is also selected in the employee list on the *User Maintenance* page (Company → Self Service → User Maintenance).

Province of Employment Validation on the Employee Profile page

When the address Province/State and or Country entered in the General Information section as a result of an address change is different from the Province of Employment in the Taxation section on the *Employee Profile* page:

- A warning message displays
- The Province of Employment should be reviewed to ensure the appropriate selections for:
 - Federal and Provincial taxes, Provincial Health taxes and Provincial Safety Plans



- Vacation entitlements per Employment Standards

In some cases, an updated TD1, TP-1015 (for Quebec) or a letter of authority may be needed. For complete details, see the Revenue Canada website.



Enhancements to Powerpay Self Service

Security Questions

To improve user experience, the following enhancements are now available on the Security Questions page:

- **Four question minimum** – Powerpay Self Service now requires only four security questions.
- **New security question choices** – The security question list now includes ten new questions.
- **New question sort order** – The security question list now displays the most popular questions first, reducing the need to scroll through the list to find appropriate questions.

Password Recovery

The password recovery process now requires only a single security question be answered correctly. Previously, two questions were required.

Date Display Format

Powerpay Self Service now displays dates consistently in the following formats:

- 09-Jan-2017: When only the date is required (without the day of the week). For example, birth date, payment date and social insurance number expiry date.



- Tuesday, January 09, 2017: When the day of the week is required. For example, next scheduled payment date.



- 09-Jan-2017 09:54 am: When the time is required.

The date format for the Date Pickers has not changed.



Earnings Statements Year End Forms

From: 01/01/2016 To: DD/MM/YYYY Filter

Earning Statements Payment Date

▼ December 2016

User Interface Updates

Profile Page

The Payroll Information label on the *Profile* page has been renamed Direct Deposit.

Work Information

Direct Deposit

Name of Financial Institution

001 - Bank of Montreal (Priority 1) ▼

Transit No. 11111

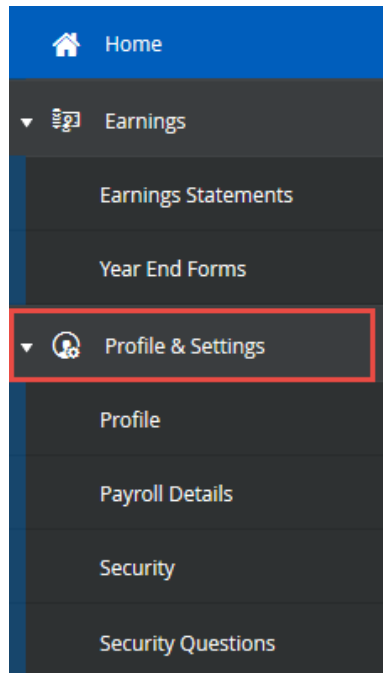
Account No. XXXX111

Deposit Value \$5.00

Enable Yes
Deposit

Profile Menu Item

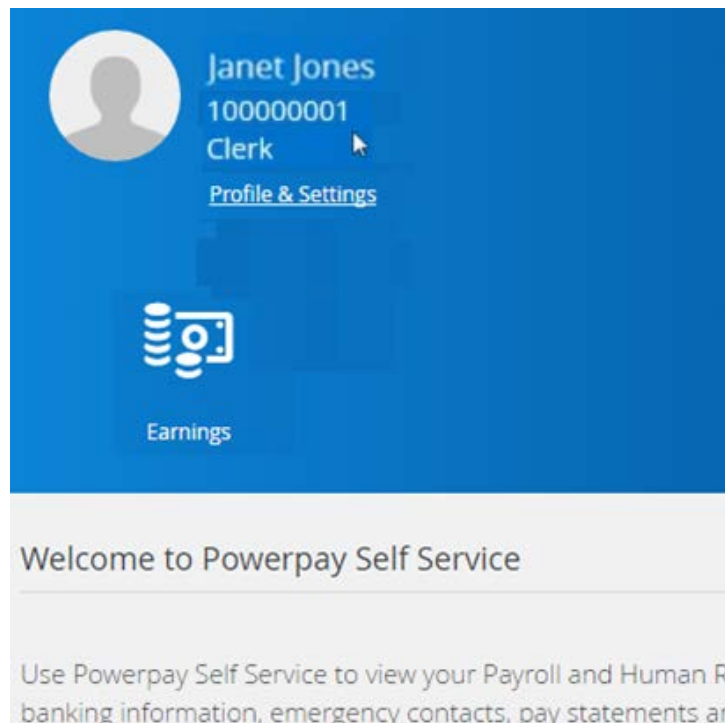
The top level Self Service Profile menu item has been renamed Profile & Settings.



Employee Number and Position Title Information in Self Service


The Employee Number and Position Title now display (view only) in Self Service:

- On the *Home* page





- On the *Profile* page



Profile Payroll Details Security Security Questions


Janet Jones
10000001
Clerk


[Contact Information](#)

[Address Information](#)  Edit [Contact Information](#) [Emergency Contact](#)  Add

- On the *Payroll Details* page.

  Profile & Settings

Profile [Payroll Details](#) Security Security Questions


Janet Jones
10000001
Clerk

[Employer Information](#)

Employer Number Next Scheduled Payment Date