

RELEASE NOTES

April 19, 2017

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 Self Service.

This document is for Powerpay Self Service version 5.1.

For questions, please contact your Ceridian representative.



Contents

<u>New Functionality Powerpay Self Service</u>	4
<u>Payroll Details Page</u>	4
<u>Contact Information</u>	6
<u>View and Edit Your Address and Contact Information</u>	6
<u>Add, View, Edit and Delete Your Emergency Contacts</u>	9
<u>Personal Information</u>	12
<u>View and Edit Your Personal Information</u>	12
<u>Earnings Statements & Year End Form Delivery</u>	13
<u>View and Edit Your Earnings Statements & Year End Form Delivery Options</u>	13
<u>Terminated Employees</u>	14
<u>Enhancements to Powerpay Self Service</u>	15
<u>Security Questions</u>	15
<u>Password Recovery</u>	15
<u>Date Display Format</u>	15
<u>User Interface Updates</u>	16
<u>Profile Page</u>	16
<u>Profile Menu Item</u>	16
<u>Employee Number and Position Title Information in Self Service</u>	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

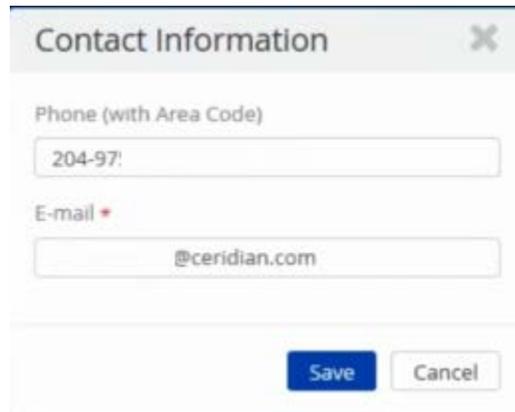
Phone (with Area Code)
204-97

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' dialog box. The title bar says 'Contact Information' with a close button (X). Below the title bar, there are two input fields. The first is labeled 'Phone (with Area Code)' and contains the text '204-97'. The second is labeled 'E-mail *' and contains the text '@ceridian.com'. At the bottom of the dialog box, there are two buttons: 'Save' (highlighted in blue) and 'Cancel'.

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> <input type="text" value="Primary"/>	<small>Last Name *</small> <input type="text" value="Jones"/>	<small>First Name *</small> <input type="text" value="James"/>	<small>Middle Initial</small> <input type="text" value="B"/>
<small>Home Phone</small> <input type="text" value="204-555-5555"/>	<small>Work Phone</small> <input type="text" value="480-555-5555"/>	<small>Ext.</small> <input type="text"/>	<small>Mobile Phone</small> <input type="text" value="- -"/>
<small>Relation</small> <input type="text" value="Father"/>	<small>Language Spoken</small> <input type="text" value="English"/>		
<small>Address Information</small>		<small>Province/State</small>	<small>Country</small>
<small>Street</small> <input type="text"/>	<small>City</small> <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

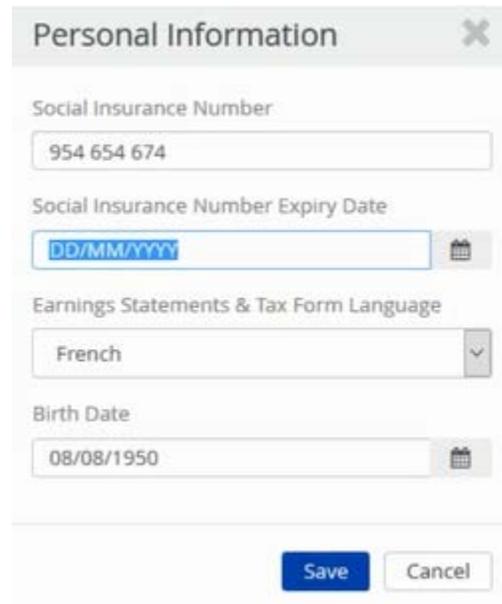
If the application is configured to use the **Edit Personal Information** control, the **Edit** button display in the **Personal Information** section on the *Profile* page (Profile & Settings → Profile).

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 'Personal Information' modal window with the following fields:

- Social Insurance Number:** 954 654 674
- Social Insurance Number Expiry Date:** DD/MM/YYYY (with a calendar icon)
- Earnings Statements & Tax Form Language:** French (dropdown menu)
- Birth Date:** 08/08/1950 (with a calendar icon)

At the bottom of the form are two buttons: **Save** 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 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

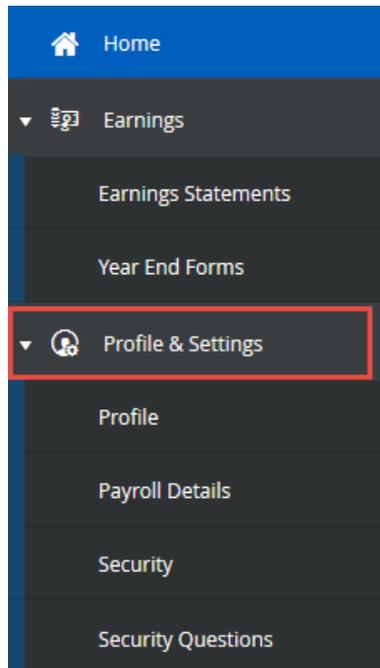
Account No. XXXX111

Deposit Value \$5.00

Enable Yes
Deposit

Profile Menu Item

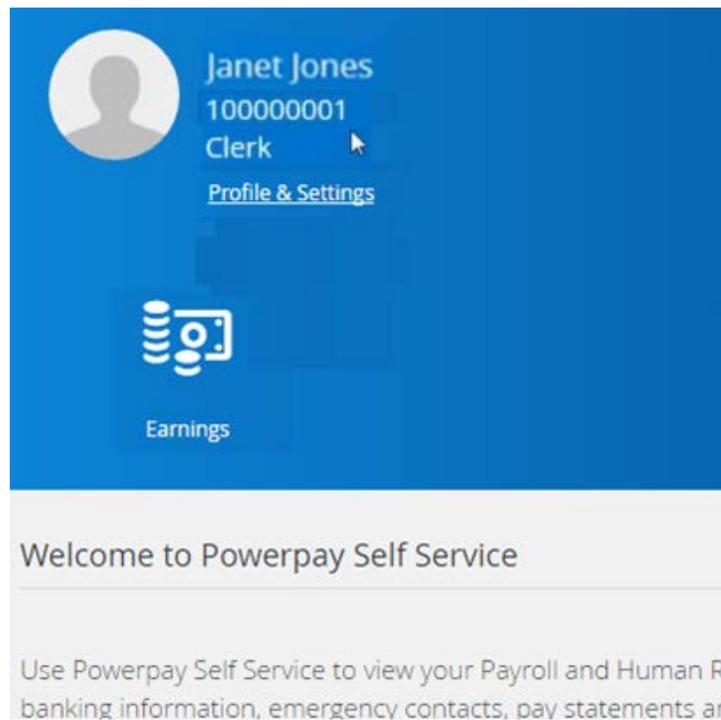
The top level Self Service Profile menu item has been renamed Profile & Settings.



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