

Dayforce Powerpay Configure Self Service

Configuring Self Service

Dayforce Powerpay Self Service configuration includes the following tasks:

- Set Self Service Options
 - Allow Unmasking of Personal Information
 - Activate Pay Statements and tax Forms flow to Self Service
 - Set deadline for Self Service changes to flow to Payroll
 - Assign default format for Auto-Generated usernames
- Define field-level controls for employee data entry access
 - Set access levels for Contact, Personal, and Work Information sections on the Profile page
 - Select users to receive notifications for Self Service actions
- Audit Emergency Contact Information on the Audit Trail page

Allow Unmasking of Personal Information

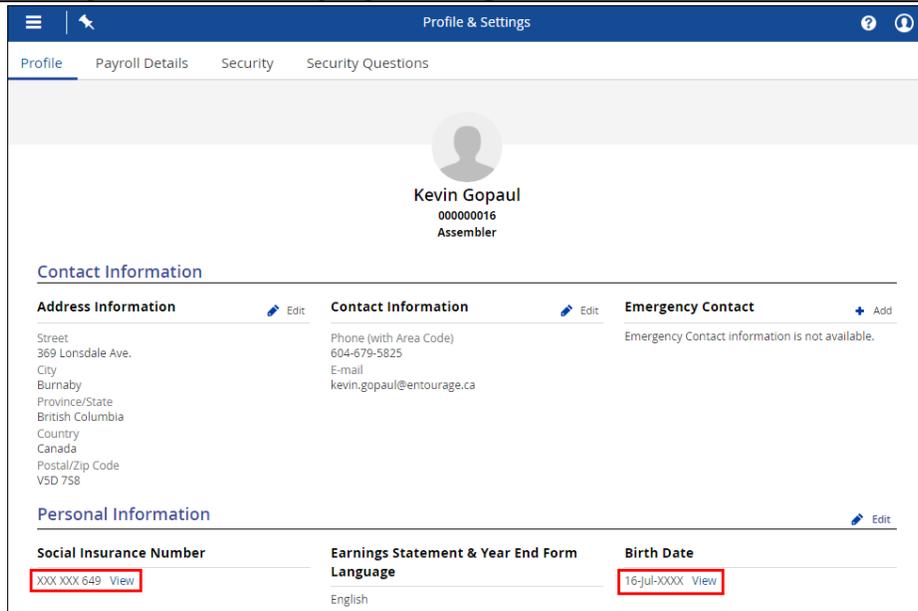
Select this option to allow employees to view unmasked personal information in Self Service including SIN, Birth Date and Direct Deposit Bank Account Numbers on the Profile page in Self Service.

The screenshot shows the 'Self Service Options' configuration page. At the top right, there is a link 'Expand All / Collapse All'. Below the title, there is a button 'Force All Users to Change Password'. The page is divided into sections: 'Feature Activation' and 'General Options'. In the 'Feature Activation' section, the checkbox 'Enable Pay Statements and Tax Forms in Self Service' is checked. In the 'General Options' section, the checkbox 'Allow Unmasking of Personal Information' is checked and highlighted with a red box. Other options include 'Auto-Generate Username Format' (set to '5charactersFirstName5charactersLastName (Mic)'), 'Employee Tax Form Delivery Default' (set to 'Electronic Only'), 'Employment Verification Letter' (checked), and 'Enforce Employee Deadline for Self Service Changes' (unchecked). A dropdown menu for 'Deadline for Changes on Submit For Processing Day (Central Time)' is set to '9:00 AM'.

1. Navigate to the **Self Service Options** page (Company → Self Service → Self Service Options).
2. In the *General Options* section, select the **Allow Unmasking of Personal Information** checkbox.
3. Click **Save**.

When this option is selected a **View** link displays to the right of the masked information in Self Service, allowing users to view the information unmasked.

Dayforce Powerpay Configure Self Service



Profile & Settings

Profile Payroll Details Security Security Questions

Kevin Gopaul
00000016
Assembler

Contact Information

Address Information Edit	Contact Information Edit	Emergency Contact Add
Street 369 Lonsdale Ave. City Burnaby Province/State British Columbia Country Canada Postal/Zip Code V5D 7S8	Phone (with Area Code) 604-679-5825 E-mail kevin.gopaul@entourage.ca	Emergency Contact information is not available.

Personal Information Edit

Social Insurance Number XXX XXX 649 View	Earnings Statement & Year End Form Language English	Birth Date 16-Jul-XXXX View
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Activating Pay Statements and Tax Forms for Self Service Users

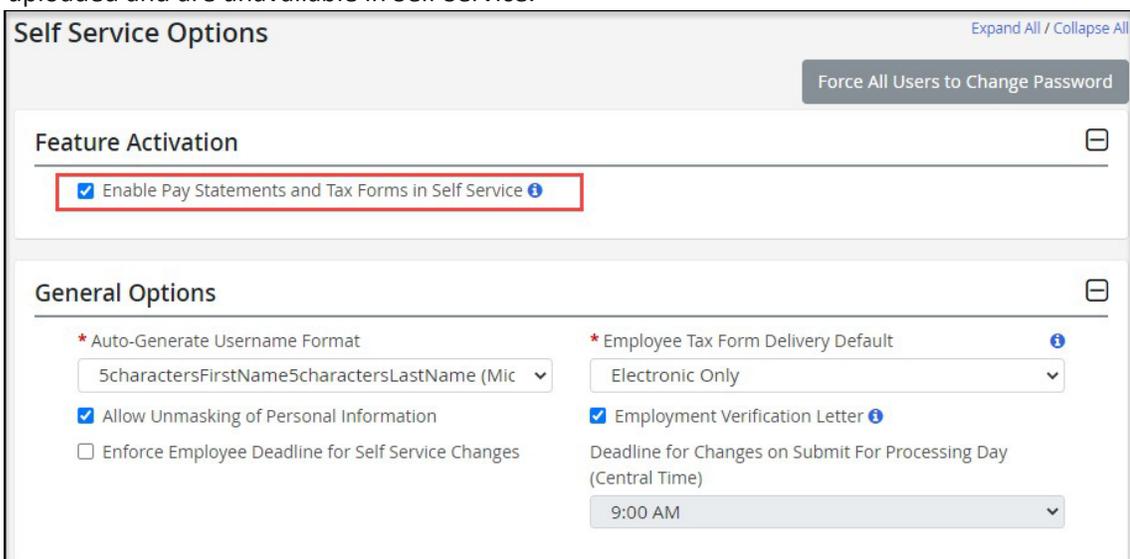
This step should only be completed once you are ready to begin using Powerpay Self Service and have created accounts for your employees.

This option must be enabled for employees to view and print their pay statements and tax forms in Self Service.

Employee tax forms are only sent to Self Service if the employee selects that option within the Self Service application.

Employee pay statements and tax forms display in Self Service starting in the payroll run after this option is selected. If this option is cleared, the pay statements and tax forms will stop being sent to Self Service. However, pay statements and tax forms that were previously uploaded to display in Self Service will remain.

Pay statements and tax forms from previous payroll runs, prior to turning on this option, are not uploaded and are unavailable in Self Service.



Self Service Options Expand All / Collapse All

Force All Users to Change Password

Feature Activation

- Enable Pay Statements and Tax Forms in Self Service ⓘ

General Options

* Auto-Generate Username Format 5charactersFirstName5charactersLastName (Mic) v	* Employee Tax Form Delivery Default ⓘ Electronic Only v
<input checked="" type="checkbox"/> Allow Unmasking of Personal Information	<input checked="" type="checkbox"/> Employment Verification Letter ⓘ
<input type="checkbox"/> Enforce Employee Deadline for Self Service Changes	Deadline for Changes on Submit For Processing Day (Central Time) 9:00 AM v

Dayforce Powerpay Configure Self Service

1. Navigate to the **Self Service Options** page (Company → Self Service → Self Service Options).
2. In the *Feature Activation* section, select the **Enable Pay Statements & Tax Forms in Self Service** checkbox.
3. Click **Save**.

Setting the Self Service Change Deadline

You can temporarily stop the flow of data from self Service to provide the payroll administrators time to audit, balance, and preview the payroll before it is submitted for processing.



Without the Change Deadline in place, Self Service changes continue to flow to Powerpay and may impact the payroll, so the final Preview could be different than the final register.

It is highly recommended that you set the Change deadline to stop the flow of changes for a specified time before the payroll is processed.

Self Service Options Expand All / Collapse All

Force All Users to Change Password

Feature Activation

Enable Pay Statements and Tax Forms in Self Service ⓘ

General Options

* Auto-Generate Username Format: 5charactersFirstName5charactersLastName (Mic) ▼

* Employee Tax Form Delivery Default: Electronic Only ▼ ⓘ

Allow Unmasking of Personal Information

Employment Verification Letter ⓘ

Enforce Employee Deadline for Self Service Changes

Deadline for Changes on Submit For Processing Day (Central Time): 9:00 AM ▼

1. Navigate to the **Self Service Options** page (Company → Self Service → Self Service Options).
2. In the General Options section, select the Enforce Employee Deadline for Self Service Changes checkbox.
3. In the **Deadline for Changes on Submit for Processing Day** field, select the time to stop the flow of data.

Once the payroll is processed, the information flow resumes automatically and any Self Service changes are updated in Powerpay in the next pay period.

When a preview is requested during the time the data flow from Self Service is being held, a message displays on the Submit page.

Dayforce Powerpay Configure Self Service

Submit

WARNING

Self Service changes have been made since the last Preview request. To verify these changes re-run Preview prior to submitting the payroll.

Submit

Before submitting your payroll, we strongly recommend the following:

- Click the 'Data Verification' page to review any warning messages and to also balance the payroll totals found at the bottom of the page
- 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.

Submit Payroll Data

Assigning the Default Username Format for Auto-Generated User Names

This option enables you to configure the default format for Powerpay Self Service usernames created with the Auto-Generate process on the User Maintenance and the Multiple User Create pages.

Self Service Options Expand All / Collapse All

Force All Users to Change Password

Feature Activation

- Enable Pay Statements and Tax Forms in Self Service

General Options

- * Auto-Generate Username Format
5charactersFirstName5charactersLastName (Mic)
- * Employee Tax Form Delivery Default
Electronic Only
- Allow Unmasking of Personal Information
- Employment Verification Letter
- Enforce Employee Deadline for Self Service Changes
Deadline for Changes on Submit For Processing Day (Central Time)
9:00 AM

The username must be a minimum of six characters. If the auto-generated username is less than six characters, a four digit number is added to the end of the username.

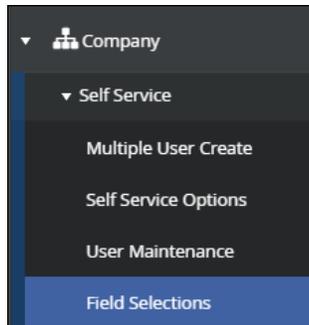
- 5charactersFirstName5charactersLastName (MichaJohns)
- FirstNameInitialLastName (MJohnson)
- FirstNameInitial.LastName (M.Johnson)
- FirstNameLastName (Michael.Johnson)
- FirstName.LastName (Michael.Johnson)
- LastName.FirstName (Johnson.Michael)

Use these settings to specify the type of access employees should have on the Profile page in Self Service. This allows you to enforce corporate policy and define:

- Which fields to display
- Which fields are view only
- Which fields are editable

Dayforce Powerpay Configure Self Service

- Notifications to be sent to Powerpay users based on specific events



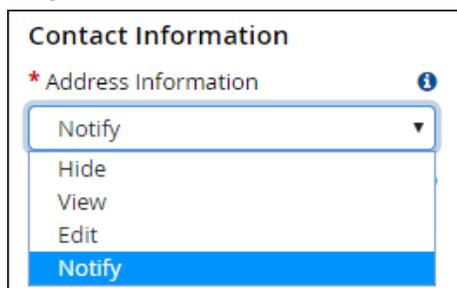
To set the options to allow employee data entry in Self Service as appropriate for your payroll:

1. Navigate to the **Field Selection** page (Company → Self Service → Field Selections).
2. Select the option to set the access for the fields based on the section of the Self Service Profile page.
3. **Save.**

Field Selection Options

There are four Field Selection options available. Select the option based on your company preference and policy, for example you can allow only the email and phone number to be edited, or address and emergency contacts. The options are:

- **Hide:** No information for this section or field will display.
- **View:** The default setting, information is view only in Self Service and cannot be modified.
- **Edit:** The item can be modified, and in some cases deleted. The edits made in Self Service flow back to Powerpay to be used when the payroll is processed.
- **Notify:** When selected, a message indicating any changes/edits by a Self Service user is sent to the Powerpay Inbox of users set to receive notifications.
 - Additional information about the Powerpay Inbox and notifications is located later in this guide.



Regardless of the Field Level setting, information is view only in Self Service for terminated employees. Any changes made to personal information, such as an address change, are not saved.

Field Selections Available for the Self Service Profile Page Sections

The following fields in Self Service can be set on the Fields Selection page:

Dayforce Powerpay Configure Self Service

- In the Contact Information section: Address Information, Phone (with Area Code), Email, and Emergency Contact.

Contact Information

* Address Information ? Notify ▼

* Phone ? Edit ▼

* E-mail ? Edit ▼

* Emergency Contact ? Edit ▼

- In the Personal Information section: Social Insurance Number, Earnings Statement & Year End Form Language, Birth Date, Gender.

Personal Information

* Social Insurance Number ? Notify ▼

* Earnings Statement & Year End Form Language ? View ▼

* Birth Date ? View ▼

* Gender ? View ▼

- In the Work Information section: Direct Deposit, Earnings Statement Delivery, and Year End Form Delivery.

Work Information

* Direct Deposit ? View ▼

* Earnings Statement Delivery ? View ▼

* Year End Form Delivery ? Edit ▼



Direct Deposit information can only be set to Hide or View. It cannot be edited by employees. Hide is not available for the Earnings Statement Deliver and Year End Form Deliver fields.

Use the **Set all to** filed to set all fields to the same value.

Profile

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

Set all to ? ▼

When you select Notify as the Field Selection option for the Profile page in Self Service, you need to define which Powerpay user(s) should receive the notifications, and the type of notifications.

Dayforce Powerpay Configure Self Service

Self Service Notifications

Select All

<input checked="" type="checkbox"/> Address Information	<input checked="" type="checkbox"/> Contact Information
<input checked="" type="checkbox"/> Emergency Contact	<input checked="" type="checkbox"/> Personal Information
<input checked="" type="checkbox"/> Earnings Statement & Year End Form Delivery	<input checked="" type="checkbox"/> System Generated Errors & Warnings (At least one user must have this selection.)
<input checked="" type="checkbox"/> Employment Verification Letter (At least one user must have this selection.)	<input checked="" type="checkbox"/> Document Information
<input checked="" type="checkbox"/> Onboarding	

Notifications must be set up on the Field Selections page to receive notifications.

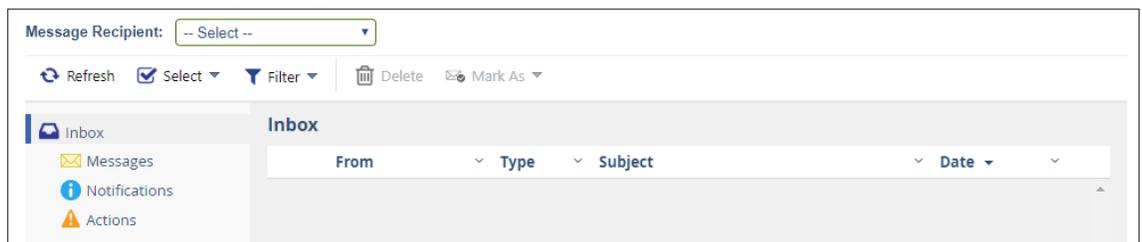
To select the notifications to be sent to a Powerpay user:

1. Navigate to the **User & Contact Management** page (Company → User & Contact Mgmt).
2. In the list of users, click the **Edit** link for the user to receive notifications.
3. In the *Self Service Notification* section, select the type(s) of notifications this user should receive.
4. **Submit.**
5. Repeat steps 2 through 4 for any additional Powerpay users who should also receive Self Service notifications.

Notification in the Powerpay Inbox

Notifications generated from Self Service entries and actions will display in the Powerpay Inbox. The Inbox will include:

- Messages: System generated information for your payroll.
- Actions: Includes notification of users who have locked themselves out of Self Service. Also pertains to data synchronization issues, such as when a Self Service user and a payroll administrator are updating the same field at the same time.



An indicator will display on the Powerpay Toolbar when you have new messages, alerts, or notifications in your Inbox.



To view the messages in your Inbox:

1. Click the **Inbox** link.
2. By default, all messages display. Messages display by date with the most recent at the top. Sort and Filter options are available.
3. Click on the message Subject to open the message.

Dayforce Powerpay Configure Self Service

Audit Emergency Contact Information on the Audit Trail Report

Changes to Emergency Contact Information will display on the Audit Trail page, in the Employee Information section. Entries made in Self Service will show ESS with the user's name in the Keyed By column.

HR - Emergency Contact				
Description	New Value	Old Value	Keyed By	Date & Time
Gopaul, Nathan				
Contact Priority	Primary		KevinGopaul ESS	2017-04-07 14:33:21
Last Name	Gopaul		KevinGopaul ESS	2017-04-07 14:33:21
First Name	Nathan		KevinGopaul ESS	2017-04-07 14:33:21
Phone Numbers - Home	604-555-2211		KevinGopaul ESS	2017-04-10 14:32:30

1. Select Pay Period → View.
2. Scroll down to the Employee Information section.