



2024

Payroll Admin Guide: Employee Payroll Data Management



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V1

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1/1/2024

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Guide Usage and Disclosures

Guide Information

This guide is designed based on the Oracle Cloud HCM delivered setups; some fields may differ from your instance configurations. For example, some fields may be required in this guide that are not required in your instance. Additionally, some of the training topics discussed in this guide may not apply to your organization, but we know you'll find it helpful. If you would like a custom guide for your organization, please contact our Training team at learn@camptratech.com

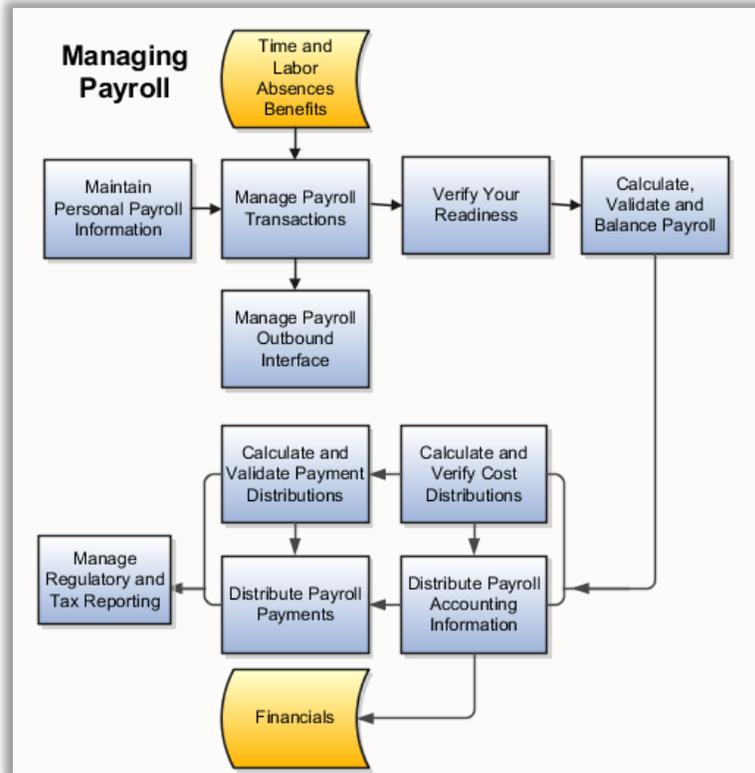
How To Use This Guide

This guide is intended to assist Admin users with their day-to-day tasks in Oracle Cloud. A few notes before you begin:

1. Any fields with an asterisk are required fields.
2. Based on your configurations, approval workflows may in place for the training topics below; those tasks would need to be approved before the additions or updates are visible in your instance.
3. You may have specific flexfields in your instance that require inputs; this guide is a generic tool and will not include those specific flexfields. You will see those fields as a context segment or not visible at all in our Oracle instance.

Overall Process Flow

Before we begin with the training content, It's important to understand the overall process flow of information in Oracle Cloud for the Payroll module.



Glossary of Terms

Here we've included common terms associated with the Payroll module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Element Entries

- ◆ There are 2 types of element entries: recurring and nonrecurring. Element entries are details of compensation or a deduction. For example, medical premiums, garnishments, salary, etc.

Payroll Relationship

- ◆ A payroll relationship exists between a person and a payroll statutory unit, which is the legal entity responsible for employee payment.

Payment Methods

- ◆ A method in which money is transferred to the third-party vendor or employee. For example, direct deposit, check, or EFT.

Tax Reporting Units

- ◆ Represents a legal entity for tax and social insurance reporting in global legislation.

Calculation Entries

- ◆ Specifies how a value is provided or calculated

Third Party Payment Methods

- ◆ A third party is any person or entity outside of your organization and a third-party payment method determines how you pay them.

Object Groups

- ◆ Object groups are user-defined sets of elements or people used to restrict which of these items to include in various processes and reports.

Quickpay

- ◆ A process executed by the payroll team to pay an employee or group of employees outside of the regular payroll run.

Retro Pay

- ◆ Payment owed to an employee or payment due from an employee due to an incorrect amount being withheld from a prior payroll.

Payroll Reconciliation

- ❖ Payroll processes transfer your payment entries to Cash Management for manual or automatic reconciliation with bank statements

Reporting

- ❖ OTBI or BI contains numerous reports used for payroll verifications and processing.

Data Loader

- ❖ HCM Data Loader validates the data and creates valid records in the HCM cloud. The Data Loader is also used to load multiple elements entries for payment for multiple employees.

Effective Date

- ❖ Effective Dates are used to store historical, current, and future information. Effective Dates are the date in which a line of data is active.

Element Classification Components

- ❖ Elements are grouped into primary classifications, such as Earnings and Voluntary Deductions. In a human resources department, you can use the primary classifications to identify groups of elements for information and analysis purposes. In a payroll department, the classifications control processing, including the sequence in which elements are processed and the balances they feed.

Costing

- ❖ If the classification is Costable, you can select any costing option for elements when you define the element links. If the classification is Distributable, you can create a distribution set from elements of this classification over which you can distribute costs. You can also view the cost type for elements in the classification, whether they debit or credit the accounts they feed.

Frequency Rules

- ❖ The payroll run uses a frequency rule to determine in which pay periods it processes a recurring element. You can view which date the payroll run uses, by default, to assess frequency rules in your localization. You can select a different date when you define a frequency rule.

Calculate Absence Duration

- ❖ Calculate the duration of an absence from the start and end dates.

Accrual Start Rule

- ◆ You use an accrual start rule to determine when newly enrolled employees start to accrue time. For example, some accrual plans allow new hires to accrue time from the date of their hire. If the predefined start rules that are available on the Accrual Plan page do not meet your requirements, you can add your own rule directly in the accrual formula.

Tax Card

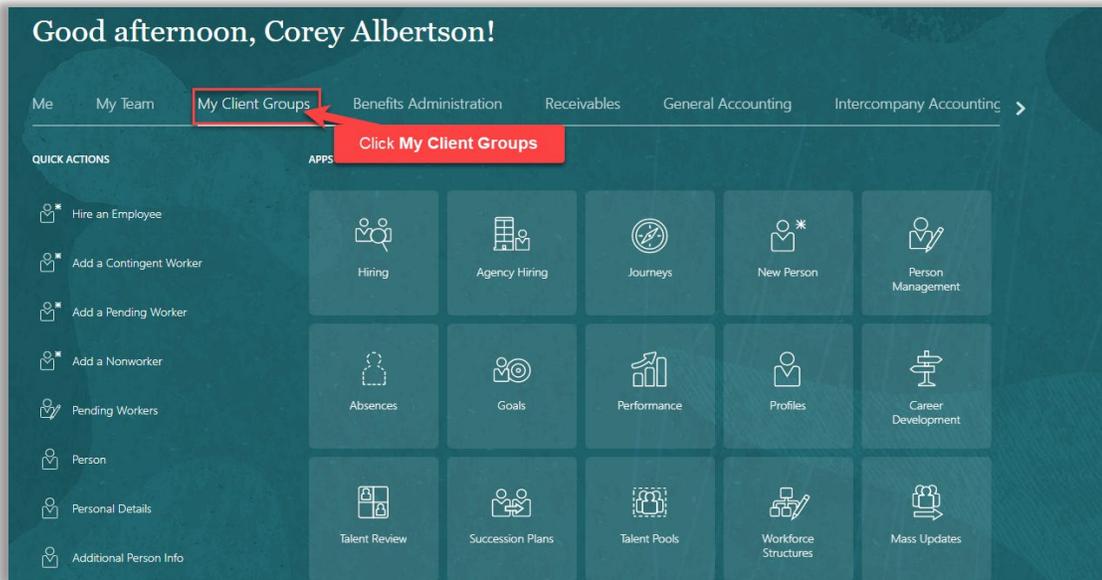
- ◆ Contains the Federal, State, and Local tax withholding information for the employee

Employee Payroll Data Management

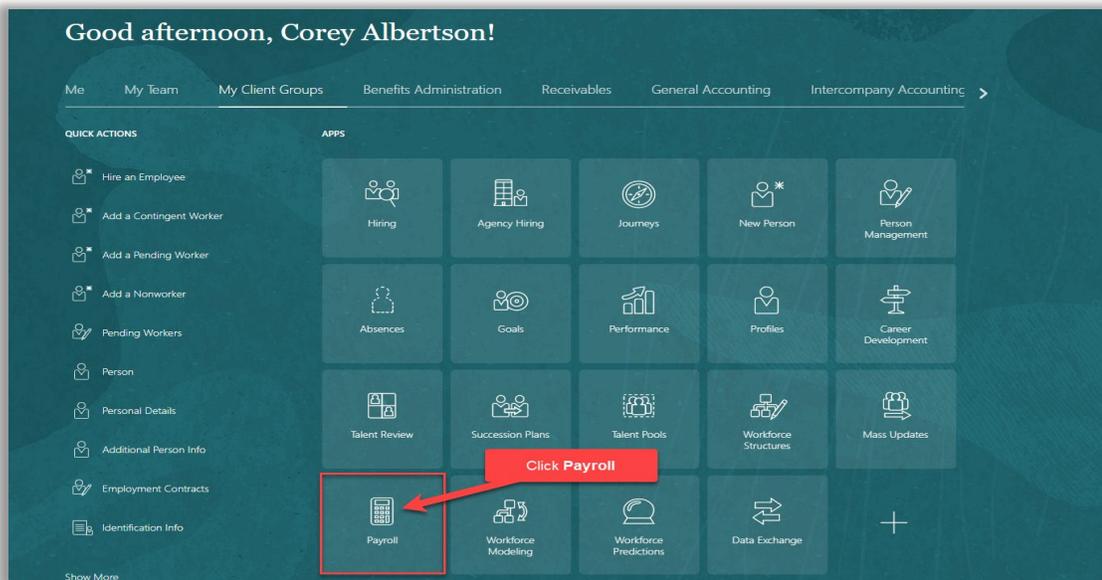
Create Tax Card Association

Navigation: Home>My Client Groups>Payroll>My Client Groups>Search Employee>Tax Withholding>Associations>Add>Save and Close

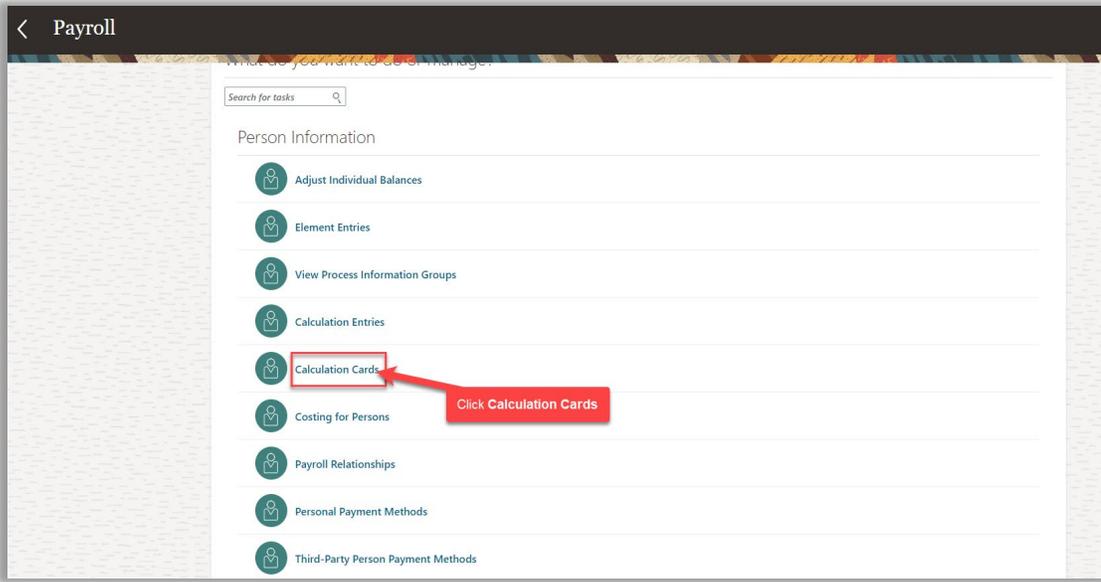
From the home screen, click **My Client Groups**



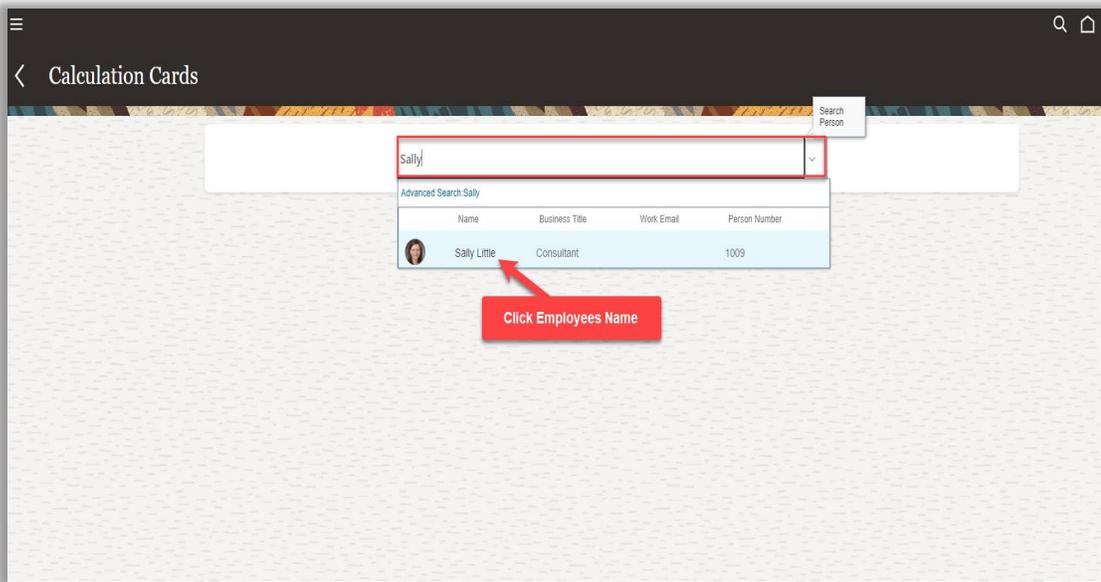
Next, click **Payroll**



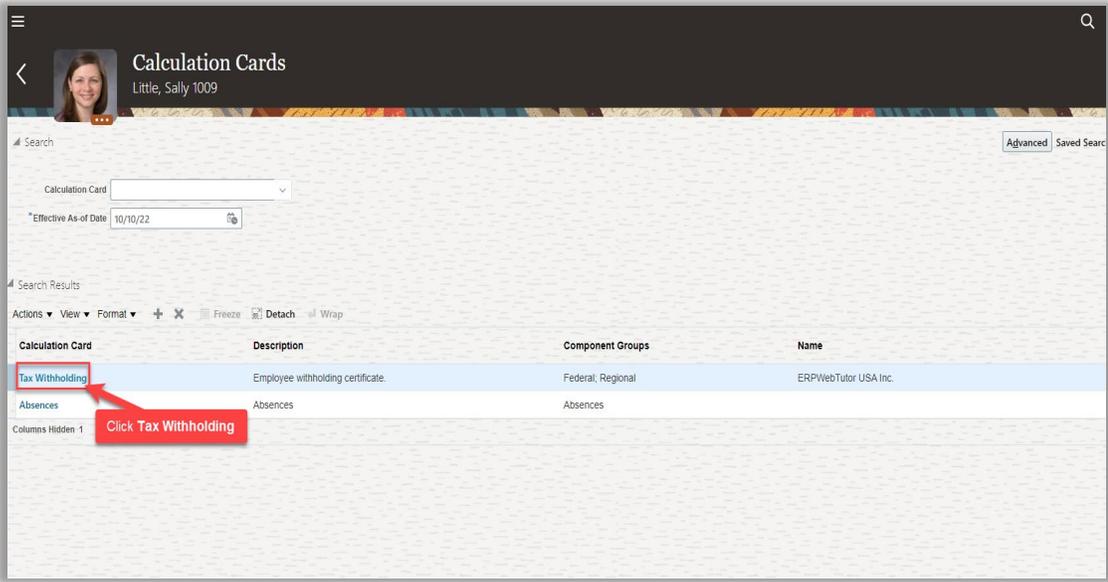
Click **Calculation Cards** under **Person Information**. If preferred, we can also search the words **Calculation Cards** in the Search box at the top



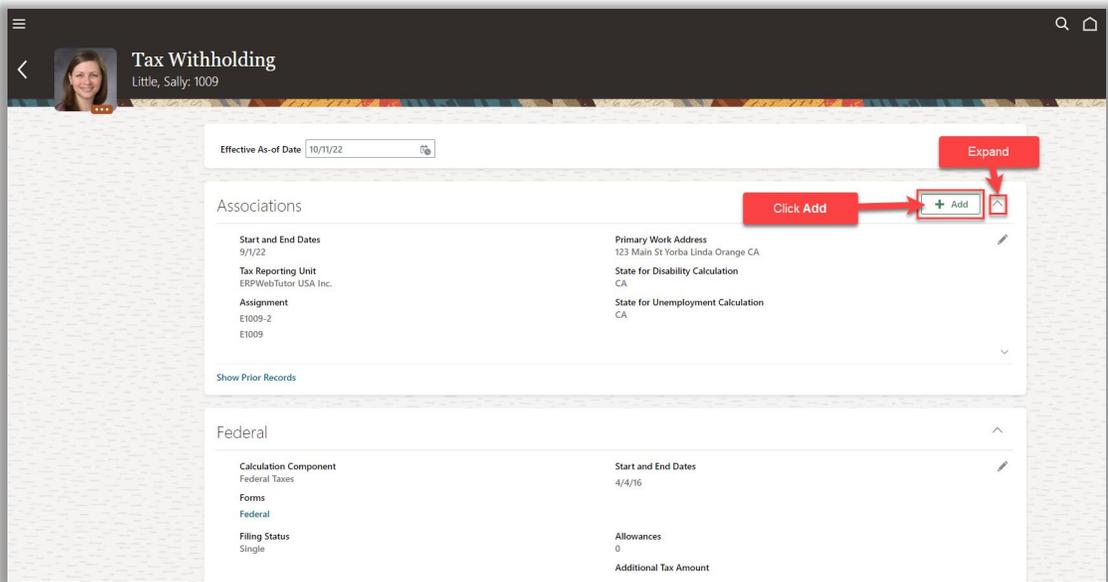
Enter the employees name in **Search for a Person** box and once the employees name is shown, click the employees' name



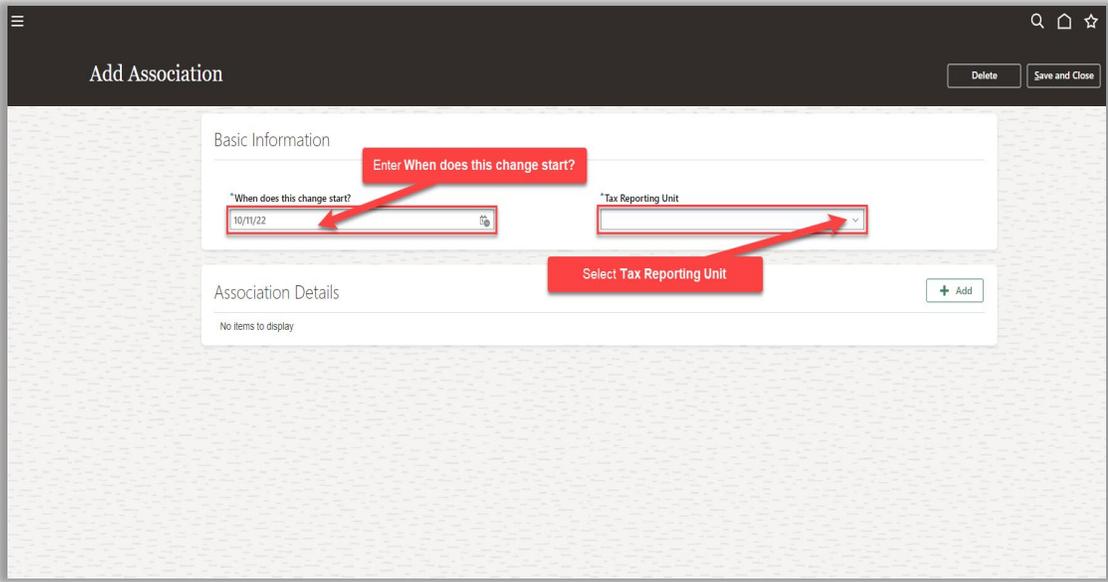
Click **Tax Withholding**



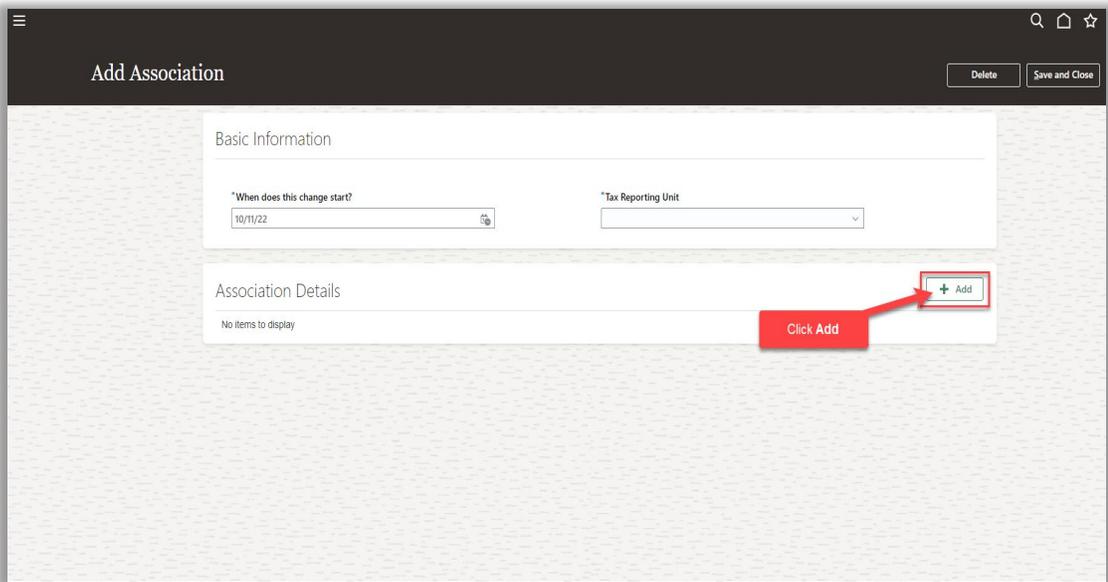
Expand Associations and click Add



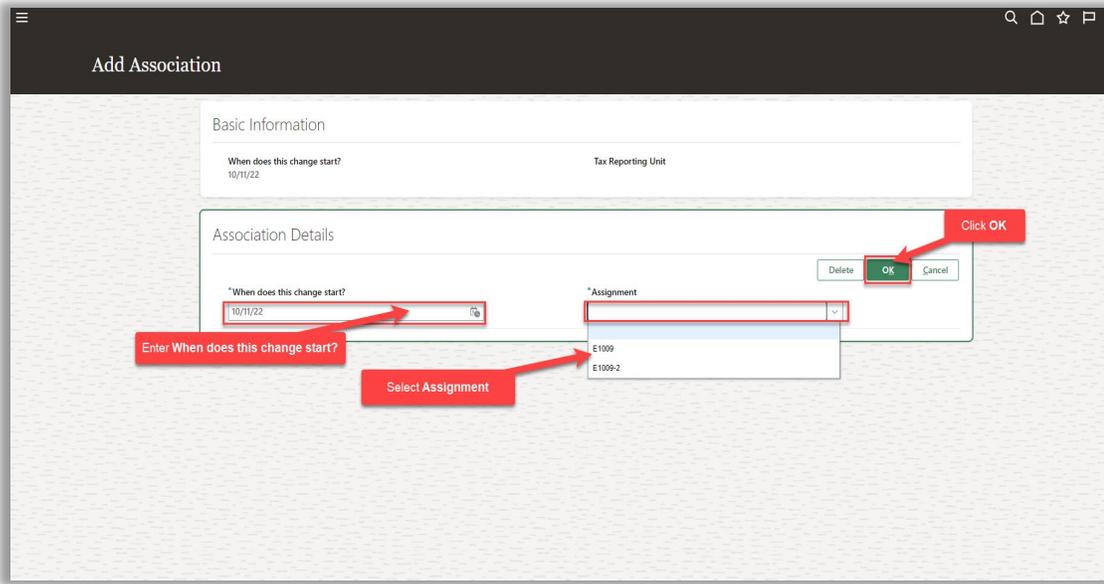
Enter the **When does this change start date**. Next, select the **Tax Reporting Unit** from the dropdown



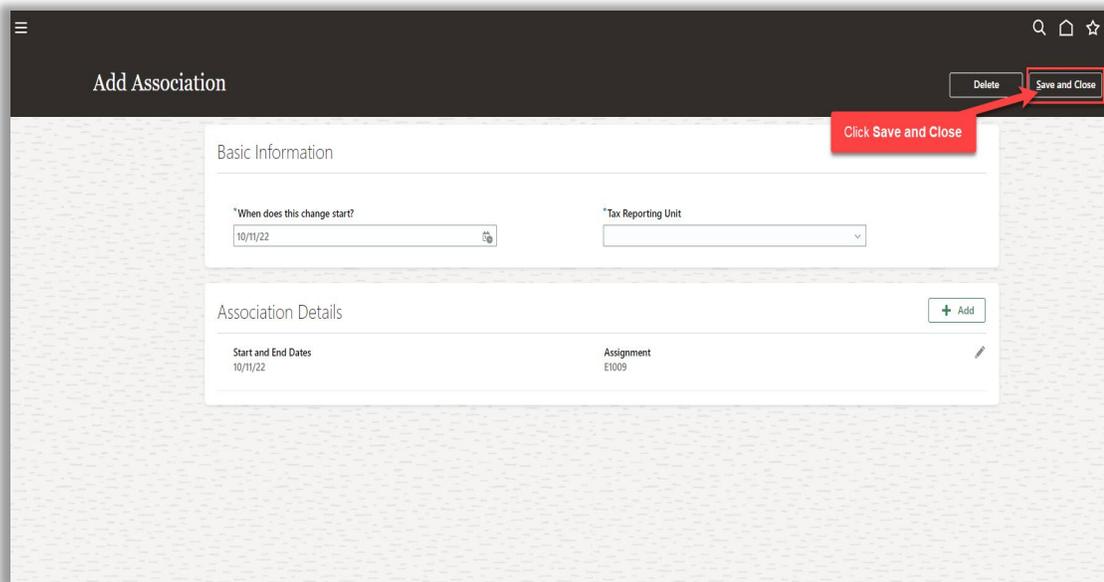
Click **Add**



Enter the **Association Details** such as **When does this change start?** Next, select the **Assignment** from the dropdown and click **OK**



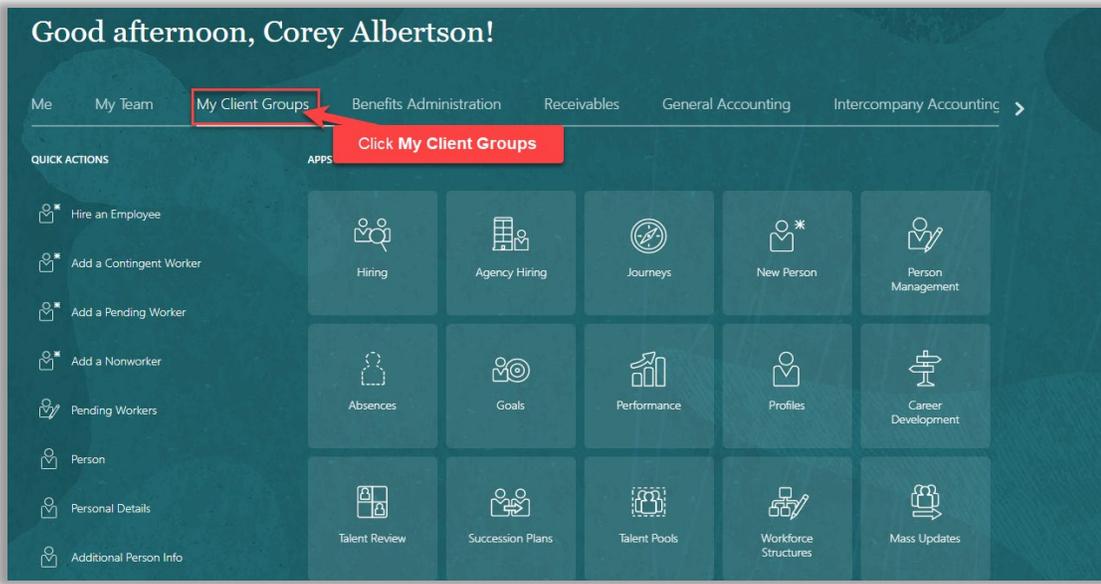
Click **Save and Close**. As a note, if the employee has multiple assignments, we will need to add an **Association** for both assignments.



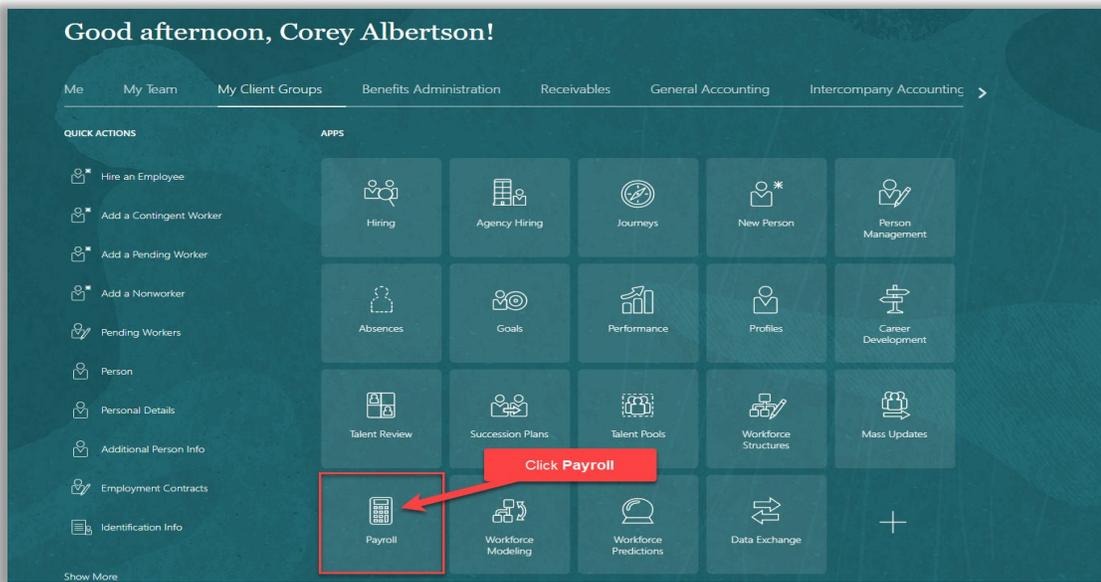
Manage Federal W4 Information

Navigation: Home>My Client Groups>Payroll>Calculation Cards>Search Employee>Tax Withholding>Edit>Save and Close

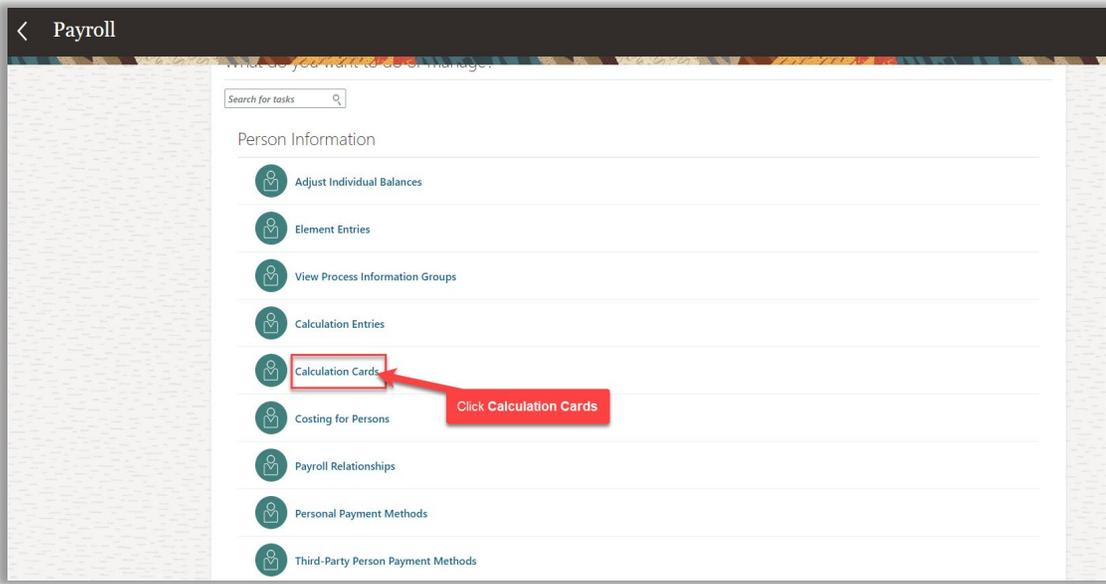
From the home screen, click **My Client Groups**



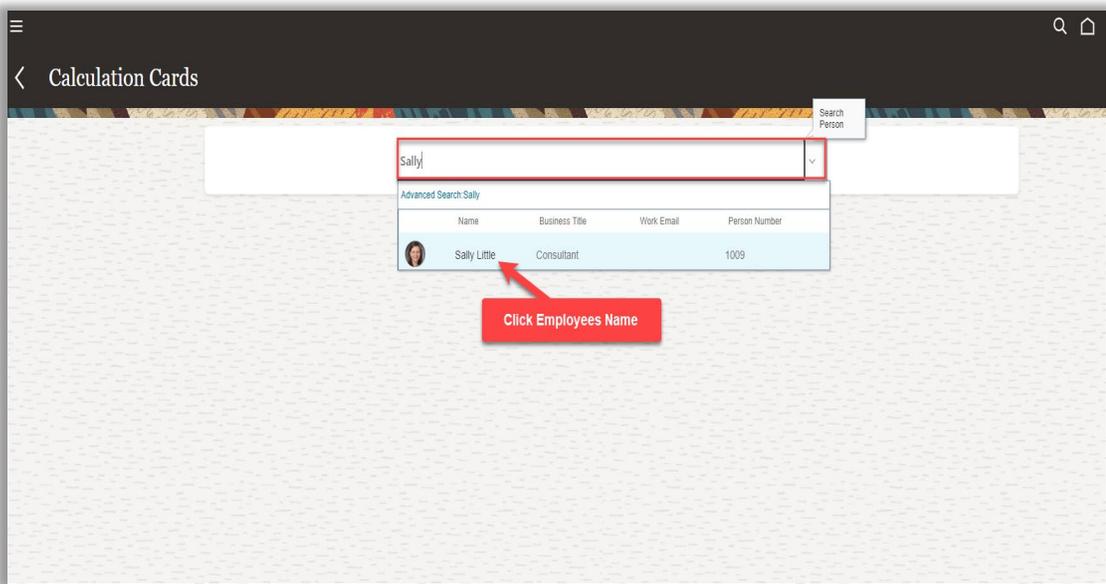
Next, click **Payroll**



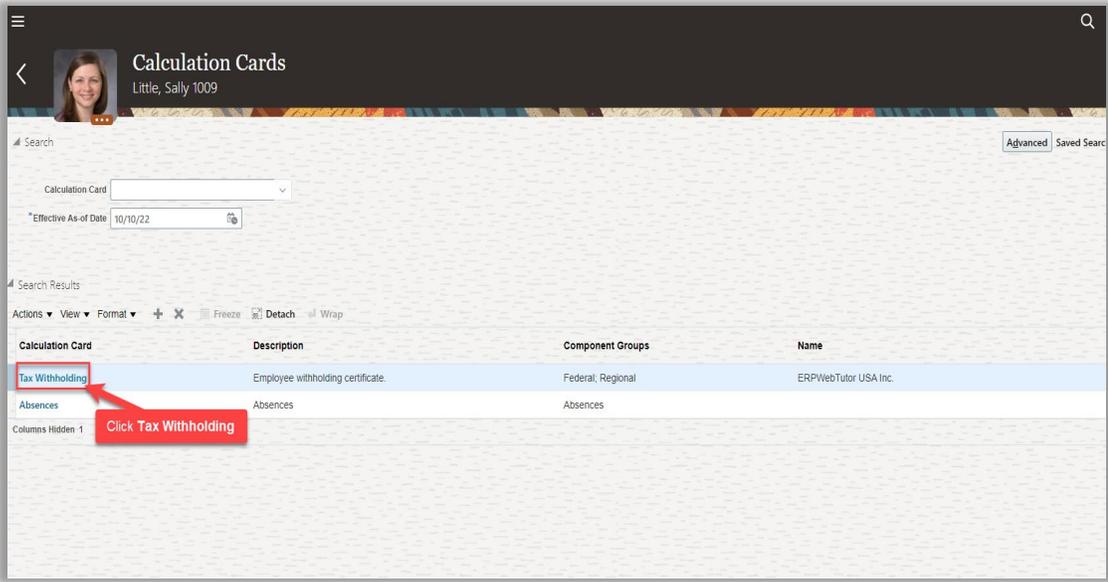
Click **Calculation Cards** under **Person Information**. If preferred, we can also search the words **Calculation Cards** in the Search box at the top



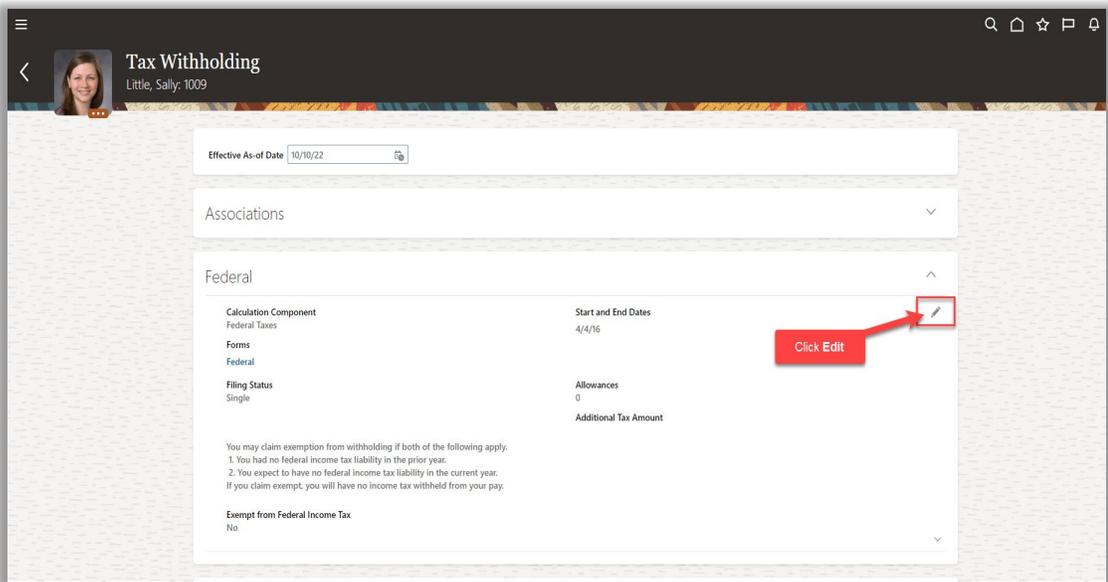
Enter the employees name in **Search for a Person** box and once the employees name is shown, click the employees' name



Click **Tax Withholding**



Click **Edit** (pencil icon) to update the W4 information



Enter the **When Does This Change Start** and update the applicable information

Federal Taxes

Update the below information

Calculation Component: Federal Taxes
Forms: Federal

Component Sequence: 1

*When does this change start?
10/10/22

Withholding Status

*Filing Status: Select a value
Multiple Jobs: Select a value

You may claim exemption from withholding if both of the following apply:
1. You had no federal income tax liability in the prior year.
2. You expect to have no federal income tax liability in the current year.
If you claim exempt, you will have no income tax withheld from your pay.

Exempt from Federal Income Tax: No

Qualifying Dependents Amount: 0 USD
Other Dependents Amount: 0 USD
Total Dependents Amount: 0 USD

Extra Withholding: 0 USD
Other Income Amount: 0 USD
Deductions Amount: 0 USD
IRS Lock in Date: 0%

Buttons: Delete, Save and Close

Click Save and Close

Federal Taxes

Click Save and Close

Calculation Component: Federal Taxes
Forms: Federal

Component Sequence: 1

*When does this change start?
10/10/22

Withholding Status

*Filing Status: Select a value
Multiple Jobs: Select a value

You may claim exemption from withholding if both of the following apply:
1. You had no federal income tax liability in the prior year.
2. You expect to have no federal income tax liability in the current year.
If you claim exempt, you will have no income tax withheld from your pay.

Exempt from Federal Income Tax: No

Qualifying Dependents Amount: 0 USD
Other Dependents Amount: 0 USD
Total Dependents Amount: 0 USD

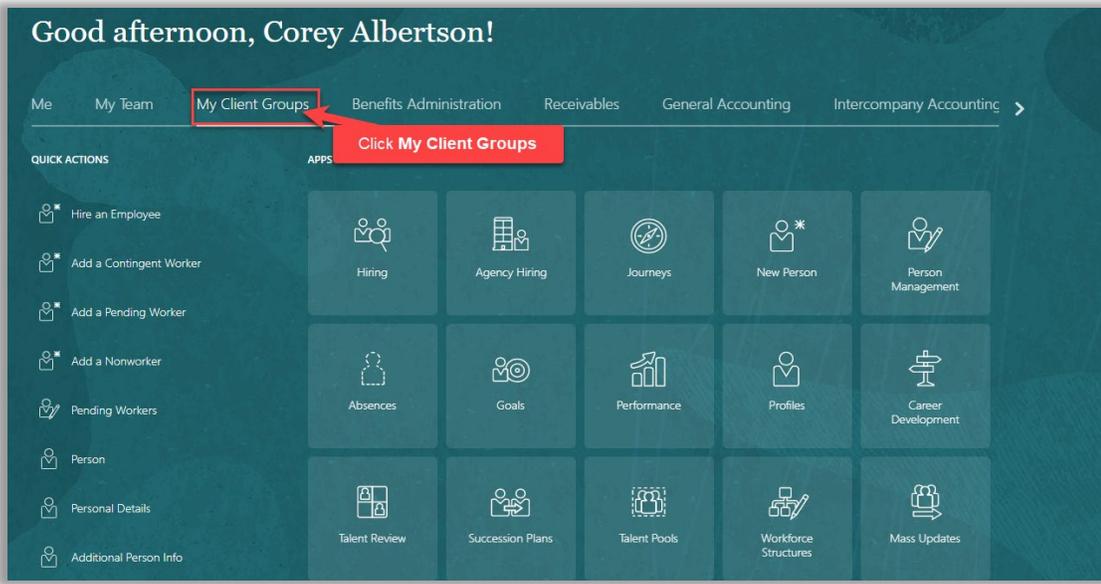
Extra Withholding: 0 USD
Other Income Amount: 0 USD
Deductions Amount: 0 USD
IRS Lock in Date: 0%

Buttons: Delete, Save and Close

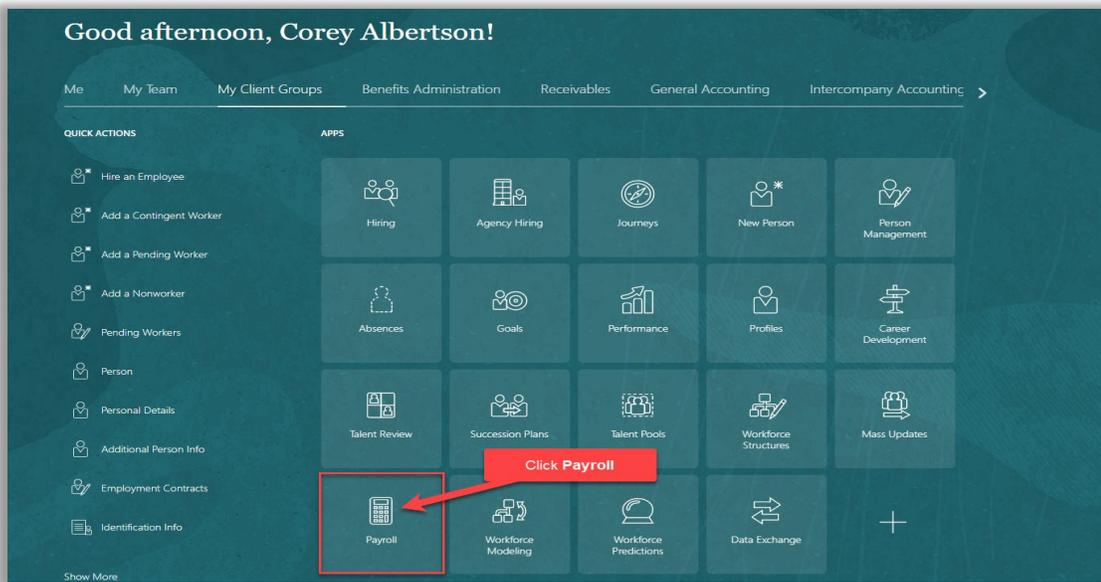
Update State W4 Information

Navigation: Home>My Client Groups>Payroll>Calculation Cards>Search Employee>Tax Withholding>Edit or Add>Save and Close

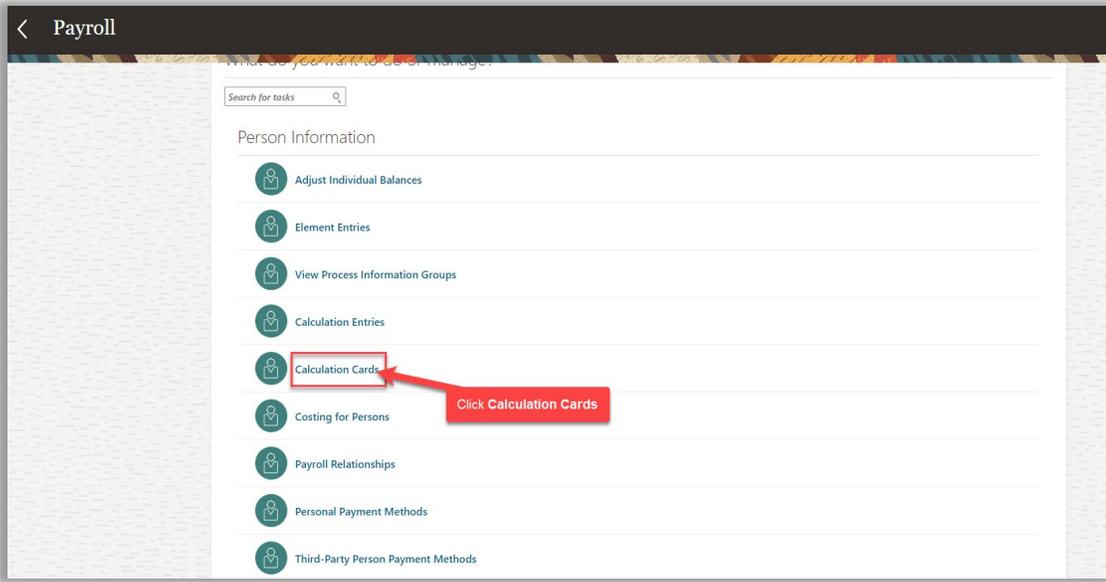
From the home screen, click **My Client Groups**



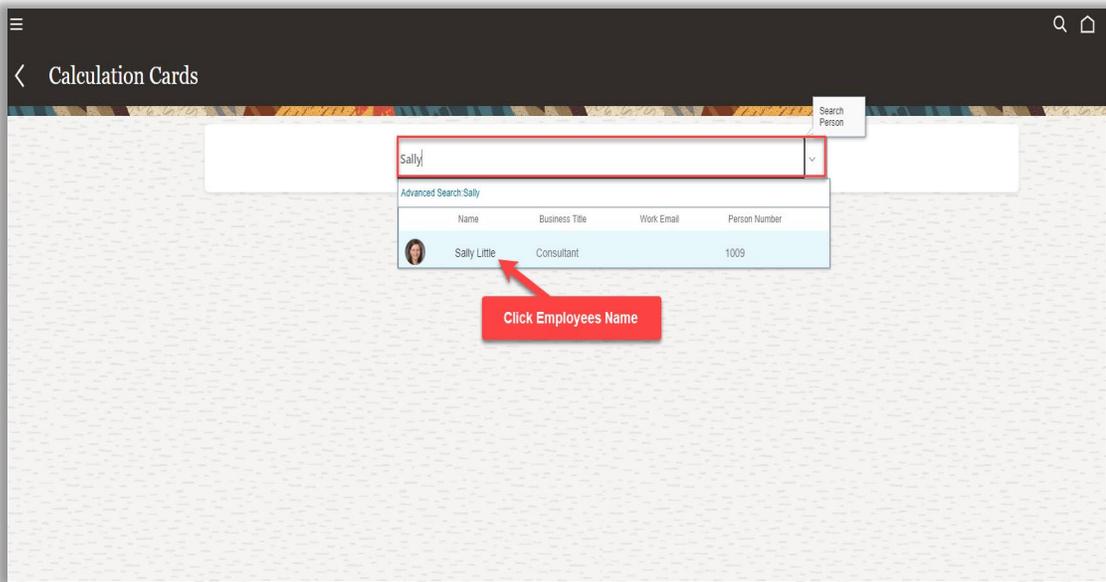
Next, click **Payroll**



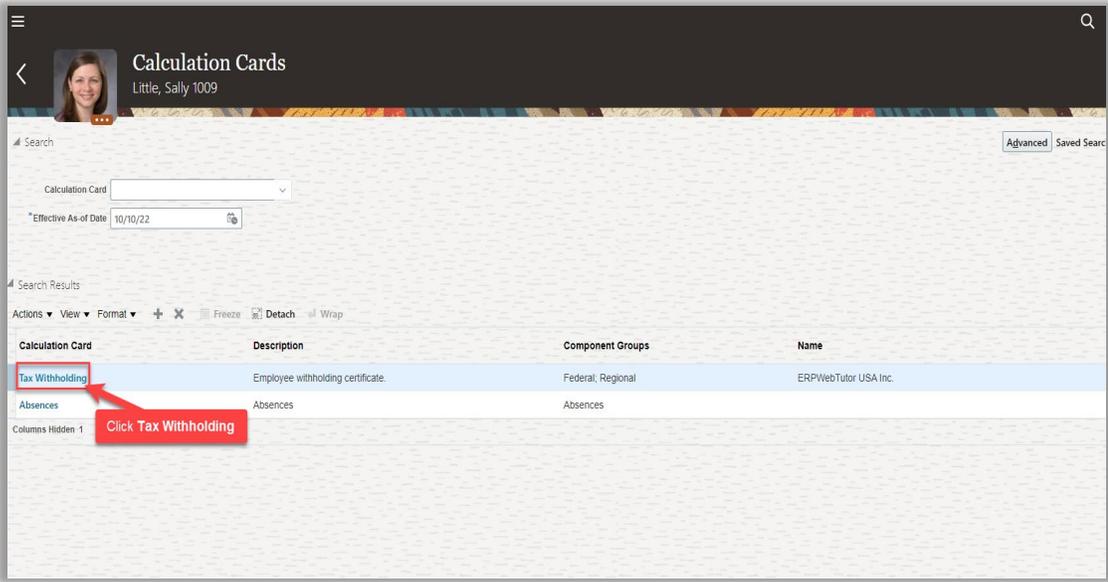
Click **Calculation Cards** under **Person Information**. If preferred, we can also search the words **Calculation Cards** in the Search box at the top



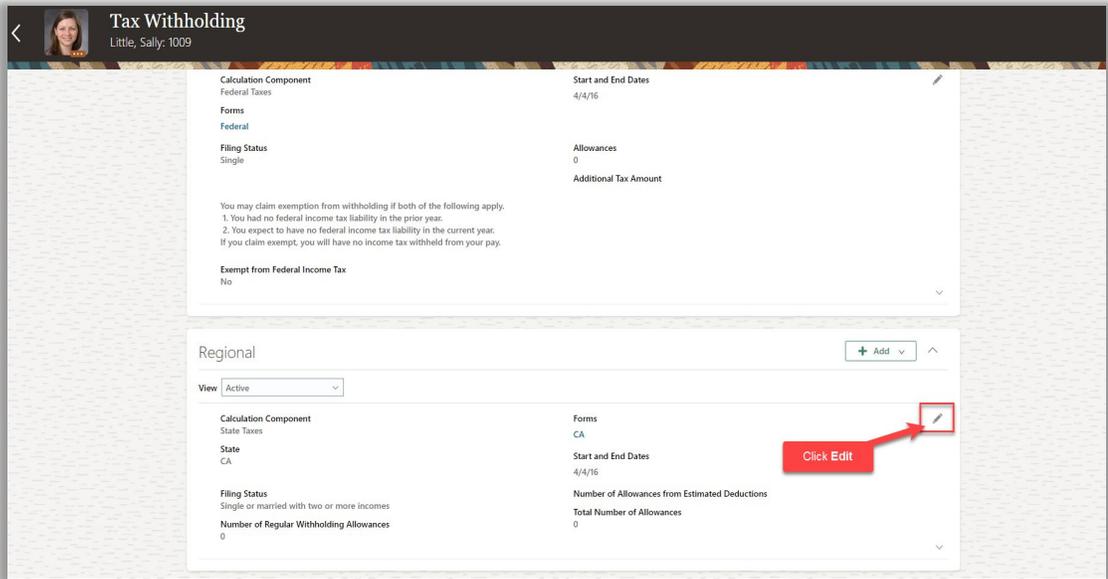
Enter the employees name in **Search for a Person** box and once the employees name is shown, click the employees' name



Click **Tax Withholding**



Click **Edit** (pencil icon) to update the State Tax information



Enter the **When Does This Change Start** and update the applicable information

State Taxes: CA

Update the below information

Basic information

Calculation Component
State Taxes

Component Sequence
1

*When does this change start?
10/10/22

State
CA

Forms
CA

Active for default view
Select a value

State Tax Information

Filing Status
Single or married with two or more incomes

Number of Regular Withholding Allowances
0

Number of Allowances from Estimated Deductions
0

Total Number of Allowances
0

Additional Tax Amount
USD

Exempt from State Income Tax
Select a value

Exemption for Military Spouse
Select a value

Lock in Date
m/d/yy

State Tax Additional Information

Nonresident
Select a value

Voluntary Income Tax Withholding
Select a value

Resident Wage Accumulation
Select a value

Exemption Amount
USD

Delete Save and Close

Click Save and Close

State Taxes: CA

Click Save and Close

Basic information

Calculation Component
State Taxes

Component Sequence
1

*When does this change start?
10/10/22

State
CA

Forms
CA

Active for default view
Select a value

State Tax Information

Filing Status
Single or married with two or more incomes

Number of Regular Withholding Allowances
0

Number of Allowances from Estimated Deductions
0

Total Number of Allowances
0

Additional Tax Amount
USD

Exempt from State Income Tax
Select a value

Exemption for Military Spouse
Select a value

Lock in Date
m/d/yy

State Tax Additional Information

Nonresident
Select a value

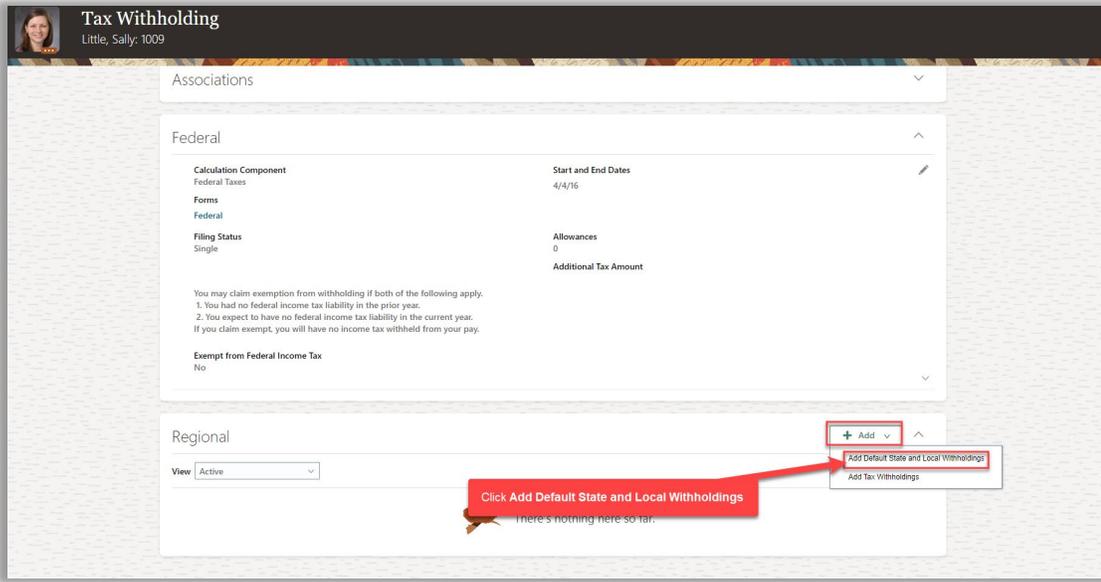
Voluntary Income Tax Withholding
Select a value

Resident Wage Accumulation
Select a value

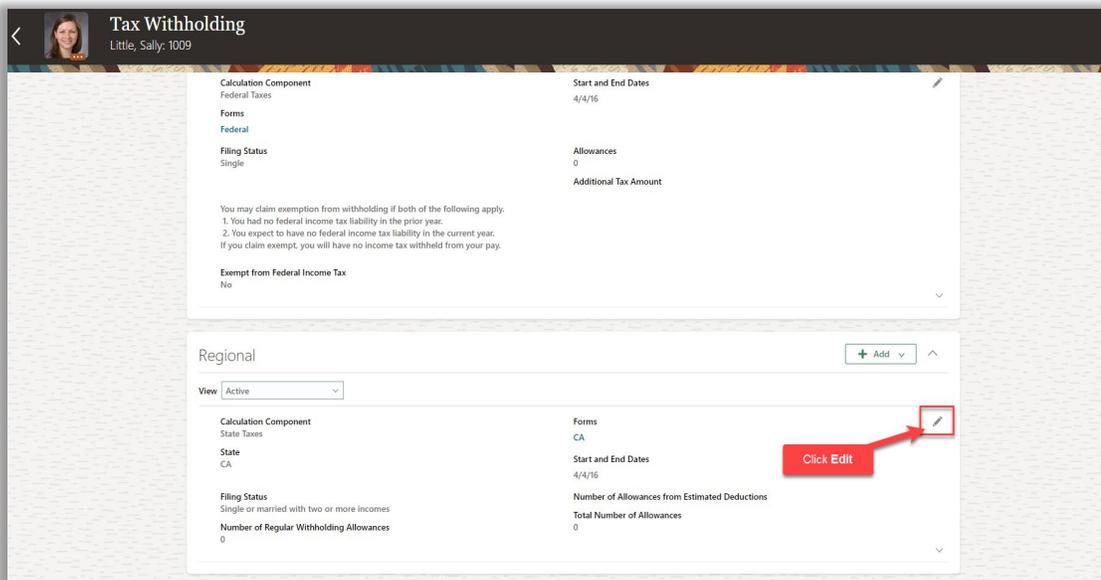
Exemption Amount
USD

Delete Save and Close

To add a new State Tax withholding, click **Add** then **Add Default State and Local Withholdings**



Next, to enter Filing Status or Allowances, click **Edit**



Enter the **When Does This Change Start** date and update the applicable information

State Taxes: CA

Update the below information

Basic information

Calculation Component
State Taxes

Component Sequence
1

*When does this change start?
10/10/22

State
CA

Forms
CA

Active for default view
Select a value

State Tax Information

Filing Status
Single or married with two or more incomes

Number of Regular Withholding Allowances
0

Number of Allowances from Estimated Deductions
0

Total Number of Allowances
0

Additional Tax Amount
USD

Exempt from State Income Tax
Select a value

Exemption for Military Spouse
Select a value

Lock in Date
m/d/yy

State Tax Additional Information

Nonresident
Select a value

Voluntary Income Tax Withholding
Select a value

Resident Wage Accumulation
Select a value

Exemption Amount
USD

Enter When does this change start?

Click Save and Close

State Taxes: CA

Delete Save and Close

Click Save and Close

Basic information

Calculation Component
State Taxes

Component Sequence
1

*When does this change start?
10/10/22

State
CA

Forms
CA

Active for default view
Select a value

State Tax Information

Filing Status
Single or married with two or more incomes

Number of Regular Withholding Allowances
0

Number of Allowances from Estimated Deductions
0

Total Number of Allowances
0

Additional Tax Amount
USD

Exempt from State Income Tax
Select a value

Exemption for Military Spouse
Select a value

Lock in Date
m/d/yy

State Tax Additional Information

Nonresident
Select a value

Voluntary Income Tax Withholding
Select a value

Resident Wage Accumulation
Select a value

Exemption Amount
USD

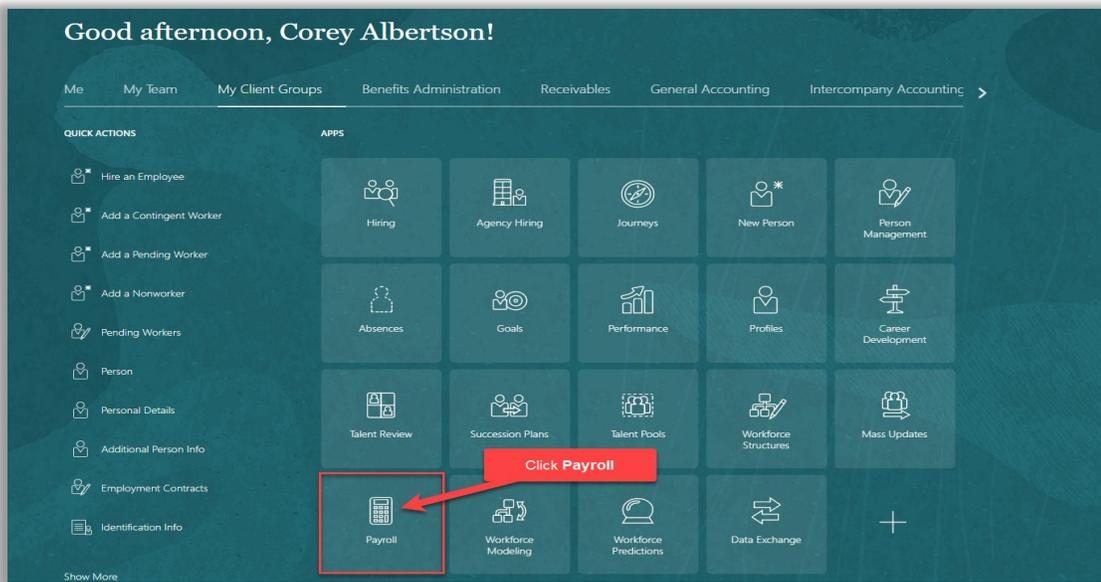
Update Local W4 Information

Navigation: Home>My Client Groups>Payroll>Calculation Cards>Search Employee>Tax Withholding>Add>Save and Close

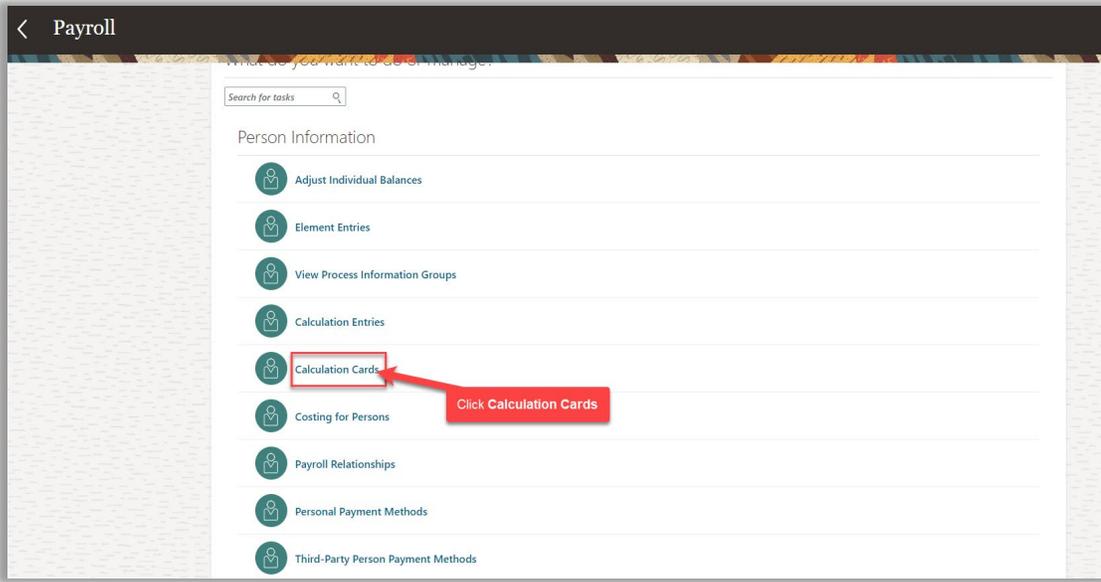
From the home screen, click **My Client Groups**



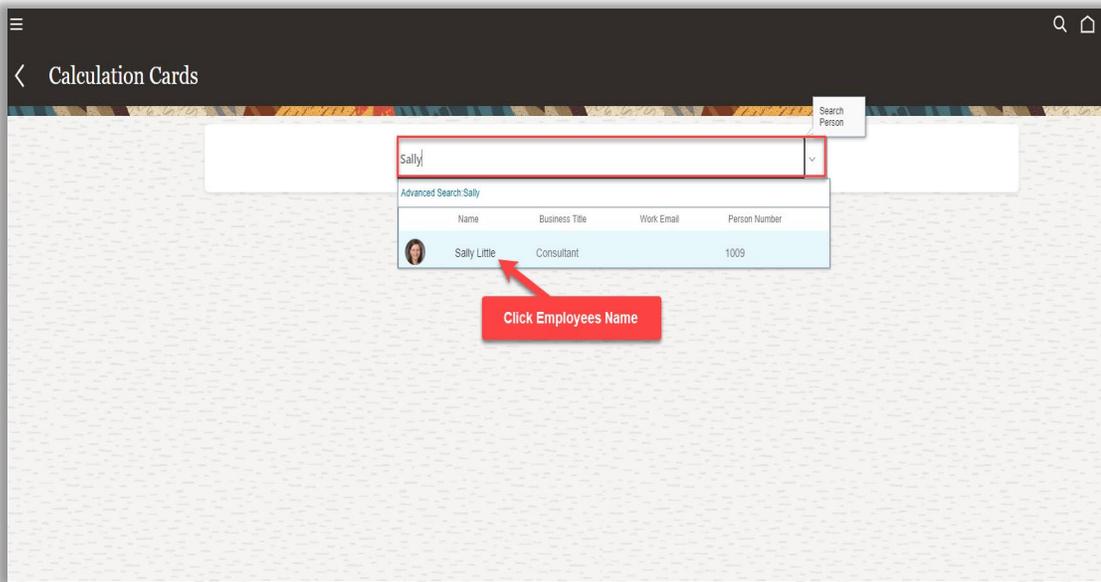
Next, click **Payroll**



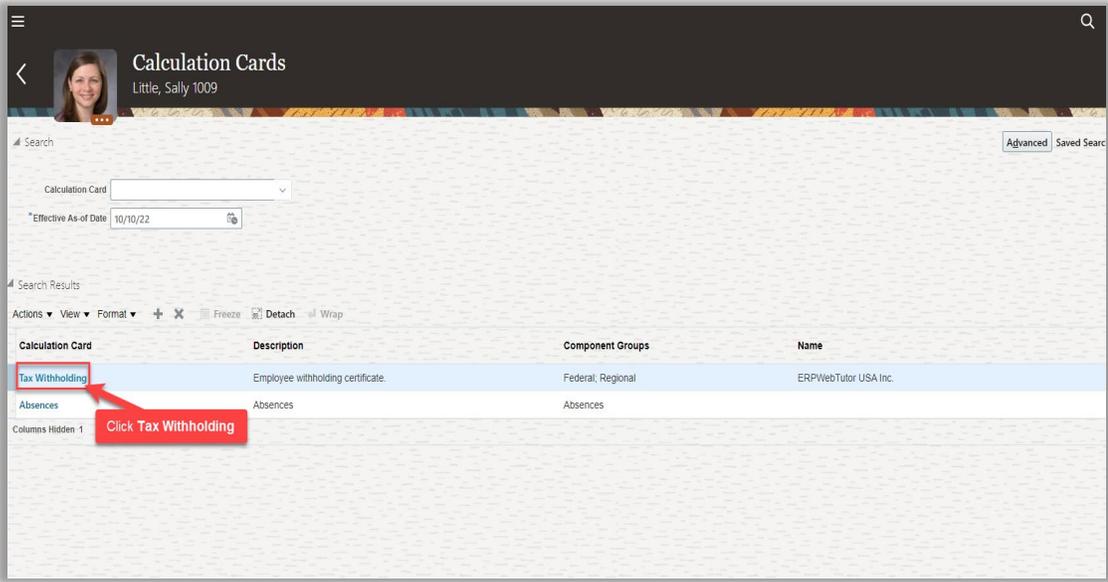
Click **Calculation Cards** under **Person Information**. If preferred, we can also search the words **Calculation Cards** in the Search box at the top



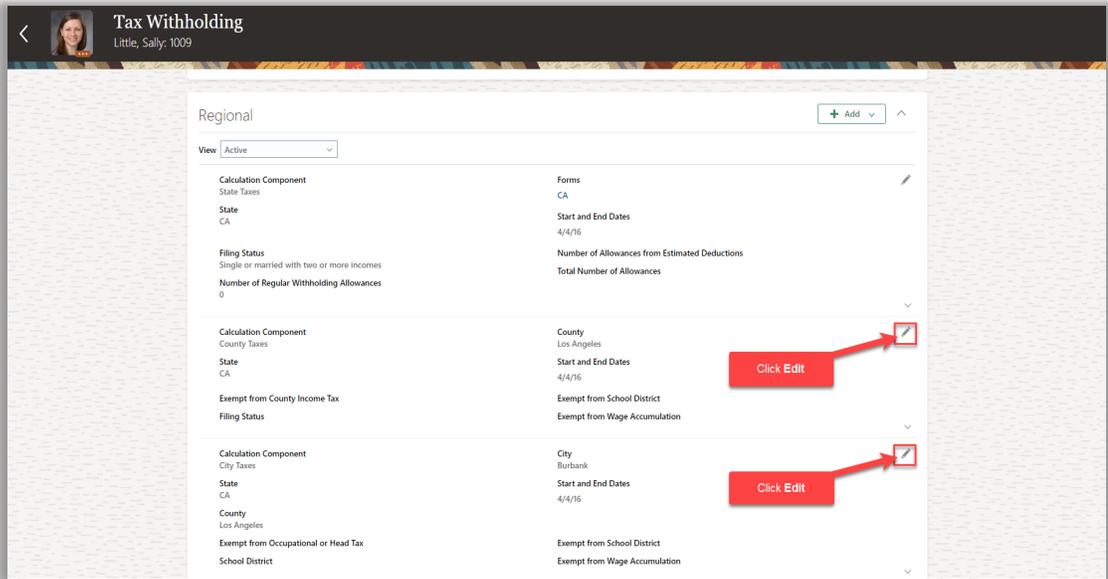
Enter the employees name in **Search for a Person** box and once the employees name is shown, click the employees' name



Click **Tax Withholding**



Click **Edit** (pencil icon) to update the County or City Tax information



Enter the **When Does This Change Start** and update the applicable information

County Taxes: CA > Los Angeles

Update the applicable information below

Calculation Component: County Taxes
 Component Sequence: 1
 *When does this change start?: 10/18/22

State: CA
 County: Los Angeles

Enter When does this change start?

County Tax Information

Exempt from County Income Tax: Select a value
 Exempt from Wage Accumulation: Select a value
 Filing Status: Married
 School District: Select a value
 Exempt from School District: Select a value
 Resident Wage Accumulation: Select a value

Click Save and Close

County Taxes: CA > Los Angeles

Click Save and Close

Calculation Component: County Taxes
 Component Sequence: 1
 *When does this change start?: 10/18/22

State: CA
 County: Los Angeles

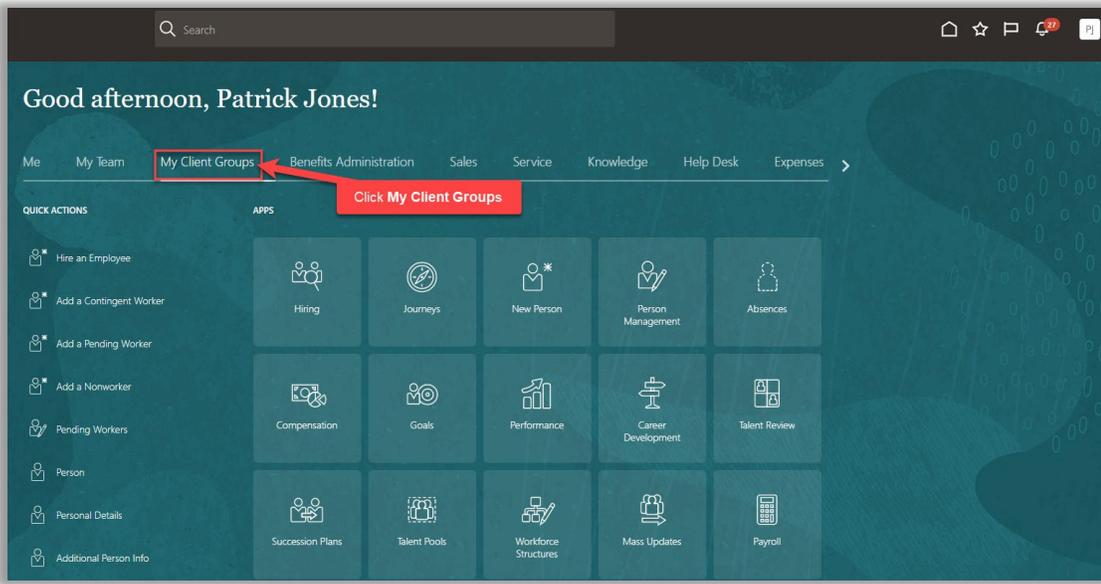
County Tax Information

Exempt from County Income Tax: Select a value
 Exempt from Wage Accumulation: Select a value
 Filing Status: Married
 School District: Select a value
 Exempt from School District: Select a value
 Resident Wage Accumulation: Select a value

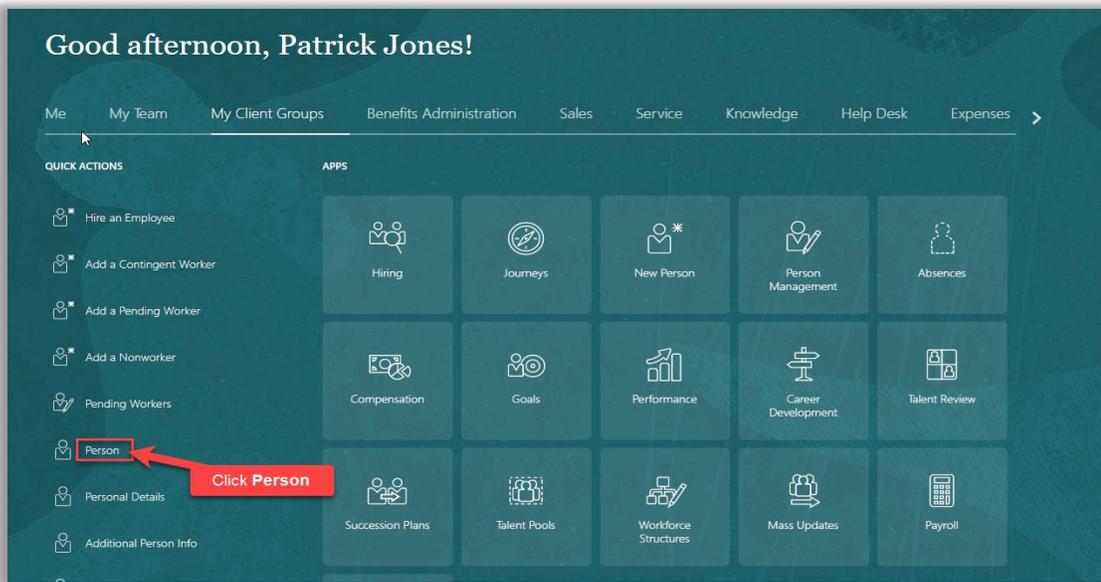
Update Employee's Home Address

Navigation: Home>My Client Groups>Person from Quick Actions>Search Employee>Person Information>Edit>Update>Submit

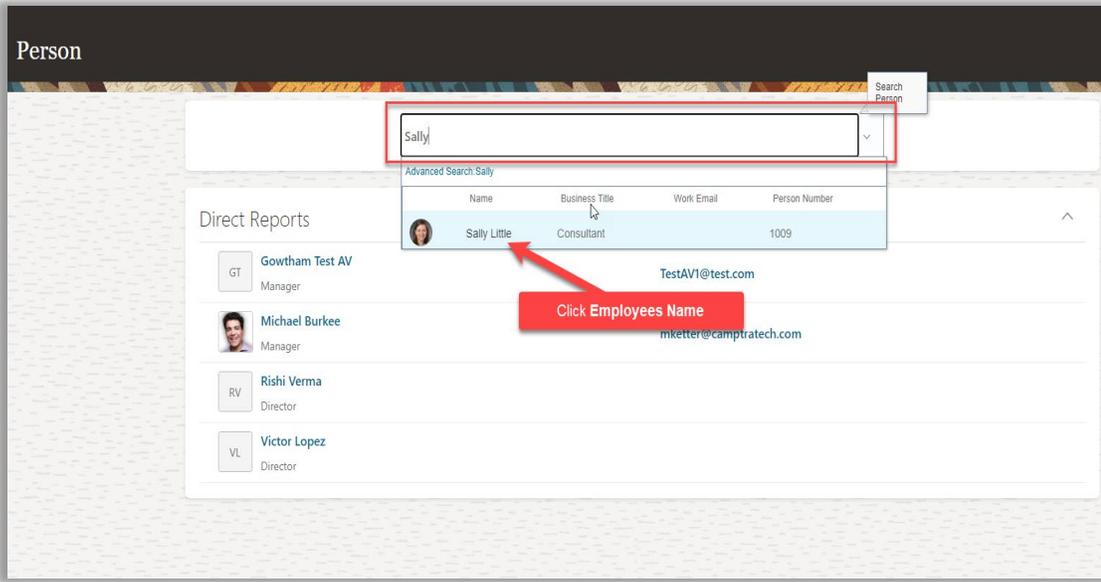
From the home screen, click **My Client Groups**



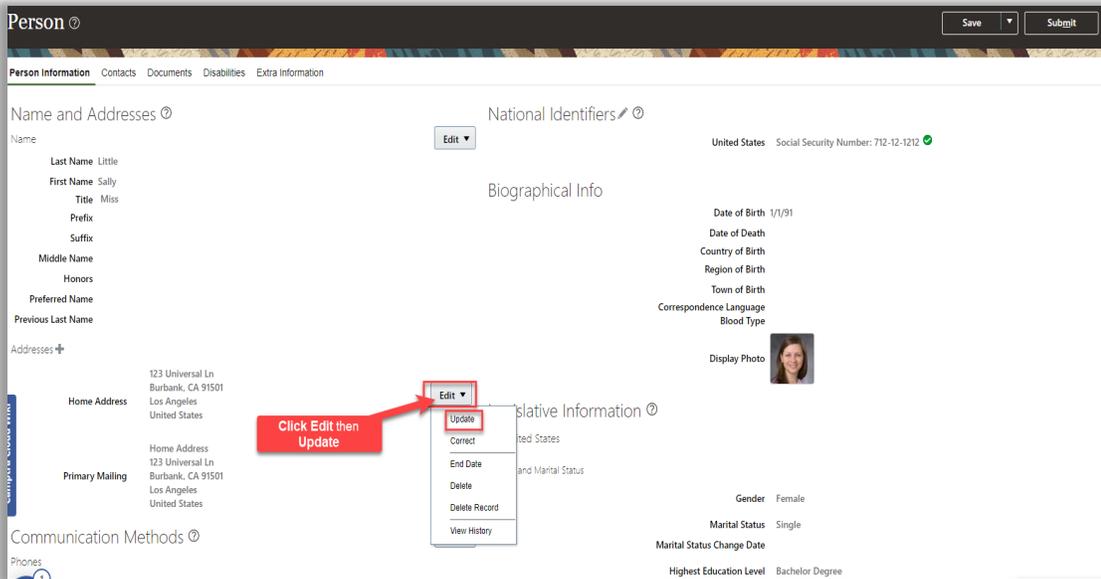
Select **Person** from the Quick Actions



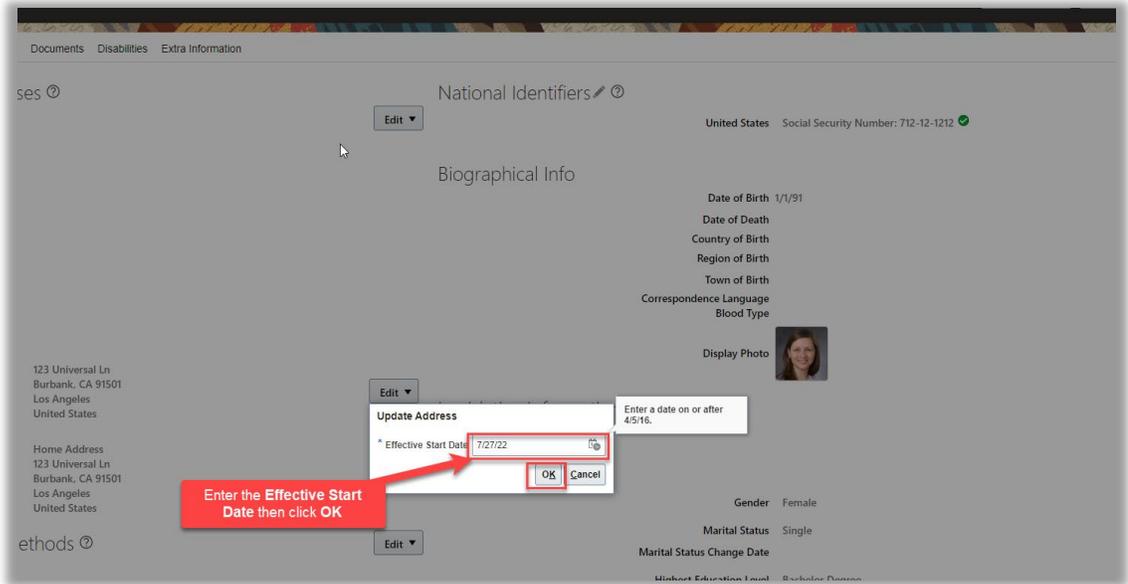
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



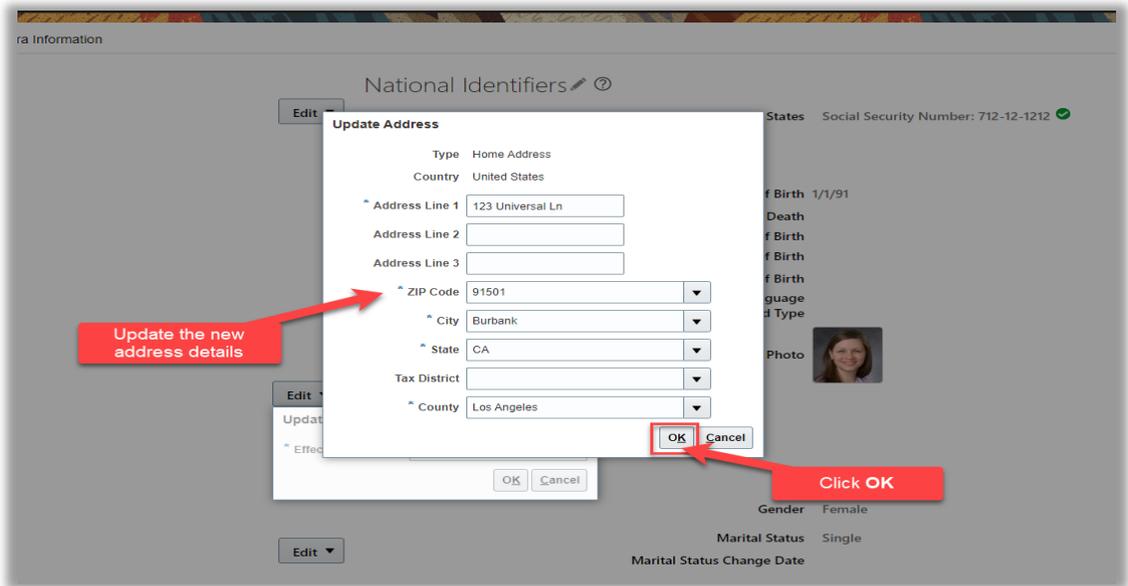
Next, click **Edit** across from the address then, click **Update**



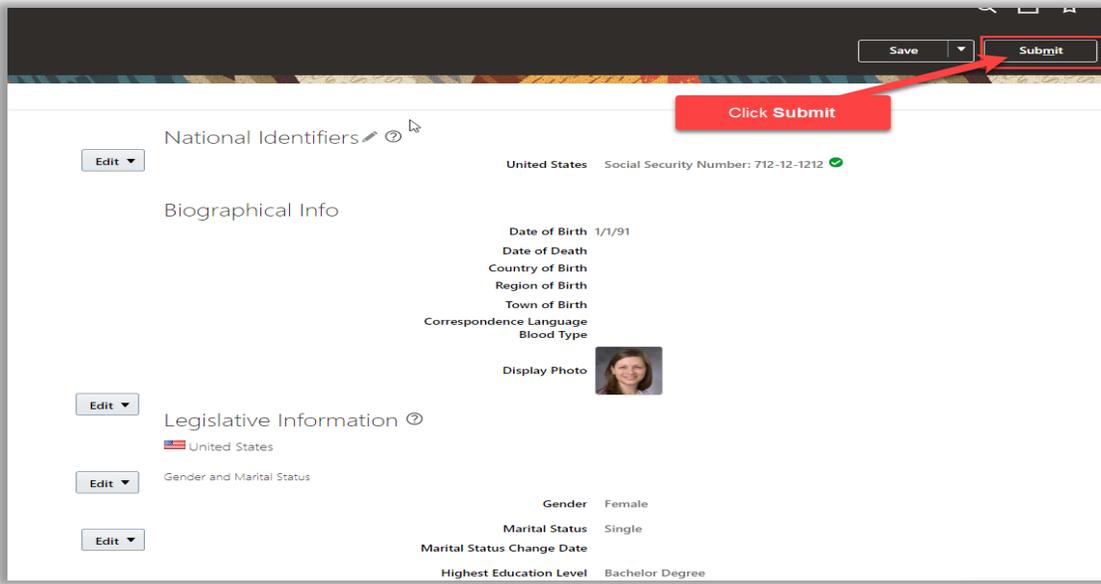
Enter the **Effective Start Date** of the address change then click **OK**



Update the applicable address details starting with the **Zip Code**. Once the zip code is entered, the City, State, and County will populate. Next, Click **OK**



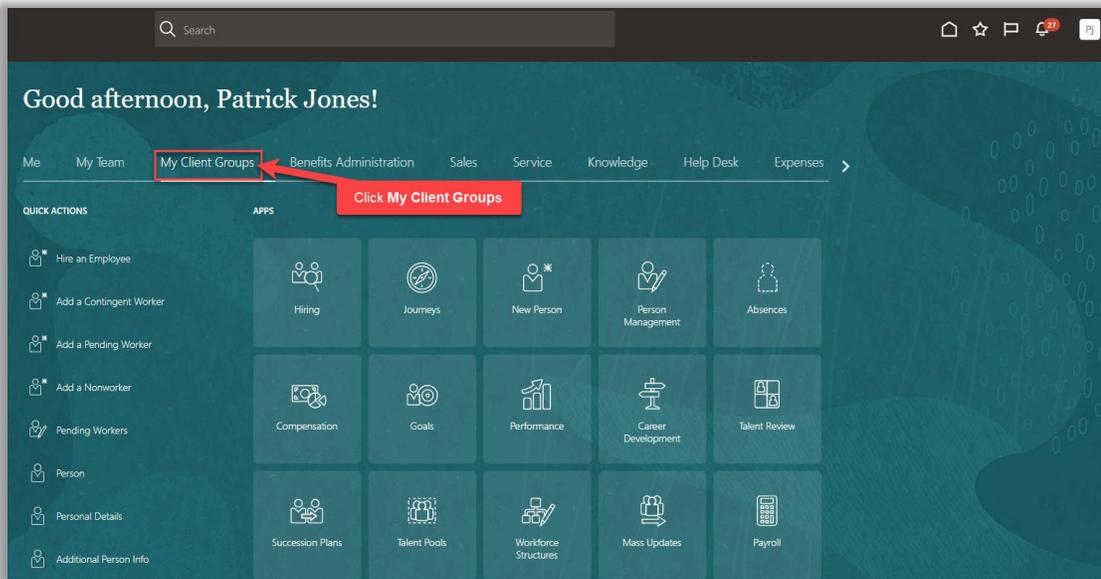
Click **Submit** to submit the address updates. The address will be updated as of the Effective Start Date entered



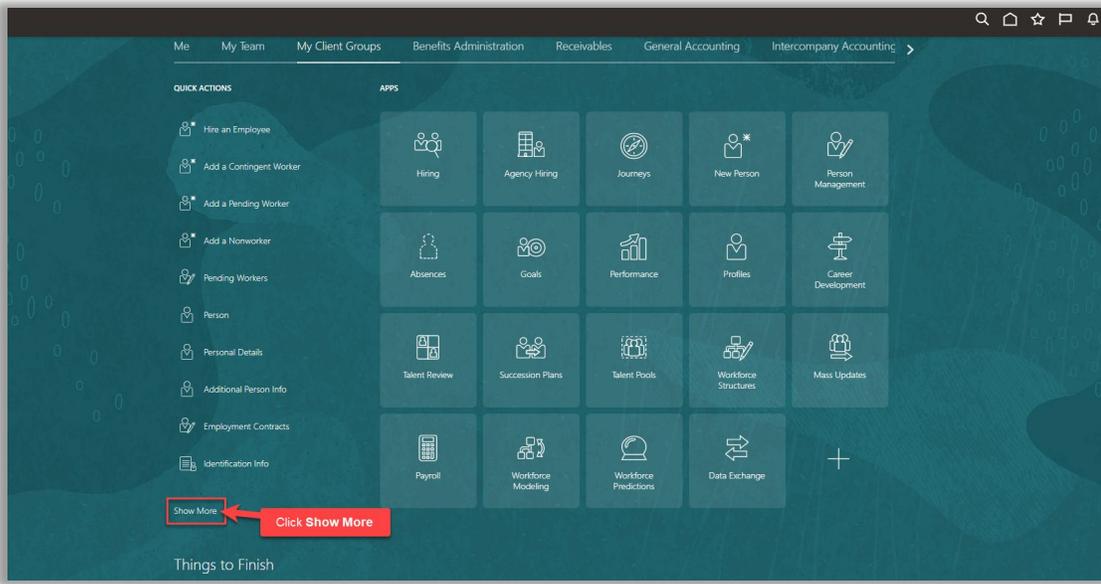
Update An Employees Work Location

Navigation: Home>My Client Groups>Show More>Change Location>Search Employee>Update>Submit

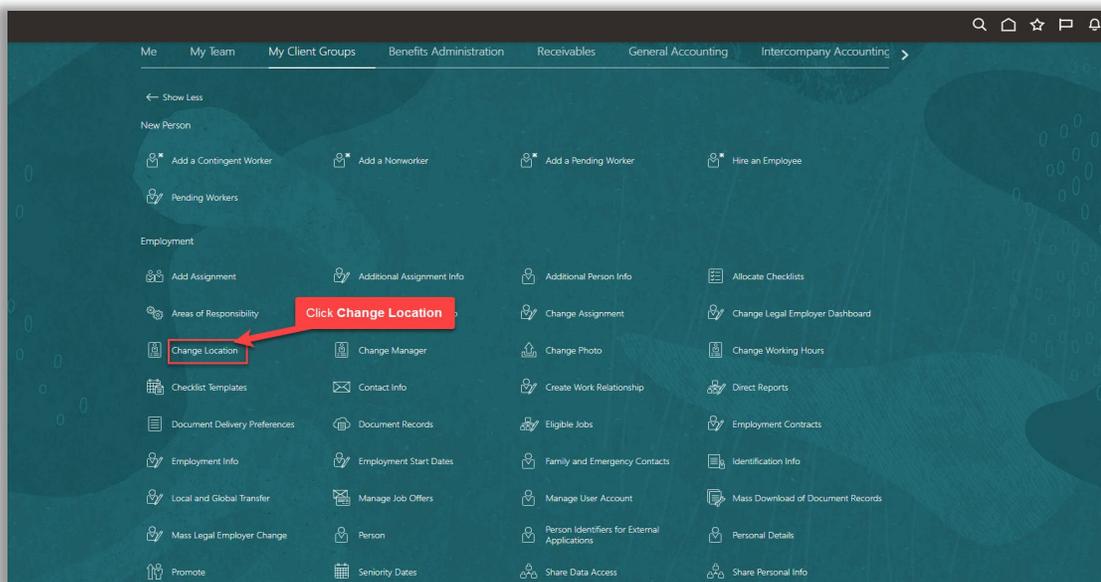
From the home screen, click **My Client Groups**



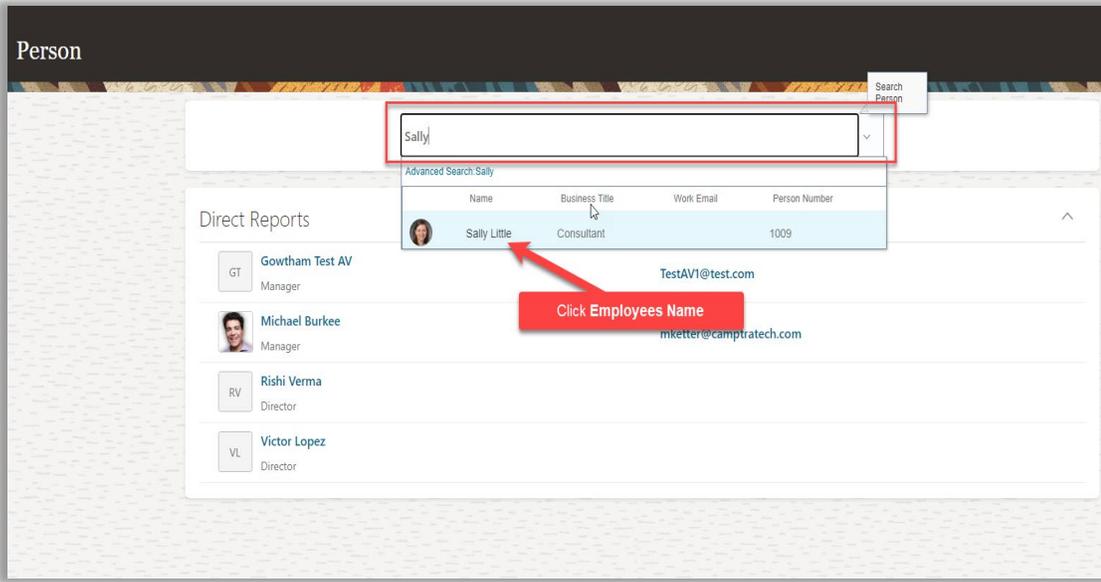
Click **Show More**



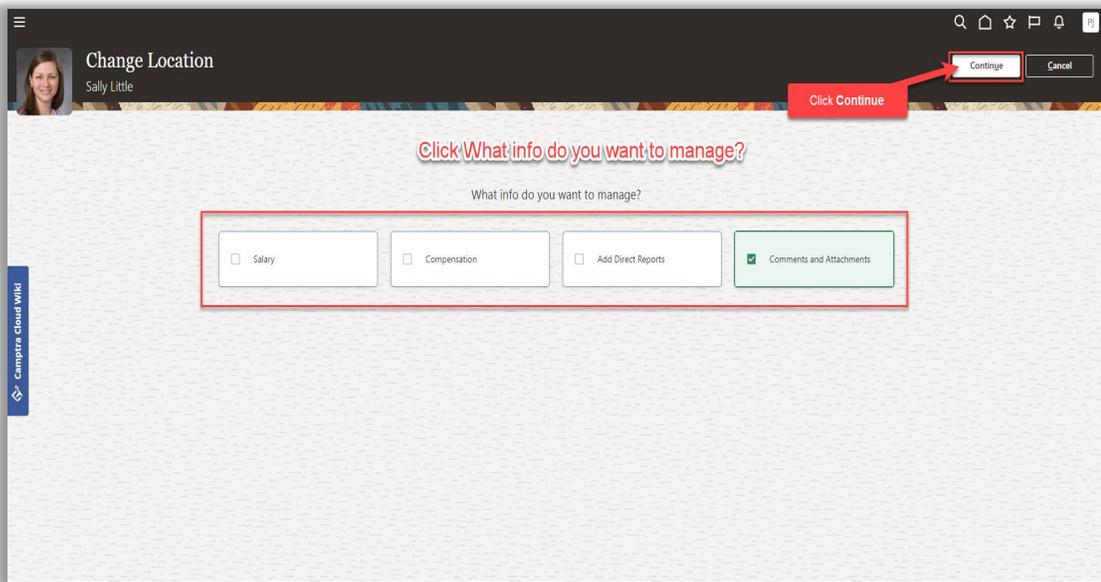
Under **Employment**, click **Change Location**



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Next, click **What info do you want to manage?** Click **Continue**



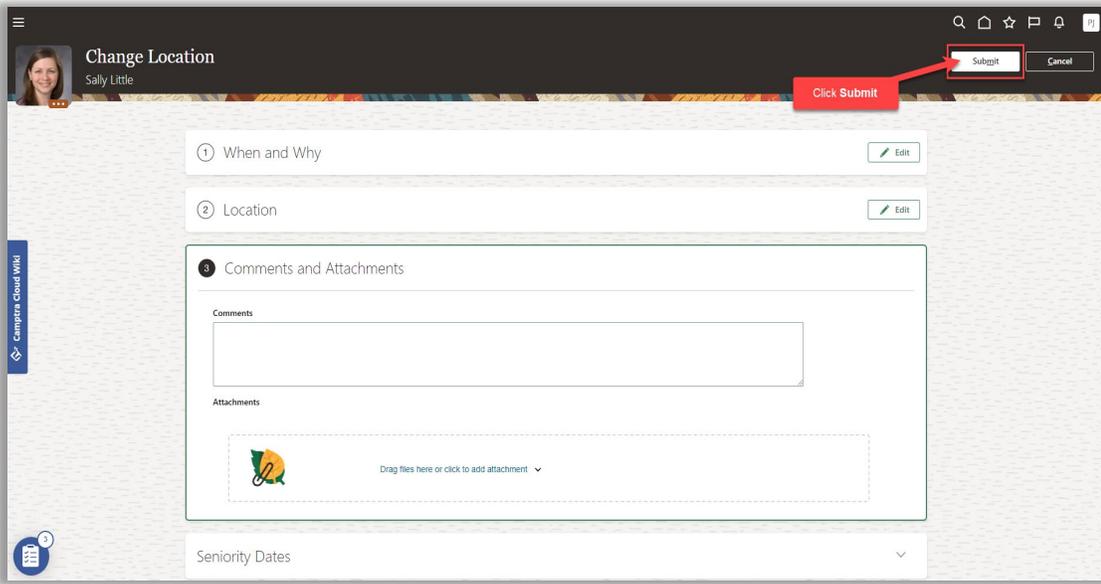
Enter the **When** and **Why** details and click **Continue**

The screenshot shows the 'Change Location' form for user Sally Little. The form is titled '1 When and Why' with a red instruction 'Enter the information below'. It contains two rows of fields. The first row has a date field for 'When does the location change start?' with the value '10/18/22' and a dropdown for 'Why are you changing the location?' with the value 'Relocation'. The second row has a dropdown for 'What's the way to change the location?' with the value 'Location Change'. A green 'Continue' button is at the bottom right of the form. A red callout box with the text 'Click Continue' and an arrow points to the 'Continue' button. The form is part of a multi-step process, with steps 2 'Location', 3 'Comments and Attachments', and 'Seniority Dates' visible below.

Enter the **Locations** details and click **Continue**

The screenshot shows the 'Change Location' form for user Sally Little, now at Step 2 'Location'. Step 1 'When and Why' is now collapsed and has an 'Edit' button. The 'Location' field is expanded and contains a dropdown menu with the value 'Virginia Sales Branch'. A green 'Continue' button is at the bottom right of the form. A red callout box with the text 'Click Continue' and an arrow points to the 'Continue' button. The form is part of a multi-step process, with steps 1 'When and Why', 3 'Comments and Attachments', and 'Seniority Dates' visible below.

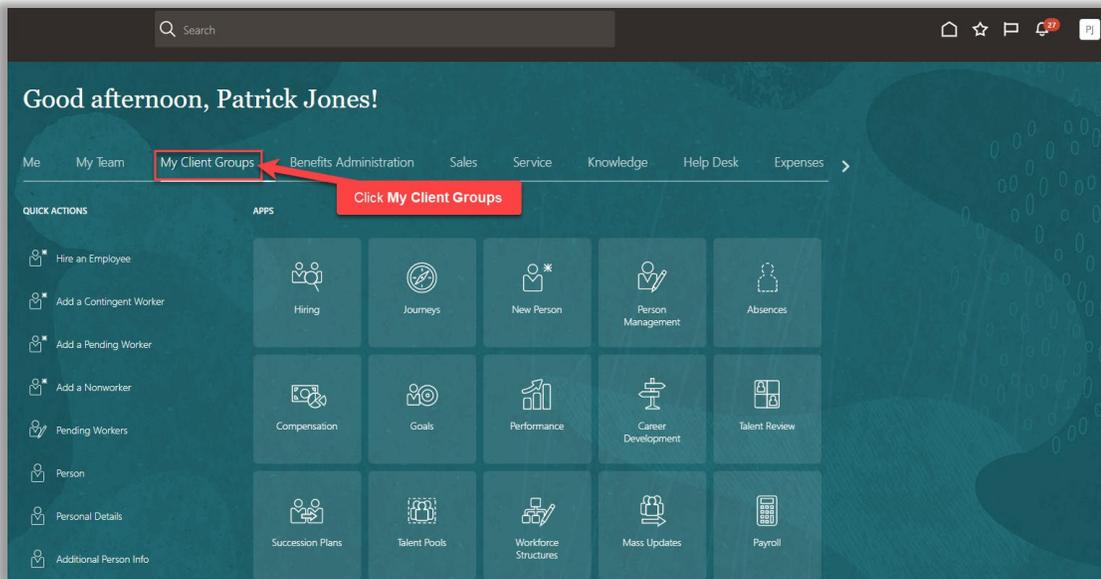
Enter the remaining details, if applicable and click **Submit**



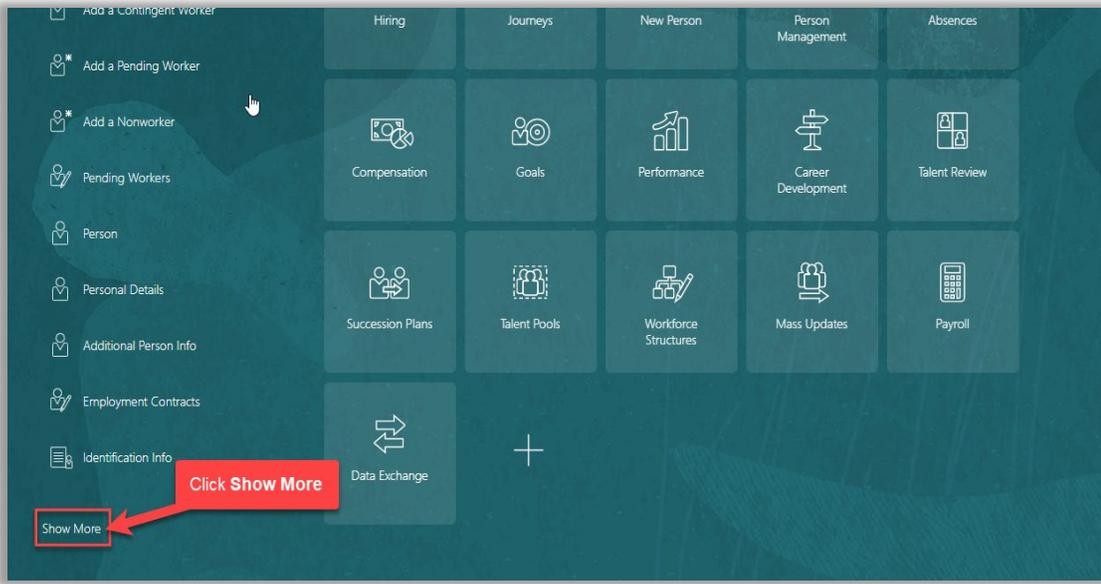
Update Employee's Salary

Navigation: Home>My Client Groups>Show More from Quick Actions>Change Salary>Search Employee>Update>Submit

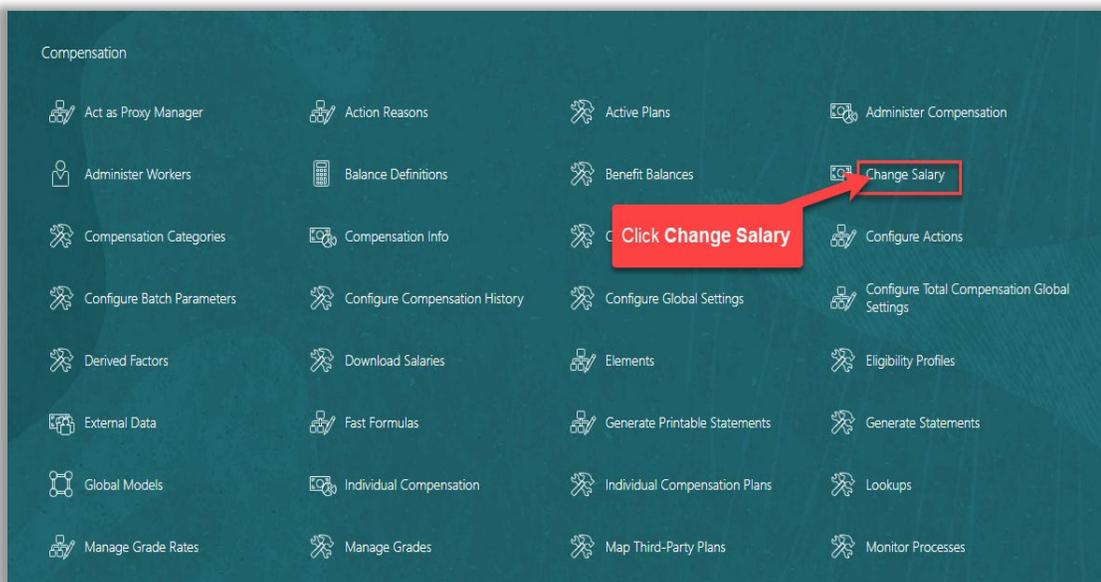
From the home screen, click **My Client Groups**



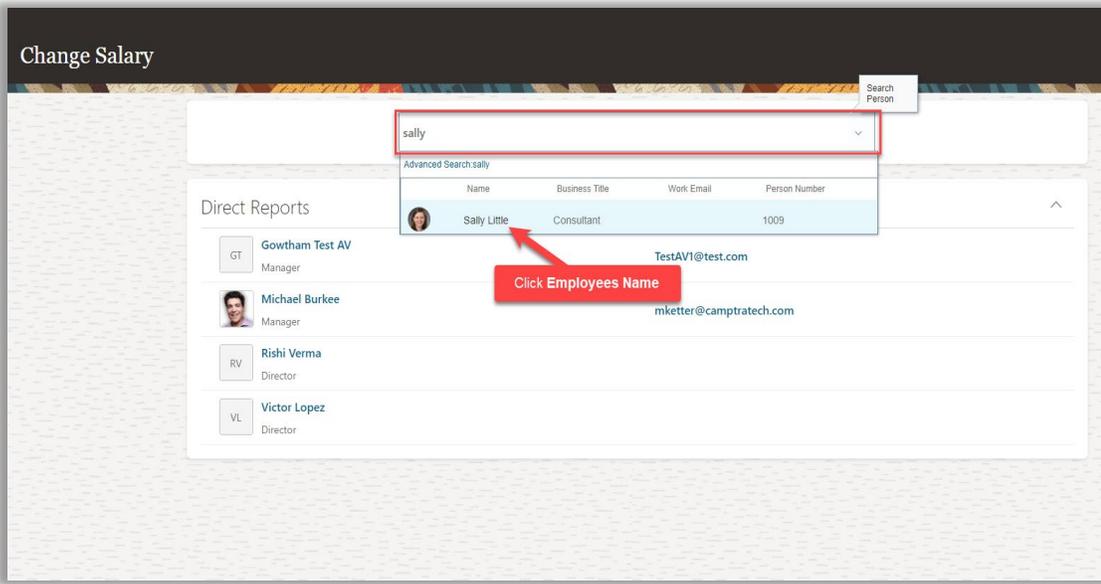
Scroll down and Click **Show More** from the quick actions



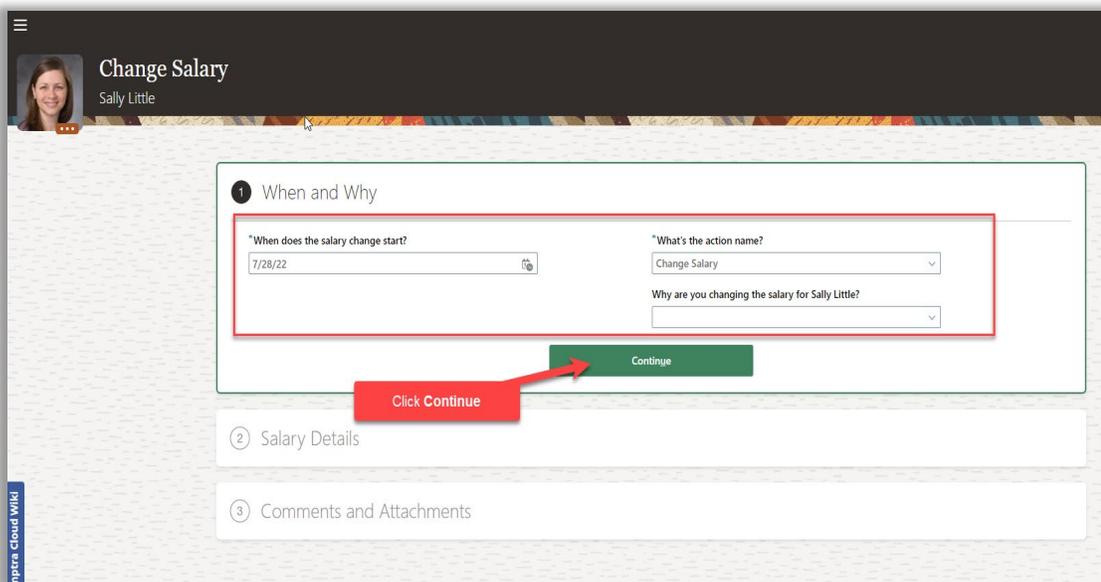
Under Compensation, click **Change Salary**



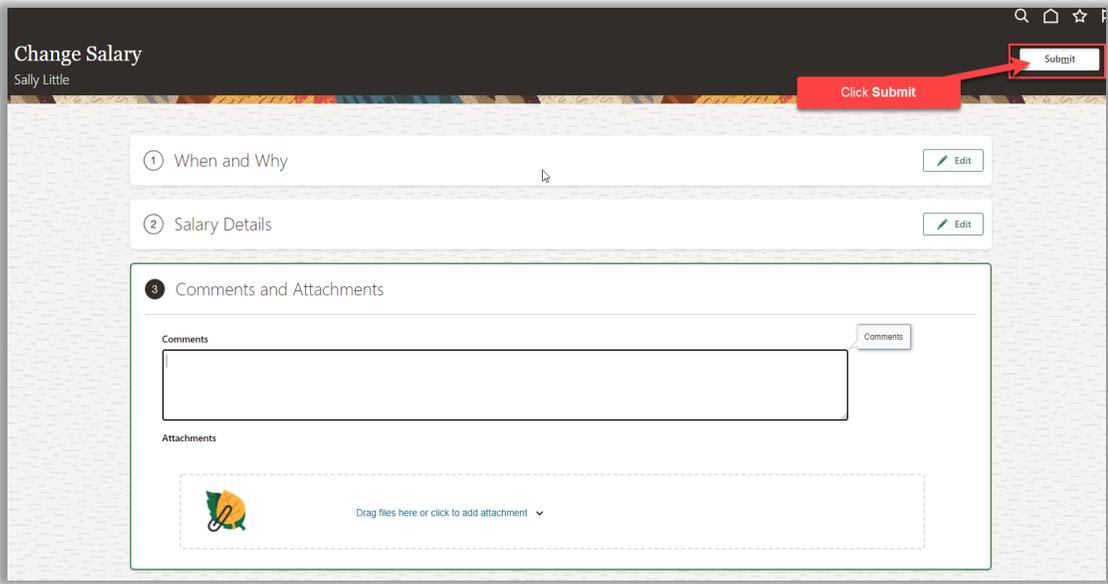
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Enter the information in the **When and Why** section then, click **Continue**



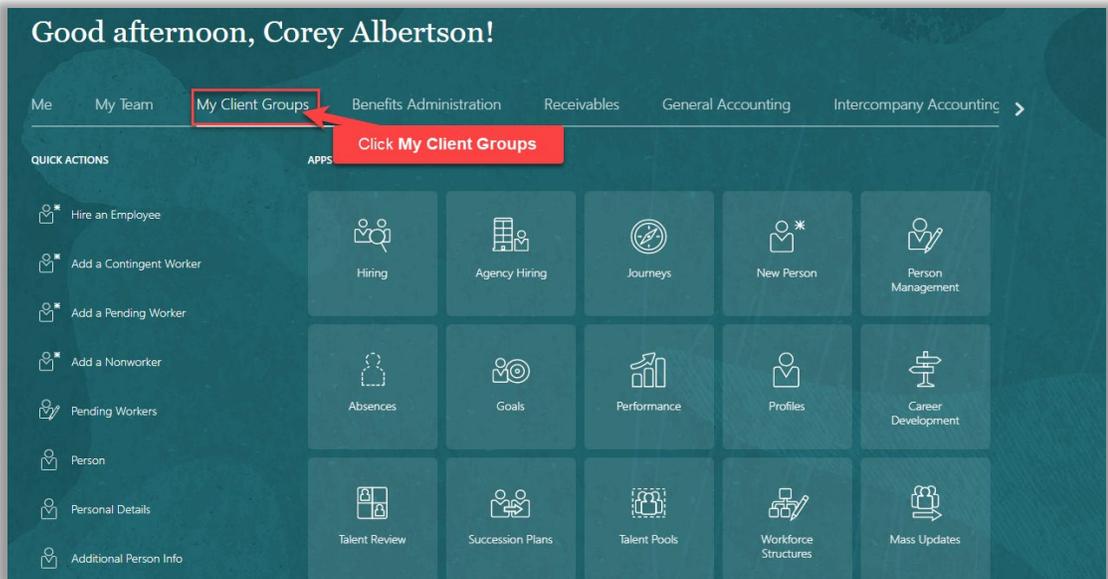
Follow this same process and complete the information in each section. The information needed in each section will depend on your configurations. Once you have added the information in the sections below, click **Submit**. The salary change for this employee has been submitted.



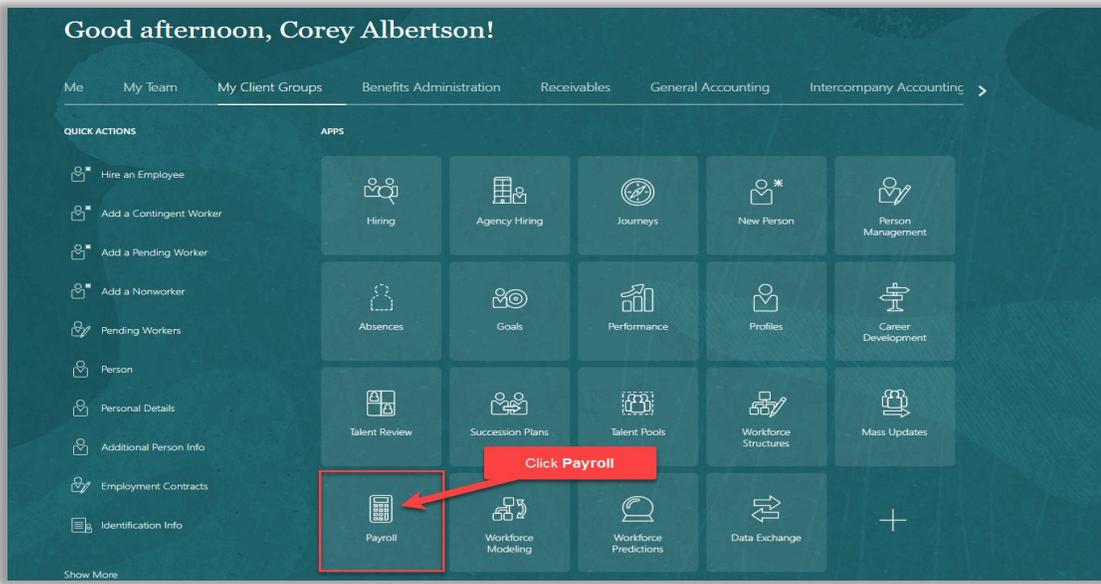
Update Employee's Payroll Relationship

Navigation: Home>My Client Groups>Payroll>Payroll Relationships>Search Employee>Edit>Save

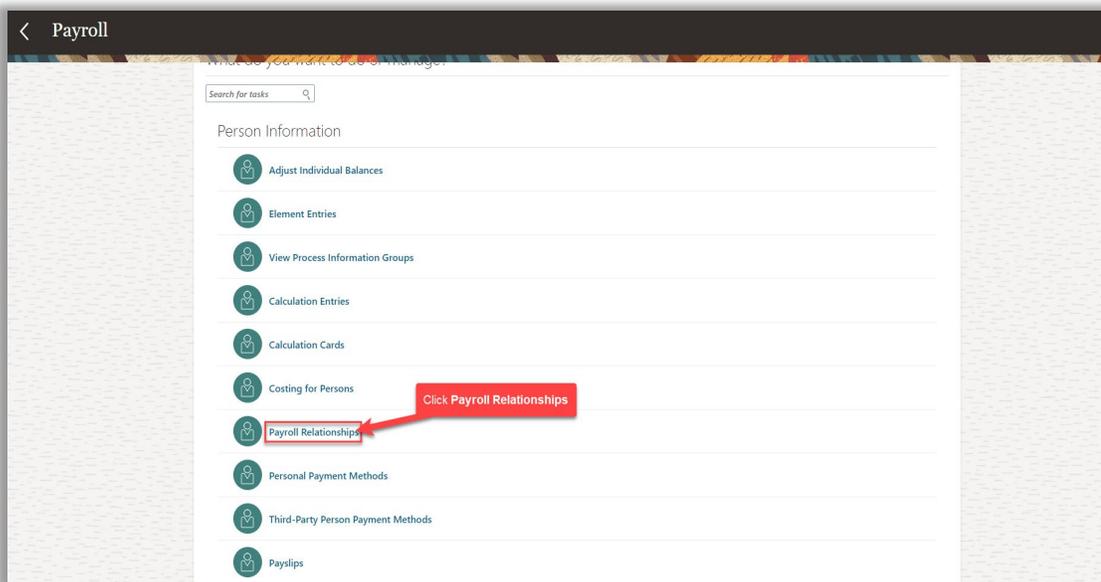
From the home screen, click **My Client Groups**



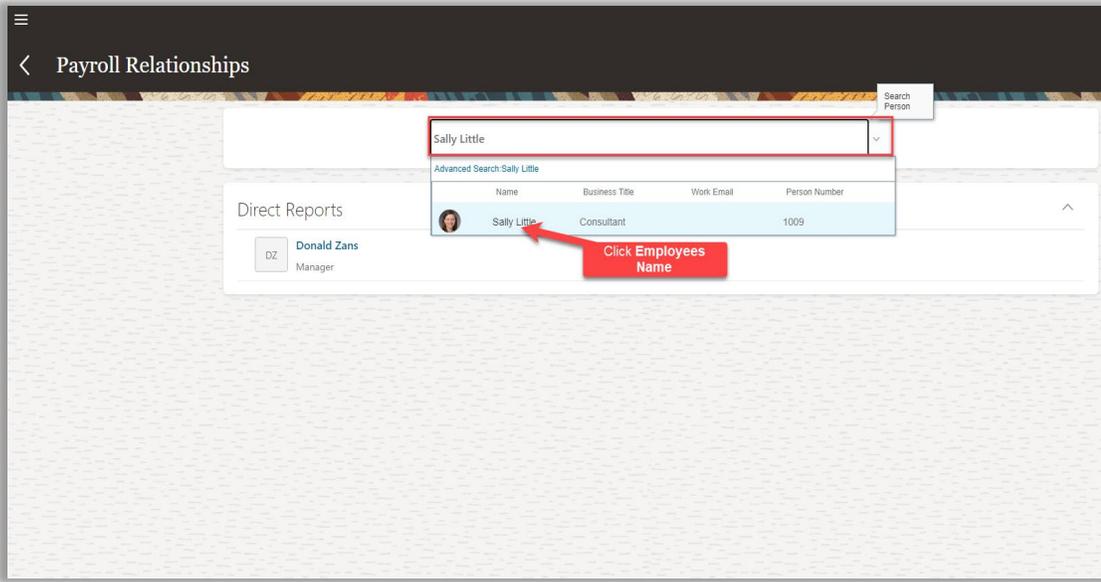
Next, click **Payroll**



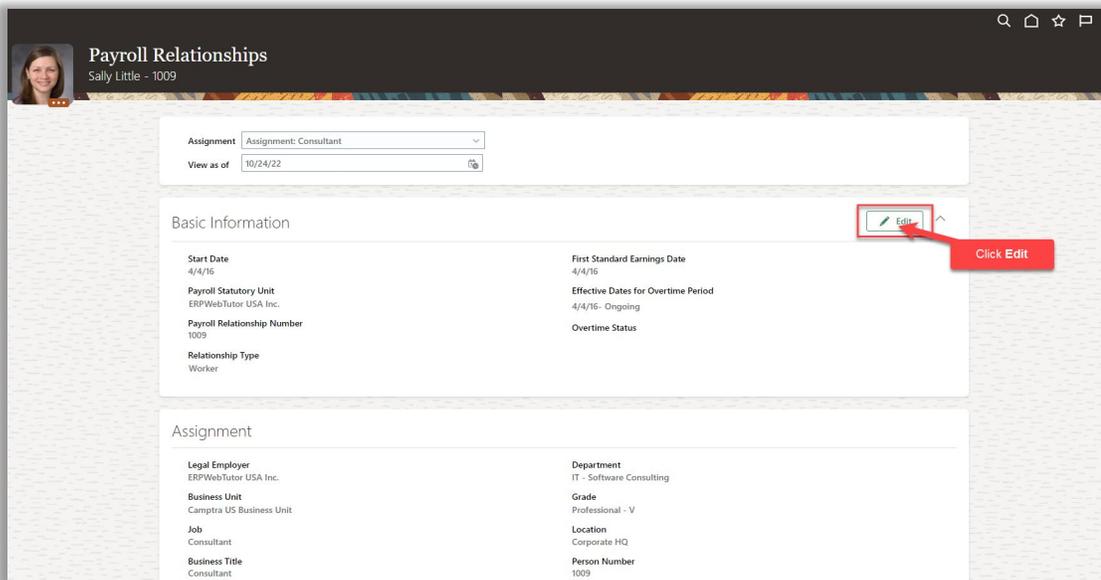
Click **Payroll Relationships** under **Person Information**. If preferred, we can also search the words **Payroll Relationships** in the Search box at the top



Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under **Basic Information**, click **Edit**



We can update the payroll relationship start date by entering the **When does this change start?** Date and click **Save**

Payroll Relationships
Sally Little - 1009

Assignment: Consultant
View as of: 10/24/22

Basic Information

Start Date: 4/4/16
Payroll Statutory Unit: ERPWebTutor USA Inc.
Payroll Relationship Number: 1009
Relationship Type: Worker

First Standard Earnings Date: 4/4/16
*When does this change start?: 10/24/22
Enter 10/24/22 if you are correcting a mistake.
Overtime Status: [Dropdown]

Assignment

Legal Employer: ERPWebTutor USA Inc.	Department: IT - Software Consulting
Business Unit: Camptra US Business Unit	Grade: Professional - V
Job: Consultant	Location: Corporate HQ
Business Title:	Person Number:

Next, we can add a **Payroll Association**. Across from **Payroll Association**, click **Add**

Payroll Relationships
Sally Little - 1009

Relationship Type: Worker

Assignment

Legal Employer: ERPWebTutor USA Inc.	Department: Corporate Office
Business Unit: Camptra US Business Unit	Grade:
Job: Consultant	Location: Corporate HQ
Business Title: Consultant-2	Person Number: 1009

Payroll Association
No data to display.

Payroll Assignment Details
First Standard Earnings Date: 9/1/22
Last Standard Earnings Date: 9/19/22
Overtime Period:
Time Card Required:

Next, enter the below information and click **Save**

Payroll Relationships
Sally Little - 1009

Assignment

Legal Employer ERPWebTutor USA Inc.	Department Corporate Office
Business Unit Camptra US Business Unit	Grade
Job Consultant	Location Corporate HQ
Business Title Consultant-2	Person Number 1009

Payroll Association

Enter the information below

*Payroll Name EWT Biweekly	Overtime Period [Dropdown]	Save Cancel
*Start Date 10/24/22	Time Card Required No	Click Save

No data to display.

Payroll Assignment Details

First Standard Earnings Date 9/1/22	Overtime Period
---	------------------------

Lastly, we can update the **Time Card Required** flag. Under **Payroll Assignment Details**, click **Edit**

Payroll Relationships
Sally Little - 1009

Camptra US Business Unit

Job Consultant	Location Corporate HQ
Business Title Consultant-2	Person Number 1009

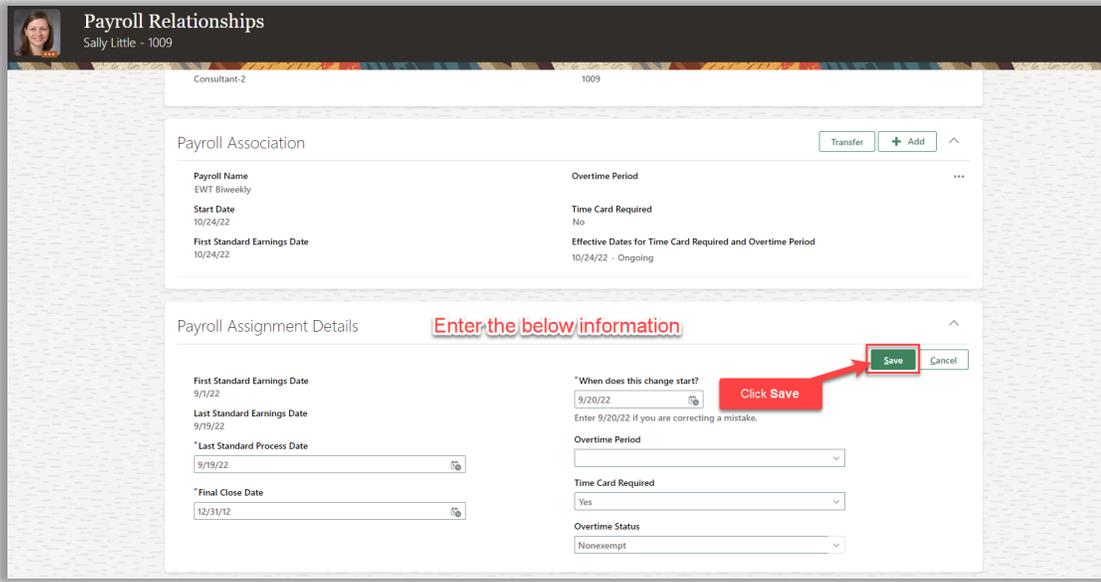
Payroll Association

Payroll Name EWT Biweekly	Overtime Period	Transfer + Add ^
Start Date 10/24/22	Time Card Required No	...
First Standard Earnings Date 10/24/22	Effective Dates for Time Card Required and Overtime Period 10/24/22 - Ongoing	

Payroll Assignment Details

First Standard Earnings Date 9/1/22	Overtime Period	Click Edit Edit ^
Last Standard Earnings Date 9/19/22	Time Card Required	
Last Standard Process Date 9/19/22	Effective Dates for Time Card Required and Overtime Period 9/20/22 - Ongoing	
Final Close Date	Overtime Status	

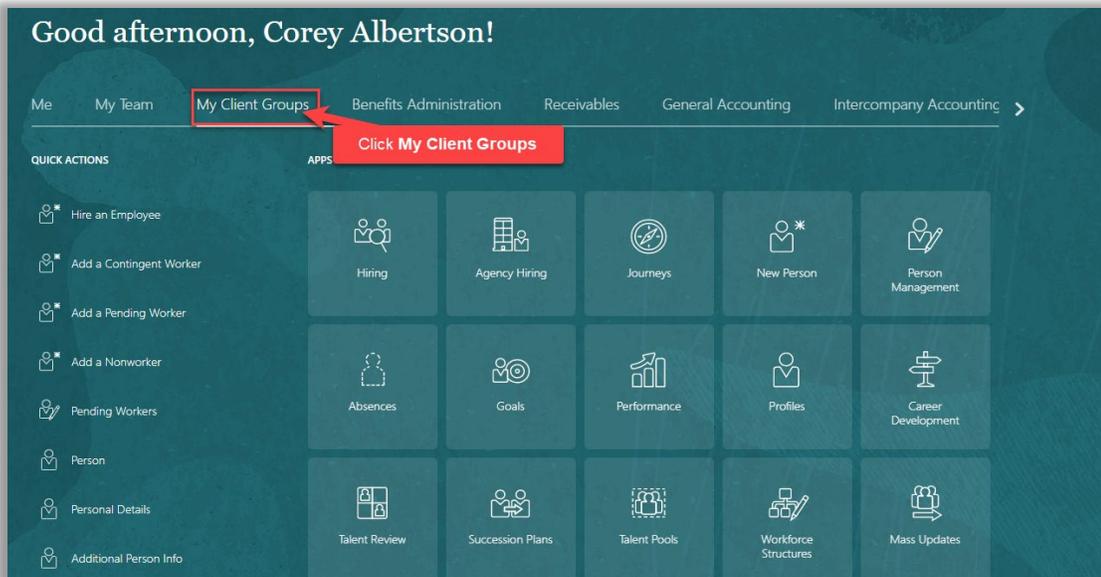
Next, enter the below information and click **Save**



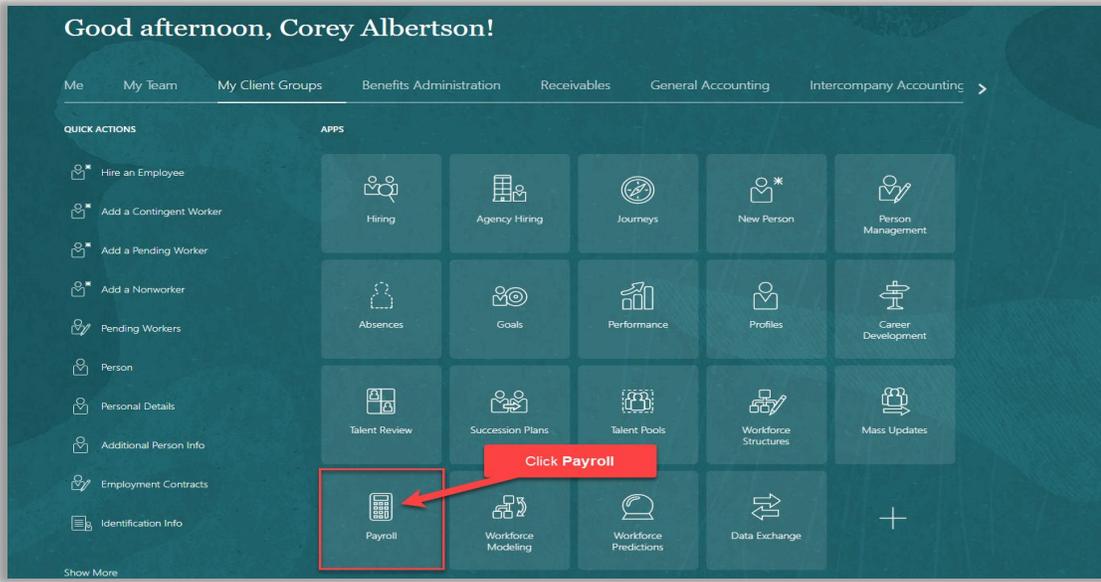
Update Employee's Timecard Required Flag

Navigation: Home>My Client Groups>Payroll>Payroll Relationships>Search Employee>Edit>Save

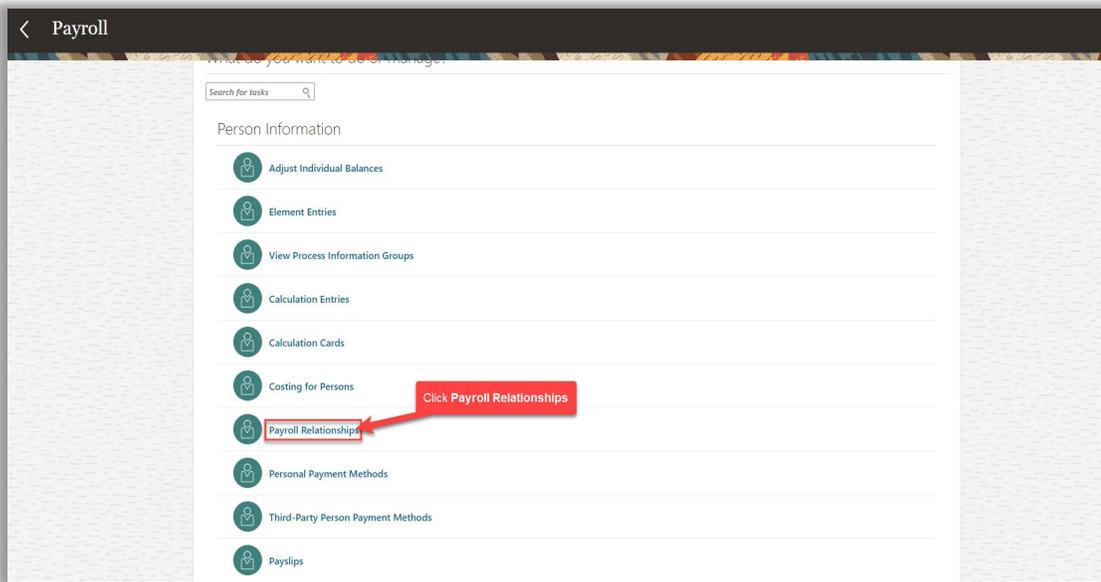
From the home screen, click **My Client Groups**



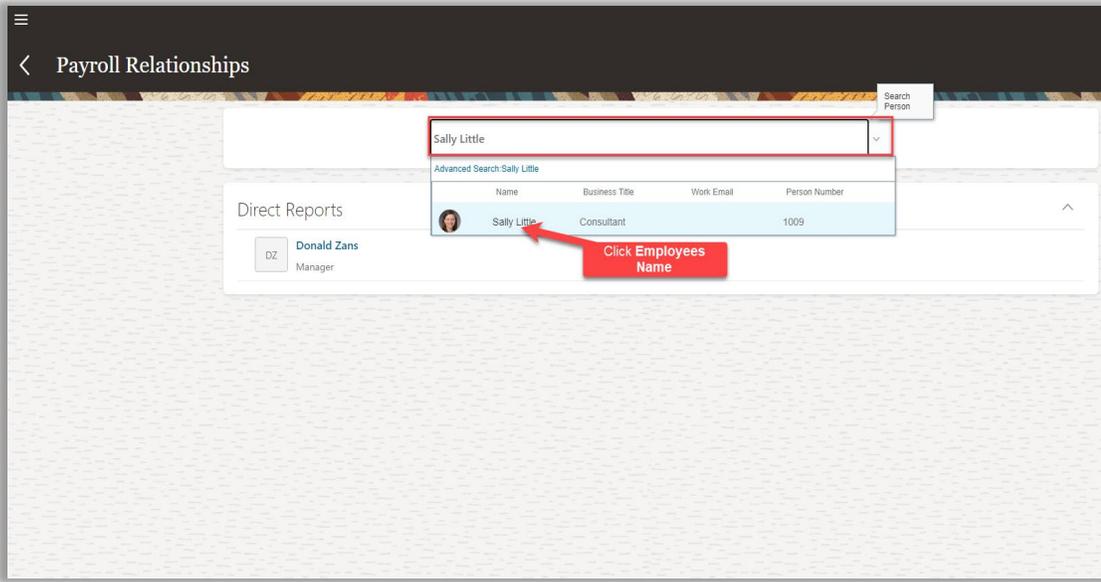
Next, click **Payroll**



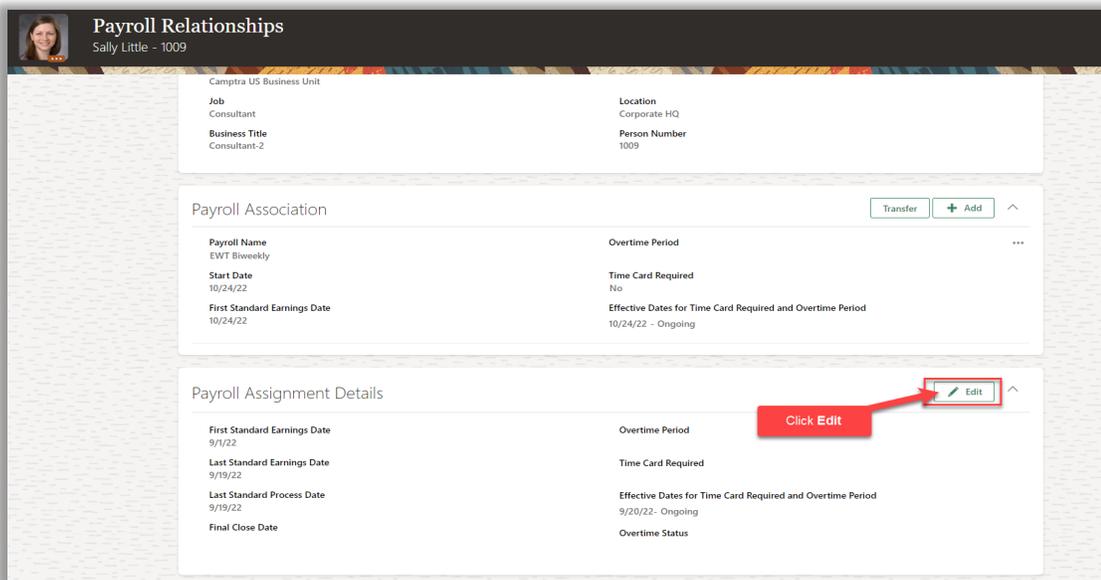
Click **Payroll Relationships** under **Person Information**. If preferred, we can also search the words **Payroll Relationships** in the Search box at the top



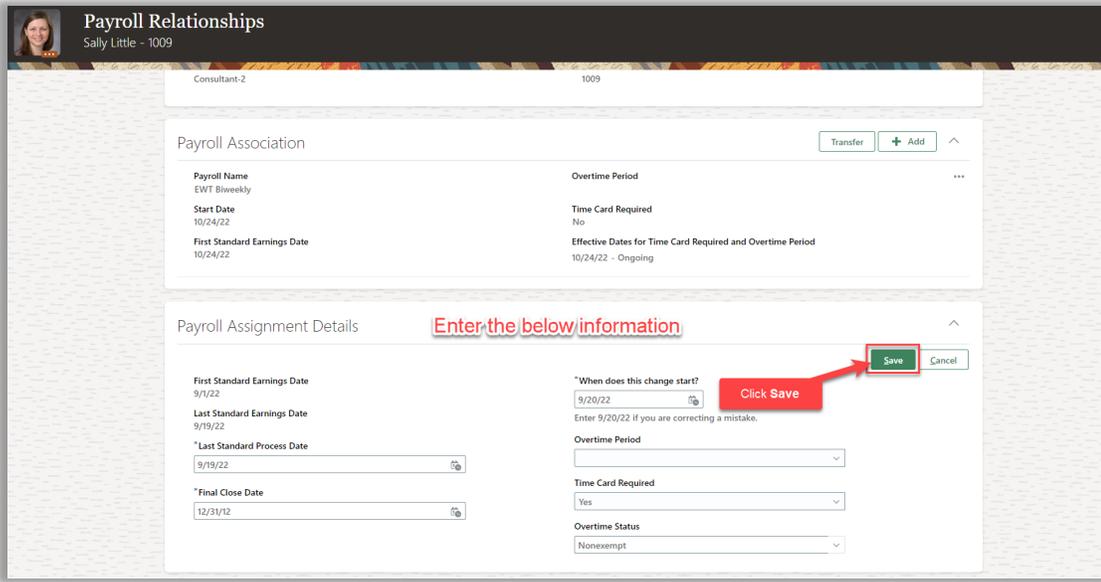
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under **Payroll Assignment Details**, click **Edit**



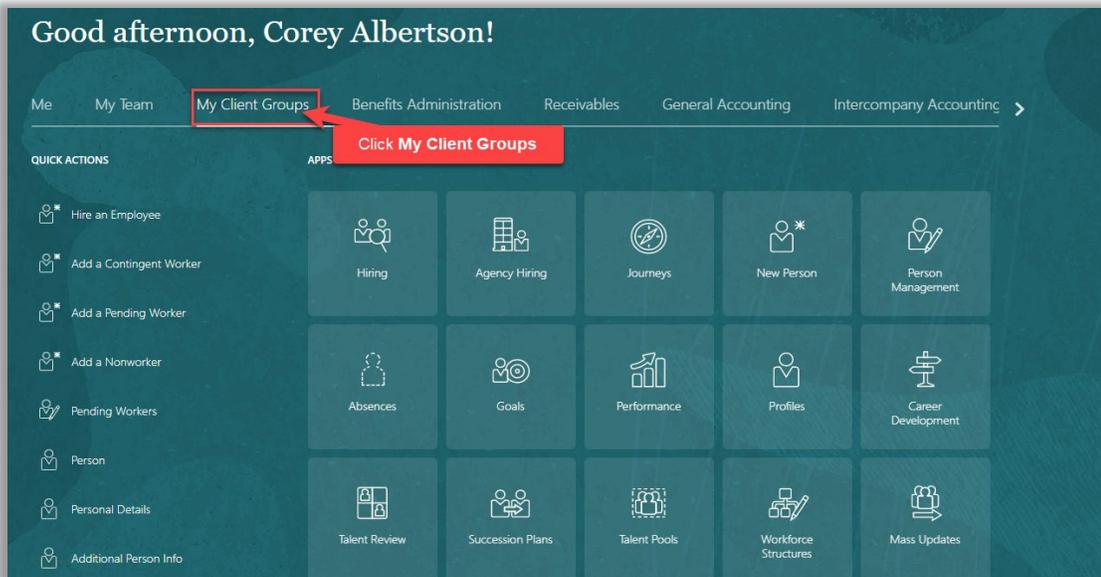
Next, enter the below information and click **Save**



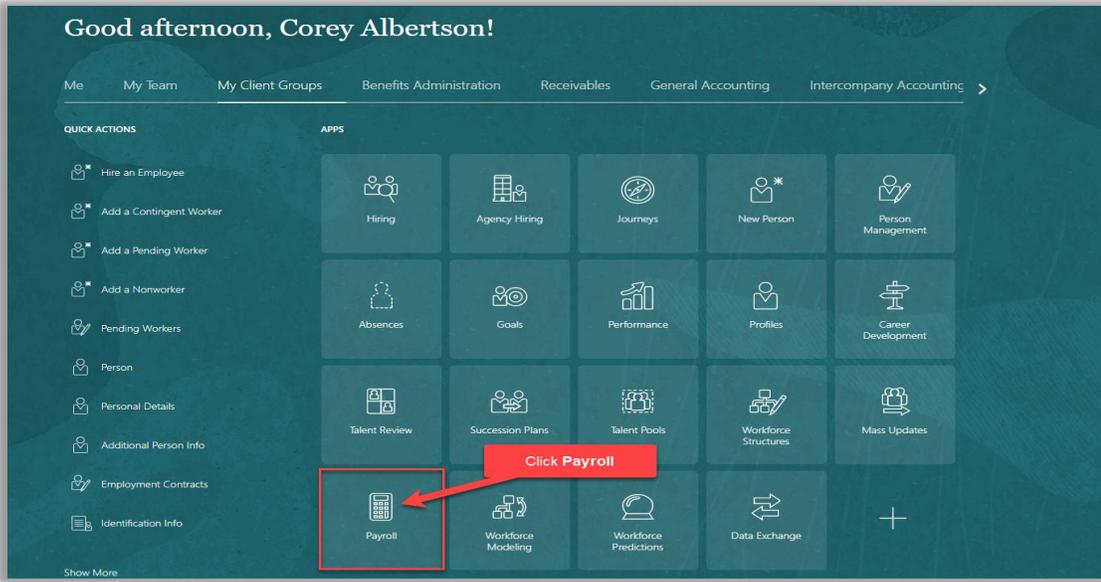
Add Employee's Personal Payment Methods

Navigation: Home>My Client Groups>Payroll>Personal Payment Methods>Search Employee>Add>Save

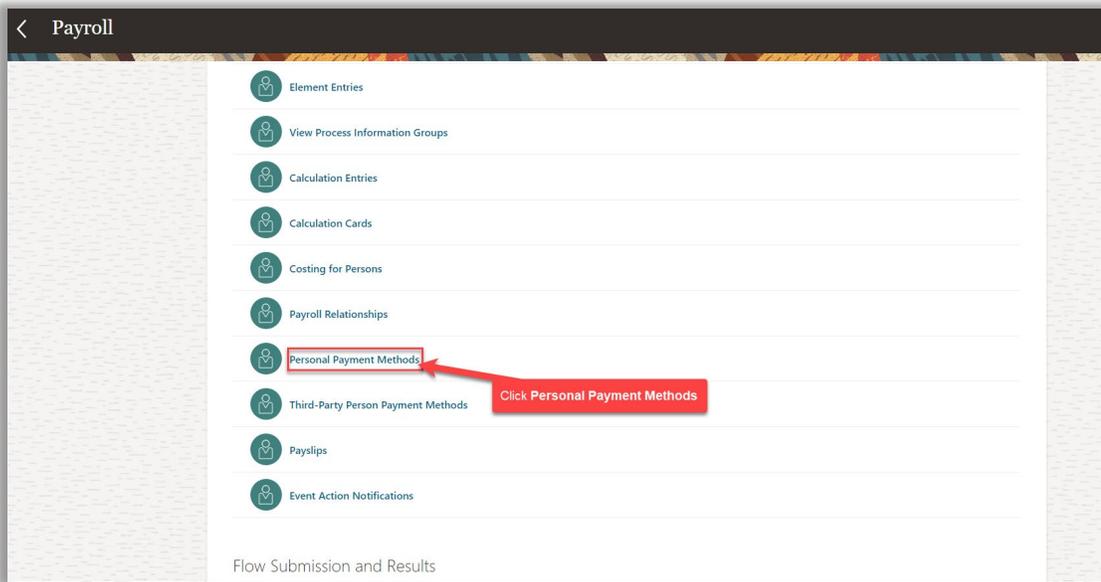
From the home screen, click **My Client Groups**



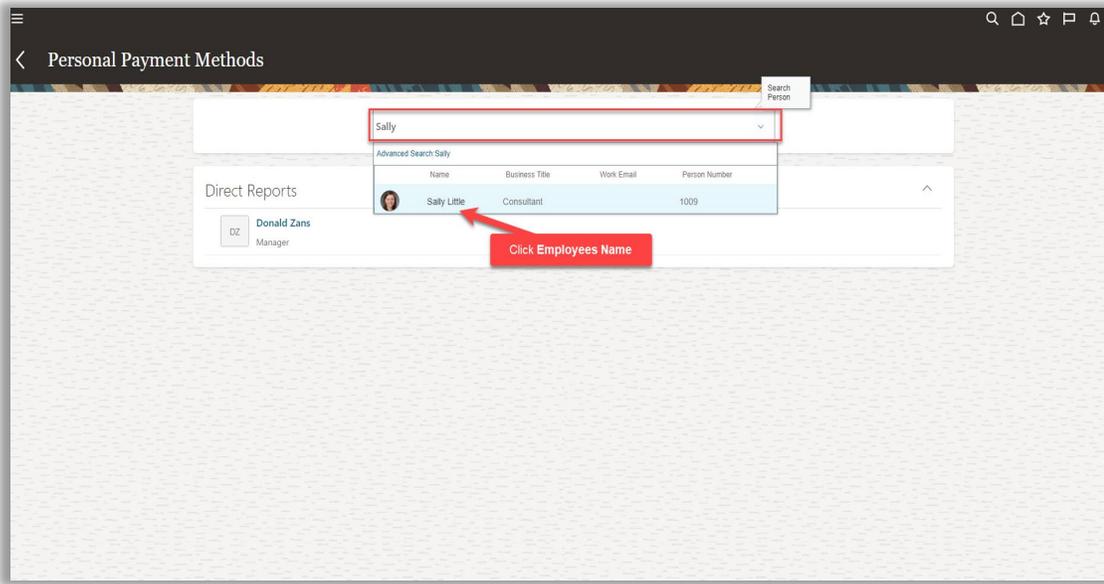
Next, click **Payroll**



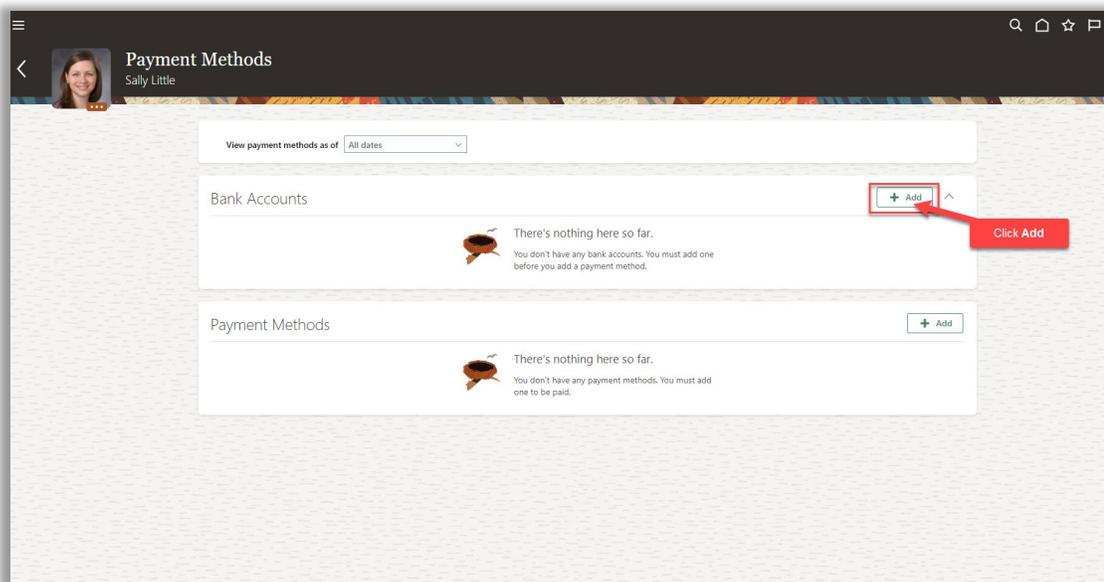
Click **Personal Payment Methods** under **Person Information**. If preferred, we can also search the words **Personal Payment Methods** in the Search box at the top



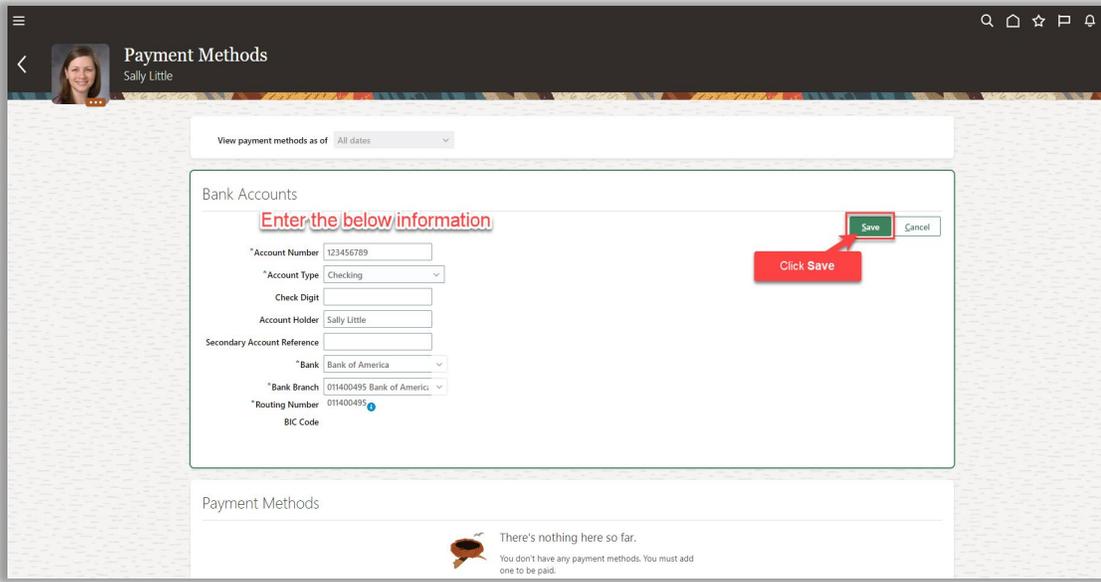
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



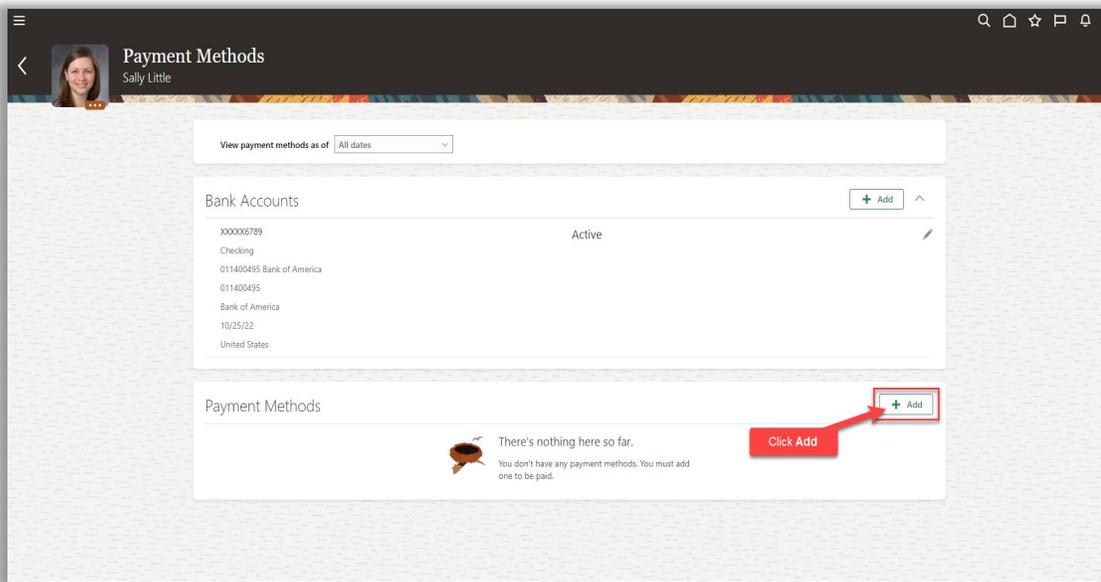
First, we need to add a **Bank Account**. Click **Add**



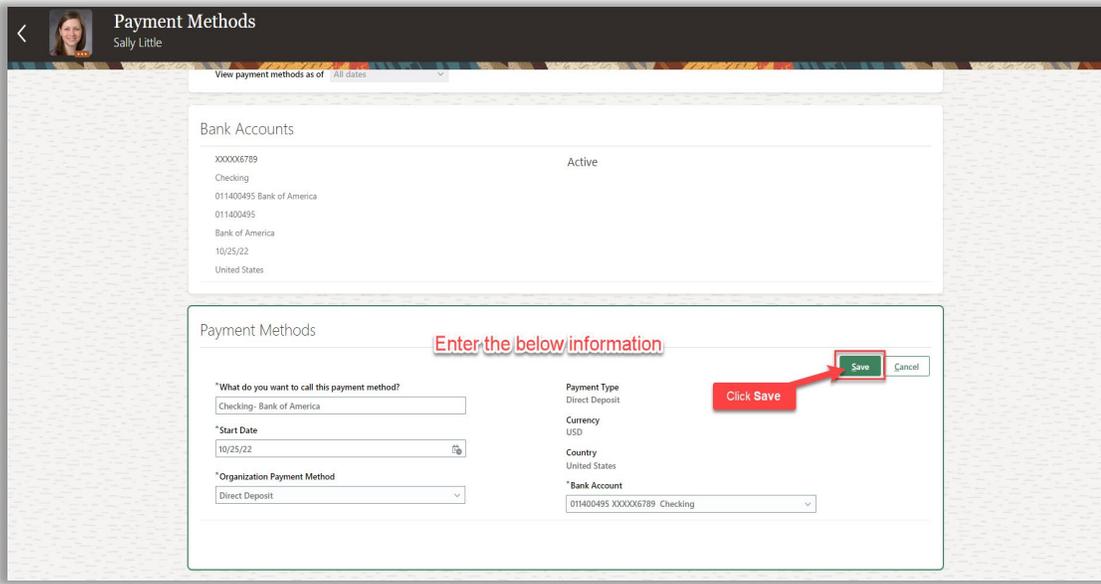
Next, enter the information below. We can use the assistive search feature by typing the information in the drop-down boxes and once the option is displayed, select the option. Click **Save**



Next, we'll enter the **Payment Methods**. Click **Add**



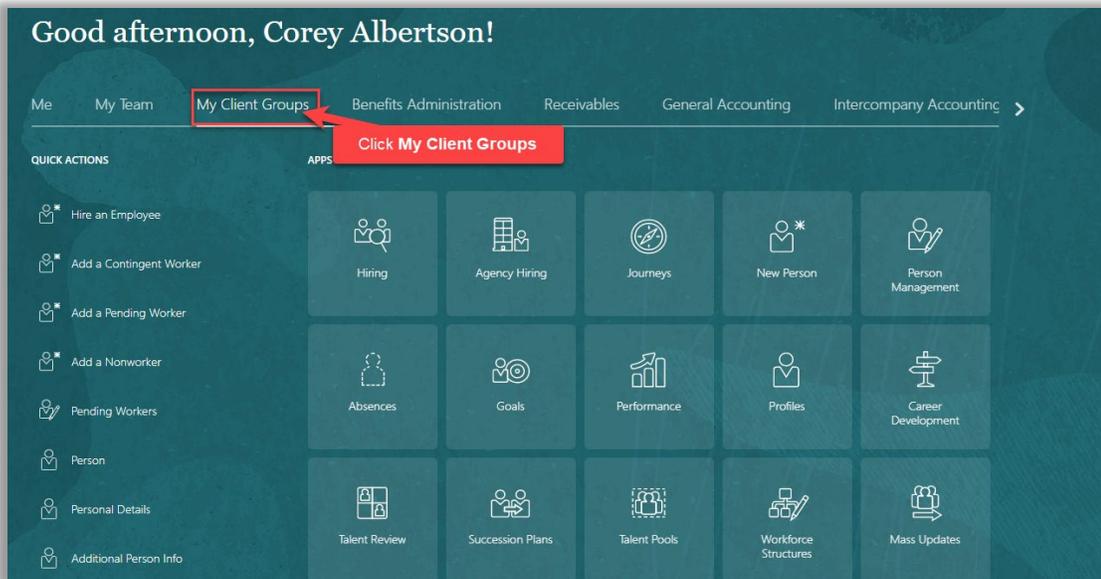
Next, enter **What do you want to call this payment method?** Select the **Start Date**, select the **Organization Payment Method** and the **Bank Account** from the dropdown. Click **Save**



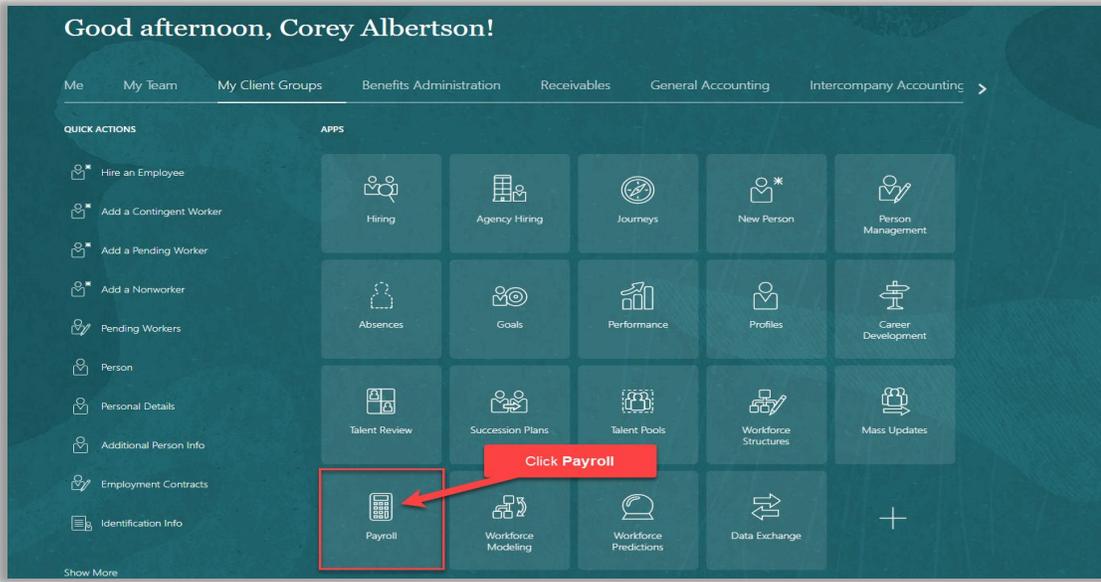
Update Employee's Personal Payment Methods

Navigation: Home>My Client Groups>Payroll>Personal Payment Methods>Search Employee>Edit>Save

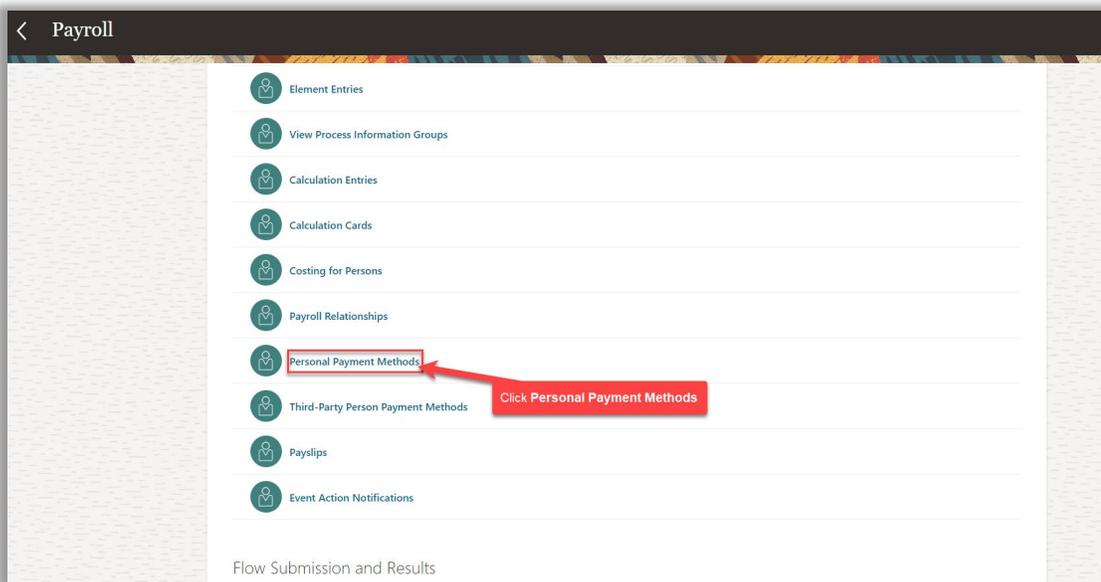
From the home screen, click **My Client Groups**



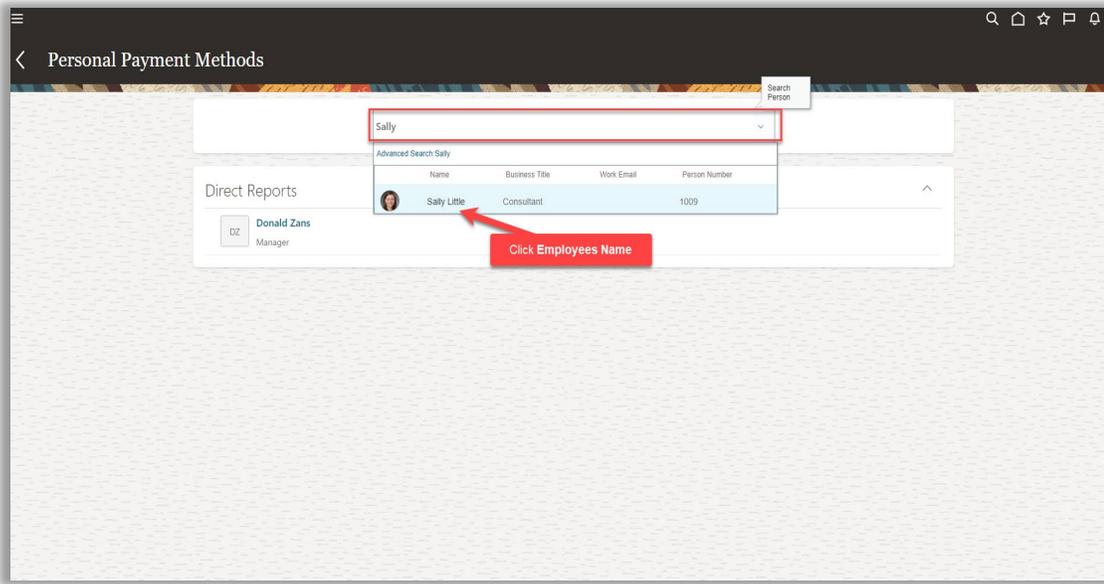
Next, click **Payroll**



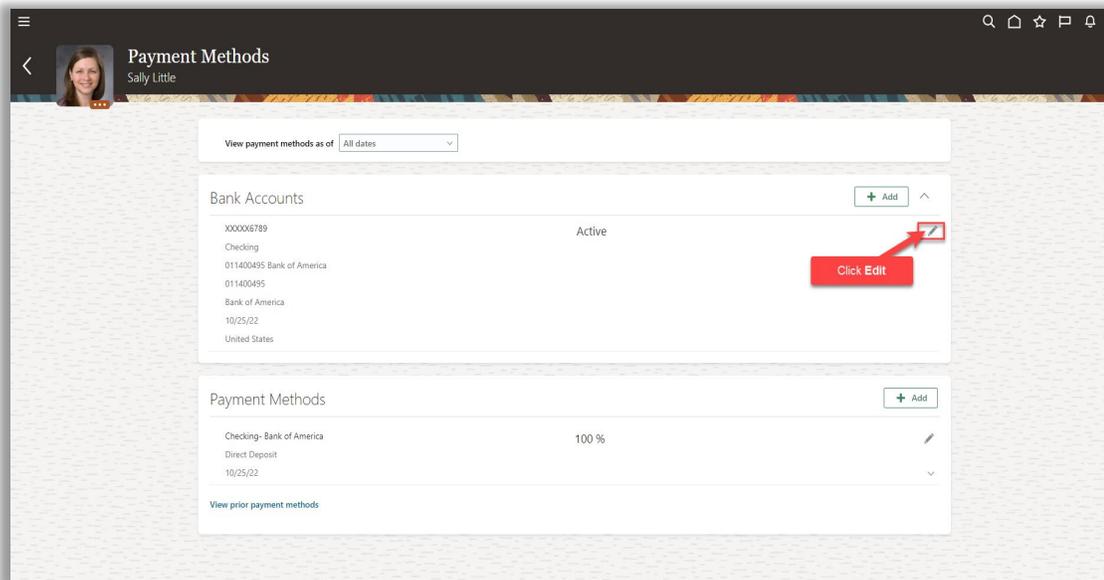
Click **Personal Payment Methods** under **Person Information**. If preferred, we can also search the words **Personal Payment Methods** in the Search box at the top



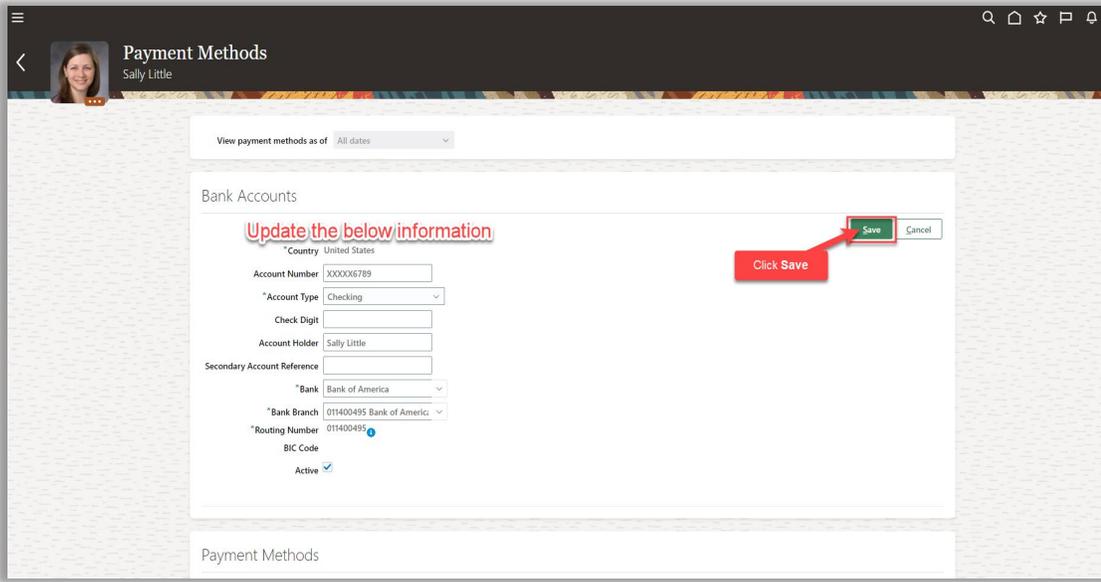
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



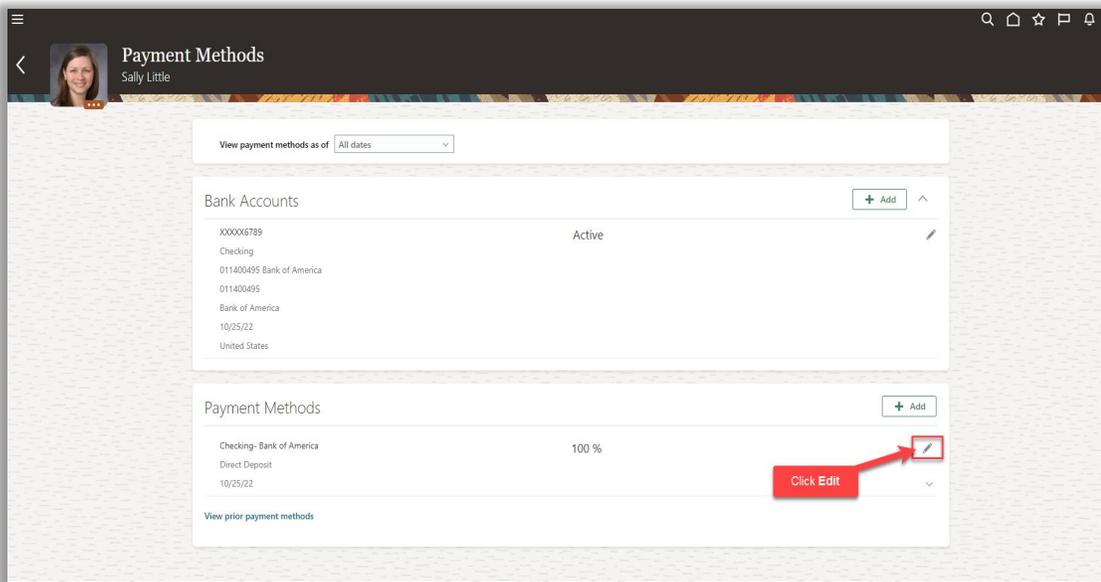
To edit a bank account, click **Edit** across from **Bank Accounts**



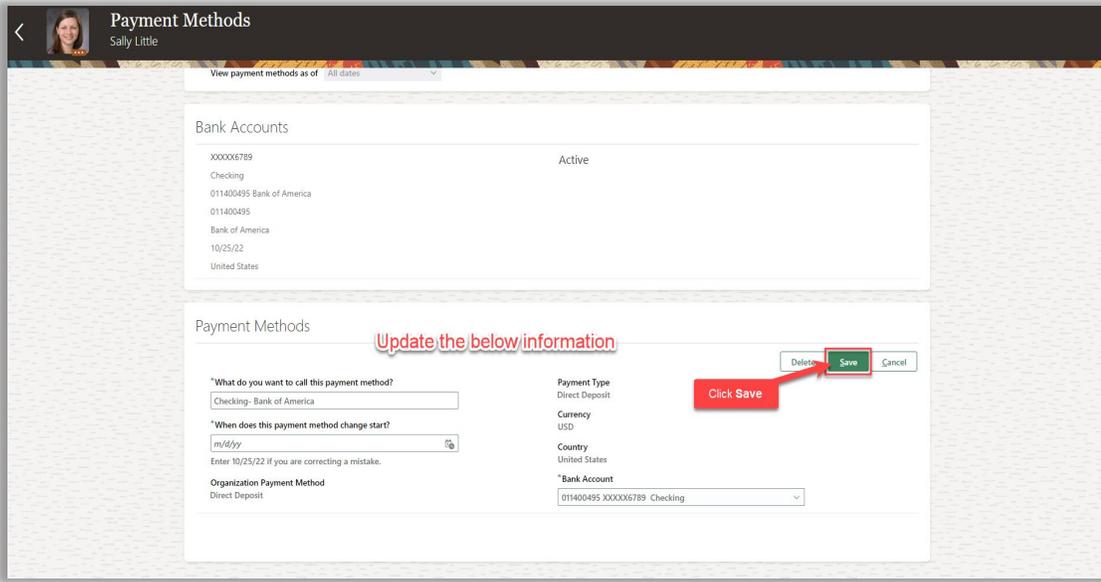
Edit the below information. To inactivate **Bank Account**, deselect the **Active** checkbox. Click **Save**



To edit a payment method, click **Edit** across from **Payment Methods**



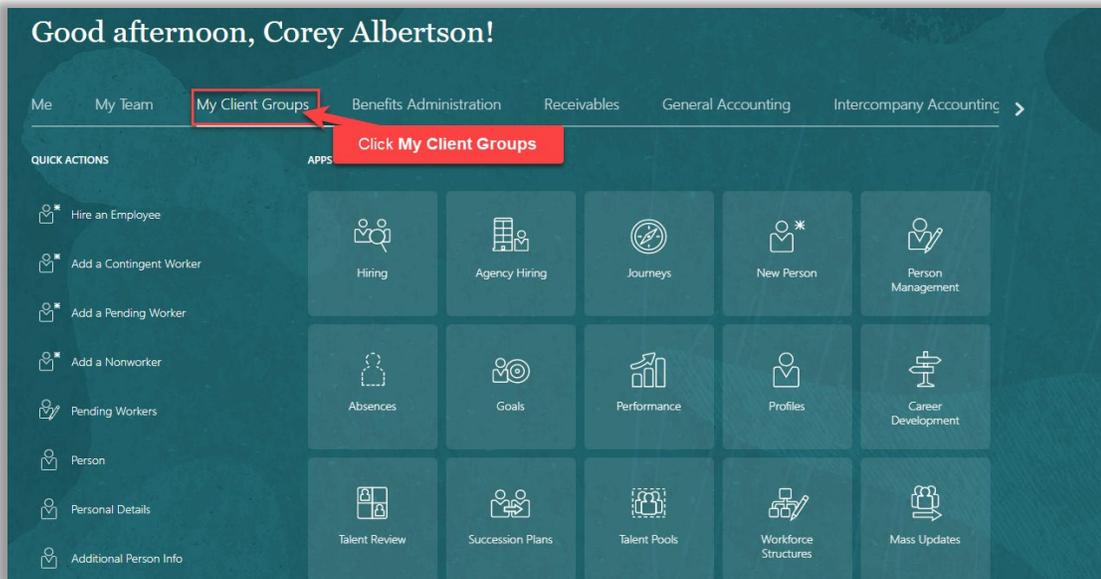
Edit the below information. Click **Save**



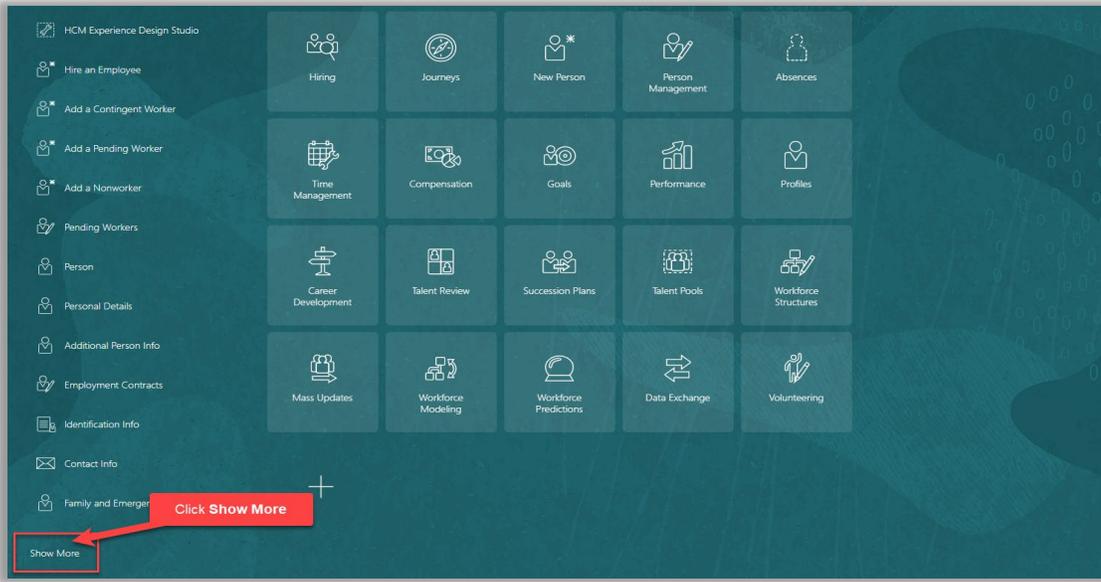
Update Employee's Document Delivery Preferences

Navigation: Home>My Client Groups>Show More>Document Delivery Options>Search Person>Update>Save

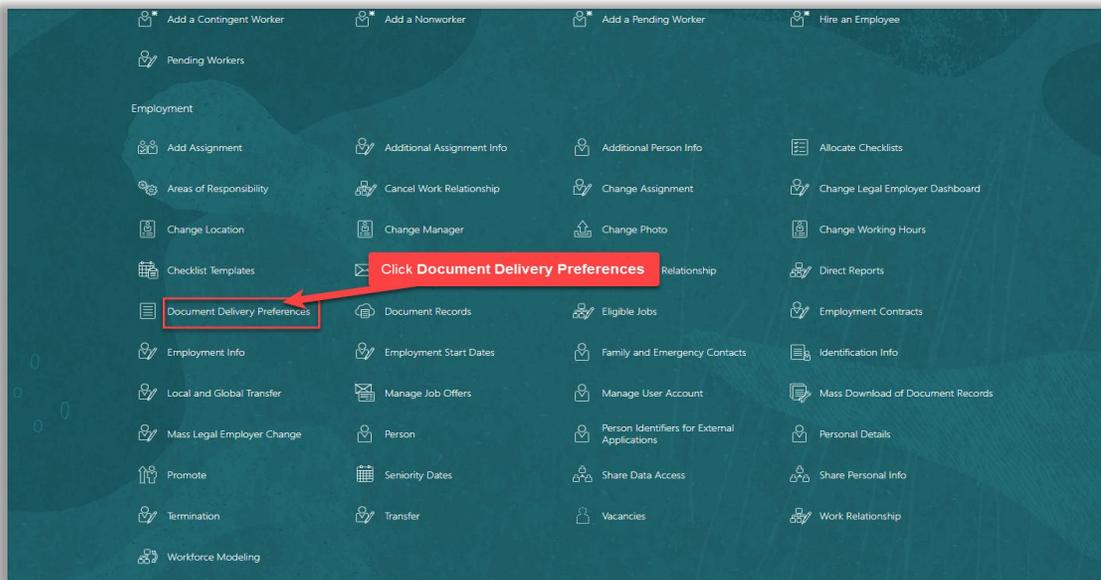
From the home screen, click **My Client Groups**



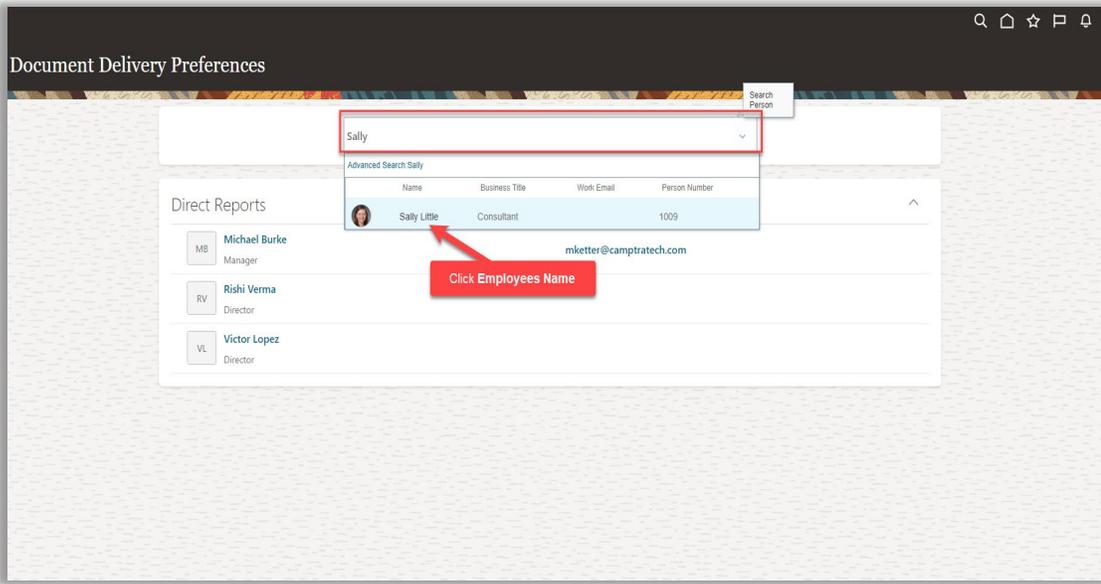
Next, click **Show More** from the Quick Actions



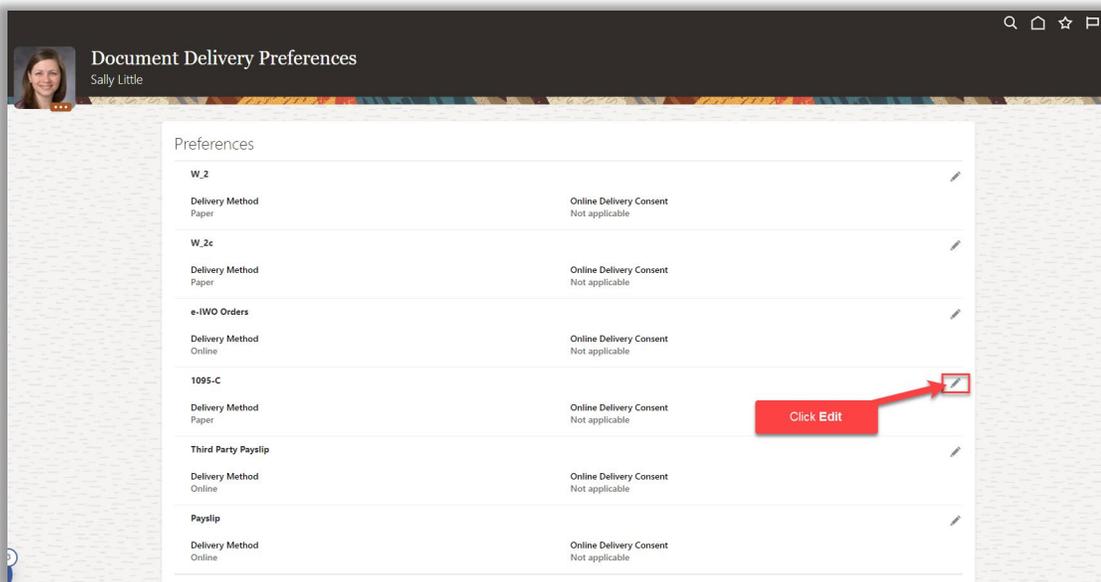
Under Employment, click **Document Delivery Preferences**



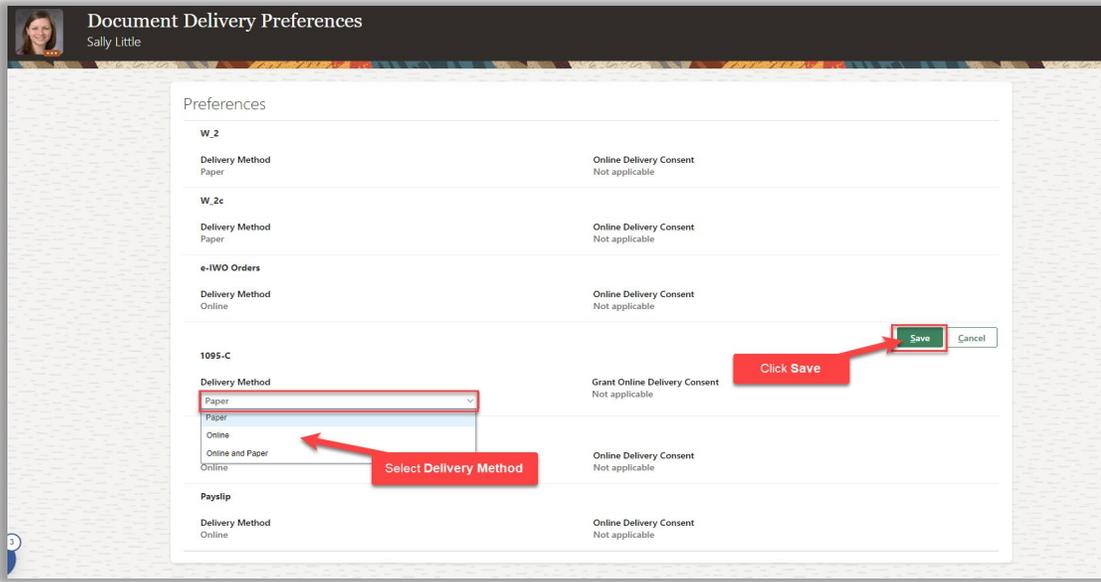
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Click **Edit** to update the delivery preference across from the document we wish to update



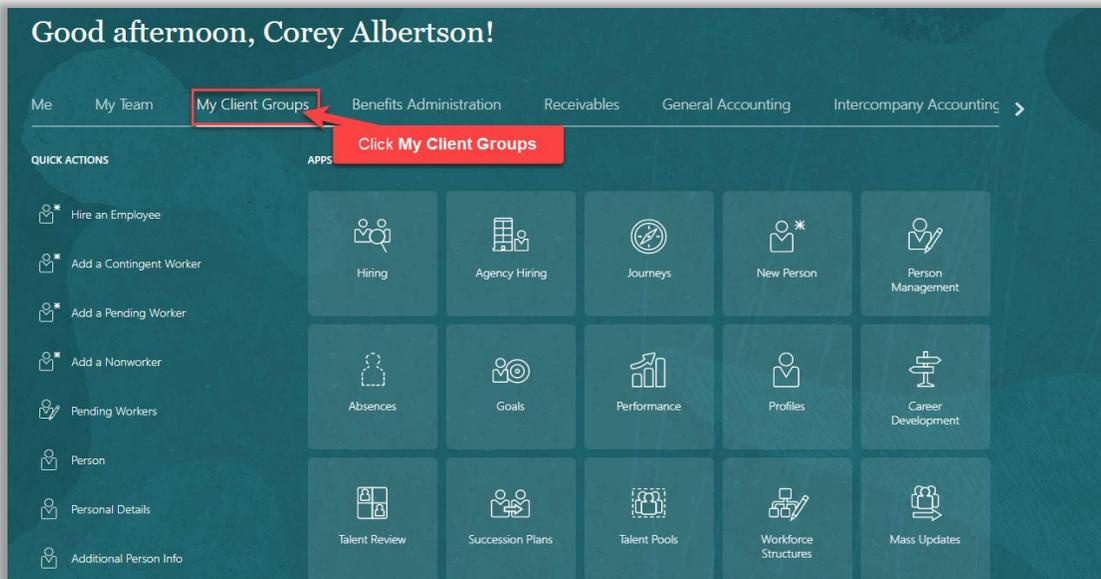
Select the **Delivery Method** from the dropdown menu and click **Save** to save the preferences



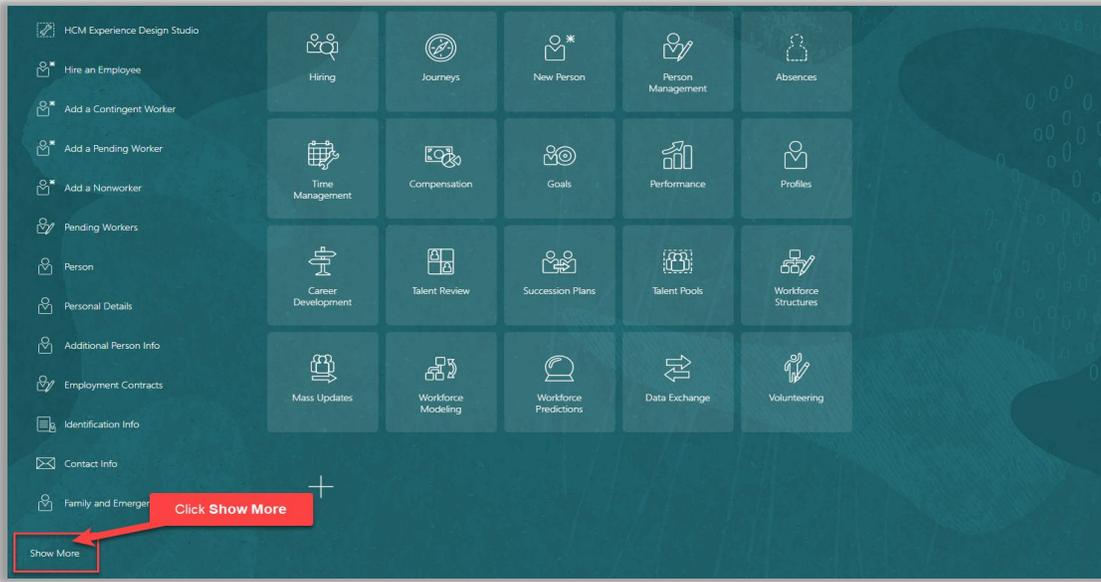
Update Final Close Date For Terminated Employees

Navigation: Home>My Client Groups>Show More>Payroll Relationships>Update>Save

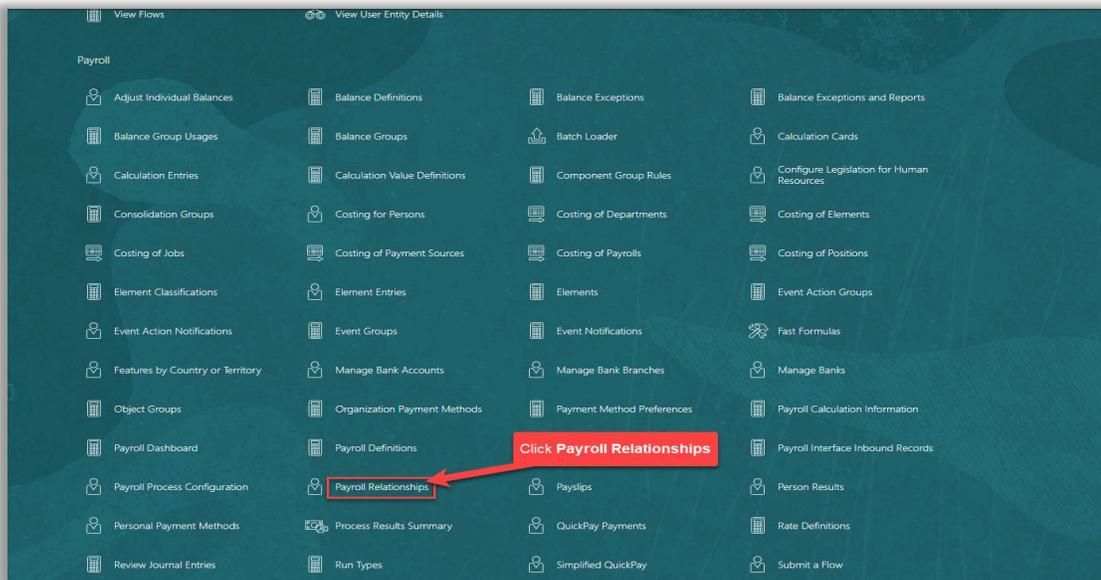
From the home screen, click **My Client Groups**



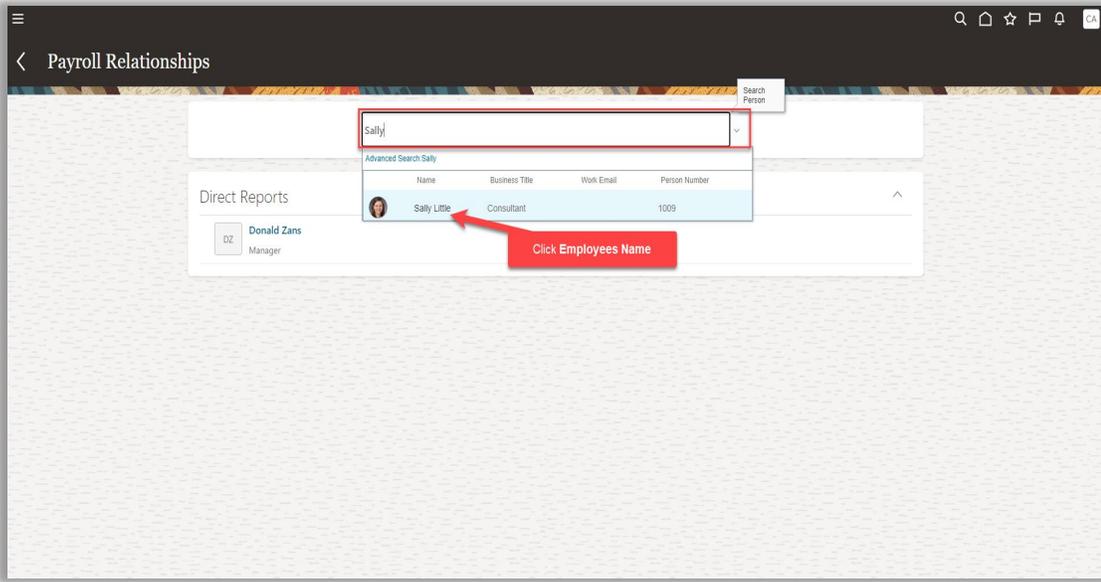
Next, click **Show More** from the Quick Actions



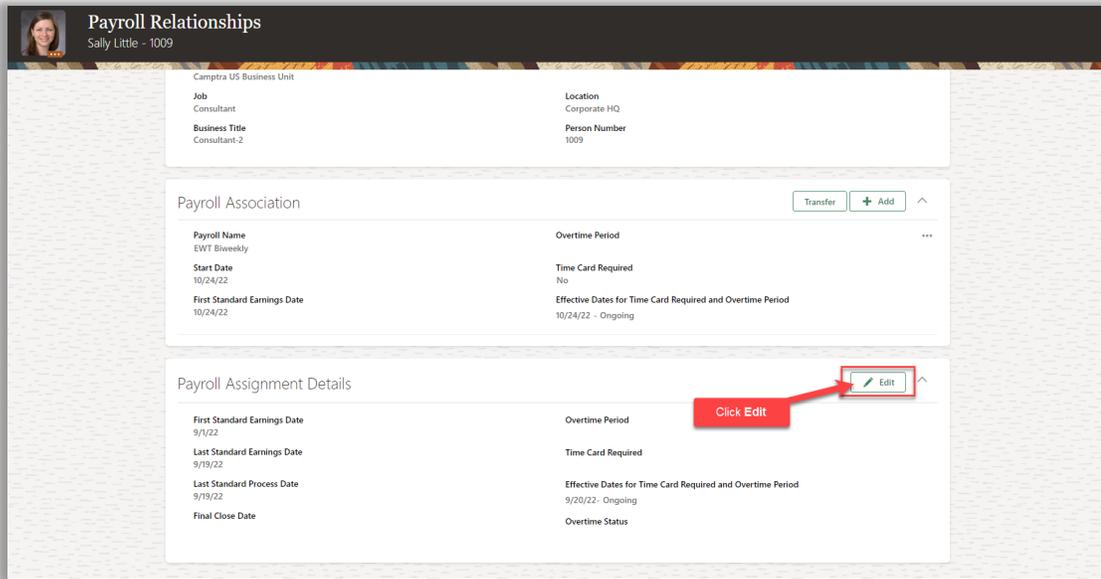
Under Payroll, click **Payroll Relationships**



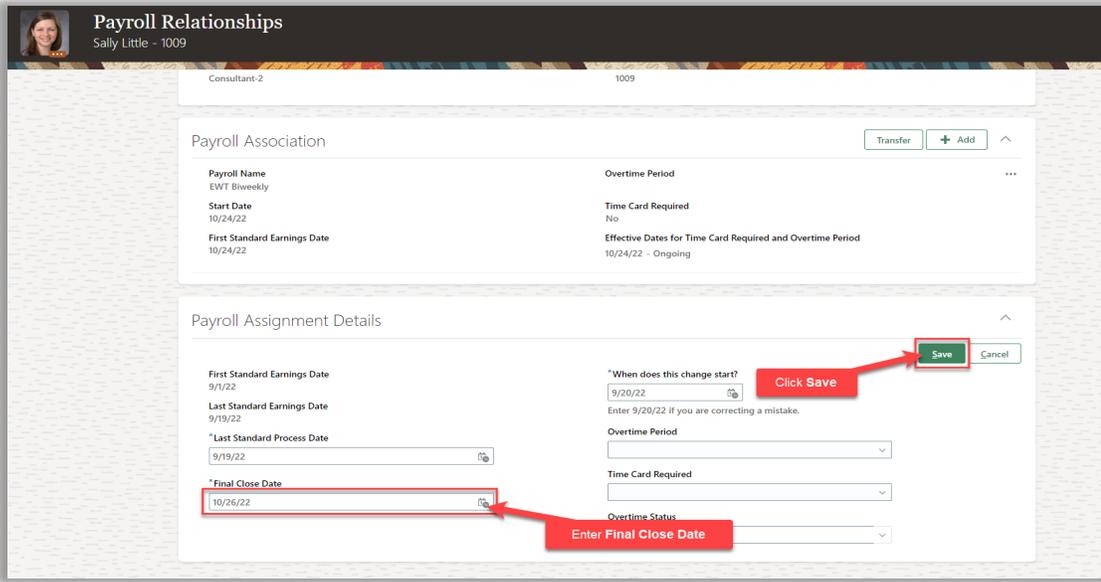
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



Under **Payroll Assignment Details**, click **Edit**



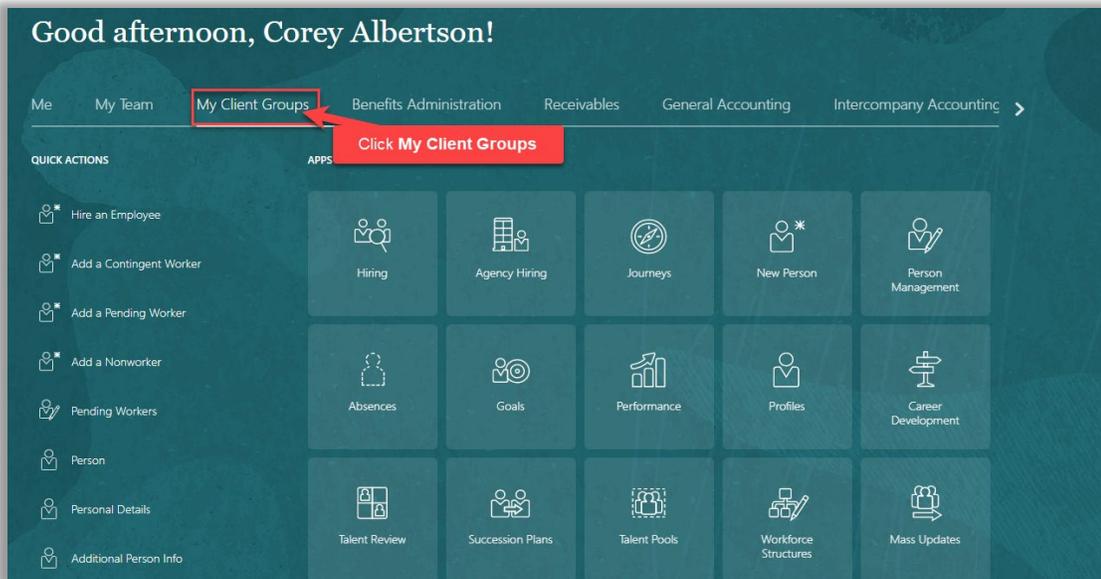
Enter the **Final Close Date** and click **Save**



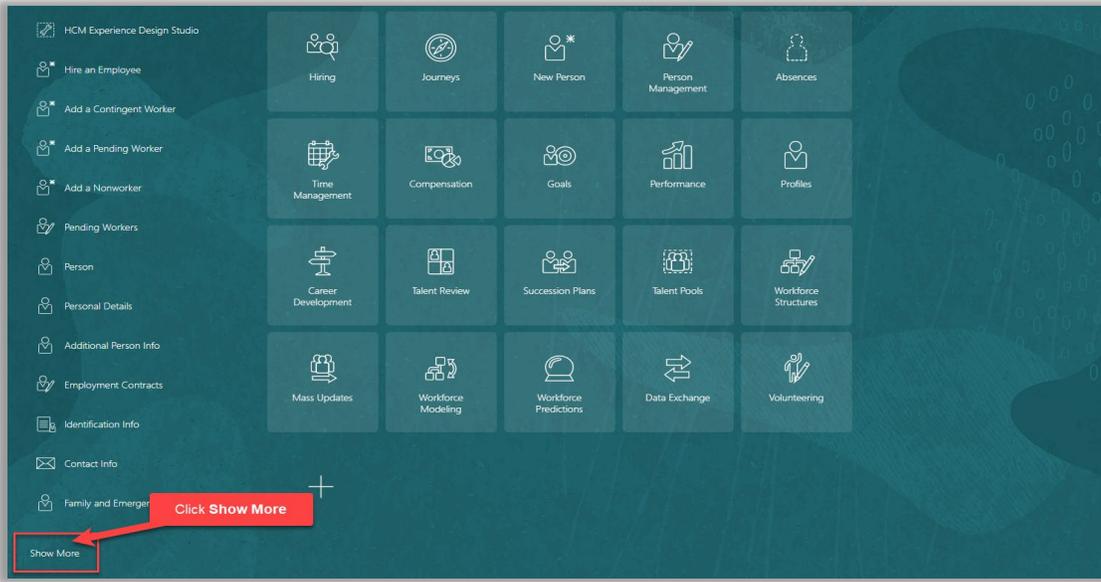
Enter Department Costing

Navigation: Home>My Client Groups>Show More>Costing of Departments>Search>Add>Submit

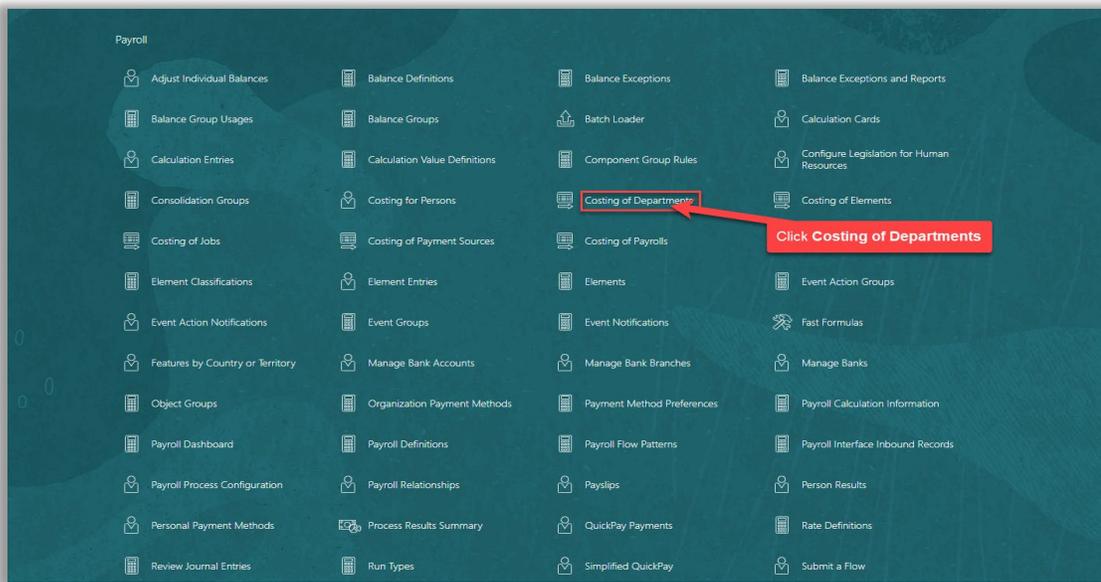
From the home screen, click **My Client Groups**



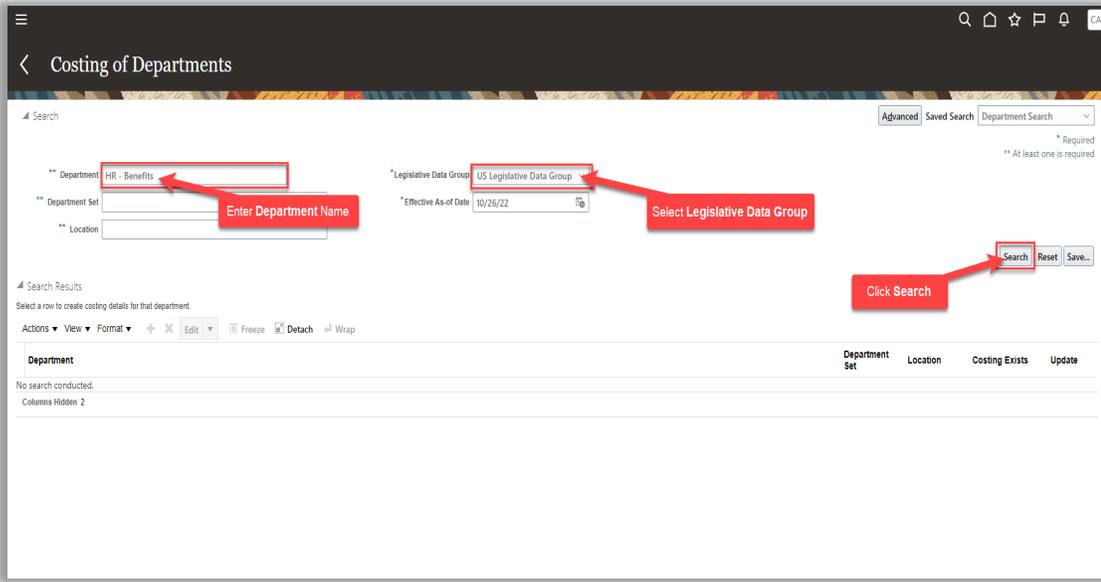
Next, click **Show More** from the Quick Actions



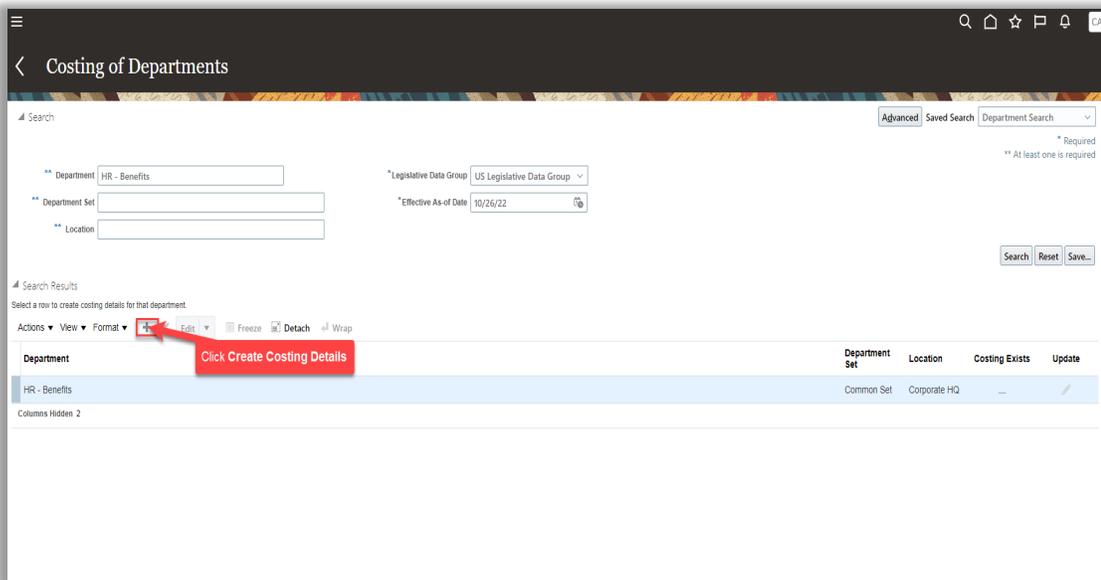
Under Payroll, click **Costing of Departments**



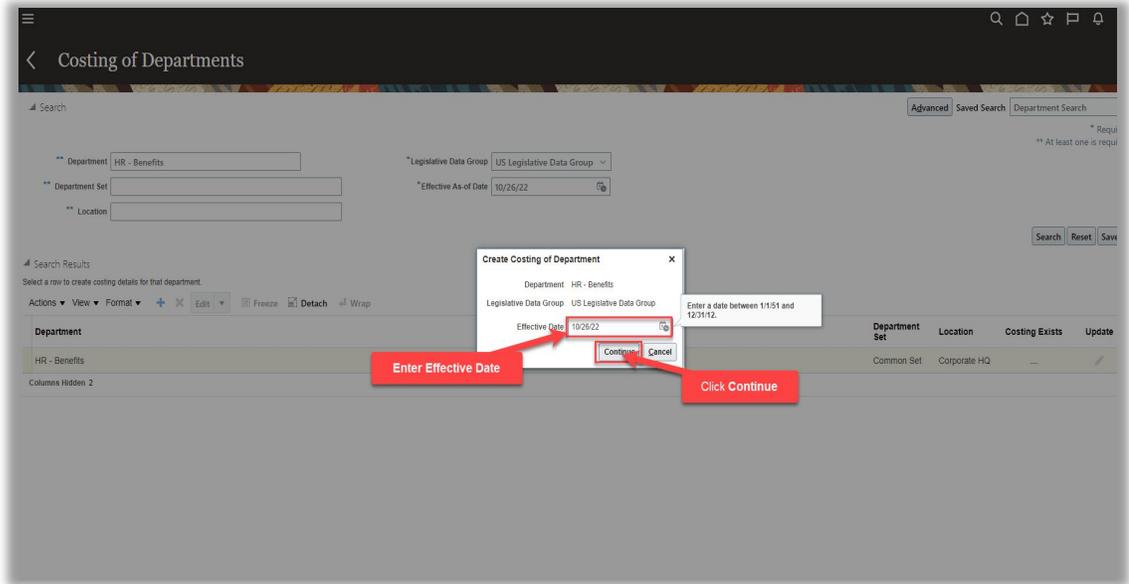
Enter the **Department**, select the **Legislative Data Group** from the dropdown, and click **Search**



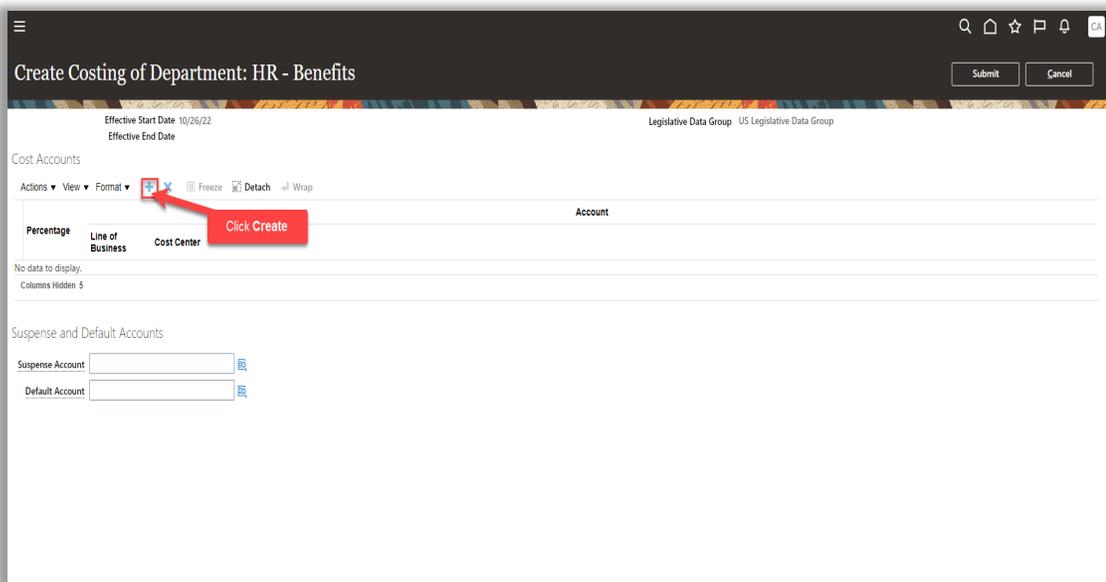
Click + to Create Costing Details



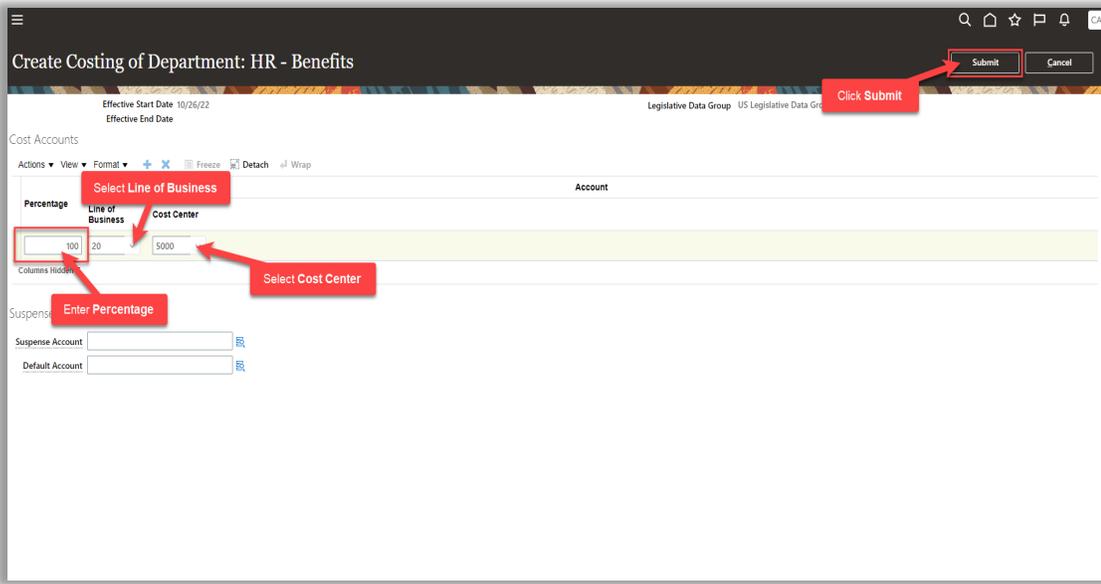
Enter the Effective Date and click Continue



Click + to create costing



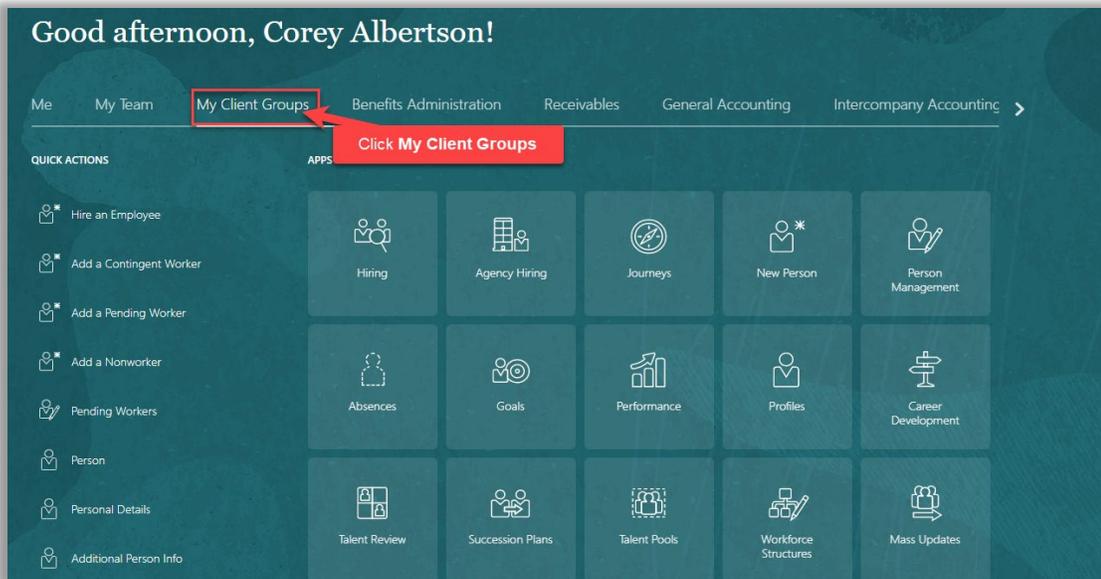
Enter the **Percentage**, **Line of Business**, and **Cost Center**. If applicable, we can click + to add another line of costing to split the costing between two Lines of Business or Cost Centers. Click **Submit**



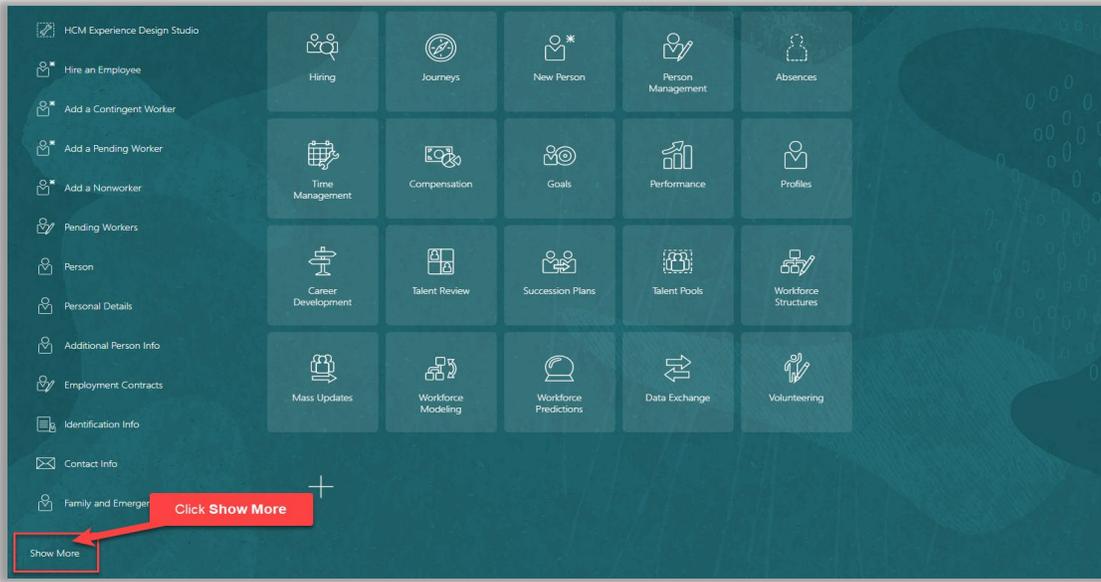
Enter Element Entries Costing

Navigation: Home>My Client Groups>Show More>Costing of Elements>Search>Add>Submit

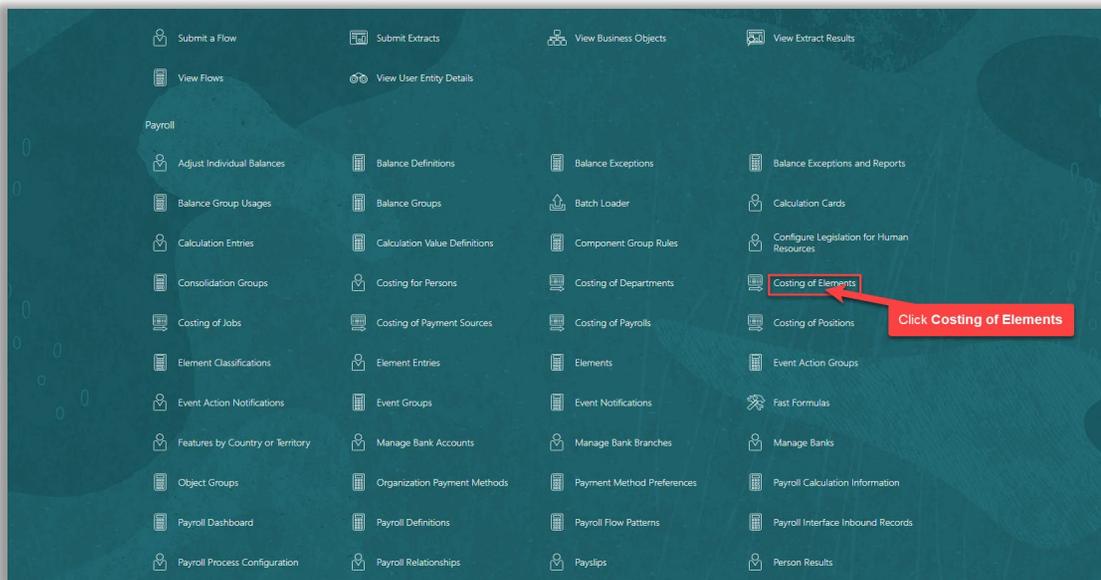
From the home screen, click **My Client Groups**



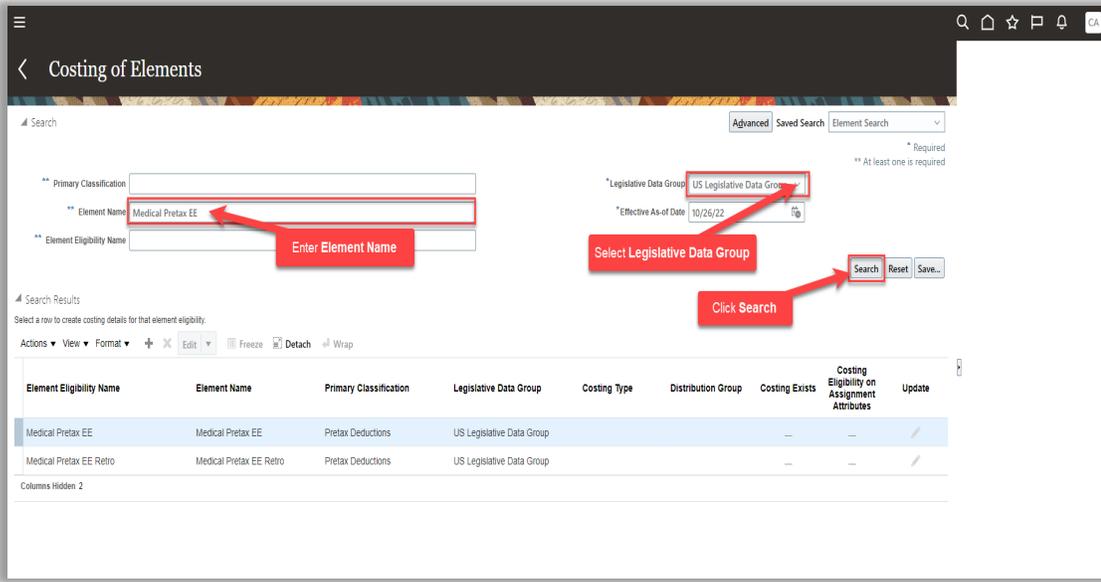
Next, click **Show More** from the Quick Actions



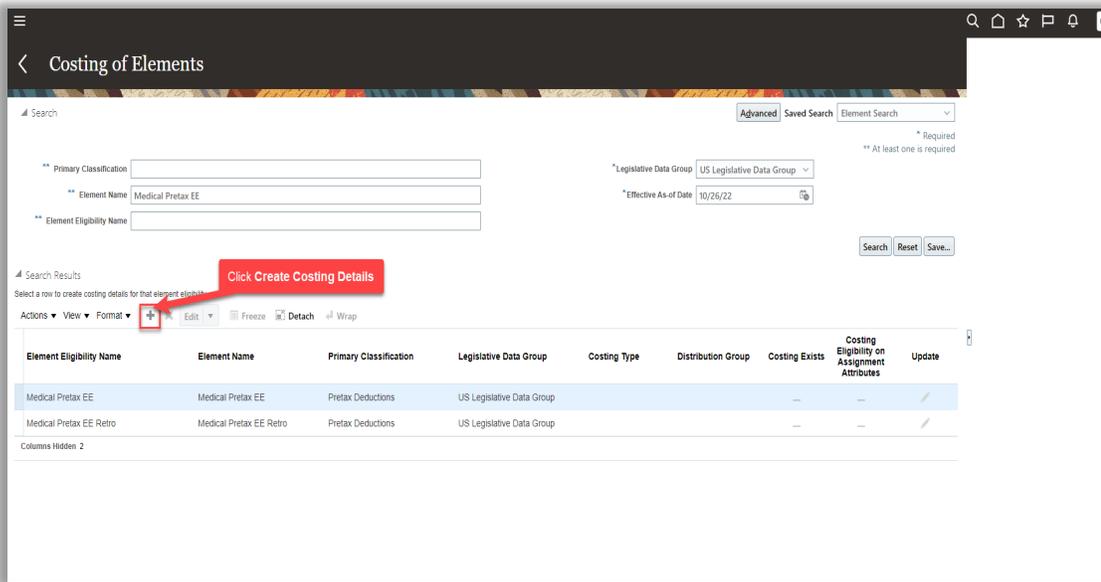
Under Payroll, click **Costing of Elements**



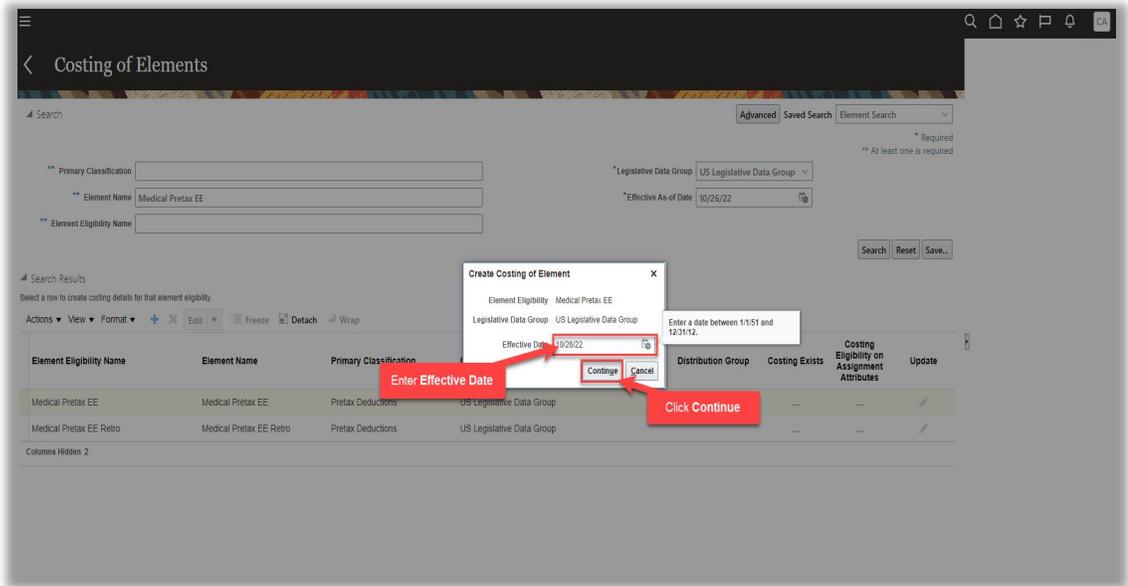
Enter the **Element Name, Legislative Data Group** from the drop down, and click **Search**



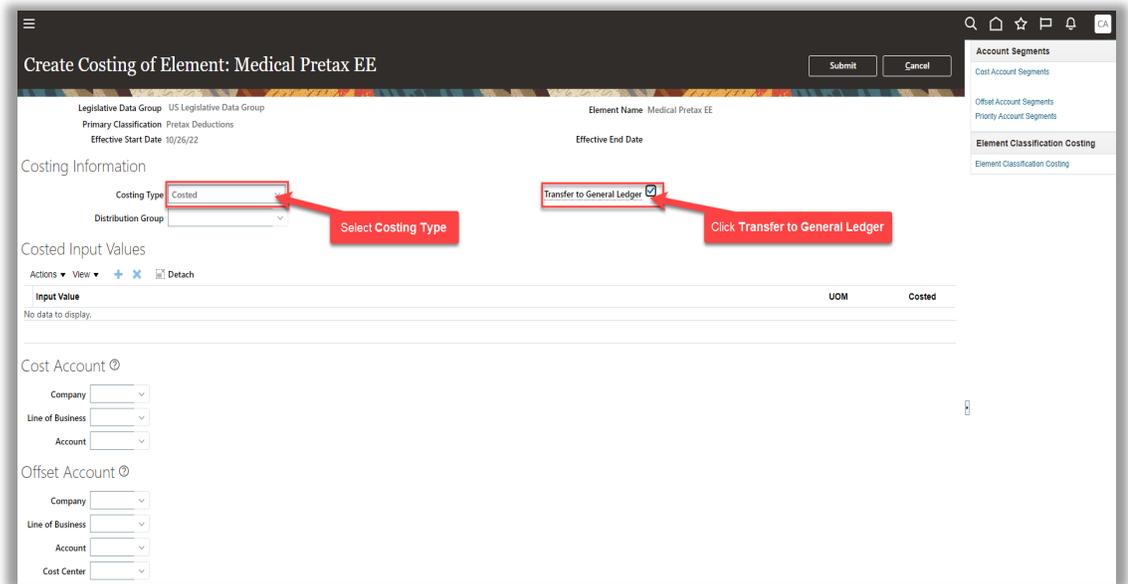
Highlight the row of the Element we wish to add costing and click **Create Costing Details**



Enter the **Effective Date** and click **Continue**



Select **Costing Type** and click the checkbox **Transfer to General Ledger** if the organization subscribes to ERP modules



Under **Costed Input Values**, click **Add Row**

Create Costing of Element: Medical Pretax EE

Legislative Data Group: US Legislative Data Group
 Primary Classification: Pretax Deductions
 Effective Start Date: 10/26/22
 Element Name: Medical Pretax EE
 Effective End Date:

Costing Information
 Costing Type: Costed
 Distribution Group:
 Transfer to General Ledger:

Costed Input Values
 Actions: View + Add Row X Detach
 Input Value: No data to display. UOM: Costed

Cost Account
 Company:
 Line of Business:
 Account:

Offset Account
 Company:
 Line of Business:
 Account:
 Cost Center:

Select Input Value

Create Costing of Element: Medical Pretax EE

Legislative Data Group: US Legislative Data Group
 Primary Classification: Pretax Deductions
 Effective Start Date: 10/26/22
 Element Name: Medical Pretax EE
 Effective End Date:

Costing Information
 Costing Type: Costed
 Distribution Group:
 Transfer to General Ledger:

Costed Input Values
 Actions: View + Add Row X Detach
 Input Value: Amount UOM: Money Costed:

Cost Account
 Company:
 Line of Business:
 Account:

Offset Account
 Company:
 Line of Business:
 Account:
 Cost Center:

Next, Enter the **Cost Account** and **Offset Account**. Select each value from the drop down and click **Submit**

Create Costing of Element: Medical Pretax EE

Costing Type: Costed
 Distribution Group: [Dropdown]
 Transfer to General Ledger: [Checked]
 Submit [Button] Cancel [Button]

Click Submit [Callout]

Costed Input Values

Input Value	UOM	Costed
Amount	Money	[Checked]

Cost Account

- Company: 3999
- Line of Business: 20
- Account: 10000

Offset Account

- Company: 3999
- Line of Business: 20
- Account: 10000
- Cost Center: 5001
- Project: 99
- InterCompany: 3999
- Future: 0000

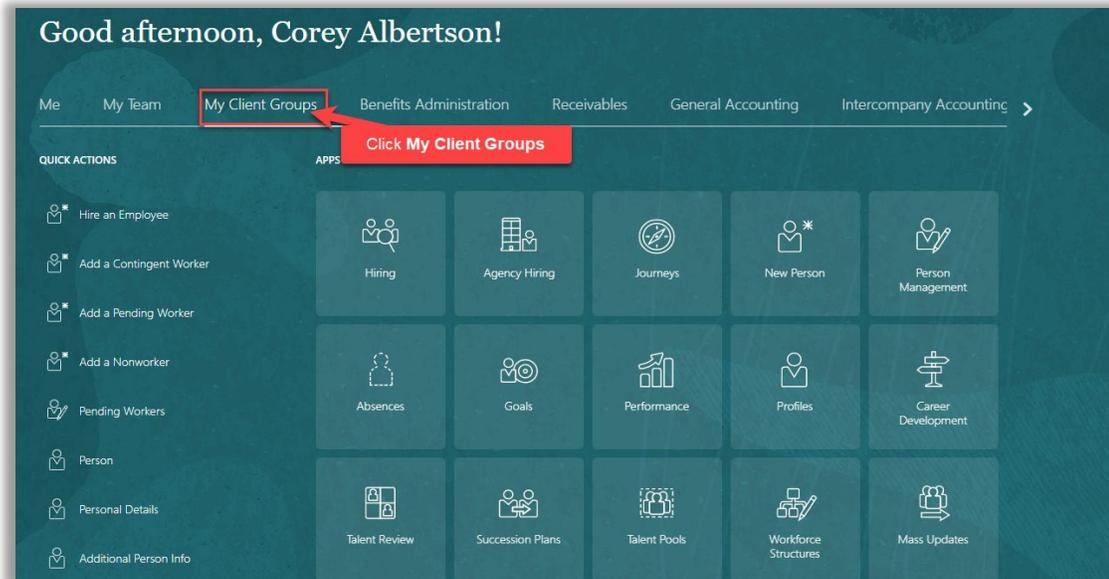
Enter Cost Account and Offset Account [Callout]

Priority Cost Accounts

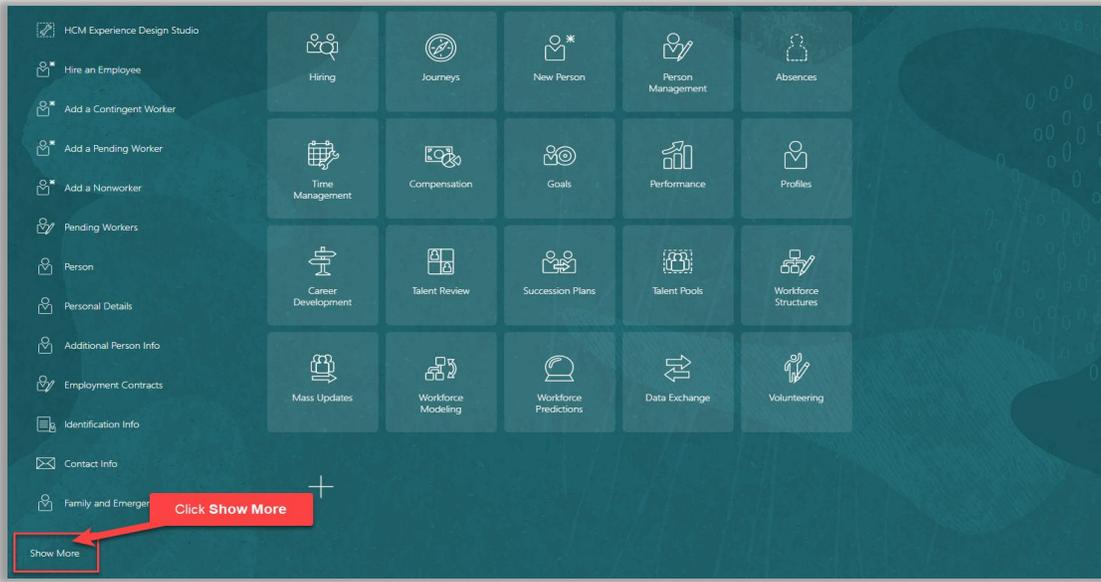
Enter Person Costing

Navigation: Home>My Client Groups>Show More>Costing for Persons>Search>Add>OK>Submit

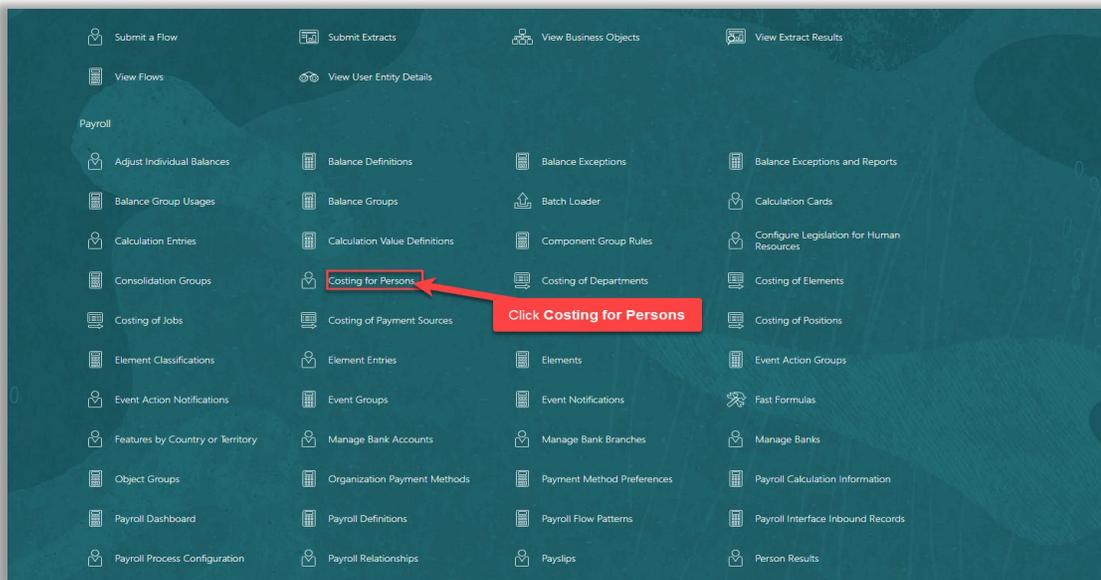
From the home screen, click **My Client Groups**



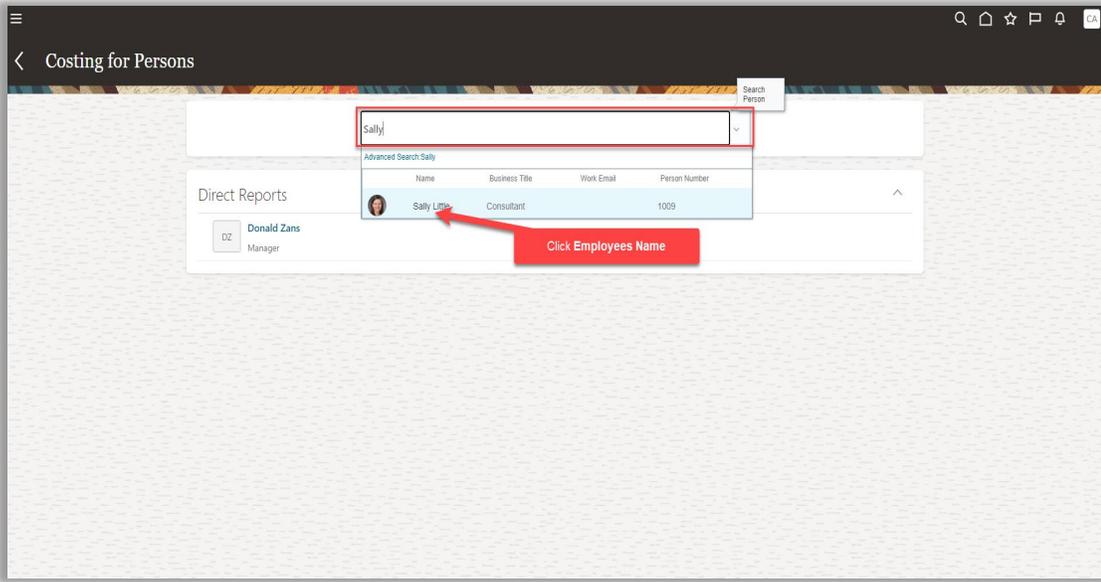
Next, click **Show More** from the Quick Actions



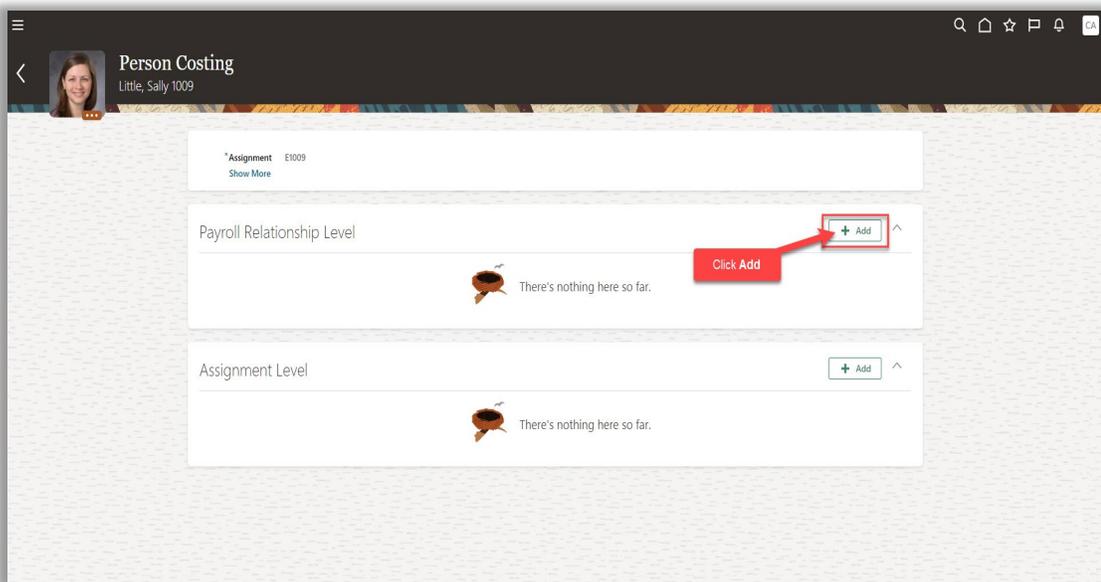
Under Payroll, click **Costing for Persons**



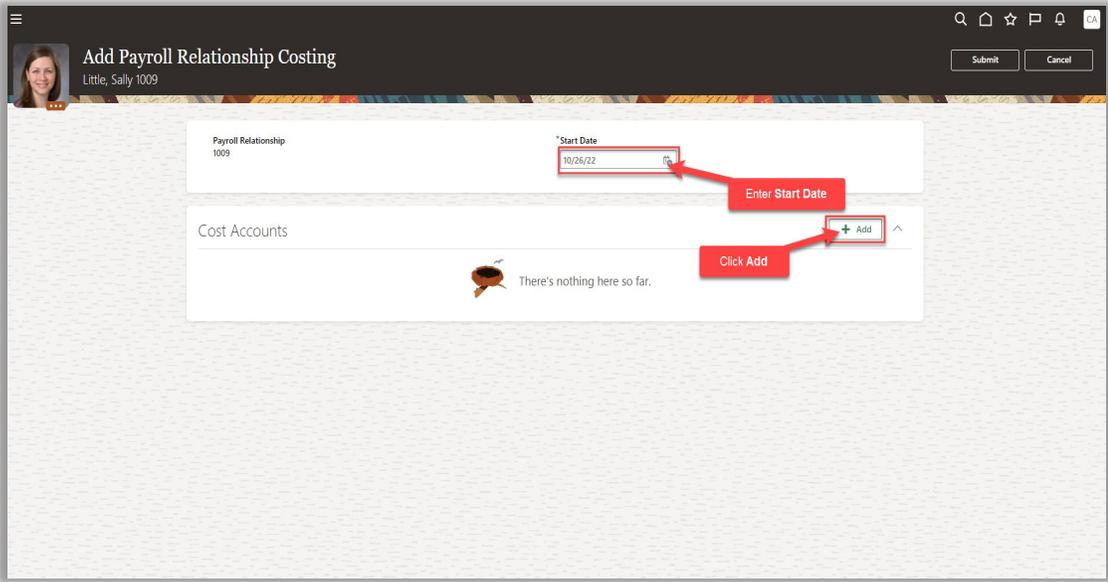
Enter the employees name in **Search for a Person** box, once the employees name is shown, click the employees' name



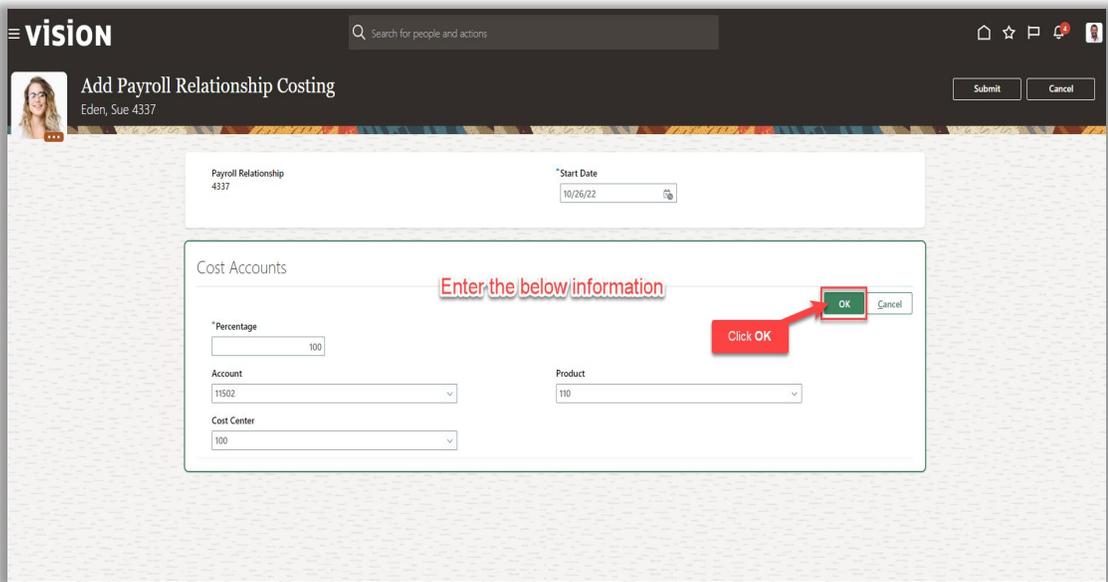
In this screen, we can enter the **Payroll Relationship Costing** or the **Assignment Level Costing**. To enter the **Payroll Relationship Level costing**, click **Add**



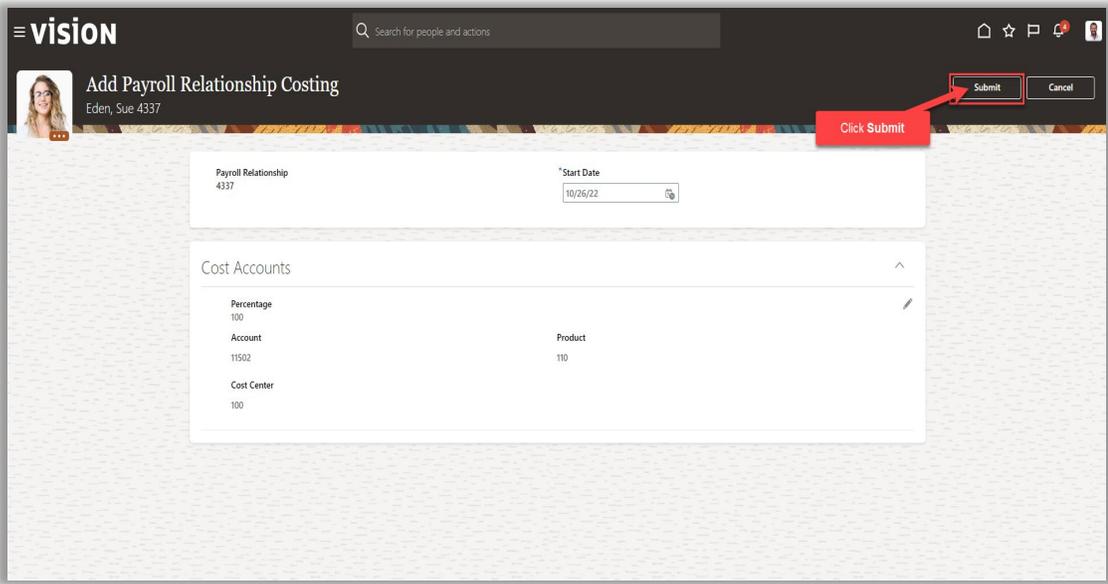
Enter the **Start Date** and click **Add**



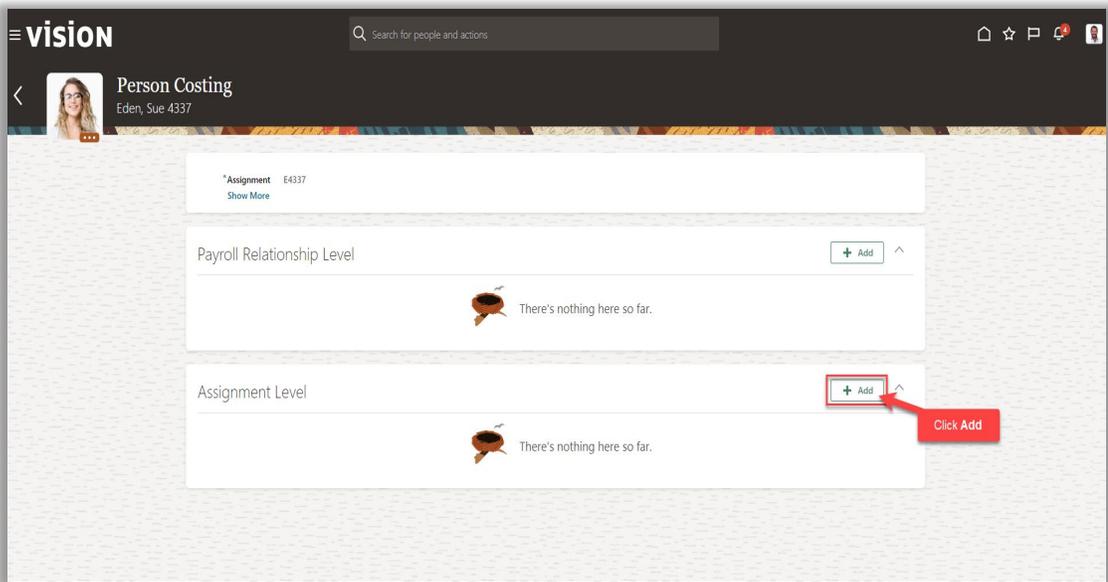
Enter the **Cost Accounts** Information and click **OK**



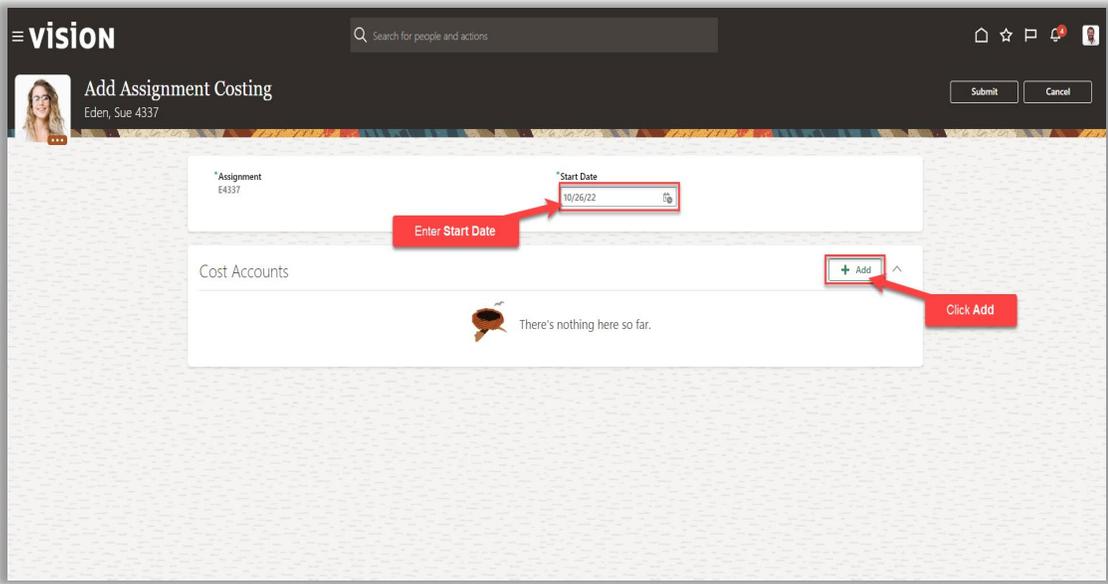
Click **Submit**



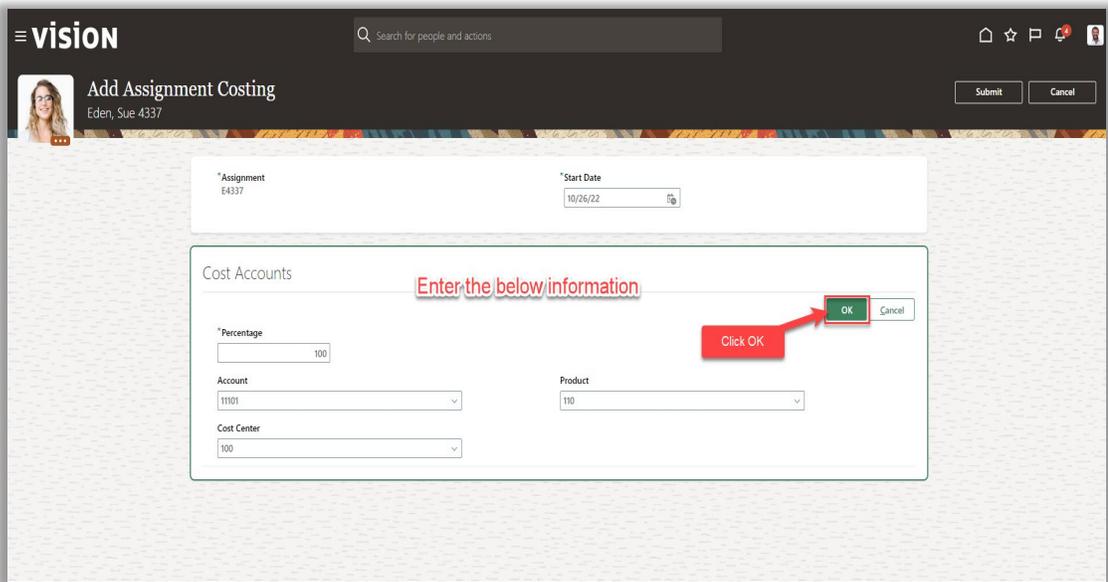
To update the **Assignment Level** costing click **Add**



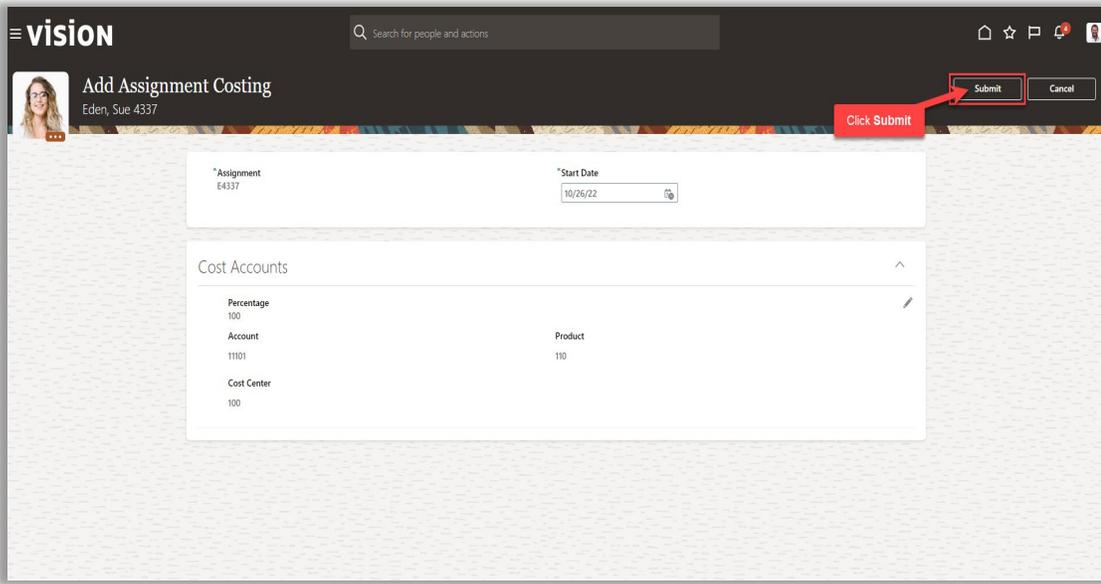
Enter the **Start Date** and click **Add**



Enter the **Cost Accounts** Information and click **OK**



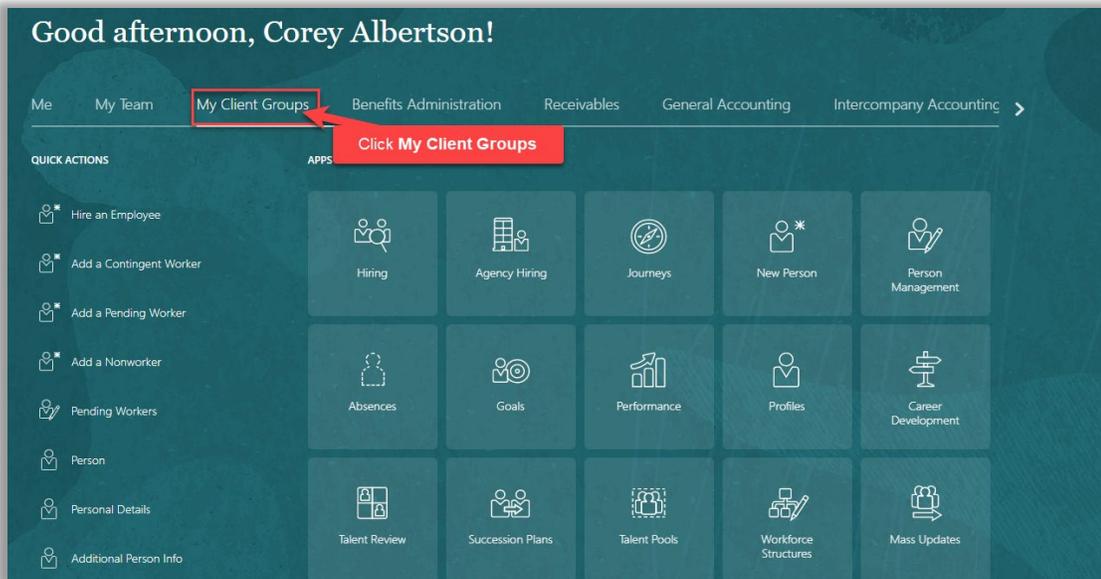
Click **Submit**



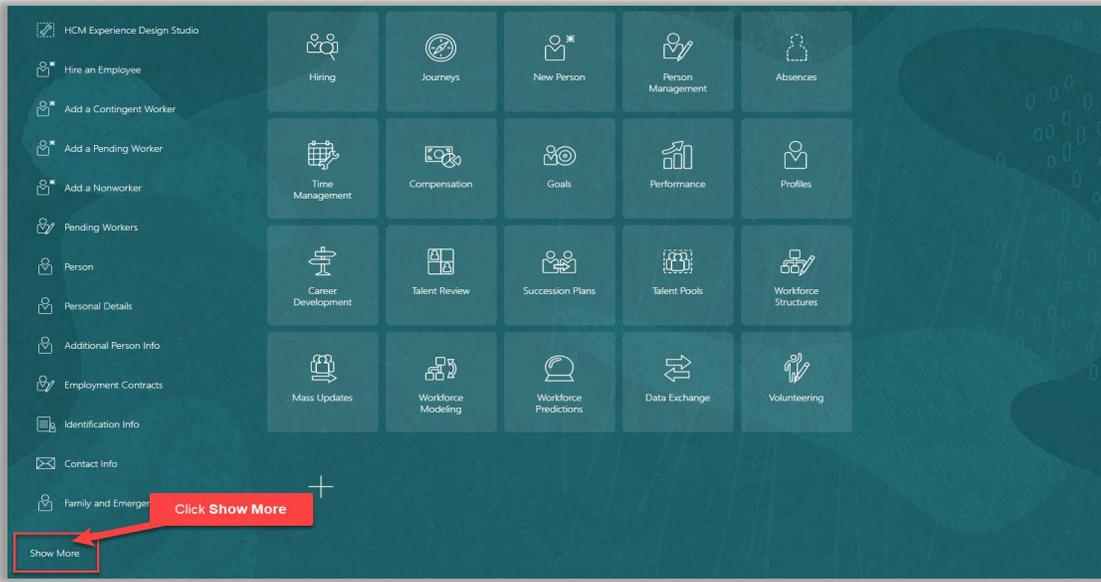
Enter Position Costing

Navigation: Home>My Client Groups>Show More>Costing of Positions>Search>Add>OK>Submit

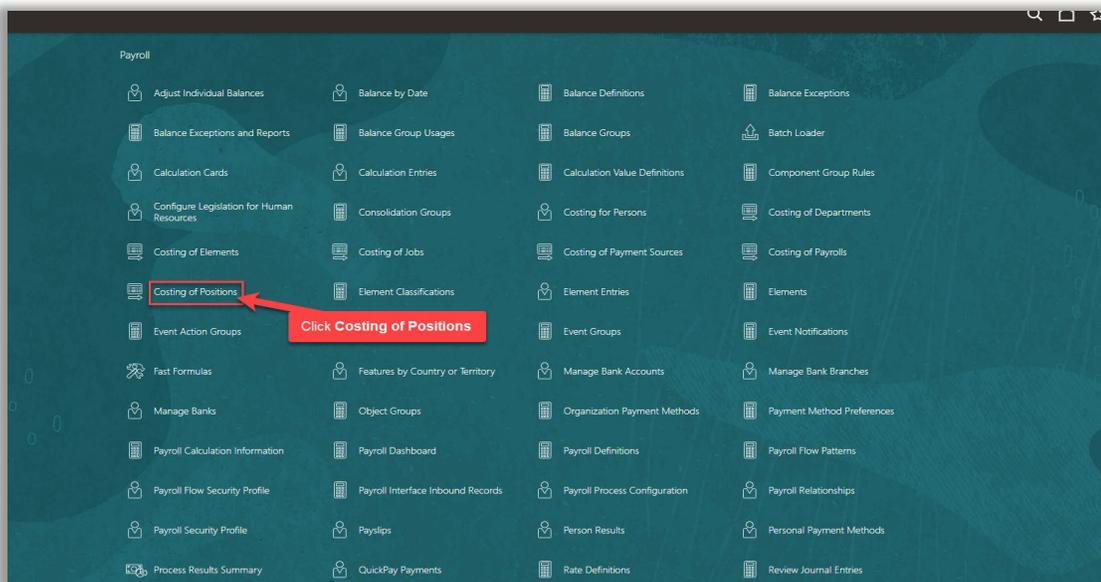
From the home screen, click **My Client Groups**



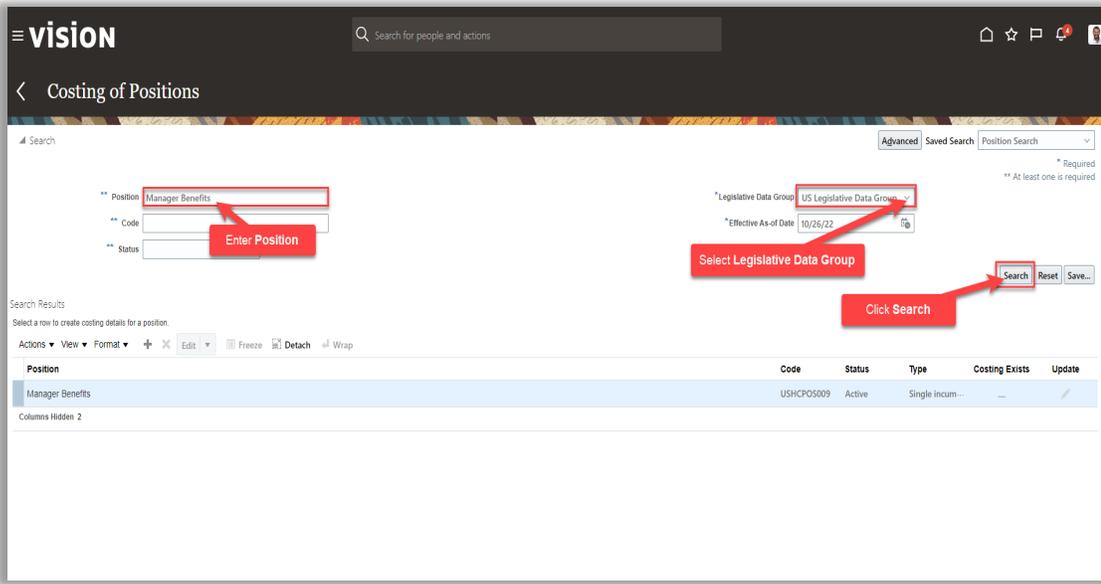
Next, click **Show More** from the Quick Actions



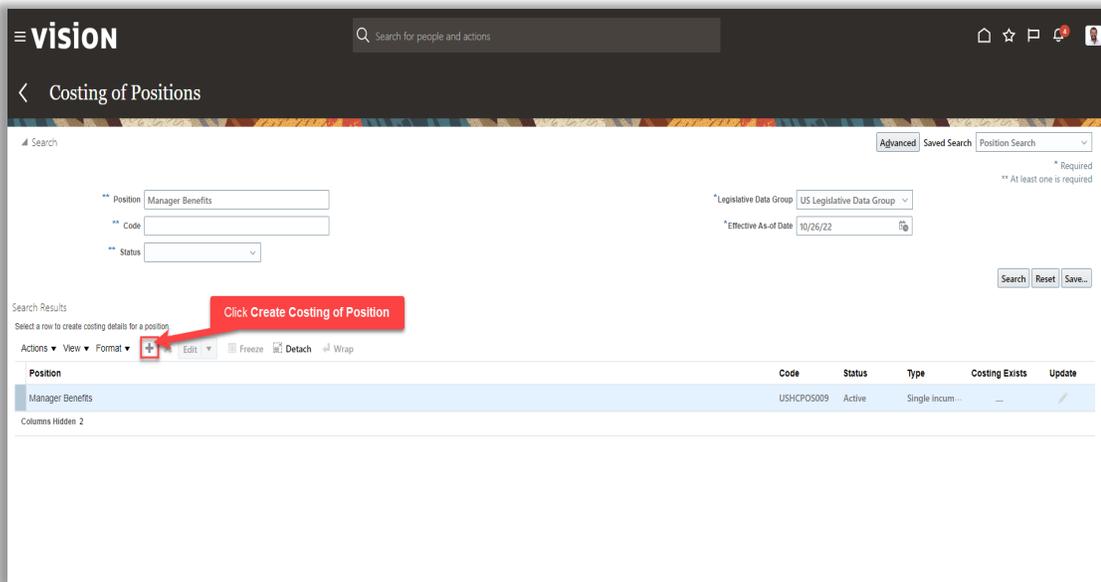
Under Payroll, click **Costing of Positions**



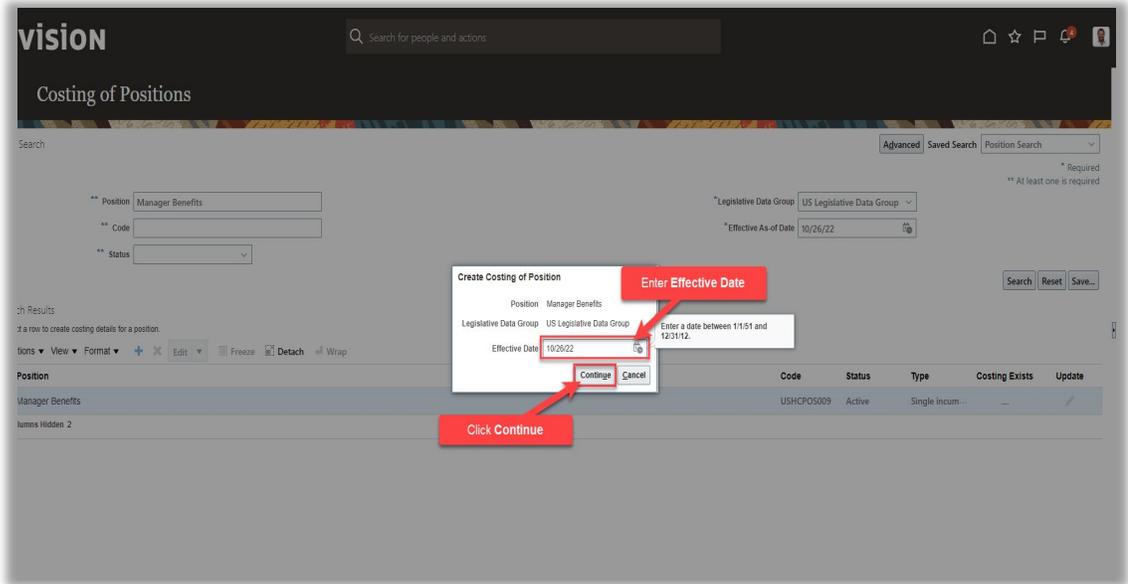
Enter the **Position Name**, select the **Legislative Data Group** from the dropdown, and click **Search**



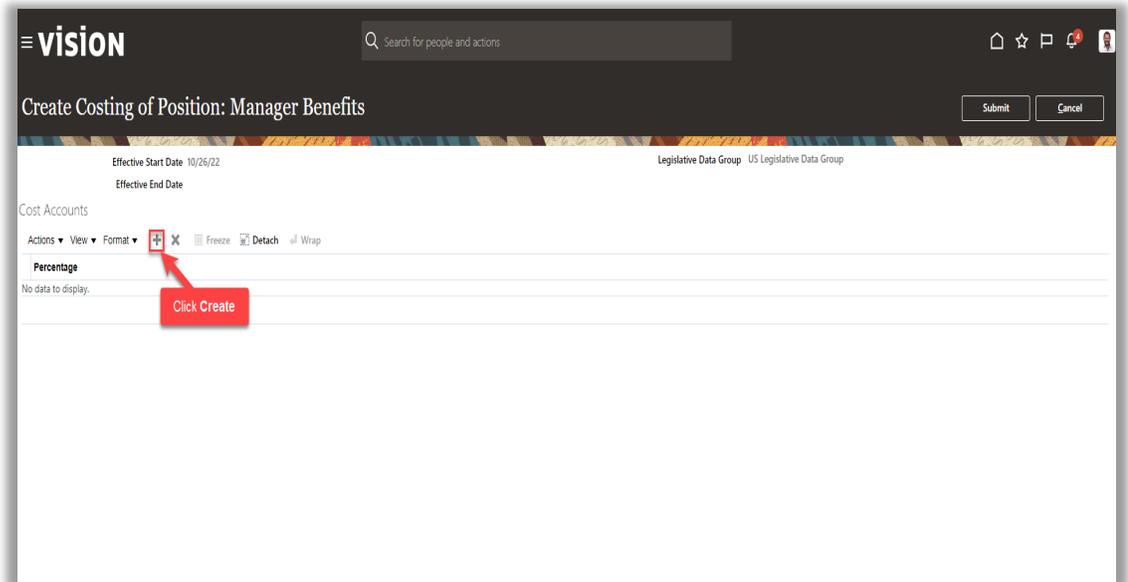
Highlight the row and click + to Create Costing of Position



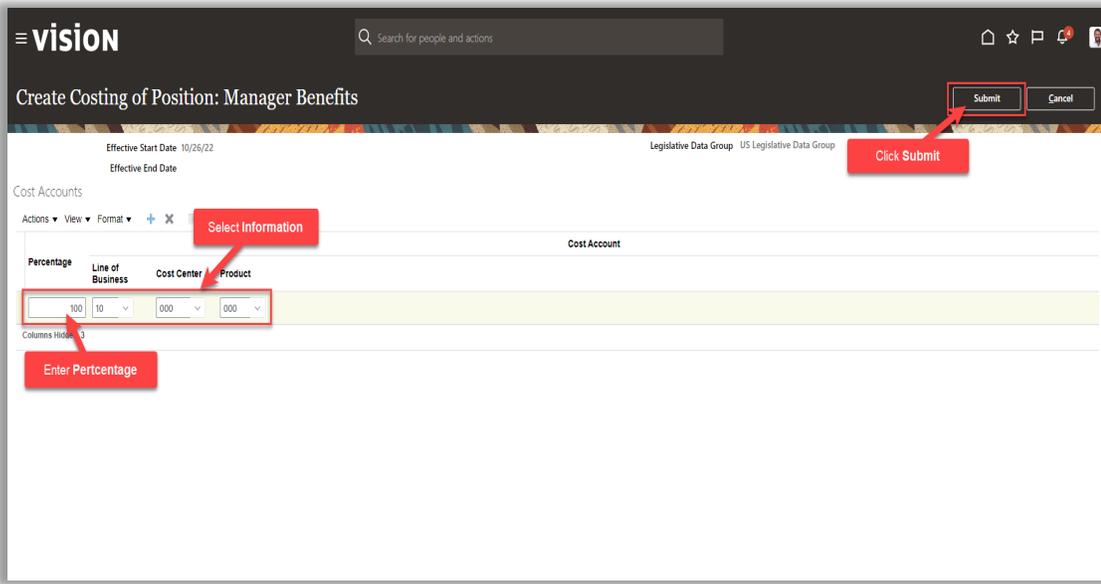
Enter the Effective Date and click Continue



Click Create



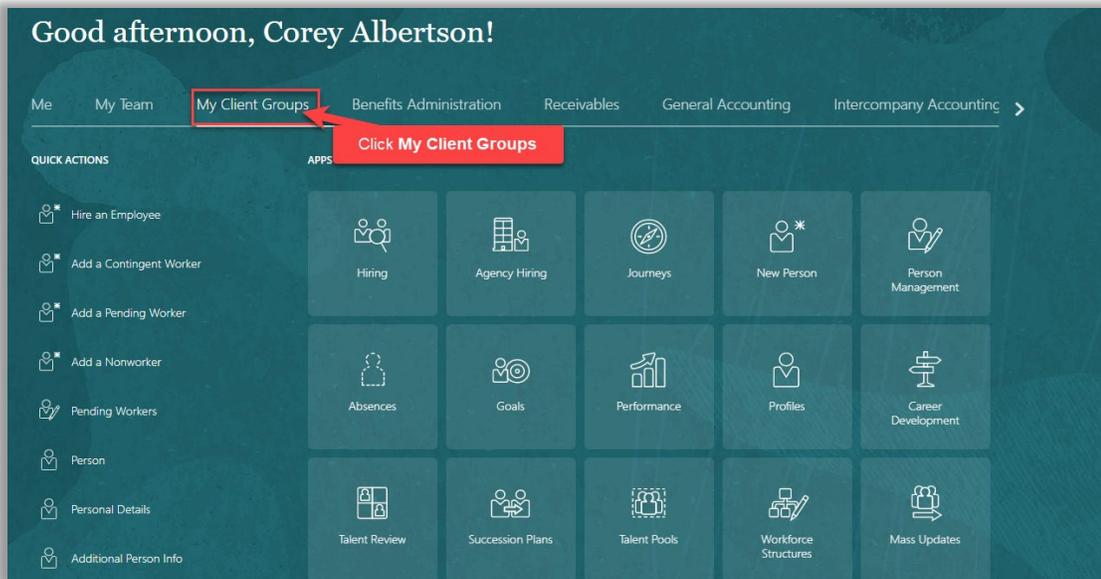
Enter the **Percentage**, **Line of Business** from the drop down, **Cost Center** from the drop down, and **Product** from the drop down. Click **Submit**



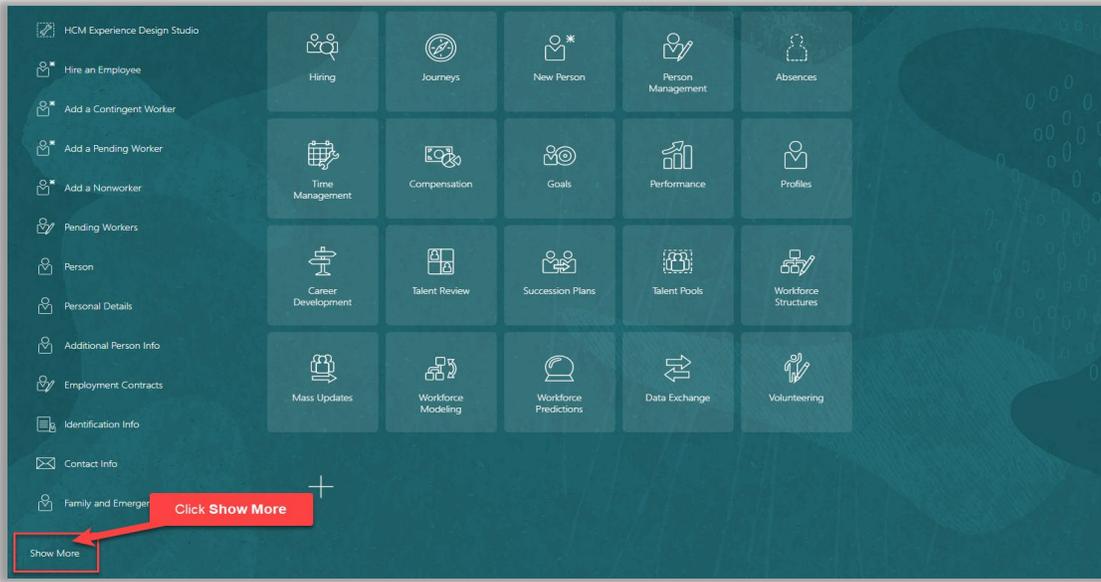
Enter Job Costing

Navigation: Home>My Client Groups>Show More>Costing of Jobs>Search>Create>Add>Continue>Submit

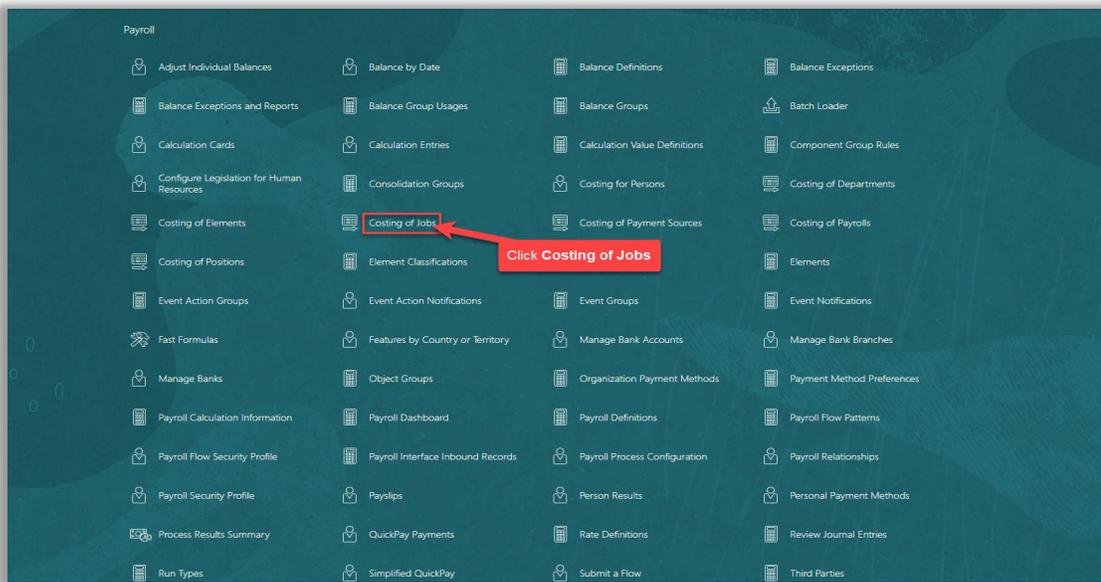
From the home screen, click **My Client Groups**



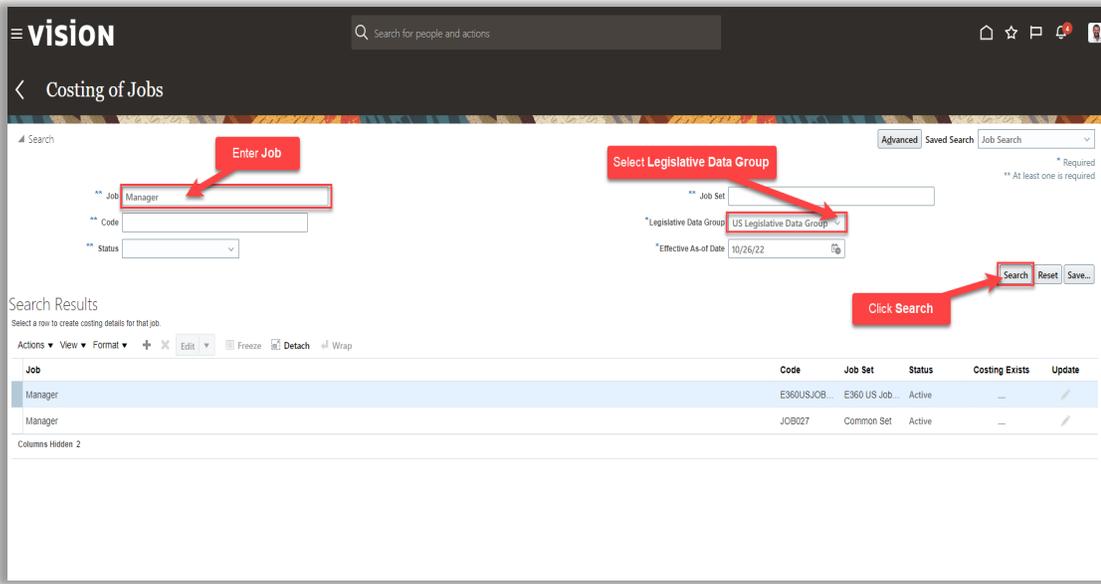
Next, click **Show More** from the Quick Actions



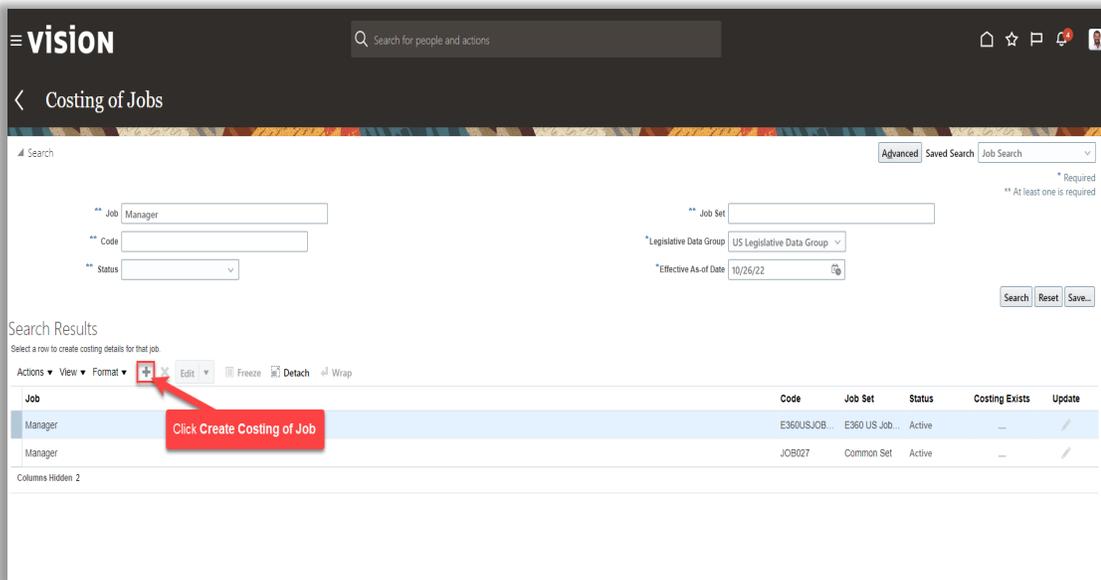
Under Payroll, click **Costing of Jobs**



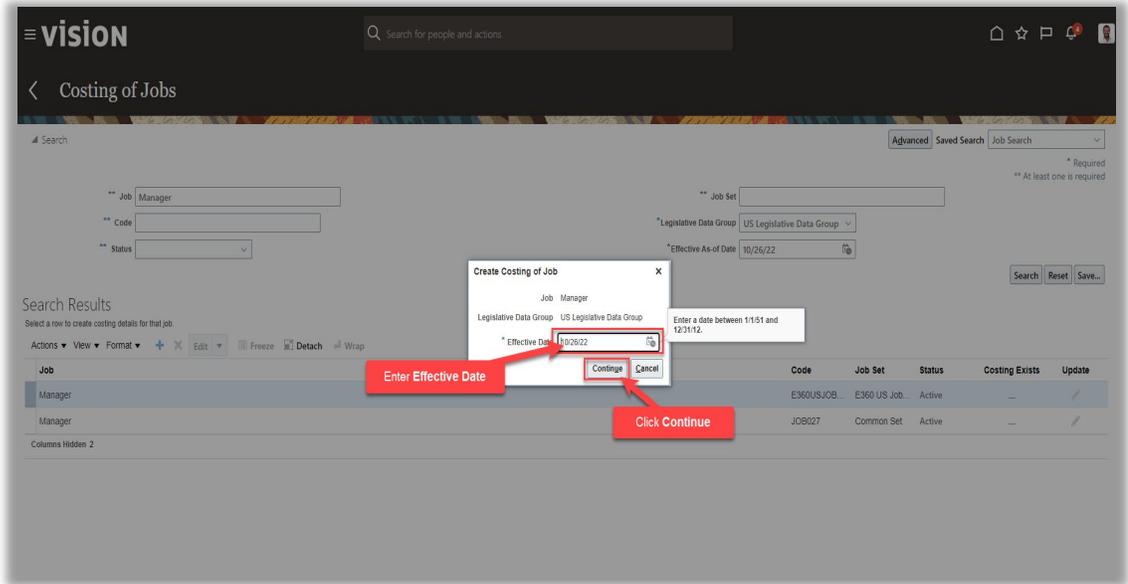
Enter **Job Name**, select **Legislative Data Group** from the dropdown, and click **Search**



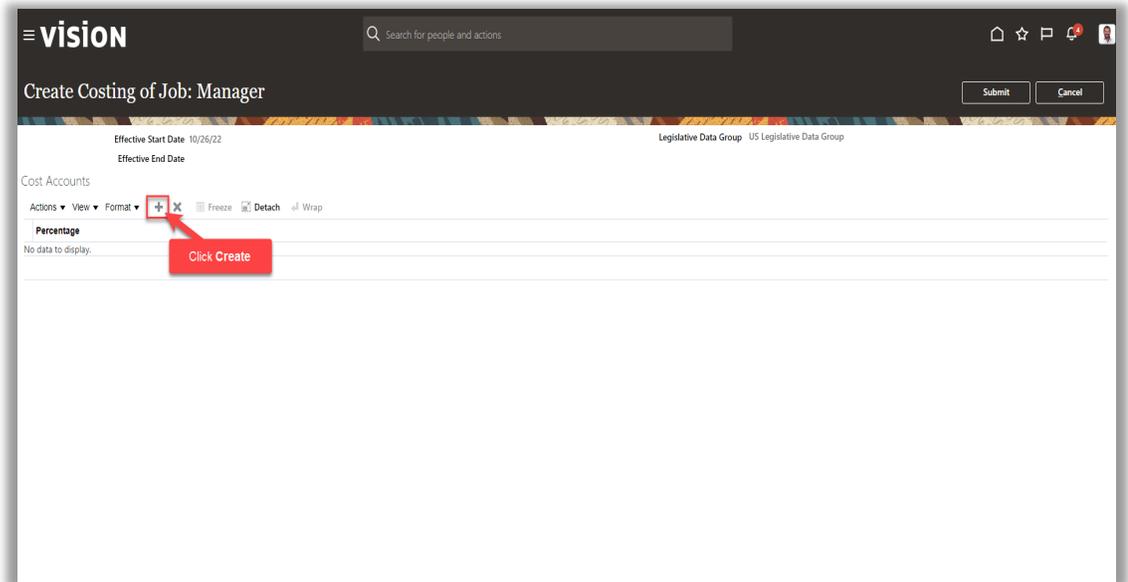
Highlight the row and click + to Create Costing of Job



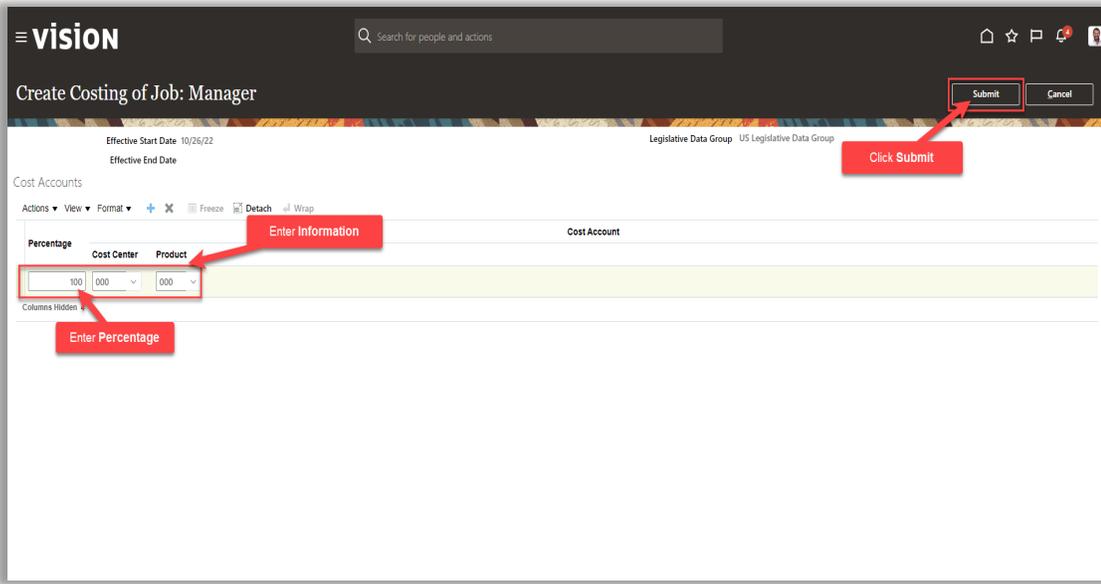
Enter the Effective Date and click Continue



Click Create

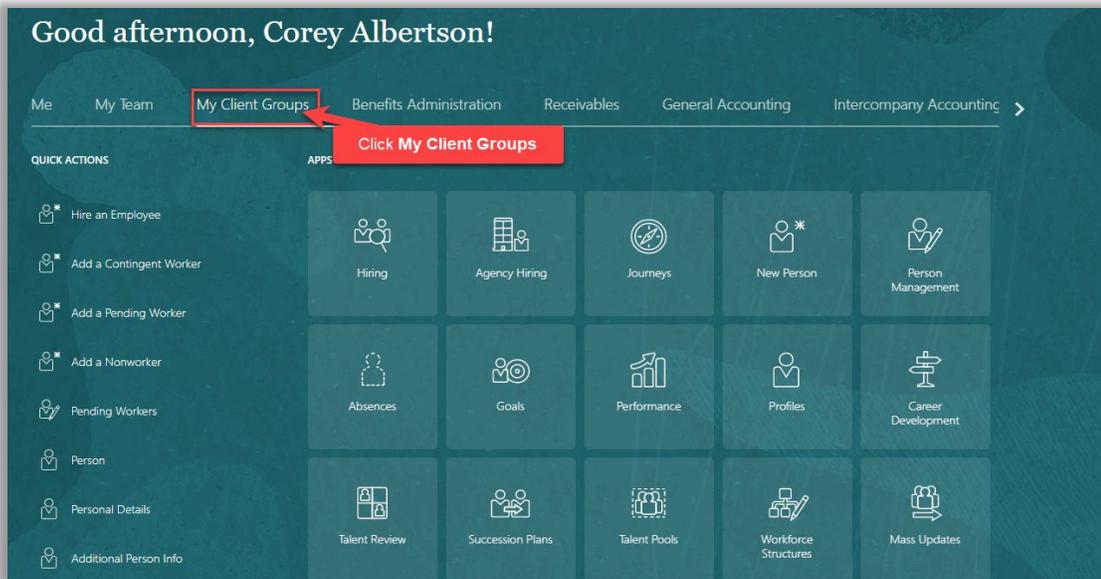


Enter the **Percentage**, **Cost Center** from the drop down, and **Product** from the drop down. Click **Submit**

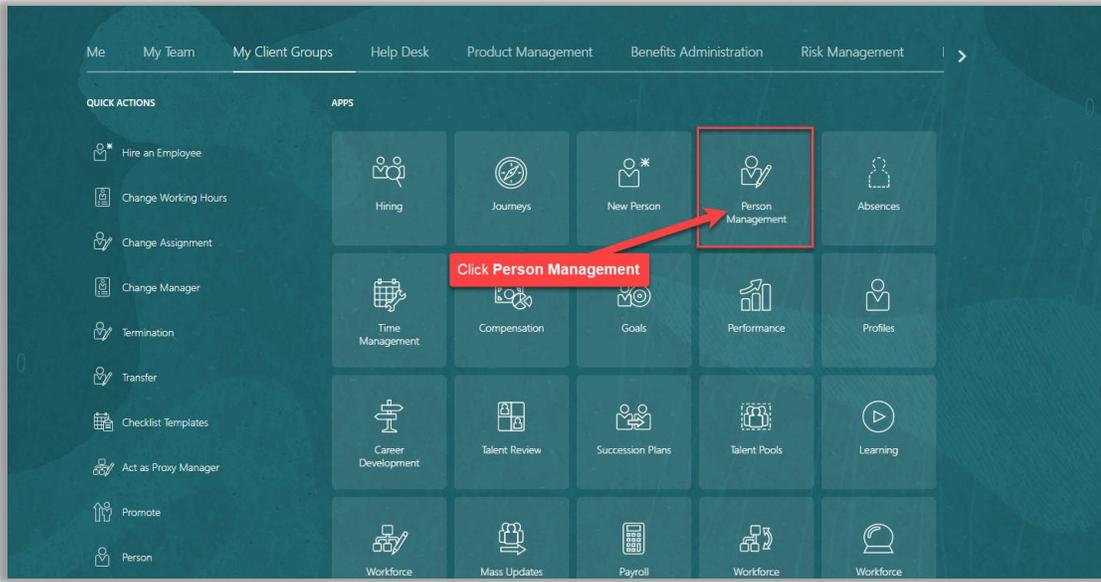


Enter & Update Employee's Work From Home Flag or Override Tax Address
 Navigation: Home>My Client Groups>Person Management>Search
 Employee>Actions>Update>Submit

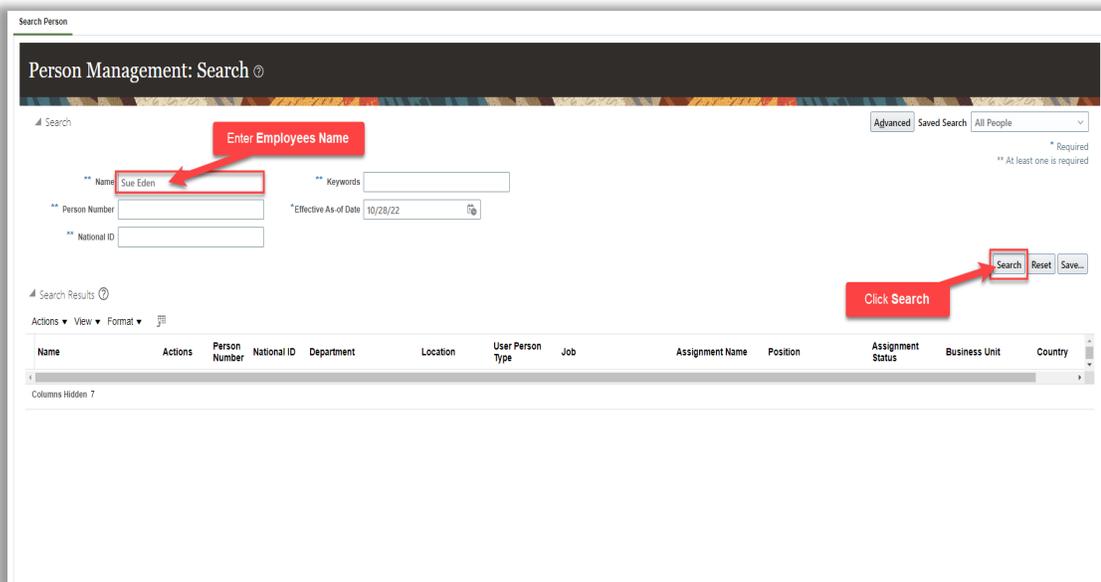
From the home screen, click **My Client Groups**



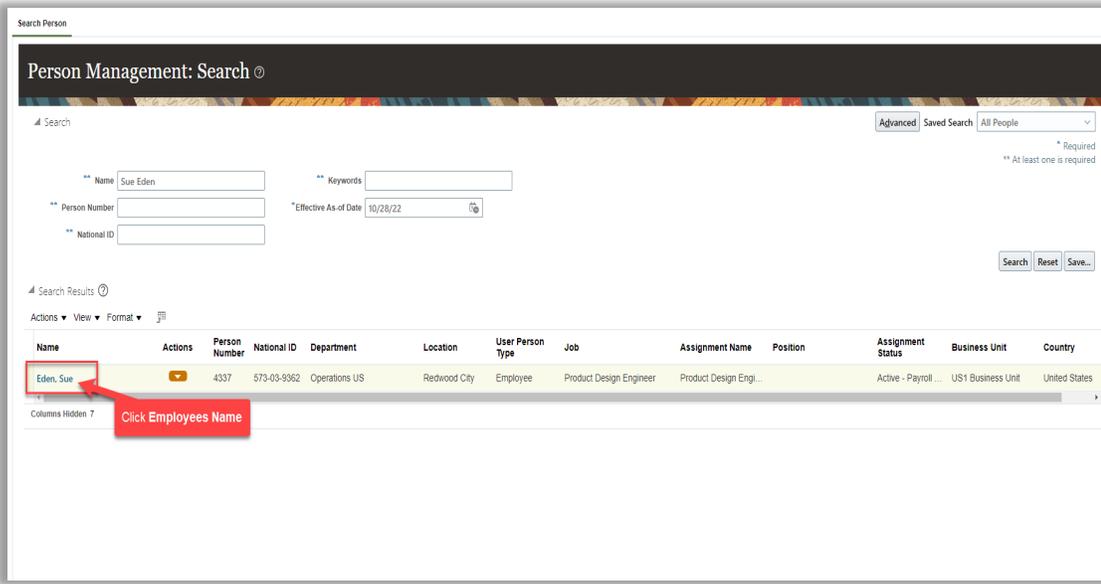
Click **Person Management**



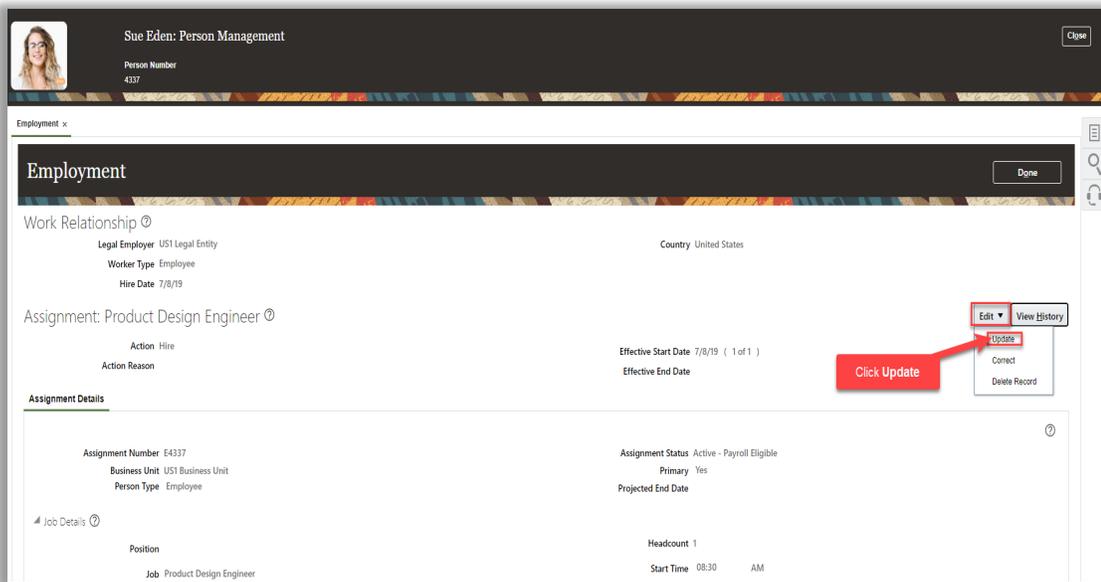
Enter the employees Name and click Search



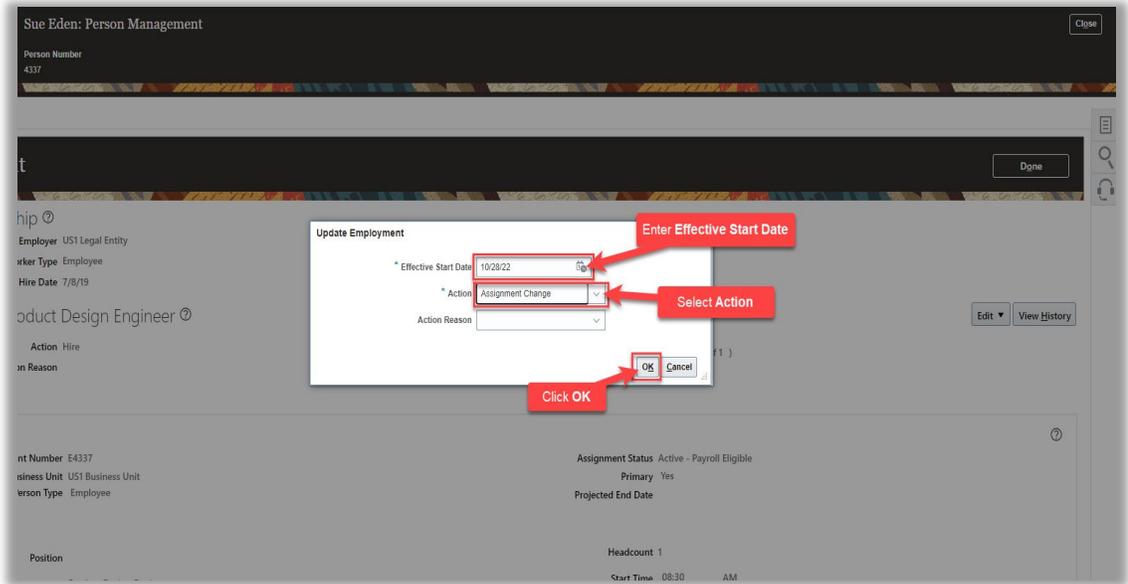
Click Employees Name



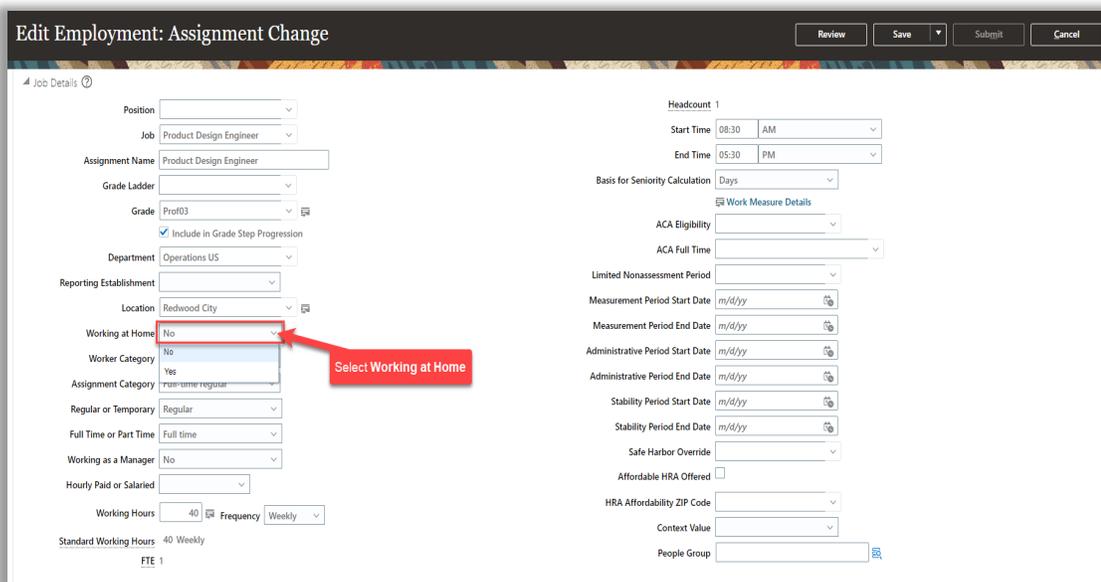
Click Edit then Update



Enter the Effective Start Date. Select Action from the dropdown and click OK



Under Job Details, select the value for **Working at Home**



Click **Review**

Edit Employment: Assignment Change

Review Save Submit

Click Review

Job Details

Position: [Dropdown]
 Job: Product Design Engineer
 Assignment Name: Product Design Engineer
 Grade Ladder: [Dropdown]
 Grade: Prof03
 Include in Grade Step Progression
 Department: Operations US
 Reporting Establishment: [Dropdown]
 Location: Redwood City
 Working at Home: Yes
 Worker Category: [Dropdown]
 Assignment Category: Full-time regular
 Regular or Temporary: Regular
 Full Time or Part Time: Full time
 Working as a Manager: No
 Hourly Paid or Salaried: [Dropdown]
 Working Hours: 40 Frequency: Weekly
 Standard Working Hours: 40 Weekly
 FTE: 1

Headcount: 1
 Start Time: 08:30 AM
 End Time: 05:30 PM
 Basis for Seniority Calculation: Days
 Work Measure Details
 ACA Eligibility: [Dropdown]
 ACA Full Time: [Dropdown]
 Limited Nonassessment Period: [Dropdown]
 Measurement Period Start Date: m/d/yy
 Measurement Period End Date: m/d/yy
 Administrative Period Start Date: m/d/yy
 Administrative Period End Date: m/d/yy
 Stability Period Start Date: m/d/yy
 Stability Period End Date: m/d/yy
 Safe Harbor Override: [Dropdown]
 Affordable HRA Offered:
 HRA Affordability ZIP Code: [Dropdown]
 Context Value: [Dropdown]
 People Group: [Dropdown]

Click Submit

Edit Employment: Review

Printable Page Back Review Save Submit

Click Submit

Current Value

Grade Ladder	Grade	Step	IncrementNumber
No data to display.			

Proposed Value

Grade Ladder	Grade	Step	Increment Number
No data to display.			

Location Information

Attribute	Current Value	Proposed Value
Working at Home	No	Yes

Work Measures

Current Value

Value	Unit
No data to display.	

Proposed Value

Value	Unit
No data to display.	

Retirement

Attribute	Current Value	Proposed Value

Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@campratech.com