# Viewing and Changing Pay Information in UltiPro

Pay

The **Pay** tab in **UltiPro** allows you to view past and current pay statements, your pay history, year to date summary of earnings and deductions, your record of direct deposits, and provincial and federal income tax forms. You can edit your direct deposit information and upload a file of your bank cheque. **NOTE:** when **UltiPro** goes live in early 2017, the pay history will start with your first pay period of 2017. No previous pay history will be available in the **UltiPro** system. Pay history displayed in this job aid is for demonstration purposes only.

UltiPro Home page
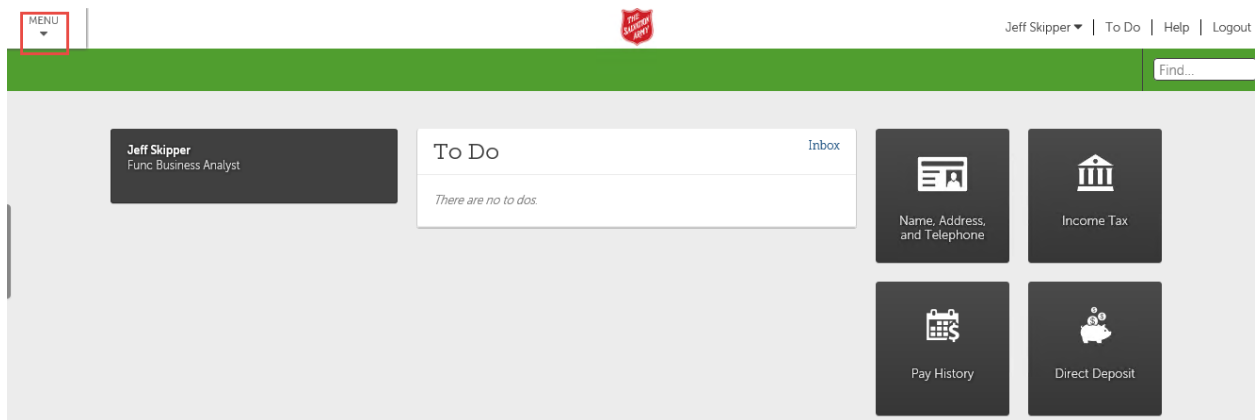
Click **Menu** to display the main menu of information tabs and pages.

Main Menu
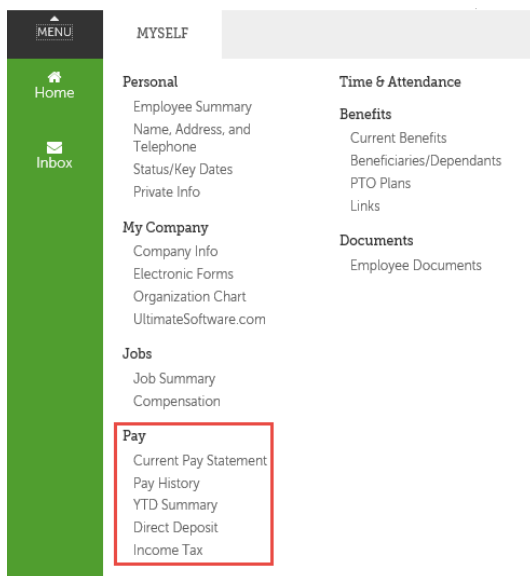
The **Pay** page links are bordered in red. To go to the **Pay** area click **Pay** tab. Or you can go directly to a page within the Pay tab by clicking on one of the pages listed below the Pay tab.

For our demonstration we will click the tab **Pay.**

Pay Tab – Current Pay Statement

The first page in the **Pay** tab – **Current Pay Statement** – is displayed. This page is a summary of all your pay information – pay date, pay period, earnings, deductions, and paid time off.

1. The Pay pages you can access are listed in the bar at the top. The black area indicates we are on the **Current Pay Statement** page.
2. You can download your pay statement as an electronic file, or print a copy.

Pay Tab - Pay History

Click **Pay History**. This page is a list of your pay statements.

1. Click a pay date to display that pay statement. It will display as shown in **Pay Statement** above.

Pay Tab – YTD Summary

Click **YTD Summary**. The summary displays your year to date earnings and deductions.

Pay Tab - Direct Deposit

Click **Direct Deposit**. This page summarizes your direct deposits. You can add or change banking information and what percentage or amount of your earnings you want deposited into individual accounts. The summary below shows two bank accounts with a percentage of wages going to each one.

Current Pay Statement	Pay History	YTD Summary	Direct Deposit	Income Tax		Find...

Direct Deposit Summary

add delete   print help

Things I Can Do

FOR THIS PAGE
Add Direct Deposit
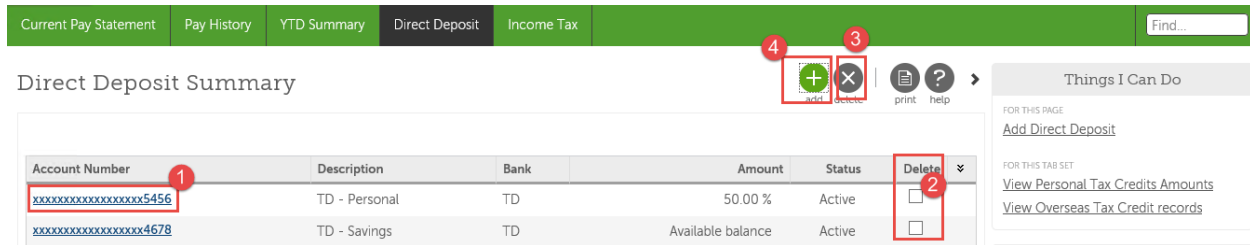
FOR THIS TAB SET
View Personal Tax Credits Amounts
View Overseas Tax Credit records

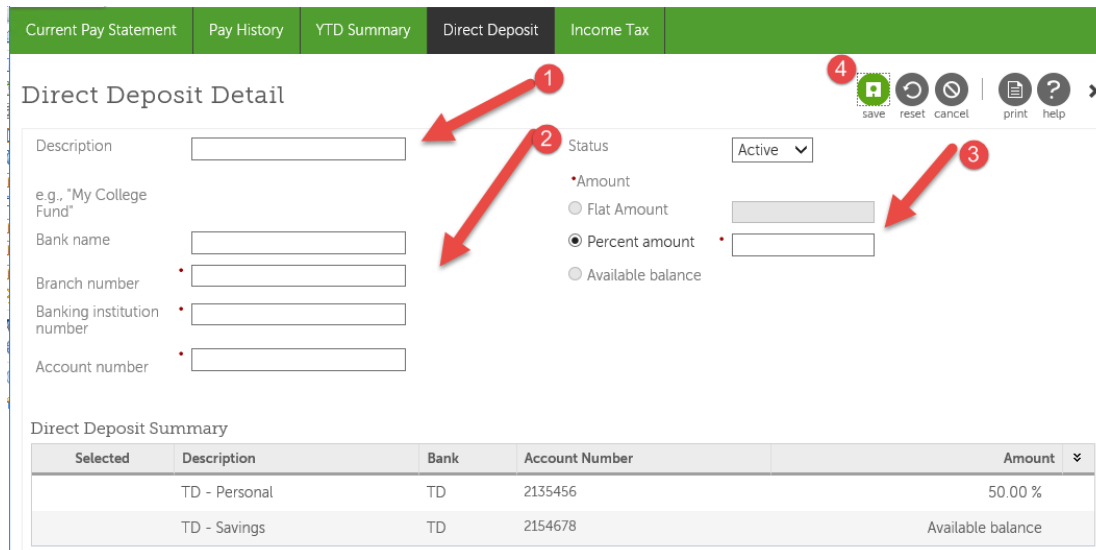| Account Number	Description	Bank	Amount	Status	Delete
xxxxxxxxxxxxxxxxx5456	TD - Personal	TD	50.00 %	Active	☐
xxxxxxxxxxxxxxxxx4678	TD - Savings	TD	Available balance	Active	☐

Add, Modify, Delete Bank Account Data

When you add or modify your bank account information you must also provide an electronic file image of your cheque. This process is explained below.

1. To modify existing account information click an account number and make changes to the editable fields.
2. To delete an account click the box in the delete column beside the account information.
3. Click the X **delete** icon.
4. To add an account click **add** icon to add **Direct Deposit Detail**.

1. Type in a description (e.g. "My college fund")
2. Type in Branch number, banking intitution number, account number
3. Select flat amount or percent amount and type in amount or percentage.
4. Click save icon.

![Project UltiPro logo]

Employee Documents - Upload Voided Cheque

After you have completed adding the account information, you need to provide a copy of a voided cheque. This is done through the *Documents* tab.
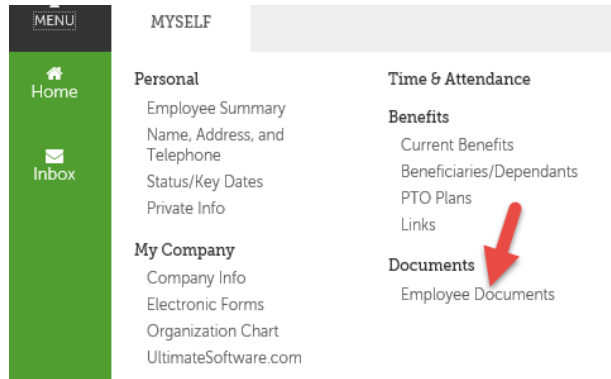
Click **Menu** then click **Employee Documents**.
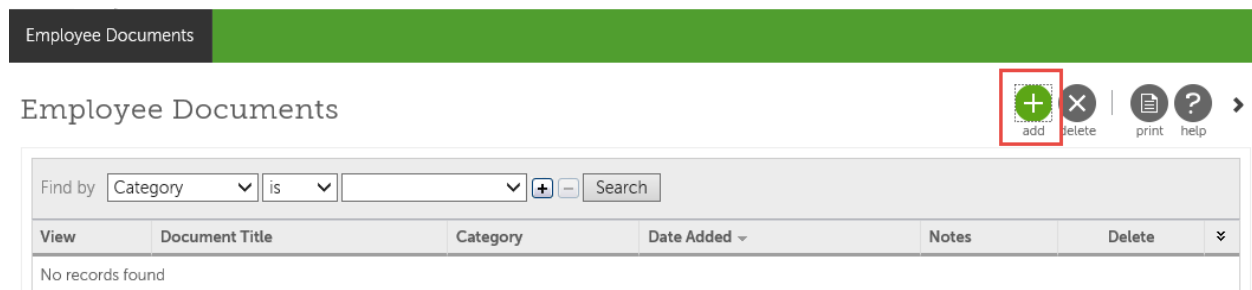
Click **Add** to display **Add/Change Document** page.

Scan or photograph your voided cheque to create an electronic file

1. Click browse to access your directories. Find and open the electronic file.
2. Type in a descriptive title (e.g. University Fund)
3. Select a category.

4. Click **save** icon.

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Pay Tab – Income Tax

Click **Income Tax**. This page allows you to access your tax forms.

Current Pay Statement	Pay History	YTD Summary	Direct Deposit	Income Tax

Income Tax

print   help

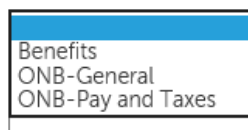| Province Of Employment	Description	History	Use Basic Personal Amount	Total Claim Amount	Requested Reduction	Block Withholding	Exempt
	Federal Tax	🕐		$0			
✓	ON Prov Tax	🕐	✓	$0			

1. Click **Federal tax** or **ON Prov Tax** to view tax forms as shown below.
2. Click **back** icon to return. Click **print** icon to print the details.

Current Pay Statement	Pay History	YTD Summary	Direct Deposit	Income Tax

Federal Tax

back   print   help

Canada Pension Plan Form CPT20   Form CPT30

Personal Tax Credits Return Form TD1

○ Use basic personal amount $11,474.00

   Basic personal amount as of   12/13/2016

◉ Use personal tax credits amounts

   Total claim amount $0.00

○ Total income less than total claim amount

Deduction for living in a prescribed zone $0.00

Additional tax to be deducted $0.00

☐ Employee requested reduction in tax deductions   Form T1213

   Annual deductions to income $0.00

   Other Federal tax credits $0.00

Current Pay Statement	Pay History	YTD Summary	Direct Deposit	Income Tax

Ontario Income Tax

back   print   help

Personal Tax Credits Return Form TD1ON

◉ Use basic personal amount $10,011.00

   Basic personal amount as of   12/13/2016

○ Use personal tax credits amounts

   Total claim amount $0.00

○ Total income less than total claim amount

Number of dependants   0

☐ Employee requested reduction in tax deductions   Form T1213

   Other Provincial tax credits $0.00

Menu, Home page or Exit

When you have finished with the pages of the **Personal** tab:

1. Click *menu* to select another tab or page to work on.
2. Click the ***Salvation Army*** logo to return to the **home** page.
3. Click ***Logout*** to exit the **UltiPro** system.