

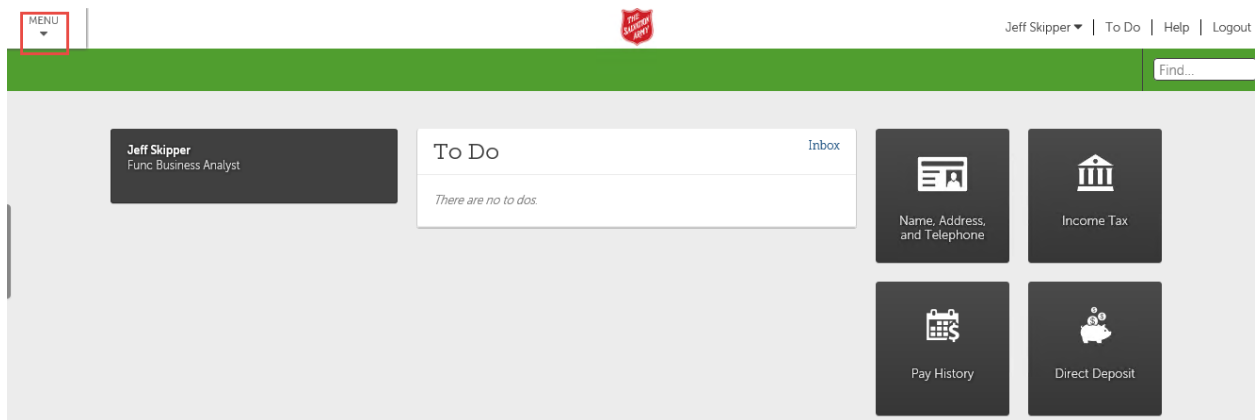
Viewing and Changing Pay Information in UltiPro

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.

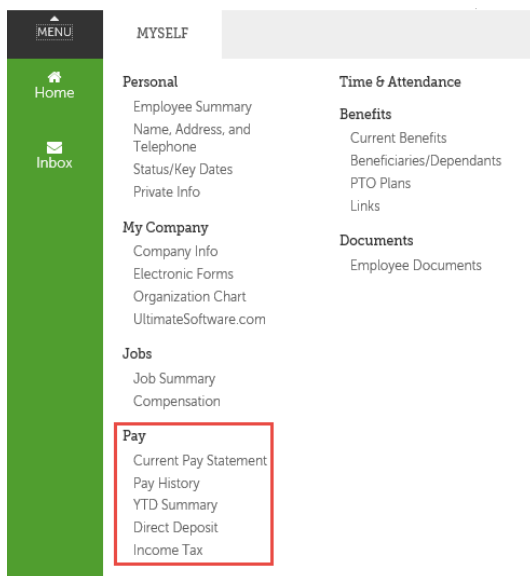
NOTE: when **UltiPro** goes live in early 2017, the pay history will start with your first pay period of 2017. No previous pay history will be available in the **UltiPro** system. Pay history displayed in this job aid is for demonstration purposes only.

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.

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




Toronto, ON M4H 1P4

Period End Date 10/07/2016

Pay Date 10/13/2016

Document 9

Net Pay \$1,202.51

download print help

Pay Details			
Train1 One 2 Overlea Blvd Toronto, ON M4H 1P4 CAN	Employee Number 1111111 Job Admin Coordinator Pay Rate \$18.85 Pay Frequency Biweekly	Pay Group Location Div/District Resp/Site Department Region	Test Hourly Territorial Headquarters THQ - Territorial Headquarters 300101 - THQ General Operations 1092 - HR Information System

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.

[Current Pay Statement](#)
[Pay History](#)
[YTD Summary](#)
[Direct Deposit](#)
[Income Tax](#)

Pay History

Find by Date range From To MM/DD/YYYY

Pay Date	Document Number	Net Pay	Earnings	Deductions	Employee
10/13/2016	9	\$1,202.51	\$1,512.82	\$310.31	
09/29/2016	7	\$1,203.66	\$1,508.00	\$304.34	
09/29/2016	6	\$1,198.32	\$1,508.00	\$309.68	
09/15/2016	5	\$0.00	\$4.82	\$4.82	

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.

[Current Pay Statement](#)
[Pay History](#)
[YTD Summary](#)
[Direct Deposit](#)
[Income Tax](#)

Pay summary

Find by
Company ZTEST
Year 2016

Earnings

Type	Hours	Amount
Regular Salary	240.0000	\$4,524.00
TB Basic Life	0.0000	\$9.64
Total	240.0000	\$4,533.64

Deductions

Type	Employee Amount	Employer Amount
Basic Life	\$0.00	\$9.64
CPP Gov Pens EE	\$210.85	\$210.85
EI Premium EE	\$85.05	\$85.05
Federal Tax	\$416.26	\$0.00
ON Prov Tax	\$207.35	\$0.00



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

>

Account Number	Description	Bank	Amount	Status	Delete
xxxxxxxxxxxxxxxxxx5456	TD - Personal	TD	50.00 %	Active	<input type="checkbox"/>
xxxxxxxxxxxxxxxxxx4678	TD - Savings	TD	Available balance	Active	<input type="checkbox"/>

Things I Can Do

FOR THIS PAGE

[Add Direct Deposit](#)

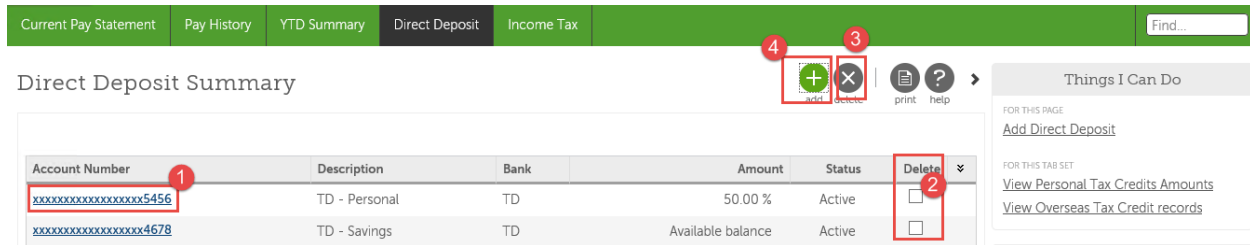
FOR THIS TAB SET

[View Personal Tax Credits Amounts](#)

[View Overseas Tax Credit records](#)

Add, Modify, Delete Bank Account Data

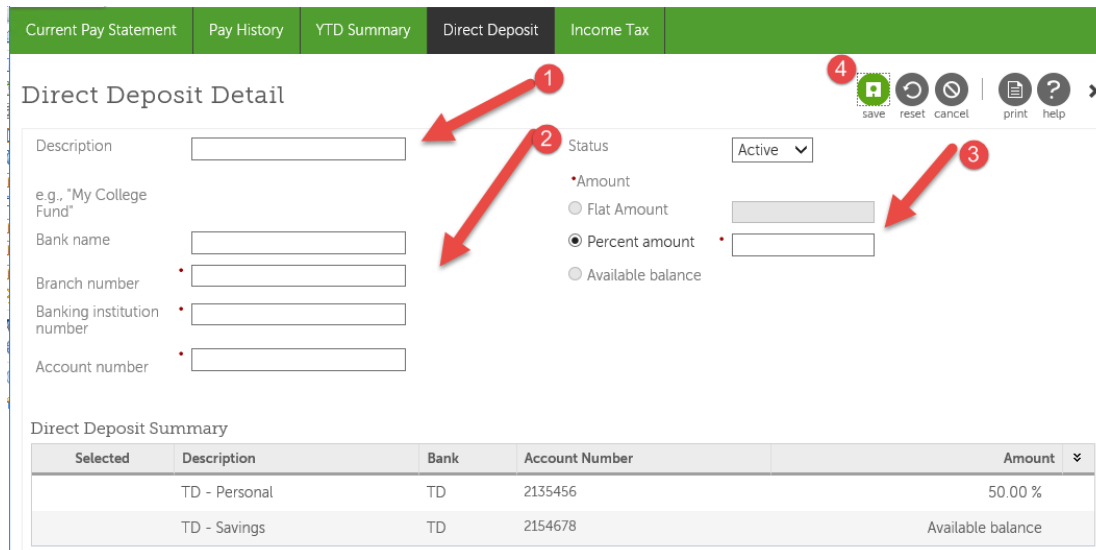
When you add or modify your bank account information you must also provide an electronic file image of your cheque. This process is explained below.



The screenshot shows the 'Direct Deposit Summary' page. At the top is a green navigation bar with tabs: 'Current Pay Statement', 'Pay History', 'YTD Summary', 'Direct Deposit' (selected), and 'Income Tax'. A search bar is on the right. Below the navigation bar is a toolbar with icons for '+ add', 'X delete', 'print', and 'help'. A sidebar on the right titled 'Things I Can Do' contains links for 'Add Direct Deposit', 'View Personal Tax Credits Amounts', and 'View Overseas Tax Credit records'. The main content area is a table with columns: 'Account Number', 'Description', 'Bank', 'Amount', 'Status', and 'Delete'. Two rows are visible: 'TD - Personal' with account number 'xxxxxxx5456' and 'TD - Savings' with account number 'xxxxxxx4678'. Red callouts are placed as follows: 1 points to the 'Account Number' column header, 2 points to the 'Delete' checkbox in the first row, 3 points to the 'X delete' icon, and 4 points to the '+ add' icon.

Account Number	Description	Bank	Amount	Status	Delete
xxxxxxx5456	TD - Personal	TD	50.00 %	Active	<input type="checkbox"/>
xxxxxxx4678	TD - Savings	TD	Available balance	Active	<input type="checkbox"/>

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**.



The screenshot shows the 'Direct Deposit Detail' page. At the top is a green navigation bar with tabs: 'Current Pay Statement', 'Pay History', 'YTD Summary', 'Direct Deposit' (selected), and 'Income Tax'. Below the navigation bar is a toolbar with icons for 'save', 'reset', 'cancel', 'print', and 'help'. The main content area contains form fields for 'Description' (with example 'e.g., "My College Fund"'), 'Bank name', 'Branch number', 'Banking institution number', and 'Account number'. There is a 'Status' dropdown menu set to 'Active'. Below these are radio buttons for 'Amount': 'Flat Amount', 'Percent amount' (selected), and 'Available balance'. Input fields for 'Amount' and 'Percent amount' are provided. Red callouts are placed as follows: 1 points to the 'Description' field, 2 points to the 'Branch number' field, 3 points to the 'Percent amount' radio button, and 4 points to the 'save' icon.

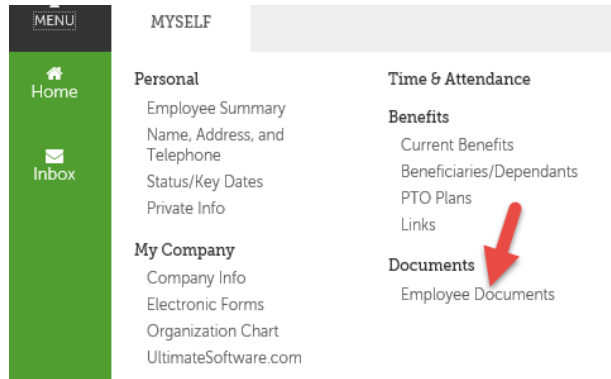
Direct Deposit Summary

Selected	Description	Bank	Account Number	Amount
	TD - Personal	TD	2135456	50.00 %
	TD - Savings	TD	2154678	Available balance

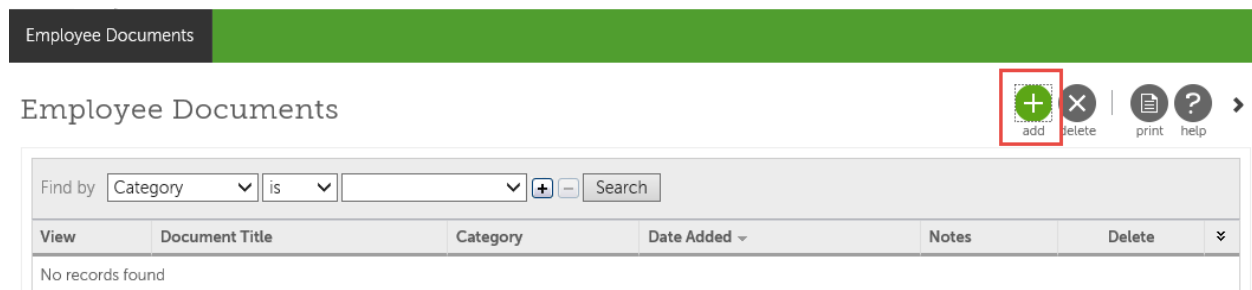
1. Type in a description (e.g. "My college fund")
2. Type in Branch number, banking institution number, account number
3. Select flat amount or percent amount and type in amount or percentage.
4. Click save icon.

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**.

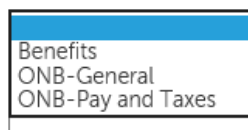


Click **Add** to display **Add/Change Document** page.



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.

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	
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Income Tax



Province Of Employment	Description	History	Use Basic Personal Amount	Total Claim Amount	Requested Reduction	Block Withholding	Exempt	
	Federal Tax			\$0				
<input checked="" type="checkbox"/>	ON Prov Tax		<input checked="" type="checkbox"/>	\$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	
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Federal Tax



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	
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Ontario Income Tax



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.