



# GRADUATE STUDENT EMPLOYEE SELF SERVICE GUIDE

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## OTHER LINKS IN THIS GUIDE

This Guide contains hyperlinks to help you navigate within the Guide, out to the Oracle Employee Self Service website, and to other external sites.

Active links appear in **ORANGE**.

On any page, click **> RETURN TO CONTENTS** in the footer to return to this page.

In sections 2, 3, 4 and 5, click on the Oracle navigation path to go directly to that task in the Employee Self Service site.

Example:

**GO TO: Employee Self Service Home > Main Menu > Employee Self Service > My Benefits**

If you have pop-up blockers enabled, you may need to turn them off to gain access to some sections of Employee Self Service.

# LOG INTO THE ORACLE BUSINESS SYSTEM

## How to Access, Log In and Navigate

You can access Self Service from anywhere you have Internet access. You will need your username and password. If you are a first-time user, you will need to set up an account.

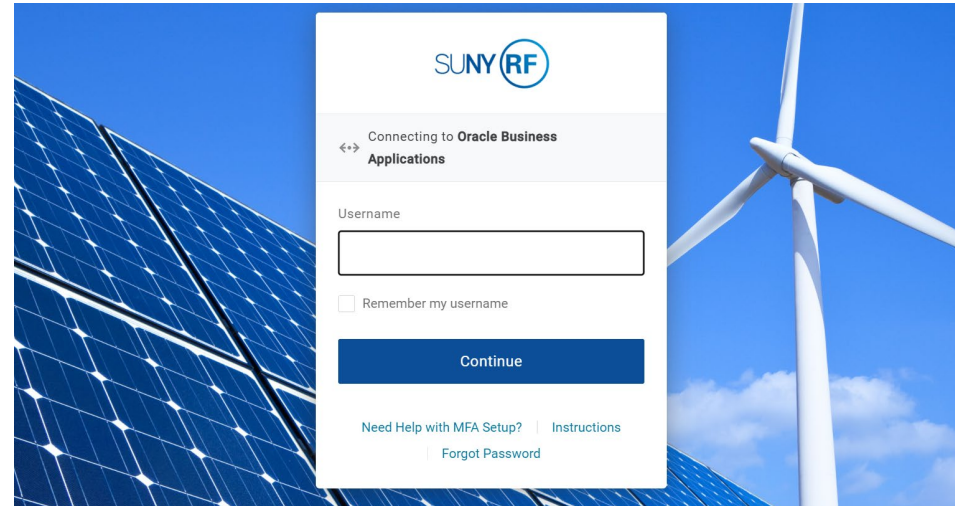
1. Go to [Employee Self Service](#)
2. Click **Access Employee Self Service**
3. Enter your Research Foundation ID Number as your username. If you are an RF employee this was sent to you via email when you were first hired. (If you are not contact your campus information security administrator for this number.)
4. Enter your password.  
*Tip! If you have forgotten your password, click “Forgot Your Password” on the login screen. Your information will be emailed to you.*
5. Enter your OneLogin Protect Code. *To set this up, please see the [MFA Quick Start Guide](#).*
6. Go to the Business Applications portlet and click **Self Service** link.

### Site Availability

The Self Service website undergoes daily planned system maintenance, from 6:00 to 6:30 p.m. and 2:00 to 4:00 a.m. EST. If you attempt to log in during these times, you will encounter a message that reads, “Employee Self Service Unavailable.”

### Log Out to Protect Your Personal Information!

When you’ve completed your session, click **Logout** in the list of links in the upper right corner of the screen. This will help prevent unauthorized access to your information.



If you need help with Self Service, contact Customer Services at: [customerservices@rfsuny.org](mailto:customerservices@rfsuny.org) or (518) 434-7222.

# HOW TO USE SELF SERVICE How to Access, Log In and Navigate Employee Self Service

## THE MAIN MENU

### Buttons

You will find the following buttons throughout the site. Other buttons may appear depending on the section you are in.

**Apply** – Enters and saves information you have provided.

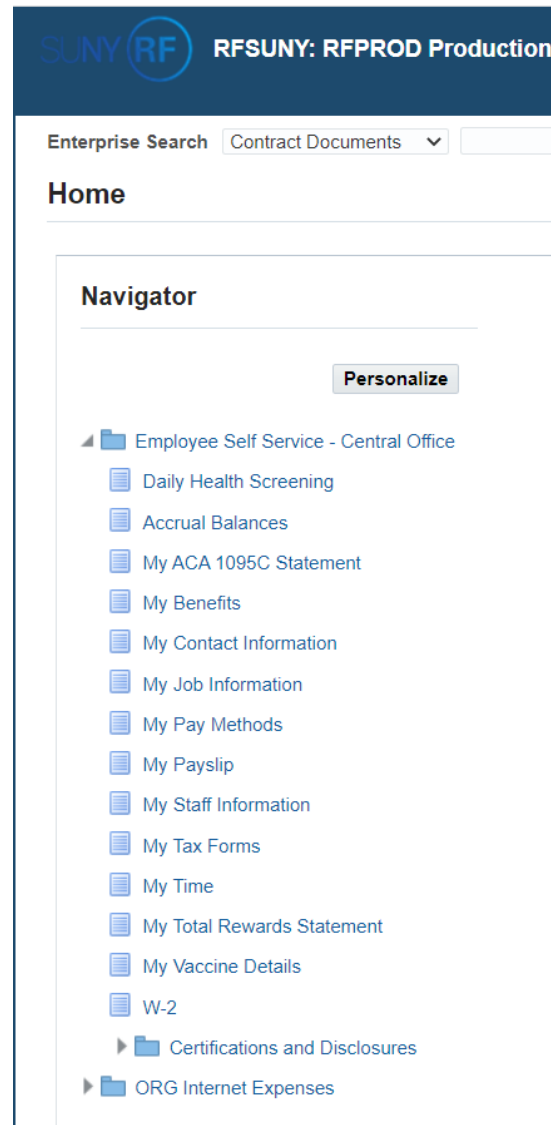
**Back** – Lets you return to a previous page to change or review entered information.

**Cancel** – Cancels changes you have entered and prevents them from being submitted or applied.

**Next** – Moves you to the next step in a process.

**Printable Page** – Presents the current page in a printer-friendly format. To print the page, use your browser's print function.

**Update** – Takes you to a page where you can edit information.



# BENEFITS Enrollment Guidelines

## **What Benefits Can I Enroll in Via Self Service?**

You may use Self Service to enroll in the Graduate Student Employee Health Plan, which includes medical, dental and vision benefits.

## **When Can I Enroll in or Make Changes to My Health Insurance Benefits Via Self Service?**

You can enroll in or make changes to your health insurance benefits:

- During your initial 45 days of eligible employment
- Up to 31 days after your marriage or child's birth/adoption
- Annually during open enrollment (typically November 1 through November 30 of each year). At any other time, you must use a hard copy enrollment form.

## **Can I Enroll in the RF Ride Transit Benefit Via Self Service?**

To enroll in RF Ride, visit [www.payflex.com](http://www.payflex.com).

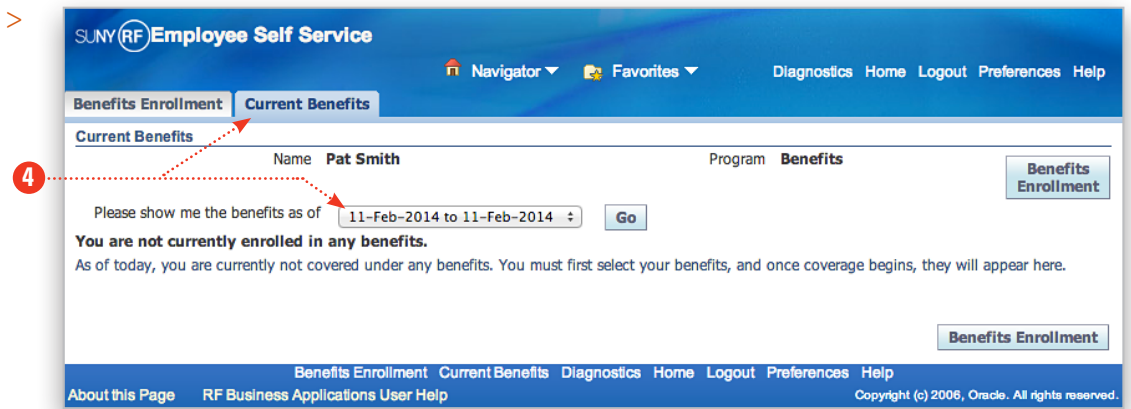
## **Can I Enroll in New York State Disability Insurance Via Self Service?**

New York State Disability is automatically provided to you at no cost. There is no need to enroll.

# BENEFITS How to View Your Benefits

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My Benefits](#)

1. **Accept** the Legal Disclaimer verifying that you are providing accurate information and click **Next**.
2. On the Dependents page, you can review your dependent information. If you need to update this information see [How to Enroll in or Make Changes to Benefits](#) on the next page. Click **Next**.
3. Select the program you wish to review and click **Next**.
4. Click the **Current Benefits** tab and use the drop-down menu to select the effective date of the benefits you would like to review.
5. Click **Go**.



# BENEFITS How to Enroll in or Make Changes to Benefits

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My Benefits](#)

1. **Accept** the Legal Disclaimer verifying that you are providing accurate information and click **Next**.
2. On the Dependents page, you can add or update your dependent information.

## To add dependents:

**Tip!** Before getting started, be sure you have your dependent's full legal name, date of birth and Social Security number (if one has been assigned).

- a. Click **Add Another Person**.
- b. Enter information in all the required (\*) fields following the guidelines below. Social Security numbers are required unless your dependent has not yet been issued one.

**If you are enrolling during open enrollment**, the relationship start date is November 1.

**If you are a new employee**, the relationship start date is your date of hire.

**If you have a new child**, the relationship start date is your child's date of birth/adoption.

**If you are adding a spouse**, the relationship start date is your date of marriage.

If you have dependent changes for any other reason, contact your campus Benefits Office.

- c. Click **Apply** at the bottom of the screen to save your changes.
- d. Repeat the steps to add more dependents.

*Continues next page >>*

2a

SUNY RF Employee Self Service

Dependents and Beneficiaries

Name Pat Smith

Cancel Next

Add Another Person

Name	Relationship	Social Security Number	Birth Date	Update
No results found.				

Cancel Next

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**!** Be very careful to enter your correct relationship start date. An error in this early step will create issues throughout your enrollment process that may force you to re-start or disqualify your enrollment.

When you add dependents any time after initial or open enrollment ends, your new dependents will need to be certified. When off-cycle changes are necessary to your dependents list due to birth, adoption, or marriage, you must submit legal documentation for the changes. Acceptable proof includes marriage and birth certificates or adoption documentation.

Your campus Benefits Office must receive certification of your dependent changes before coverage will be effective.

## BENEFITS How to Enroll in or Make Changes to Benefits *Continued*

### To update information for a current dependent:

- a. Click the pencil icon in the row in which the person's name appears.
  - b. Update the information as needed.
  - c. Click **Apply** at the bottom of the screen to save your changes.
  - d. Repeat these steps to update more dependents.
3. When you are finished adding/updating your dependents, click **Next**.
  4. Select the **Benefits** program.
  5. Click **Next**.

*Continues next page >>*

SUNY RF Employee Self Service

Navigator Favorites Diagnostics Home Logout Preferences Help

Dependents and Beneficiaries

Name Pat Smith

Cancel Next

Add Another Person

Name	Relationship	Social Security Number	Birth Date	Update
Grace Smith	Child	001-01-0010	27-Jul-2007	 a

Cancel Next 3

Diagnostics Home Logout Preferences Help

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# BENEFITS How to Enroll in or Make Changes to Benefits *Continued*

- On the Benefits Enrollment page is a summary of your current benefit elections. All newly eligible employees will default to “Waived”. To make your elections, click **Update Benefits** on the bottom right. For more information about your options, visit [www.rfsuny.org/benefits](http://www.rfsuny.org/benefits).
- Use the checkboxes and fields to enter your elections. Some benefits are provided to you automatically at no charge. You will not be able to change those elections.

*Tip!* Select the pre-tax option to ensure your benefits are exempt from

If you don't see the coverage options you're looking for, make sure you have added all your dependents and their birth dates. If you go back to add dependents, your Benefits Enrollment changes will not be saved. If you are not eligible for a certain option and you think you should be, contact your campus Benefits Office.

- When you're ready to elect coverages for specific dependents, click **Next**.

*Continues next page >>*

The screenshot shows the SUNY RF Employee Self Service interface. The user is logged in as Pat Smith, and the page is titled "Update Benefits: Update Enrollments". The enrollment period is 15-JAN-2014 to 01-MAR-2014. The page is divided into sections for Healthcare and Short Term Disability.

**Healthcare**

Plan	Option	Select	Emp Pretax	Emp After Tax	RF Cost
Grad Health Pretax	Grad Only	<input checked="" type="checkbox"/>	10.55		94.97
Grad Health After Tax	Grad Only	<input type="checkbox"/>		10.55	94.97
Waive Medical		<input type="checkbox"/>			

**Short Term Disability**

Plan	Select	RF Cost
NYS	<input checked="" type="checkbox"/>	2.02

**Add Dependents and Beneficiaries**

If a benefit or coverage option (e.g. dependent life insurance, EE + Spouse, EE+ Child, EE+ Family coverage options) does not appear, please click here to add dependents and restart the enrollment process.

Buttons: Recalculate, Back, Next

# BENEFITS How to Enroll in or Make Changes to Benefits *Continued*

9. Use the checkboxes to designate which dependents receive which coverages.
10. Once you have made your elections, click **Next**.
11. On the Confirmation Statement, you can review your elections to confirm they are accurate.
  - a. To print your Confirmation Statement, click **Confirmation Statement**, and then use your browser's print function.
    - ! *You will not have a chance to review your confirmation statement again, so be sure to print it now for future reference.*
  - b. To make changes to your elections, click **Back**.
  - c. To complete the enrollment process, click **Finish**.

On the Confirmation Statement page, you may see warnings indicating that proper certification is required before coverage can begin for your dependents. Please contact your campus Benefits Office for more details.

**SUNY RF Employee Self Service**

Benefits Enrollment | Current Benefits

Update Enrollments | Cover Dependents | Update Beneficiaries | Confirmation Statement

**Confirmation**  
Your changes have been saved. To make additional changes, return to the Overview page and repeat the process. Please print this page for your records.

**Confirmation Statement**

Name: **Pat Smith** | Program: **Benefits**  
Event Name: **Grad Salary Gain** | Enrollment Period: **15-JAN-2014 - 01-MAR-2014**

**TIP** Click Confirmation Statement to get a PDF document of your enrollments. Click Finish to complete the enrollment process, then click the Logout link when you are ready to leave the application.

**Benefit Selections**

Plan	Option	Coverage Start Date	Coverage	Emp Pretax	Emp After Tax	RF Cost
Healthcare - Grad Health Pretax Grad Only		15-Jan-2014		10.55	0.00	94.97
Short Term Disability - NYS		12-Feb-2014		0.00	0.00	2.02
<b>Total</b>				<b>10.55</b>	<b>0.00</b>	<b>96.99</b>

Buttons: Back, Confirmation Statement, Finish

Footer: About this Page | RF Business Applications User Help | Copyright (c) 2006, Oracle. All rights reserved.

# CONTACT INFORMATION

## How to Update Your Email Address, Phone Number and/or Main Address

GO TO: [Employee Self Service Home](#) > [Main Menu](#)  
> [Employee Self Service](#) > [My Contact Information](#)

### To Update Your Email Address:

1. Click **Update** in the Basic Details section.
2. Select “Enter new information because of a real change to the current details (e.g. because of a change in marital status)” and click **Next**.
3. Update your email address and click **Next**.
4. You will be taken to the My Contact Information: W-2 Distribution Option page. If you want to change how you receive your W-2 as a result of your email change, refer to [How to Change the Way You Receive Your W-2](#) on page 4.2. Otherwise, click **Next**.
5. On My Contact Information: Review page, confirm your changes are accurate. To make changes, click **Back**.  
To continue, click **Submit**.
6. On the Confirmation page, click **Return to Overview** to return to the My Contact Information page.

**My Contact Information**

Employee Name **Smith, Pat** Employee Number **103185**  
Organization Email Address Business Group **The Research Foundation for SUNY**

**Basic Details**

Use the "update" button to change your e-mail address or your form W-2 print option

Full Name **Smith, Pat**  
Date of Birth **01-Jan-1970**  
Social Security **001-01-0001**  
Employee Number **103185**  
Organization Email Address

**Phone Numbers**

To add a phone number click "add", to change click "update".

Home **555-123-1234**

**Main Address - US Address**

This address is used for the mailing of your important documents. This address represents your legal address on record. You may have additional addresses on file that are not displayed. Also note: Changes to this address could change tax calculations for New York City income tax withholdings.

Address Line 1 **1234 Mainstreet**  
Address Line 2  
Address Line 3

**Basic Details: Choose Option**

Employee Name **Smith, Pat** Employee Number **103185**  
Organization Email Address Business Group **The Research Foundation for SUNY**

Select the type of change you want to make.

Correct or complete the current details.

Enter new information because of a real change to the current details (e.g. because of a change in marital status)  
(As an employee you can only enter new information)

# CONTACT INFORMATION

## How to Update Your Email Address, Phone Number and/or Main Address

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My Contact Information](#)

### To Update Your Phone Number(s):

1. Click **Update** in the Phone Numbers section.
2. Update your phone numbers as needed and click **Next**.
3. On the My Contact Information: Review page, confirm your changes are accurate. To make changes, click **Back**. To continue, click **Submit**.
4. After the Confirmation page, click **Return to Overview** to return to the My Contact Information page.

SUNY RF Employee Self Service

Navigator Favorites Diagnostics Home Logout Preferences Help

My Contact Information

Employee Name **Smith, Pat** Employee Number **103185**  
Organization Email Address Business Group **The Research Foundation for SUNY**

Back

Basic Details

Use the "update" button to change your e-mail address or your form W-2 print option

Update

Full Name **Smith, Pat**  
Date of Birth **01-Jan-1970**  
Social Security **001-01-0001**  
Employee Number **103185**  
Organization Email Address

Phone Numbers

To add a phone number click "add", to change click "update".

Update

Home **555-123-1234**

Main Address - US Address

SUNY RF Employee Self Service

Navigator Favorites Diagnostics Home Logout Preferences Help

Phone Numbers: Enter and Maintain

Employee Name **Smith, Pat** Employee Number **103185**  
Organization Email Address Business Group **The Research Foundation for SUNY**

Cancel Next

Type	Number	Delete
Home	555-123-1234	

Add Another Row

Cancel Next

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# CONTACT INFORMATION

## How to Update Your Email Address, Phone Number and/or Main Address

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My Contact Information](#)

### To Update Your Main Address:

1. Click **Update** in the Main Address section.
2. To make any changes to your address, select “Enter a new address if you have moved.” Note that you cannot select “Correct or amend this address.” Click **Next**.
3. On the My Contact Information: Review page, confirm your changes are accurate. To make changes, click **Back**. To continue, click **Submit**.
4. After the Confirmation page, click **Return to Overview** to return to the My Contact Information page.

**SUNY RF Employee Self Service**

Navigator Favorites Diagnostics Home Logout Preferences Help

### My Contact Information

Employee Name **Smith, Pat** Employee Number **103185**  
Organization Email Address Business Group **The Research Foundation for SUNY**

**Basic Details**

Use the "update" button to change your e-mail address or your form W-2 print option

Full Name **Smith, Pat**  
Date of Birth **01-Jan-1970**  
Social Security **001-01-0001**  
Employee Number **103185**  
Organization Email Address

**Phone Numbers**

To add a phone number click "add", to change click "update".

Home **555-123-1234**

**Main Address - US Address**

This address is used for the mailing of your important documents. This address represents your legal address on record. You may have additional addresses on file that are not displayed. Also note: Changes to this address could change tax calculations for New York City income tax withholdings.

Address Line 1 **1234 Mainstreet**  
Address Line 2  
Address Line 3  
City **Albany**

**1** Update

**SUNY RF Employee Self Service**

Navigator Favorites Diagnostics Home Logout Preferences Help

### Main Address: Choose Option

Employee Name **Smith, Pat** Employee Number **103185**  
Organization Email Address Business Group **The Research Foundation for SUNY**

Select the type of change you want to make: Correct if details of the address are incorrect, or enter a new address.

Correct or amend this address.  
 Enter a new address if you have moved.

**2**

Cancel Next

Cancel Next

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# PAYROLL

## How to Choose or Update the Way You Receive Your Pay

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My Pay Methods](#)

1. Choose your payment method(s):

### Direct Deposit(s)

- To add a new bank account for direct deposit, click **Add Deposit Payment** and enter bank account information.
- To update information for a current direct deposit account, click the pencil icon in the row in which the account appears.

New or changed bank accounts will be verified before initiating payroll deposits and you may receive a check until that happens.

**Tip!** Make sure you have the bank account number, routing number and bank name and address for any new account(s). You can find this information on a check for that account.

### Check Payment(s)

- To add a check payment, click **Add Check Payment** and enter the amount for that check.
- To update the amount on an existing check, click the pencil icon in the row in which the check appears.
- Click **Apply**.

Check changes will take place immediately with the next payroll.

**Tip!** To delete a direct deposit or check, click the trash can icon on the row you wish to remove.

Continue adding or updating your pay methods as needed.

2. Set your pay priorities by numbering each Payment Type in the left column on the Manage Payroll Payments screen. The Payment Type with “Remaining Pay” under Amount will always have the lowest priority.

4.1 | [GRADUATE STUDENT EMPLOYEE SELF SERVICE GUIDE](#) > [RETURN TO CONTENTS](#)

**SUNY RF Employee Self Service**

Manage Payroll Payments: Define Payments

Employee Name: Smith, Pat  
Organization Email Address: patsmith@albany.org  
Employee Number: 103186  
Business Group: The Research Foundation for SUNY

Use these pages to specify how you wish to be paid. Click Continue to proceed to submit your changes or Cancel to return without change.  
\* Indicates required field

**Employee Payments**

*Priority	Payment Type	IAT	Account Type	Account Number	Amount Type	*Amount	Currency	Update	Delete
1	Check	<input type="checkbox"/>			Percentage	80.0	US Dollar		
2	Direct Deposit	<input type="checkbox"/>	Checking Account	2222222		Remaining Pay	US Dollar		

**SUNY RF Employee Self Service**

Add Check Payment

Employee Name: Smith, Pat  
Organization Email Address: patsmith@albany.org  
Employee Number: 103186  
Business Group: The Research Foundation for SUNY

\* Indicates required field

Payment Method: Check  
Currency: US Dollar  
Amount Type: Percentage  
\* Amount: 0.0

**Apply**

# PAYROLL

## How to Change the Way You Receive Your W-2

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My Contact Information](#)

*Tip!* See [How to Review Your W-2 Online](#) on page 4.4.

1. In the Basic Details section, click **Update** on the far right.

The screenshot shows the 'My Contact Information' page in the SUNY RF Employee Self Service system. The page is divided into sections: 'My Contact Information', 'Basic Details', and 'Phone Numbers'. In the 'Basic Details' section, there is a red instruction: 'Use the "update" button to change your e-mail address or your form W-2 print option'. A red circle with the number 1 points to the 'Update' button on the right side of this section.

2. Select “Enter new information because of a real change to the current details (e.g. because of a change in marital status).” The first option, “Correct or complete the current details” is only available to Payroll administrators.

3. Click **Next**.

4. In the Other section, confirm your email address is accurate or update your email address.

5. Click **Next**.

*Continues next page >>*

The screenshot shows the 'Basic Details: Choose Option' page. It displays the same employee information as the previous screenshot. Below the information, there is a section titled 'Select the type of change you want to make.' with two radio button options. A red circle with the number 2 points to the second option: 'Enter new information because of a real change to the current details (e.g. because of a change in marital status)'. Below this option is a note: '(As an employee you can only enter new information)'. A red circle with the number 3 points to the 'Next' button on the right side of the page.

# PAYROLL

## How to Change the Way You Receive Your W-2 *Continued*

6. To choose an electronic or paper W-2, look in the Self Service Preference for Person box under Document Type.

**If W-2 is listed there:**

a. Use the pull-down menus to change your Online and Paper preferences.

b. Click **Apply**.

**If you see “No results are found”:**

c. Click **Add**.

d. On the Self Service Preference for Person page, click the magnifying glass icon next to the Document Type field.

e. On the Select and Search pop-up, select “W-2” and click **Select**.

f. Use the pull-down menus to change your Online and Paper preferences.

g. Click **Apply**.

7. Click **Next**.

8. On the My Contact Information page, verify that all the information is accurate, and then click **Submit**.

**!** *If you do not click Submit, your changes will not be applied.*

9. On the Confirmation page, click **Return to Overview** to go back to your Contact Information summary.

**My Contact Information: W-2 Distribution Option**

To receive your Year End Form W-2 in electronic format only via self service, please do the following:  
If "Document Type" W-2 is already listed click "Update" to change your preferences.  
If the table below shows "No results are found" click "Add" and enter your preference for paper as "No".  
If no changes are necessary please click "Next"

Employee Name **Smith, Pat** Employee Number **103186**  
Organization Email Address [patsmith@albany.org](mailto:patsmith@albany.org) Business Group **The Research Foundation for SUNY**

Click "Next" to continue this action, "Back" to return to the previous page, or "Cancel" to cancel all actions.

**Self Service Preference for Person**

Select Object:	Delete	Update	Add
Select Status			
Document Type			
Online			
Paper			

**Self Service Preference for Person**

Employee Name **Smith, Pat** Employee Number **103186**  
Organization Email Address [patsmith@albany.org](mailto:patsmith@albany.org) Business Group **The Research Foundation for SUNY**

Enter any changes below. Click Apply to continue this action, click Cancel to cancel this action and return to the previous page.

Document Type **W-2**

Online **Yes**  
Paper **Yes**

**Apply**

**Results**

Select	Quick Select	Document Type
<input checked="" type="radio"/>		W-2
<input type="radio"/>		W-2C

**Select**



# PAYROLL

## How to Review Your W-2 Online

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My W-2](#)

Your current year's W-2 will be displayed. W-2's are available for seven years.

To choose a prior year's W-2, adjust the date using the drop-down box. Click [Go](#).

**SUNY RF Employee Self Service**

Navigator Favorites Diagnostics Home Logout Preferences Help

**Form W-2 Wage and Tax Statement**

Employee Name **Smith, Pat** Employee Number **103186**  
 Organization Email Address [patsmith@albany.org](mailto:patsmith@albany.org) Business Group **The Research Foundation for SUNY**

Select Organization/Year [The Research Foundation for SUNY-2014-W2 PDF](#) [Go](#)

Form W-2 Wage and Tax Statement 2014		OMB No. 1545-0008		Department of the Treasury - Internal Revenue Service				
Control number 478694410		Employer identification number 14-1368361		<b>COPY B To Be Filed With Employee's FEDERAL Tax Return</b>				
Employee's name, address and zip code The Research Foundation for SUNY PO Box 9 Albany NY 12201-0009		Employee's SSN 001-01-0002		1 Wages, tips, other compensation 2809.90	2 Federal income tax withheld 361.78			
Employee's first name and init Last Name Suffix Pat Smith 1234 Mainstreet Albany NY 12207		7 Social security tips		3 Social security wages 2809.90	4 Social security tax withheld 174.21			
		8 Allocated tips		5 Medicare wages and tips 2809.90	6 Medicare tax withheld 40.74			
		9		10 Dependent care benefits		11 Nonqualified plans		
		12a		13 Statutory Employee <input type="checkbox"/>		14 Other		
12b		Retirement Plan <input type="checkbox"/>						
12c		Third-party sick pay <input type="checkbox"/>						
12d								
Employee's address and ZIP code		15 State NY	Employer's State ID number 14-1368361	16 State wages, tips etc. 2809.90	17 State income tax 120.72	18 Local wages, tips etc.	19 Local income tax	20 Locality name
This information is being furnished to the Internal Revenue Service.								

**Form W-2 Wage and Tax Statement 2014** OMB No. 1545-0008 Department of the Treasury - Internal Revenue Service

**COPY C For Employee's Records (See Notice to Employee on back of Copy B)**

Control number 478694410		Employer identification number 14-1368361		1 Wages, tips, other compensation 2809.90		2 Federal income tax withheld 361.78		
Employee's name, address and zip code The Research Foundation for SUNY PO Box 9 Albany NY 12201-0009		Employee's SSN 001-01-0002		3 Social security wages 2809.90		4 Social security tax withheld 174.21		
Employee's first name and init Last Name Suffix Pat Smith 1234 Mainstreet Albany NY 12207		7 Social security tips		5 Medicare wages and tips 2809.90		6 Medicare tax withheld 40.74		
		8 Allocated tips		10 Dependent care benefits		11 Nonqualified plans		
		12a		13 Statutory Employee <input type="checkbox"/>		14 Other		
		12b		Retirement Plan <input type="checkbox"/>				
12c		Third-party sick pay <input type="checkbox"/>						
12d								
Employee's address and ZIP code		15 State NY	Employer's State ID number 14-1368361	16 State wages, tips etc. 2809.90	17 State income tax 120.72	18 Local wages, tips etc.	19 Local income tax	20 Locality name

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# PAYROLL

## How to Review Your Payslip Online

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My Payslip](#)

Your most recent payslip will be displayed. Payslips are available for 18 months.

### To choose a prior period's payslip:

1. Use the pull-down menu in the Choose a Payslip field.
2. Click **Go**.

*Tip! You may print your payslip(s) using your browser's print function (if available).*

**SUNY Employee Self Service**

Navigator Favorites Diagnostics Home Logout Preferences Help

**Payslip**

Employee Name **Smith, Pat** Employee Number **103186**  
 Organization Email Address [patsmith@albany.org](mailto:patsmith@albany.org) Business Group **The Research Foundation for SUNY**

Choose a Payslip

Employee **Pat Smith** Location **010 Albany**  
 Employee Address **1234 Mainstreet Albany NY 12207**  
 Pay Basis **Salaried Annual**

**Pay Period and Salary**

Payment Date	Pay Begin Date
24-Jan-2014	11-Jan-2014

**Summary**

Current or YTD	Gross	Pre-Tax	Taxes	Deductions	Net Pay
Current	1538.46	133.51	348.72	13.84	1042.39
YTD	3076.92	267.02	697.45	27.68	2084.77

**Hours and Earnings**

Description	Current Hours	Current Amount	YTD Hours	YTD Amount
Reg Salary 1		1538.46		3076.92

**Pre-Tax Deductions**

Description	Current	YTD
HCSA	96.15	192.30
Dental PT	1.63	3.26
BC Trad PPO PT	35.73	71.46

**Taxes**

Description	Current	YTD
Federal Tax	180.89	361.78
Social Security	87.10	174.21
Medicare	20.37	40.74
NY State Tax	60.36	120.72

**After-Tax Deductions**

Description	Current	YTD
Opt Life Ins	7.04	14.08
Voluntary STD	6.80	13.60

**Tax Withholding Information**

# PAYROLL

## How to Review and Update Your Federal and/or State Tax Withholding

GO TO: [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [My Tax Form](#)

### To update your federal W-4 information:

1. Review your current information under Federal Information (Filing Status, Allowances, Additional Amount Withheld, Federal Income Tax Exemption (FIT Exempt)).
2. To make changes to your federal W-4 information, click **Update**.
3. On the Update Tax Form page, update your information as needed.
4. Click **I Agree** to the perjury statement and click **Continue**.
5. On the My Tax Form page, you will see a completed W-4 form. To submit your form, click **Submit**.

You will receive an email confirmation after you complete your changes. You may print the form or the email confirmation for your records, but you do not need to submit anything to your campus payroll office.

6. On the Confirmation page, click **Return to Overview** to return to the Tax Form page.

### To update your state tax withholding information:

1. Click the document link under State Information.
2. Fill out the form online, print it, sign it and take it to your campus payroll office.

### Effective Date of Changes

All changes will be effective with the payroll that follows receipt of your changes. If you change your withholdings in a way that does not allow the RF to meet its tax obligations, your changes will be overridden.

**Tip!** If you are a non-citizen of the United States, you should consult your campus payroll office or tax advisor before changing your withholdings.

The screenshot displays the 'Update Tax Form: Federal W-4 Form' interface. At the top, it identifies the user as Pat Smith, Employee Number 103186, from The Research Foundation for SUNY. The form includes fields for Filing Status (Married), Allowances (4), and Additional Amount Withheld (0.00). It also features sections for 'Last Name Different', 'Exempt from Withholding', and 'Agreement'. A red circle with the number 4 points to the 'I Agree' checkbox in the Agreement section. A 'Continue' button is visible at the bottom right. An inset window shows a preview of the W-4 form with a 'Submit' button highlighted by a red circle with the number 5.

# ACKNOWLEDGMENTS AND CERTIFICATIONS

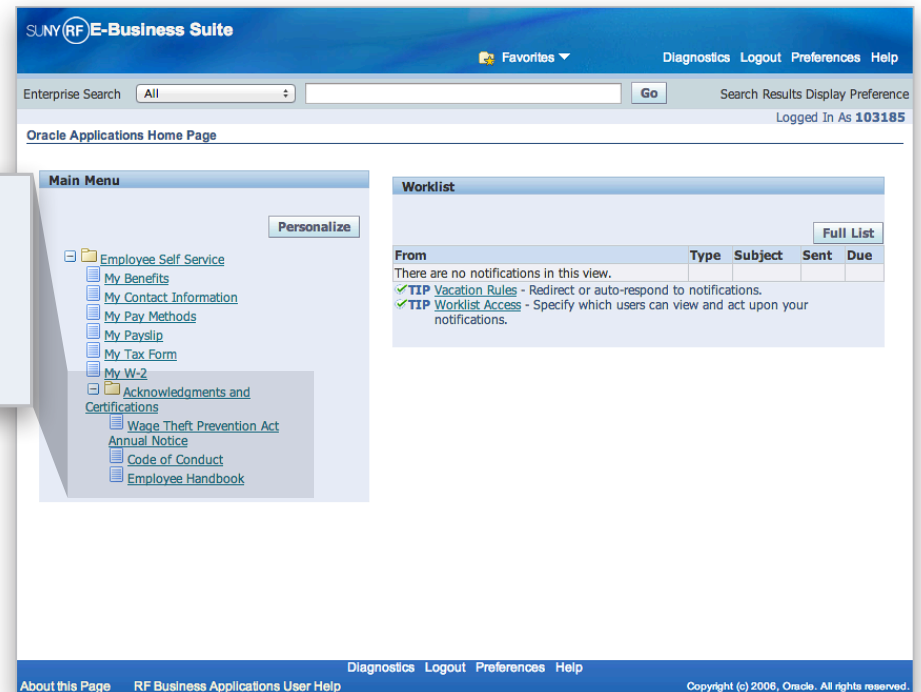
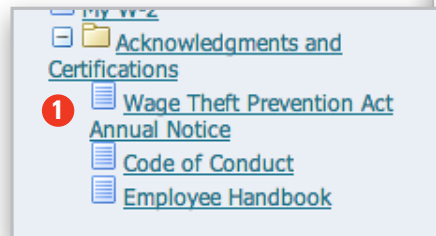
## How to Acknowledge and Certify Required Documents

From time to time you will receive emails from the RF asking you to certify that you have reviewed important documents, such as the RF's Code of Conduct. Instructions should be provided in those emails. You may also acknowledge and certify documents by following the steps below.

**GOTO:** [Employee Self Service Home](#) > [Main Menu](#) > [Employee Self Service](#) > [Acknowledgments and Certifications](#)

1. A list will appear below the folder. Click the notification that applies to you; the email notification you received will indicate which document you need to review and acknowledge.

*Continues next page >>*



# ACKNOWLEDGMENTS AND CERTIFICATIONS

## How to Acknowledge and Certify Required Documents

2. A new screen will open with a description of the document you need to read. Read it and then follow the instructions.
3. Click the link to open the document.
4. After you have read it, return to the previous page and click the button next to Select Object.
5. On the pop-up screen, click **Yes** to acknowledge that you have read the document.  
*Tip! Before submitting your certifications, double check to make sure that you have certified the current year's form. The notices are often provided annually, so if the wrong year is indicated, you will be asked to certify the current year's notice again.*
6. Click **Next**, then you must click **Submit** to finalize your acknowledgment for the notices that require it. Otherwise, the Employee Self Service system will not record your action and you will be prompted to revisit the site to take appropriate action.

*Tip! In the future, when you receive email notifications about acknowledging documents, click the link within the email to go straight to Employee Self Service, and follow the steps above after logging in.*

**2** → The Code of Conduct ("Code") outlines the Research Foundation's Board of Directors expectation with regard to employee conduct and values. Contact your campus HR office with any questions.

**3** →

**4** →

**5** →

**SUNY RF Acknowledgments and Certifications**

Code of Conduct: Extra Information

Next

**INSTRUCTIONS:**  
Follow the steps below to certify you have read the Code of Conduct.

1. Open and read the Research Foundation Code of Conduct by clicking the 'Code of Conduct' link below. After reading the code of conduct return to this page by closing the code of conduct.  
[Code of Conduct](#)
2. Once you have read the code of conduct, choose the current year below by selecting the radio button in the first column and click on the 'Certify You Read the Code of Conduct' button in the table below to read and acknowledge the certification.

**Code of Conduct Certification**

Select Object: Certify You Read the Code of Conduct

Select Status	Year	Acknowledged?	Annual or New Hire
<input checked="" type="radio"/>	2014		Annual Certification or Acknowledgment is from Annual Process
<input type="radio"/>	2014		Annual Certification or Acknowledgment is from Annual Process

**SUNY RF Acknowledgments and Certifications**

Code of Conduct Certification

Next

Select 'Yes' in the Acknowledged column on this page to indicate you have read the Code of Conduct. Click 'Next'.  
Annual Acknowledgment and Certification of Compliance with the Code of Conduct

This is to acknowledge that I have received and reviewed The Research Foundation for the State University of New York's Code of Conduct. I agree to comply with the standards contained in the Code and all related policies and procedures as is required as part of my continued employment or association with the organization. I acknowledge that the Code is only a statement of principles for individual and business conduct and does not constitute an employment contract.

I will report any potential violation of which I become aware promptly to my supervisor, Vice President, Operations Manager, or in the alternative to the Research Foundation President, Chief Compliance Officer, Vice President of Internal Audit, or Office of General Counsel. I understand that any violation of the code of conduct or any corporate ethics or compliance policy or procedure is grounds for disciplinary action, up to and including discharge from employment.

Acknowledged? Yes

Next

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