



2014 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:

**GOTO: [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.

HOW TO USE SELF SERVICE

How to Access, Log In and Navigate Employee Self Service

You can access Employee Self Service from anywhere you have Internet access. You will need your user name and password. If you are a first-time user, you will need to set up an Employee Self Service account. You should have received a Welcome Email with a link.

1. Go to <https://portal.rfsuny.org/selfservice>
2. Click **Login** in the upper right corner of the screen.
***Tip!** Bookmark <https://portal.rfsuny.org/selfservice> for easy future access.*
3. Enter your Research Foundation ID Number as your user name.
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.*

Site Availability

The Employee 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.

The screenshot shows the login interface for SUNY RF. At the top right is the SUNY RF logo with the text 'The Research Foundation for The State University of New York'. Below the logo, the page is divided into two main sections. The left section is titled 'Log In' and contains instructions: 'Access to this website is for authorized users only. Log in below with your user name and password. If you do not have access to the RF website, you must [set up a user account](#).' It also includes a note: 'If you are attempting to access a web page from an e-mail link or a link within another website, you will be directed to that web page once you log in to the site.' Below this text are input fields for 'User Name' and 'Password', followed by 'Login' and 'Cancel' buttons, and a link for 'Forgot Your Password?'. The right section is titled 'What is my user name?' and provides instructions: 'Your RF website user name is: Your e-mail address - if you established your user account before November 21, 2010. Your RF ID number - if you established your user account November 21, 2010 or later. Locate your RF ID number on your pay stub, or contact your campus HR representative.' At the bottom right, it says 'Contact Customer Services at customerservices@rfsuny.org or (518) 434-7222 for assistance.'

If you need help with your Employee Self Service account, contact Customer Services at 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.

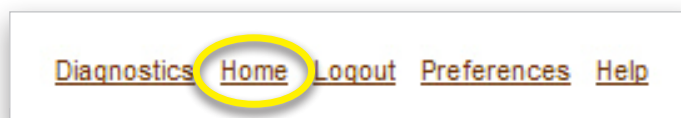
Next – Moves you to the next step in a process.

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.

Home Link

Click **Home** in the navigation at the bottom right of any page to return to the Employee Self Service home page.



BENEFITS Enrollment Guidelines

Click on any web address in the table to go directly to that website.

BENEFIT	IS ENROLLMENT REQUIRED?	CAN I ENROLL ON SELF SERVICE?	IS PAPER ENROLLMENT AN OPTION?
Health Insurance Dental Insurance Vision Insurance	Yes, even if you are electing to decline coverage.	Yes, during the initial 60 days of eligible employment, marriage or birth/adoption of a child; and annually during Open Enrollment. Enrollment at any other time must be done via paper enrollment form.	Yes. Use the RF Benefits Enrollment form.
Basic Life and AD&D Coverage	No, coverage is automatic.	Yes and no. Coverage is automatic, so you will not have to enroll, but you may designate or change beneficiaries during the initial 60 days of eligible employment and annually during Open Enrollment. Beneficiary changes at any other time must be made via paper enrollment form.	Yes and no. Coverage is automatic, so you will not have to enroll, but you may designate or change beneficiaries using the RF Benefits Enrollment form.
Optional Life and AD&D Coverage	Yes.	Yes, during the initial 60 days of eligible employment. At any other time, coverage and beneficiary changes must be made via paper enrollment form.	Yes. Use the RF Benefits Enrollment form. Evidence of insurability is also required for coverage increases and late enrollments.
Optional Dependent Life and AD&D Coverage	Yes.	Yes, during the initial 60 days of eligible employment. At any other time, coverage changes must be made via paper enrollment form.	Yes. Use the RF Benefits Enrollment form and Optional Dependent Life Enrollment form. Evidence of insurability is required for dependent or spouse coverage greater than \$20,000 and for coverage changes.
NY State Disability	No, coverage is automatic.	No, coverage is automatic.	No, coverage is automatic.
Voluntary Short- Term Disability	Yes.	Yes, during the initial 60 days of eligible employment. At any other time, coverage changes must be made via paper enrollment form.	Yes. Use the RF Benefits Enrollment form and Voluntary Short-Term Disability Enrollment form. Evidence of insurability is also required for coverage increases and late enrollments.
Long-Term Disability	No, coverage is automatic.	No, coverage is automatic.	No, coverage is automatic.
Basic Retirement	No. Contributions begin automatically after you satisfy the eligibility requirements.	No. However, you should log on to the vendor website (www.tiaa-cref.org/rfsuny) to designate your beneficiary and/or if you would like to choose an investment option other than the default (age-based target date fund).	No. However, you should log on to the vendor website (www.tiaa-cref.org/rfsuny) to designate your beneficiary and/or if you would like to choose an investment option other than the default (age-based target date fund).
Optional Retirement	Yes.	Yes, at any time during the year. However, you should log on to the vendor website (www.tiaa-cref.org/rfsuny) to designate your beneficiary and/or if you would like to choose an investment option other than the default (age-based target date fund).	Yes. Use the RF Salary Reduction Agreement form. However, you should log on to the vendor website (www.tiaa-cref.org/rfsuny) to designate your beneficiary and/or if you would like to choose an investment option other than the default (age-based target date fund).
Deferred Compensation (special eligibility rules apply)	Yes.	No. Paper enrollment form only.	Yes. Complete the voluntary salary deferral agreement and the TIAA-CREF enrollment form.
Long-Term Care Insurance	Yes.	Yes, but log in via the carrier website (www.ltcbenefits.com). Password: trfsunyltc	No.
Health and Dependent Care Flexible Spending Accounts	Yes.	Yes, during the initial 60 days of eligible employment and annually during Open Enrollment. At any other time, coverage changes must be made via paper enrollment form.	Yes. Use the Flexible Spending Account Enrollment form.
RF Ride Transit and Parking Benefit	Yes.	Yes, but log in via the vendor website (www.wageworks4me.com).	No.

BENEFITS How to View Your Benefits

GOTO: [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 and Beneficiaries page, you can review your dependent and beneficiary 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**.

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SUNY RF Employee Self Service

Navigator Favorites Diagnostics Home Logout Preferences Help

Benefits Enrollment **Current Benefits**

Name **Pat Smith** Program **Benefits**

Please show me the benefits as of **01-Jan-2013 and later** **Go**

Benefit Selections and Rate Details

Details	Plan	Option	Coverage Start Date	Coverage	Emp Pretax	Emp After Tax	RF Cost
Show	Healthcare - Blue Cross Traditional PPO - Pretax	EE Only	12-Feb-2012		35.73	0.00	262.01
Show	Dental - Dental Plan - Pretax	EE Only	01-Jul-2012		1.63	0.00	14.69
Show	Vision - Vision Plan	EE Only	01-Jul-2012		0.00	0.00	1.97
Show	Basic Life - Basic Life and ADD		01-Jul-2012	50000.00	0.00	0.00	2.40
Show	Short Term Disability - NYS		29-Jan-2012		0.00	0.00	2.02
Show	Long Term Disability - Long Term Disability		01-Jan-2013		0.00	0.00	6.89
Show	Flexible Spending Accounts - Health Care Spending Account	Dollar Amount	01-Jan-2012	2500.00	96.15	0.00	0.00
Show	Voluntary Life Insurance - Optional Life and ADD	4X Salary	01-Jul-2012	160000.00	0.00	7.04	0.00
Show	Voluntary Short Term Disability - Voluntary Short Term	\$400 Weekly Income	29-Jan-2012	400.00	0.00	6.80	0.00
Total					133.51	13.84	289.98

Beneficiaries

[Update Beneficiaries](#)

Plan	Option	Beneficiary Relationship	Social Security Number	Primary %	Contingent %
Basic Life - Basic Life and ADD		Pat Smith Self	001-01-0002	100	0

Benefits Enrollment Current Benefits Diagnostics Home Logout Preferences Help

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BENEFITS

How to Enroll in or Make Changes to Benefits

GOTO: 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 and Beneficiaries page, you can add or update your dependent and beneficiary information.

To add dependents and/or beneficiaries:

Tip! Before getting started, be sure you have your dependent's or beneficiary'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 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 these steps to add more dependents or beneficiaries.

Continues next page >>

! 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 and/or beneficiary:

- 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 and beneficiaries.
3. When you are finished adding/updating your dependents and beneficiaries, click **Next**.
 4. Select the **Benefits** program for the following benefits.

Enrolling In ...	Choose Program Name ...
Medical, Dental, Vision, Voluntary Life and AD&D Insurance, Voluntary Short-term Disability, Flexible Spending Accounts	Benefits
Note: <i>Basic Life and AD&D, Short-term Disability, and Long-term Disability are automatic benefits and do not require enrollment.</i>	
Long-term Care and Parking Benefit	See carrier website to enroll, you will not be able to enroll here.

5. Click **Next**.

Continues next page >>

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" for Health, Dental and Vision coverage. To make your elections, click **Update Benefits** on the bottom right. For more information about your options, visit www.rfsuny.org/benefits.
- Use the checkboxes and fields to enter your elections for each benefit. Benefit levels with a certificate icon next to them require certification. Also, 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 taxes.

If you don't see the benefit options you're looking for, make sure you have added all your dependents and their birth dates. If you go back to add dependents or beneficiaries, 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.

! Your Dependent Care and/or Health Care Spending elections must be entered annually. The amount you enter for dependent care should not include the employer subsidy. To receive the subsidy, you must check the Dependent Care Spending Employer Subsidy box.

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


Continues next page >>

Plan	Option	Select	Emp Pretax	Emp After Tax	RF Cost
Blue Cross Traditional PPO - Pretax	EE Only	<input type="checkbox"/>	35.73		262.01
	EE + Spouse	<input type="checkbox"/>	123.82		500.16
	EE + Child(ren)	<input type="checkbox"/>	97.45		428.87
	EE + Family	<input checked="" type="checkbox"/>	195.88		694.99
Blue Cross Deductible PPO - Pretax	EE Only	<input type="checkbox"/>	0.00		0.00
	EE + Spouse	<input type="checkbox"/>	0.00		0.00
	EE + Child(ren)	<input type="checkbox"/>	0.00		0.00
	EE + Family	<input type="checkbox"/>	0.00		0.00
CDPHP - Pretax	EE Only	<input type="checkbox"/>	32.66		239.50
	EE + Spouse	<input type="checkbox"/>	106.14		438.19
	EE + Child(ren)	<input type="checkbox"/>	98.80		418.32
	EE + Family	<input type="checkbox"/>	164.94		597.13
MVP - Pretax	EE Only	<input type="checkbox"/>	35.24		258.44
	EE + Spouse	<input type="checkbox"/>	115.79		476.22

Plan	Option	Select	Coverage	Emp Pretax
Health Care Spending Account	Dollar Amount	<input type="checkbox"/>	0.00	0.00
Dependent Care Spending Account	Dollar Amount	<input checked="" type="checkbox"/>	500.00	19.23
Dependent Care Spending Employer Subsidy		<input checked="" type="checkbox"/>	700.00	

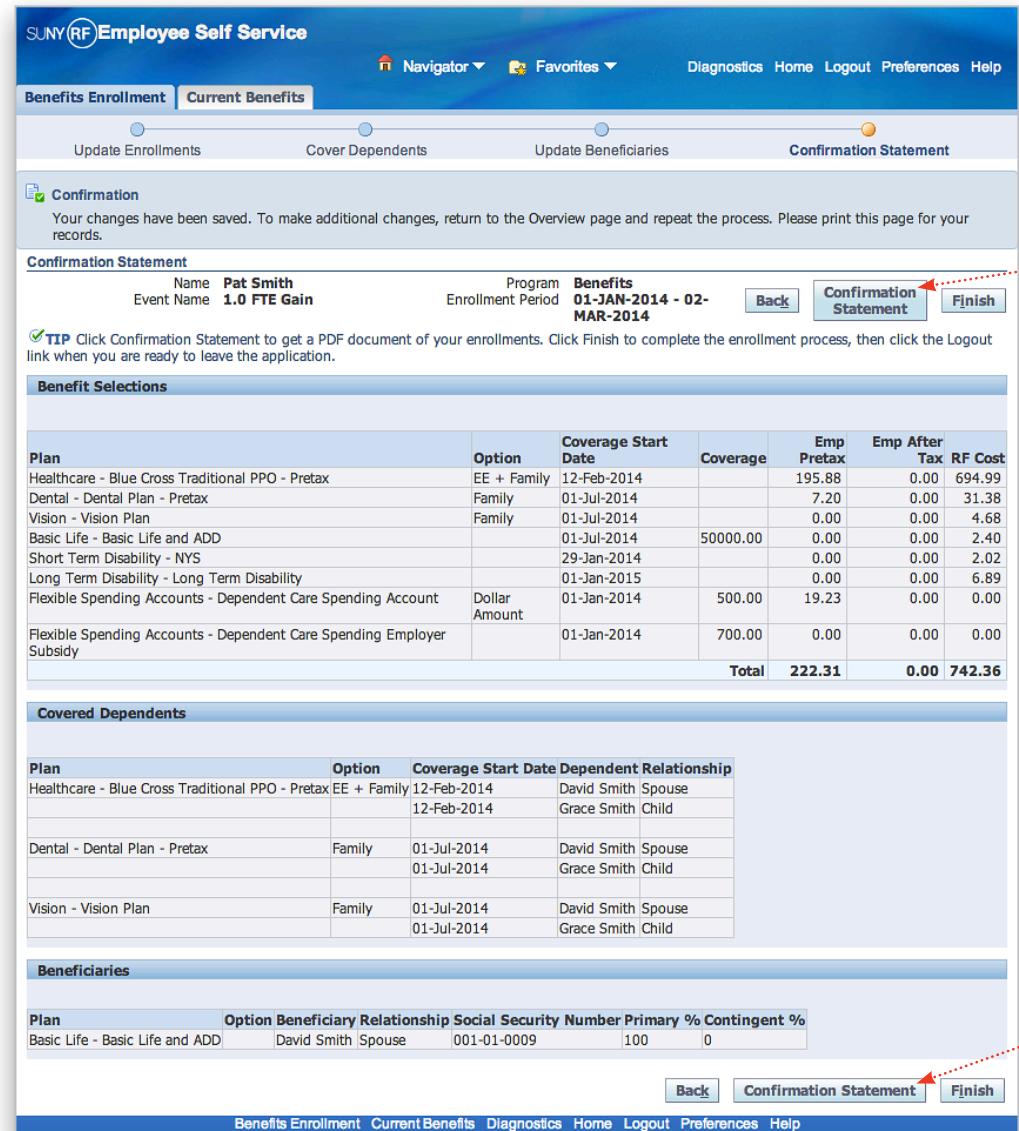
BENEFITS How to Enroll in or Make Changes to Benefits *Continued*

9. Use the checkboxes to designate which dependents receive which coverages.
10. Once you have made your elections, click **Next**.
11. On the Beneficiary Selection page, update your beneficiary designations. Click **Recalculate** to ensure your totals do not exceed 100%.

Tip! If you would like some or all of your benefits to go to your estate, assign the percentage to your own name.
12. Once you have entered your beneficiary designations, click **Next**.
13. 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.

Tip! To enroll in Optional Retirement, click the **Change Program** tab at the top of the page to switch the benefits program to Optional Retirement and start at step 3 in the Optional Retirement section.



SUNY RF Employee Self Service

Navigator Favorites Diagnostics Home Logout Preferences Help

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 **1.0 FTE Gain** Enrollment Period **01-JAN-2014 - 02-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 - Blue Cross Traditional PPO - Pretax	EE + Family	12-Feb-2014		195.88	0.00	694.99
Dental - Dental Plan - Pretax	Family	01-Jul-2014		7.20	0.00	31.38
Vision - Vision Plan	Family	01-Jul-2014		0.00	0.00	4.68
Basic Life - Basic Life and ADD		01-Jul-2014	50000.00	0.00	0.00	2.40
Short Term Disability - NYS		29-Jan-2014		0.00	0.00	2.02
Long Term Disability - Long Term Disability		01-Jan-2015		0.00	0.00	6.89
Flexible Spending Accounts - Dependent Care Spending Account	Dollar Amount	01-Jan-2014	500.00	19.23	0.00	0.00
Flexible Spending Accounts - Dependent Care Spending Employer Subsidy		01-Jan-2014	700.00	0.00	0.00	0.00
Total				222.31	0.00	742.36

Covered Dependents

Plan	Option	Coverage Start Date	Dependent Relationship
Healthcare - Blue Cross Traditional PPO - Pretax	EE + Family	12-Feb-2014	David Smith Spouse
		12-Feb-2014	Grace Smith Child
Dental - Dental Plan - Pretax	Family	01-Jul-2014	David Smith Spouse
		01-Jul-2014	Grace Smith Child
Vision - Vision Plan	Family	01-Jul-2014	David Smith Spouse
		01-Jul-2014	Grace Smith Child

Beneficiaries

Plan	Option	Beneficiary Relationship	Social Security Number	Primary %	Contingent %
Basic Life - Basic Life and ADD		David Smith Spouse	001-01-0009	100	0

Back **Confirmation Statement** **Finish**

Benefits Enrollment Current Benefits Diagnostics Home Logout Preferences Help

BENEFITS How to Enroll in or Make Changes to Optional Retirement

GOTO: [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 and Beneficiaries page, click **Next**.
3. Select the **Optional Retirement** program and click **Next**.
4. On the Benefits Enrollment page is a summary of your current Optional Retirement election (stated as a percentage of gross pay). To enroll or update this amount, click **Update Benefits** on the bottom right.
5. Enter the percent of gross pay you would like to contribute and click **Next**.
6. Click **Next** again as there are no covered dependents for this program and beneficiaries must be designated at TIAA-CREF.
7. 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**.

This deduction will take place immediately, and be processed in the first pay period to be run after you have made your election.

Note that you can review your dependent and beneficiary information, but all beneficiaries for Optional Retirement must be managed at TIAA-CREF.

CONTACT INFORMATION

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

GOTO: [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.

The top screenshot displays the 'My Contact Information' page for Pat Smith, Employee Number 103185, at The Research Foundation for SUNY. It includes sections for Basic Details, Phone Numbers, and Main Address - US Address. The 'Update' button in the Basic Details section is highlighted with a red circle and arrow labeled '1'.

The bottom screenshot shows the 'Basic Details: Choose Option' dialog box. It asks the user to select the type of change they want to make. The radio button for 'Enter new information because of a real change to the current details (e.g. because of a change in marital status)' is selected and highlighted with a red circle and arrow labeled '2'.

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 Back

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 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 1

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 Cancel Next

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

2

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

GOTO: [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

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**

Update

2

SUNY RF Employee Self Service

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.

Cancel **Next**

Cancel **Next**

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PAYROLL

How to Choose or Update the Way You Receive Your Pay

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

1. Choose your payment method(s):

Direct Deposit(s)

- a. To add a new bank account for direct deposit, click **Add Deposit Payment** and enter bank account information.
- b. 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)

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

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		

Callouts: 1a points to 'Add Deposit Payment', 1b points to pencil icon, 1c points to 'Add Check Payment', 2 points to priority '1'.

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

Callout: 1e points to 'Apply' button.

PAYROLL

How to Change the Way You Receive Your W-2

GOTO: 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.

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

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

Update

Phone Numbers

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

Update

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.

SUNY RF Employee Self Service

Navigator Favorites Diagnostics Home Logout Preferences Help

Basic Details: Choose Option

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

Cancel Next

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)

Cancel Next

About this Page RF Business Applications User Help Diagnostics Home Logout Preferences Help Copyright (c) 2006, Oracle. All rights reserved.

5. Click **Next**.

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

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

SUNY RF Employee Self Service

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 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: **C**

Select Status	Document Type	Online	Paper
<input checked="" type="radio"/>	W-2	Yes	
<input type="radio"/>	W-2	Yes	No

Self Service Preference for Person

Employee Name: **Smith, Pat** Employee Number: **103186**
 Organization Email Address: 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: **d**

Online:

Paper:

a,f **b,g**

Results

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

e

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](#).

The screenshot shows the 'Form W-2 Wage and Tax Statement' for the year 2014. The form is titled 'Form W-2 Wage and Tax Statement 2014' and includes the OMB No. 1545-0008. It is a 'COPY B To Be Filed With Employee's FEDERAL Tax Return'. The form is for 'Smith, Pat' with Employee Number 103186 and Business Group 'The Research Foundation for SUNY'. The form is for the year 2014, selected from a dropdown menu. The form is divided into two main sections: 'Form W-2 Wage and Tax Statement 2014' and 'Form W-2 Wage and Tax Statement 2014'. The first section contains the following information:

Control number 478694410	Employer identification number 14-1368361	1 Wages, tips, other compensation 2809.90	2 Federal income tax withheld 361.78
Employer'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 Pat	7 Social security tips	5 Medicare wages and tips 2809.90	6 Medicare tax withheld 40.74
Last Name Smith	8 Allocated tips	9	10 Dependent care benefits
Suffix	12a	13 Statutory Employee	14 Other
1234 Mainstreet Albany NY 12207	12b	Retirement Plan	
Employee's address and ZIP code	12c	Third-party sick pay	
15 State NY	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		

The second section is identical to the first, but it is labeled 'Form W-2 Wage and Tax Statement 2014' and 'COPY C For Employee's Records (See Notice to Employee on back of Copy B)'. It contains the same information as the first section.

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).

The screenshot shows the SUNY Employee Self Service interface. At the top is a blue navigation bar with the SUNY logo and 'Employee Self Service' text. Below this are links for Navigator, Favorites, Diagnostics, Home, Logout, Preferences, and Help. The main content area is titled 'Payslip' and displays employee information: Smith, Pat; Organization Email Address: patsmith@albany.org; Employee Number: 103186; Business Group: The Research Foundation for SUNY. A 'Choose a Payslip' dropdown menu is set to '24-JAN-2014 - 103186 - Check 1', with a 'Go' button next to it. Below this, employee details are listed: Employee Name: Pat Smith, Employee Address: 1234 Mainstreet, Albany, NY 12207, Location: 010 Albany, and Pay Basis: Salaried Annual. The 'Pay Period and Salary' section shows Payment Date: 24-Jan-2014 and Pay Begin Date: 11-Jan-2014. The 'Summary' table shows Current and YTD values for Gross, Pre-Tax, Taxes, Deductions, and Net Pay. The 'Hours and Earnings' table shows Current Hours and YTD Amount for Reg Salary 1. The 'Pre-Tax Deductions' and 'Taxes' tables show Current and YTD values for various deductions and taxes. The 'After-Tax Deductions' table shows Current and YTD values for Opt Life Ins and Voluntary STD. The 'Tax Withholding Information' section is at the bottom.

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

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

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

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

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

PAYROLL

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

GOTO: [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 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.

SUNY RF Employee Self Service

Update Tax Form: Federal W-4 Form

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

The [IRS Federal W-4 Form \(PDF\)](#) comes with worksheets and tax information that may be helpful in completing this form. Click this link to view the full form in a new window.

Filing Status: ☐ Single
☒ Married
☐ Married, but Withhold at Higher Single Rate

Allowances:

Additional Amount Withheld:

Last Name Different

If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a new card.
☐ Last Name Different

Exempt from Withholding

I claim exemption from withholding for 2014, and I certify that I meet BOTH of the following conditions for exemption:
Last year I had a right to a refund of ALL Federal income tax withheld because I had NO tax liability AND
This year I expect a refund of ALL Federal income tax withheld because I expect to have NO tax liability.
If you meet both conditions, check 'EXEMPT':
☐ Exempt

Agreement

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.
☒ I Agree

IRS Form W-4, Cat. No. 10220Q Form **W-4** (2014)

Buttons: Cancel, Continue, Submit

ACKNOWLEDGMENTS AND CERTIFICATIONS

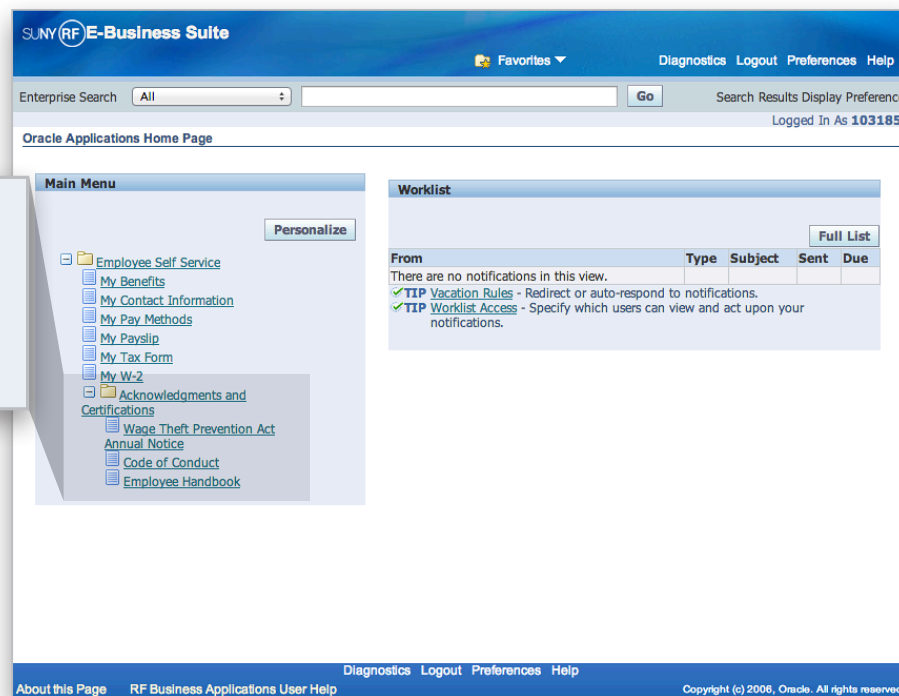
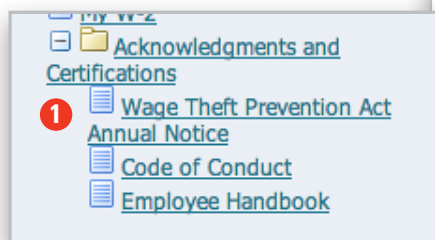
How to Acknowledge and Certify Required Documents

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.

SUNY RF Acknowledgments and Certifications

Code of Conduct: Extra Information

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.

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

3 → 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.

4 → 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:	Year	Acknowledged?	Annual or New Hire
Certify You Read the Code of Conduct	<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

3. Main Page

SUNY RF Acknowledgments and Certifications

Code of Conduct Certification

Select 'Yes' in the Acknowledged column on this page to indicate you have read the Code of Conduct. Click 'Next'.

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 **5**

SUNY RF