Office of Operations' 2024 Virtual Fall Conference

# **NYS Payroll Online**

Amanda Killips Akeem Cassermere



New York State Comptroller THOMAS P. DINAPOLI

# NYS Payroll Online What We Will Cover Today

- What is NYSPO
- Accessing NYSPO
  - Who can use
  - How to access
- Current Functionality

- Multifactor Authentication (MFA)
- Future Functionality
- NYSPO Help
  - Agency roles and responsibilities
- Questions



### NYS Payroll Online History

- NYS Payroll Online (NYSPO) was launched on March 8, 2016.
- NYSPO is an employee self-service payroll application that allows State employees the ability to view and print their pay stubs and W-2s, opt out of receiving a paper pay stub, update their tax withholdings and update/change address information.
- Since its launch, the service has been made available to all NYS agencies and over 250,000 State employees.
- So far, NYSPO has had...
  - More than 112,000 unique user log ins
  - More than 63,000 employee opt-outs of printed and mailed payroll material
  - Nearly 107,000 W-4 Self-Service Tax Changes

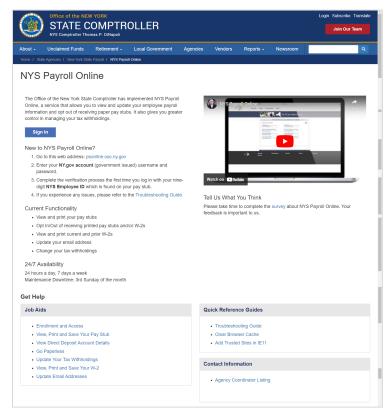


#### NYS Payroll Online Accessing NYSPO

- To use NYSPO employees must:
  - have an active Job record in PayServ,
  - have an active agency-issued ny.gov account at their current agency, and
  - complete the initial verification application accurately.
- To sign in to NYSPO, log in using a government account at:
  - <u>https://www.osc.state.ny.us/state-agencies/payroll/nyspo</u>
  - <u>https://my.ny.gov</u>







#### NYS Payroll Online Accessing NYSPO

New users must complete the verification form before accessing NYSPO

- Fields:
  - First Name
  - Last Name
  - Work Email/Other Email Address
    - one must be checked as a 'Primary' email
  - Last 4 Digits of SSN
  - NYS Employee ID

	ine users must complete the User Verification f	orm below.
* Denotes required field *First Name: Test	*Last Name: User	
Work Email Address: ✓ Primary	Other Email Address:  Primary	
NYSPOHelp@Osc.ny.gov Confirm Work Email: NYSPOHelp@Osc.ny.gov	Confirm Other Email:	
*Last 4 Digits of SSN:	*New York State Employee ID: N01234567	
	bmit Cancel and LogOut	
Su	Cancer and LogOut	





# NYSPO Homepage

#### 

#### NYS Payroll Online

View Paycheck View your past and present pay stubs

View Direct Deposit Account(s) View your direct deposit account details

Go Paperless Opt In/Out of receiving printed pay stubs and /or W-2s.

Update Tax Withholdings View and update your Federal, State, and Local tax withholding information.

View W-2 View and print your past and present W-2s. Update Email Addresses

View and update your email addresses.

View and update home, mailing and check addresses.

How Can We Improve This Site? Take a quick survey and share your thoughts.

NYS Payroll Online Availability 24 hours a day, 7 days a week Maintenance Downtime: 3<sup>rd</sup> Sunday of the Month

Troubleshooting Guide

Job Aids

Change coming soon to direct deposit!

#### Payroll News

#### **Direct Deposit Enrollment Information**

The Office of the State Comptroller (OSC) encourages all employees paid through the New York State payroll system to enroll in direct deposit. Enrolling in direct deposit will help ensure employees are able to safely access their neuroll funds.

With direct deposit, you get paid even when you are out sick or out of town. It saves you check and from worrying that your check has been lost, misplaced, or stolen. Your net p you flexibility in managing your money. Over 85% of the State workforce is already enror

To enroll in direct deposit, complete the <u>Direct Deposit Form for NYS Employees (AC-2</u> Human Resources or Payroll Office.

Of Interest

0 -

#### 03/25/2022 Public Service Loan Forgiveness (PSLF) and Temporal Exp

Employees interested in participating in either the PSLF or TEPSLF must pamplete and application form per the program instructions. Section 3 can be completed by either the and Employer Address should be that of the agency at which you are actually employed Department and Location on the pay stub available by selecting) we Paycheck under the identification Number (FEIN) can be found in Box b – Employe identification number (E by selecting View W-2 under NYS Payroll Online. Section 1 must be completed by the e Office of the State Comptroller.

#### C 0 -NYS Payroll Online View Paycheck View your past and present pay stubs. View Direct Deposit Account(s) 2 View your direct deposit account details. Go Paperless 3 Opt In/Out of receiving printed pay stubs and /or W-2s. Update Tax Withholdings View and update your Federal, State, and Local tax withholding information. 5 View W-2 View and print your past and present W-2s. Update Email Addresses View and update your email addresses. Update Personal Information View and update home, mailing and check addresses. How Can We Improve This Site? Take a guick survey and share your thoughts

Sign Out



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#### NYS Payroll Online View Paycheck

View Payche Review your avail		t the check date of the paycheck	you would like t	o review.						
Select Paycl	heck			Thomas P. DiNapoli State Comptroller		Pay Group: Pay Begin Date: Pay End Date: Negotiating Unit:	AL 4 Administration/L 16/06/2020 02	Advice #: Advice Date:	11/105	2020
Check Date	View Paycheck	Company	Employee D Department Location:	49130 Taconic State Park Comm	TAX DATA: Tax Status Allowances	Refrement System Pader 8 1	DRS al NY State 0	NYC	Yonkers	
08/17/2022	View Paycheck	STATE OF NEW YORK	Job Title: Pay Rate:	PROGRAM ADE 98,107.00 Annual	Add. Percent. Add. Amount.			TAJ		
08/03/2022	View Paycheck	STATE OF NEW YORK	Location Mid-F	alary Engloyee	Current 2,152.04 58.03	Haven	1 333 41 Medica	ution Inhoiding	Carrent 226.65 31.85	11 5.938.5 775.4
07/20/2022	View Paycheck	STATE OF NEW YORK	Longevity LSP		0.00		3,000.00 Social NY W	Security Bholding	136.20 99.71	3.315.1 2.493.2
07/06/2022	View Paycheck	STATE OF NEW YORK								
06/22/2022	View Paycheck	STATE OF NEW YORK	Description Defended Comp Regular Before		Current 109.84 13.36	YTO Description 2,523.84 Deterred Comp 507.26 ERS Retireme		6.00	2000	¥1 0.0 0.0
06/08/2022	View Paycheck	STATE OF NEW YORK				Chil Service B	ngkoyeen Aasoo	6.00	30.91	710.6
05/25/2022	View Paycheck	STATE OF NEW YORK								
05/11/2022	View Paycheck	STATE OF NEW YORK	Current YTD	101AL GROSS 2,210.07 59,763,21	ED TAXABLE GROSS 2.566.87 50.942.00					NET PA 1.559.5 37,718.4
Return to NYS P	ayroll Online			Advice	Accessed To Checking	ET PAY DISTRIBUTION DE TRANSER	1	1,559,55		
			MESSAGE:	TOTAL:				1,553.55		

View pay advices going back 3 years \* (36 months)

• PDFs open in a separate tab

\* 36 months as of 2023 when update was implemented to extend archive.



#### **View Direct Deposit**



-	Office of the NEW YORK	
	Office of the NEW YORK STATE COMPTROLLER NYS Comptroller Thomas P. DINapoli	NYSPO
	NYS Comptroller Thomas P. DiNapoli	New York State Payroll Online

#### **Direct Deposit**

Please review your direct deposit information.

Direct Deposit Details (?)

Account Type	Routing Number	Account Number	Deposit Type	Amount or Percent	Deposit Order
Checking		*****	Balance of Net Pay		999

Opt In/Out of Printed Pay Stubs

Return to NYS Payroll Online



#### New York State Comptroller THOMAS P. DINAPOLI

Sign Out Terms of Use

New Window | Personalize Page

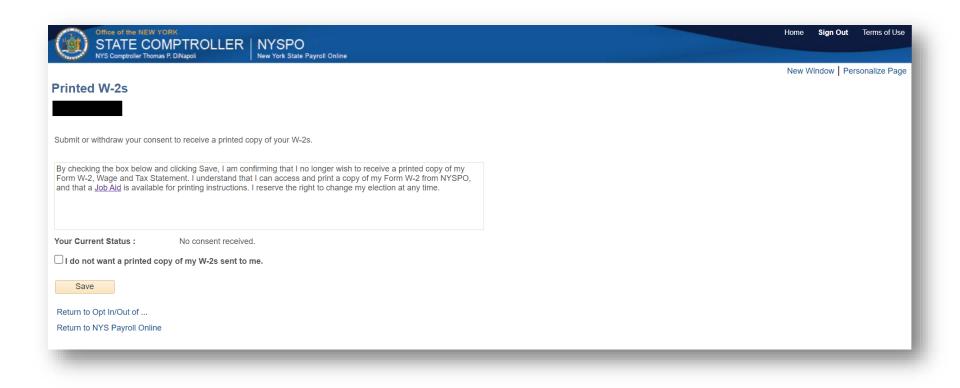
Home

### NYS Payroll Online Go Paperless

Office of the NEW YORK STATE COMPTROLLER NYSPO NYS Comptroller Thomas P. DiNapoli New York State Payre	oll Online
Opt In/Out of	Office of the NEW YORK STATE COMPTROLLER NYSPO NYS Comptroller Thomas P. DiNapoli New York State Payroll Online
Printed Pay Stubs	Printed Pay Stubs
Grant or withdraw consent to stop printing pay stubs	
Printed W-2s Grant or withdraw consent to stop printing W-2s	Select the appropriate button to indicate your preference for receiving a printed copy of your direct deposit pay stub
Return to NYS Payroll Online	OI do not want a printed copy of my Direct Deposit pay stub sent to me.
	Submit
	Return to Opt In/Out of
	Return to NYS Payroll Online



### NYS Payroll Online Go Paperless





#### NYS Payroll Online Update Tax Withholding

	New Window   Personalize Page -	Step 4: Other Adjustments
ithholding Certificate	2022	View Instructions
Employee Number:		(a) Other Income
DF NEW YORK		(b) Deductions
be information below to adjust the ancurt of tax withheld from your pay, We recommend complete the worksheets found on defearl Form W-4 and NYS Form 17:2104 to determine the umber of allowances to claim. Please note that your state and local allowances may be than your federal allowances.		(c) Extra Withholding
		Claim Exemption from Withholding
1: Personal Information		I claim exemption from withholding for the year 2022 and I certify that I meet BOTH of the following conditions for exemption from withholding:
your name match the name on your social security card? If not, to ensure you get credit for your earnings, co 1213 or go to WWW.SSB.00%	intact SSA at 800-	Exemption Conditions
		Last year I owed no federal income tax.     This ways I avong to says on forland income tax
7865		<ul> <li>This year I expect to owe no federal income tax.</li> <li>Check this box if you meet both conditions to claim exemption from tax withholding</li> </ul>
		Under promities of projury; I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.
		NYS Form IT-2104
		NY State IT-2104 Forms and Instructions IT-2104
	Form	Employee's Withholding Allowance Certificate
Form W-4 W-4 Form and Instructions		This certificate, Form IT-2104, is completed by an employee and submitted online to instruct the employer how much New York State (and New York City) and Yonkers) las to withhold from the employee's pay. The more allowerness claimed the lower the monunol of tax withhold.
		allowances claimed the lower the amount of tax withheid. You cannot use Form IT-2104 to claim exemption from withholding. To claim exemption from income tax
atus		withholding, you must file Form IT-2104-E. Please contact your payroll administrator for additional information.
or Married filing separately		New York State Tax Withholding
or marine unity separatery d filing jointy (or dualifying widow(er)) of Household (Chock only if you are unmarried and pay more than half the cost of keeping up a home for yourself and a qualifying individual).		Indicate Marital Status:
te Steps 2 through 4 ONLY if they apply to you. To see if you are exempt from withholding or you		Enter total number of state allowances you are claiming: 0
cerns about your privacy, see instructions for Form W-4 on the IRS website.		Additional state amount, if any, you want withheld from each paycheck: 0.00
Multiple Jobs or Spouse Works		Local Tax Withholding
e this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your		Are you a resident of New York City? Yes  No
also works. The correct amount of withholding depends on income earned from all these jobs. Instructions		Are you a resident of Yonkers? Yes ® No
ale Jobs or Spouse Works		Enter total number of local allowances you are claiming: 0
		Additional local amount, if any, you want withheld from each paycheck: 0.00
te Steps 3 through 4(b) on Form W-4 for only one of these jobs. Leave those steps blank for jobs.		raanaann toan muonul u suft ban unur muusta nam saan fabanaan
thholding will be most accurate if you complete Steps 3 through 4(b) on the Form W-4 for the avying job.)		
: Claim Dependents		
, our seperate		Penalty A penalty of \$500 may be imposed for any false statement you make that decreases the amount of money you have withheld from your wages. You may also be subject to criminal penalties.
Instructions		annear or menty you nare mentor for your region. You may use a suggest to seminar pollation,
come will be \$200,000 or less (\$400,000 or less if married filing jointly):		Save



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#### View W-2

1-1 of 1 🗸

View V	V-2					
	W-2 forms are lis		click on Year Er	nd Form link to view printable	e W-2 form or on Filing Instructions link to	0
	-				View a Different Tax Year	
Select Y	/ear End Form					
						1
Tax Year	W-2 Reporting Company	Tax Form ID	Issue Date	Year End Form	Filing Instructions	
2022	NYS	W-2	01/12/2023	Year End Form	Filing Instructions	

Return to NYS Payroll Online

- View W-2s and Filing Instructions
- PDFs open in a separate tab

		7 Social security tips	_	1 Wages, tips, other con	ID.	2 Feder	al income tax wi	ithheid
W-2 Wage and Tax Statement 2022				125,	327.80		28	,620.57
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110 STATE STREET		9		6 Medicare wages and 125.	ps 27.80	6 Medic	are tax withhek	,817.25
ALBANY NY 12207		10 Dependent care benefits		11 Nonqualified plans		12a See	instructions for 11	,026.34
Employee's name, address, and ZIP code		13 Statutory Retrement Third plan alcks	-party my	14 Other		12b		
		b Employer identification numb 14-6013200	er (EIN)			120	1	
		a Employee's social security n	λ.			12d		
5 State Employer's state ID no. 16 State wages, tips, et		17 State income tax	18 Loca	al wages, tips, etc.	19 Local inc	ome tax	<b>20</b> Lo	cality name
IY 146013200 125,323		6,410.91						
ppy B To Be Filed With Employee's FEDERAL Tax Return	1	This information is being furnished	i to the li OM	Internal Revenue Service. 8 No. 1545-0008		Voit the B	Dept. of the Treat	asury - IRS w.irs.gov/efile
				This information is being furnish	d to the internal Re	enue Service	F you are required to	o file a tax return, a
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#### View W-2



View W-2 Available W-2 forms are listed below. Please click on Year End Form link to view printable W-2 form or on Filing Instructions link to view printable filing instructions. View a Different Tax Year Select Year End Form E, W-2 Тах Reporting Tax Form ID Issue Date Year End Form Filing Instructions Year Company 2022 NYS W-2 01/12/2023 Year End Form Filing Instructions

Return to NYS Payroll Online

#### View W-2

Select the tax year that you would like to review

#### Select Tax Year

Tax Year	Company	
2022	STATE OF NEW YORK	
2021	STATE OF NEW YORK	
2020	STATE OF NEW YORK	
2019	STATE OF NEW YORK	
2018	STATE OF NEW YORK	
2017	STATE OF NEW YORK	
2016	STATE OF NEW YORK	
2015	STATE OF NEW YORK	
2014	STATE OF NEW YORK	
2013	STATE OF NEW YORK	
2012	STATE OF NEW YORK	
2011	STATE OF NEW YORK	
Return to Year F	End Form Selection	





### NYS Payroll Online Update Email Address

- Users can have a maximum of two email addresses listed on their NYSPO account (Work and/or Other).
- One must be marked as a 'Preferred' email.

At leas	st one e-mail entry i	must be select	ed as the preferred e-mail.
		ОК	

 NYS Payroll Online will send an email notification whenever the user makes a change to their payroll information through NYSPO.

n using the NYS Payroll nake sure the email
Delete
Î
Î



### NYS Payroll Online Update Personal Information

- Address change allows employees to maintain their home and/or mailing and check address(es) via self-service to include: view, add, change, and delete.
- Users can have a maximum of three addresses listed on their NYSPO account (Home, Mail, Check).
- One address must be marked as a 'Preferred' email.

#### 

Payroll Options				
Company	Address Type	Address	Country	Status
STATE OF NEW YORK	Home		USA	Current

<ul> <li>Email Addresses</li> </ul>				
Email Addresses				
Email Type	Email Address	Preferred		
Work		4		

Contact your Payroll Administrator if any of your Employee Information is incorrect.

Return to NYS Payroll Online

Personal Information Summary





### NYS Payroll Online Update Personal Information

 One address must be identified as the address where the paycheck and/or advice will be mailed.

**Edit Payroll Options by Company** 



Return to Personal Information

Return to NYS Payroll Online

Payroll Options					
Company	Address Type	Address	Country	Status	
STATE OF NEW YORK	Home		USA	Current	
STATE OF NEW YORK	Mailing		USA	Submitted for Approva	



### NYS Payroll Online Satisfaction Survey

We welcome your comments.	
* 1. What agency do you work for? Select your agency from the drop down menu.	
T. What agency do you work for a select your agency from the drop down mend.	
2. What was the purpose of your visit to NYS Payroll Online today?	
View my paycheck	
View my direct deposit account(s)	
Opt out of receiving printed pay stubs	
Update my tax withholding	
View my W-2s	
Update my email addresses	
* 3. Have you opted out of receiving a paper pay stub?	
○ Yes	
○ No	
Next	

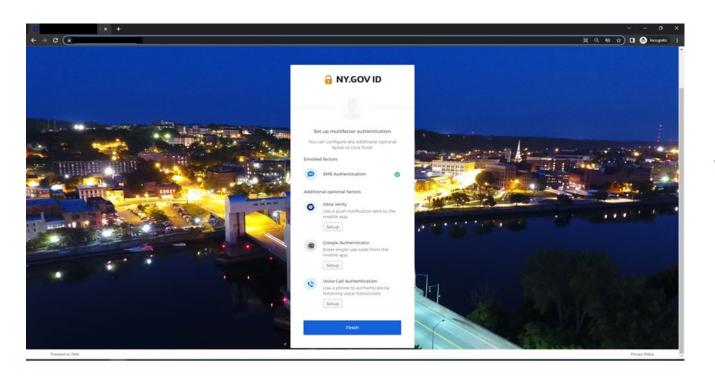


#### **Multifactor Authentication (MFA)**

- Utilizes additional factors to confirm account is not being accessed fraudulently.
- Set up at initial login after MFA is turned on, user may choose one or many factors:
  - SMS
  - Voice call
  - Google Authenticator application
  - OKTA Verify application
- All NYSPO users are required to authenticate before accessing NYSPO (after logging in to ny.gov).



### **NYS Payroll Online** Multifactor Authentication (MFA)



Job Aids for setting up MFA are provided on the NYSPO webpage





### NYS Payroll Online Future Functionality

MFA implementation enables OSC to consider future enhancements including Direct Deposit Account Management

• Direct Deposit – Implementation in Fall/Winter 2024



#### **Future Functionality – Direct Deposit**

If a NYSPO user is currently not enrolled in Direct Deposit, they can enroll online

Direct Deposit	Add Direct Deposit			
	Your Bank I	nformation		
You are not currently enrolled in Direct Deposit. Click here to enroll in direct deposit.		*Routing Number		View Check Example
	Distribution	Bank Name		
Return to NYS Payroll Online	• •	Account Number		
	*Retype	Account Number		
		*Account Type		~
		*Deposit Type	Balance of Net Pay	~
	Ok		Cancel	
	* Required Fi	ield		
	Click here to	see instructions on	first time enrollment.	
	Return to Dire	ect Deposit		



#### **Future Functionality – Direct Deposit**

Users will now be able to edit their Direct Deposit Information

(M) STATE	Office of the NEW YORK STATE COMPTROLLER NYSPO NYS Comptroler Thomas P. DiNapol New York State Payroll Online							
Direct Deposit								
Please review you	Please review your direct deposit information.							
Direct Deposit	Details ⑦							
Account Type	Routing Number	Bank Name	Account Number	Deposit Type	Amount or Percent	Deposit Order	Edit	Remove
Checking		State Employees Fcu	WE	Amount	\$3000.00	300	Edit	Û
Checking		JP Morgan Chase Bank	xxxxxxxx	Balance of Net Pay		999	Edit	Û
Add Acc								



#### **Future Functionality – Direct Deposit**

	י	View, Add,	Edit, Rer	nove				
Direct Deposit Details				Dir	Direct Deposit			
						De	lete Confirmat	ion
Your Bank Information						?		
Routing Number View Check Example						-	Are you sure you	want to delete this Deposit Account: 123?
Bank Name Bank Of America	STATE COMPTROL	ER NYSPO						Yes - Delete No - Do Not Delete
Distribution Instructions	NYS Comptroller Thomas P. DNapoli	New York State Payroll Online						
Edit Account Number								
Account Number	Direct Deposit							r
Retype Account Number								
Account Type Checking								
Deposit Type Percent	Please review your direct deposit info	rmation.						
Amount or Percent 80.00 Deposit Order 100 Maximum number of accounts have been								
added in direct deposit distribution.	Direct Deposit Details ③				Amount or Deposit			
Return to Direct Deposit	Account Type Routing Number	Bank Name	Account Number	Deposit Type	Amount or Deposit Percent Order	Edit	Remove	
	Checking	State Employees Fcu	WE	Amount	\$3000.00 300	Edit	Û	
Add Direct Deposit	Checking	JP Morgan Chase Bank	20000000	Balance of Net Pay	999	Edit	Û	Edit Direct Deposit
	Opt In/Out of Printed Pay Stubs							
Your Bank Information	Add Account	Submit						Your Bank Information
*Routing Number View Check Example	Return to NYS Payroll Online							*Routing Number View Check Example
Bank Name	recurricit to the of a given of mile							Bank Name State Employees Fcu Distribution Instructions
Distribution Instructions								Edit Account Number
*Account Number								*Account Number WE
*Retype Account Number								"Retype Account Number WE
*Account Type								*Account Type Checking ~
*Deposit Type								*Deposit Type Amount
*Amount or Percent								*Amount or Percent 3000.00
*Deposit Orders 200';300';400';500';600';700';999' in use.								*Deposit Order 300   Deposit Orders '300','999' in use. Please choose available order(s)
Please choose available order(s)								Ok Cancel
Ok Cancel								* Required Field
* Required Field								Return to Direct Deposit
Return to Direct Deposit								



#### New York State Comptroller THOMAS P. DINAPOLI

#### Agency Responsibilities – NYSPO Help Roles

- Agency Coordinator (NYSPO AC):
  - First point of contact for employees at an agency
  - Some agencies also assign a backup coordinator
  - Should have access to PayServ
- Payroll Officer:
  - Assist with questions and information related to paychecks and PayServ
- Agency Participating Organization Directory Services Administrator (PODSA) or Participating Organization Delegated Administrator (PODA):
  - Roles assigned by New York State Directory Service (NYSDS) in the Office of Information Technology Services (ITS)
  - Responsible for managing various aspects of the agency's ny.gov accounts



# NYS Payroll Online Agency Responsibilities – NYSPO AC

Responsibility	NYSPO AC	PODSA/PODA	Agency Payroll Officer
First contact for employees' questions about NYSPO	$\checkmark$		
Providing employees with NYSPO job aids	$\checkmark$		
Providing employees with NYSPO Quick Reference Guides	~		
Providing employees with NYSPO Troubleshooting Guide	~		



#### **Agency Responsibilities – PODSA/PODA**

Responsibility	NYSPO AC	PODSA/PODA	Agency Payroll Officer
Resetting ny.gov passwords		✓	
Updating NYSDS/ny.gov information using Delegated Admin, including Employee ID		✓	
Providing ny.gov account usernames		✓	
Creating ny.gov accounts for new employees at their agency		✓	
Reclaiming accounts when an employee transfers into their agency		√	
Archiving accounts when an employee leaves their agency (so the new agency can reclaim the account)		✓	
Unlocking ny.gov accounts		✓	
Removing/combining duplicate accounts		1	
Reviewing employee entitlements in ny.gov		✓	



#### **Agency Responsibilities – Payroll Officers**

Responsibility	NYSPO AC	PODSA/PODA	Agency Payroll Officer
Updating employee information in PayServ			~
Providing EMPLID to new employees			~
Answering questions related to Payroll (paychecks, taxes, PayServ, etc.)			~



### NYS Payroll Online Questions?

- Email: <u>nyspohelp@osc.ny.gov</u>
- Phone: (518) 408-4271
- <u>Website</u>
  - Includes Job Aids and Troubleshooting Guide and Quick Reference Guides
- Troubleshooting Guide

