Welcome to Self Service Charitable Deductions Part 1

Welcome to this Self Service Charitable Deductions session which will demonstrate how to start, update and stop a charitable deduction. If you have any problems with this recording, return to the list of recordings and select How to Play a Recording located near the top of the list, or you can contact your payroll or human resources office for further assistance, and then return to this recording.
During this session, you will see a demonstration of how to add, update and stop a charitable deduction. Whenever you add a charitable deduction, start and stop dates are required. Optionally, you can request that your contribution be designated for a particular affiliated member of a charitable organization and that you be sent an acknowledgement of your contribution.

On the Voluntary Deductions page, you select the charitable organization, enter the amount to be deducted from each paycheck or just once, as well as entering start and stop dates. You may donate to multiple organizations. All deductions stop at the end of the calendar year or sooner if you choose. If you wish to donate on a continuous basis, you will need to add a new deduction record yearly for each organization. You will typically do this during the combined charities campaign.
To access the Charitable Deductions page, from the State of Minnesota Self Service home page, select Other Payroll.

To add, update or stop charitable deductions, on the Other Payroll page, select the Charitable Deductions link. There is also an Instructions link. You can refer to the instructions on-line or you can print them.

Click the Charitable Deductions link.
The Voluntary Deductions page displays. In this case the employee has current deductions for four organizations. We will talk about the fields on this page in greater detail in just a moment.

First, some general information:

- You can enter charitable deduction records for organizations participating in the Minnesota State Employees Combined Charities Campaign.
- You can add, update or stop your charitable deductions.
- These deduction records are used each pay period to deduct contributions from your paycheck for your selected charity.
- On October 1 of each year, the list of approved charitable organizations is updated.
- From October 1 through December 31, new deduction records you add apply to the next calendar year.
- To continue deductions for the same organizations or to start new ones for the next year, you always add a deduction record.
- Current or future deduction records can be updated throughout the year, but all deductions stop at the end of the year, or sooner if you choose.
The Voluntary Deductions page includes:

- Current and future dated charitable deduction records:
- Under Deduction Type, the name of each organization displays.
- Deduction Start and Stop Dates for each deduction/organization.
- The Status for each record.
- Deduction amount for each organization, and
- Optionally, Goal Amount and Goal Balance fields that will be referred to later. Notice that the start and stop dates for each organization are the same. These records were added during the annual Combined Charities campaign last year, which is from October to December. The system defaults the dates so the deductions will begin starting on the first check in the calendar year through the last check in the calendar year.

To change a dollar amount or stop a deduction, you would click the Edit button. Click the Designation/Acknowledgement button to request an acknowledgement of your contribution and/or request a contribution be designated for a particular affiliated member of a charitable organization. Return to the Other Payroll page by clicking the Other Payroll Page link.
Example 1

Add a record so that the deduction for the first organization in the list will continue through the next calendar year.

Click the Add Deduction button.

The Add Voluntary Deduction page displays.

Add Voluntary Deduction

Charles Pride
State of Minnesota

*Type of Deduction:

*Enter Amount to be deducted:

Take deduction until I reach this Goal Amount:

*Enter Deduction Start Date: 12/1/2006

*Enter Deduction Stop Date: 12/31/2007

Goal Balance: 0.00

Save Return to List

* Required Field

The Add Voluntary Deduction page displays.

*Type of Deduction:

To add a new deduction record for the first organization, in the Type of Deduction field click the Look up button.
A list of all of the approved charitable organizations displays. Select the organization.
The selected organization displays in the Type of Deduction field. The amount to be deducted will be $3.45. Do not enter a dollar sign ($). Always enter the decimal and the trailing two digits. Leave the **Take deduction until I reach this Goal Amount** field blank. Notice that the Start and Stop dates defaulted for the next calendar year. This deduction will begin starting with the first check in the calendar year through the last check in that year.

Suppose you have gotten this far and have **not** saved the record yet. You have forgotten how much the deduction was for the current year and you would like to set up this record with the same amount. Click the Return to List link.

Click the Return to List link.

The Voluntary Deductions page displays the list of deductions. The current deduction amount is $2.50.
The record that was started was not saved. You can start over by clicking the Add Deduction button.

Click the Look up button.

Search Results
View All

Deduction Description
Community Health Charities, MN
Community Solutions Fund
MN Environmental Fund
Open Your Heart Hungry/Homeless
Peace Maker Foundation
United Arts
United Negro College Fund
United Way of Caring Rivers
United Way Of Becker County
United Way Of Bemidji Area
United Way Of Carlton Co
United Way Of Cass - Clay
United Way Of Central MN
United Way Of Crow Wing County
United Way Of Faribault
United Way Of Freeborn County

Select the organization.
Enter 2.50. The dates default.

Click the Save button.

The Save Confirmation box displays to let you know that the save was successful. Note the informational message, due to timing your change may not be reflected on the very next pay. Click the OK button.

The Voluntary Deductions records display. Notice both the current and future-dated records display.
Example 2

John Elway
State of Minnesota

<table>
<thead>
<tr>
<th>Voluntary Deductions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deduction Type</td>
</tr>
<tr>
<td>MN Environmental Fund</td>
</tr>
<tr>
<td>United Way Of Central MN</td>
</tr>
</tbody>
</table>

On this record, complete two tasks:
- Change the deduction amount for the first record
- Add a new donation.

Part 1
Click the Edit button to change the deduction amount.

*Enter Amount to be deducted: 2.25

Change the dollar amount to 2.25.

Click the Save button.

Click the OK button on the Save Confirmation pop-up box.
Part 2
Add a new donation.

Click the Add Deduction button.

Type of Deduction:

Click the Look up button.

Select the organization.

John Elway
State of Minnesota

Type of Deduction: United Arts

Enter Amount to be deducted: 3.65

Take deduction until I reach this Goal Amount: 

Enter Deduction Start Date: 12/13/2006

Enter Deduction Stop Date: 12/11/2007

Enter the amount to be deducted each pay period which is 3.65. Notice that the dates defaulted so the deduction would be taken from each check in the next calendar year.
In this case change the start date to March 1 of 2007 and change the end date to October 1.

Click the Save button.

The future-dated and updated records display. Notice, that the record with the new deduction amount has been assigned a new start of today – the date the transaction was entered.
Example 3

For this example, set up a deduction that will occur only once.

Karen Doe
State of Minnesota

Voluntary Deductions

<table>
<thead>
<tr>
<th>Deduction Type</th>
<th>Start Date</th>
<th>Stop Date</th>
<th>Status</th>
<th>Deduction</th>
<th>Goal Amount</th>
<th>Goal Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Your Heart Hungry/Homeless</td>
<td>12/14/2006</td>
<td>12/12/2006</td>
<td>Current</td>
<td>$10.00</td>
<td>0.00</td>
<td>Edit</td>
</tr>
<tr>
<td>United Way Of Gtr Twin Cities</td>
<td>12/14/2006</td>
<td>12/12/2006</td>
<td>Current</td>
<td>$1.00</td>
<td>0.00</td>
<td>Edit</td>
</tr>
</tbody>
</table>

Click the Add Deduction button.

*Type of Deduction:  

Click the Look up button.

Deduction Description

Community Health Charities, MN  
Community Solutions Fund  
MN Environmental Fund  
Open Your Heart Hungry/Homeless  
Peace Maker Foundation  
United Arts  
United Negro College Fund  
United Way of Caring Rivers

Select the organization.

*Type of Deduction: United Negro College Fund

*Enter Amount to be deducted: 150.00

Take deduction until I reach this Goal Amount: 150.00

*Enter Deduction Start Date: 12/13/2006

*Enter Deduction Stop Date: 12/11/2007

Goal Balance: 0.00

The deduction amount must be 1.00 or more. In this case it will be 150.00. Use the Take deduction until I reach this Goal Amount field to cause the deduction to be taken once,
even though the date range is for the entire year. Note: You could change the start date to later in the year to delay when the deduction will be taken.

Click the Save button.

Voluntary Deductions

Save Confirmation

The Save was successful. However, due to timing, your change may not be reflected on the very next pay.

Click the OK button on the Save Confirmation pop-up box.

<table>
<thead>
<tr>
<th>Deduction Type</th>
<th>Start Date</th>
<th>Stop Date</th>
<th>Status</th>
<th>Deduction</th>
<th>Goal Amount</th>
<th>Goal Balance</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Your Heart</td>
<td>12/1/2005</td>
<td>12/1/2006</td>
<td>Current</td>
<td>$10.00</td>
<td></td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>Hungry/Homeless</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>United Negro College Fund</td>
<td>12/13/2006</td>
<td>12/11/2007</td>
<td>Future</td>
<td>$150.00</td>
<td>150.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td>United Way Of Gtl Twin Cities</td>
<td>12/1/2005</td>
<td>12/1/2006</td>
<td>Current</td>
<td>$1.00</td>
<td></td>
<td>0.00</td>
<td>Edit</td>
</tr>
</tbody>
</table>

The future-dated record is listed.
Example 4

Stop a deduction as soon as possible.

<table>
<thead>
<tr>
<th>Deduction Type</th>
<th>Start Date</th>
<th>Stop Date</th>
<th>Status</th>
<th>Deduction</th>
<th>Goal Amount</th>
<th>Goal Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peace Maker Foundation</td>
<td>08/04/2006</td>
<td>12/12/2006</td>
<td>Current</td>
<td>$6.00</td>
<td></td>
<td>0.00</td>
</tr>
<tr>
<td>United Way Of St Croix</td>
<td>08/16/2006</td>
<td>12/12/2006</td>
<td>Current</td>
<td>$25.55</td>
<td>520.00</td>
<td>140.00</td>
</tr>
</tbody>
</table>

Click the **Edit** button.

Type of Deduction: Peace Maker Foundation

Enter Amount to be deducted: 6.00

Take deduction until I reach this Goal Amount: 0.00

Enter Deduction Start Date: 08/16/2006

Enter Deduction Stop Date: 08/16/2006

Click the **Stop Deduction** button.

Click the **Save** button.

Voluntary Deductions

Save Confirmation

The Save was successful.
However, due to timing, your change may not be reflected on the very next pay.

Click the **OK** button on the Save Confirmation pop-up box.

Notice that the start and stop dates are updated with the date the “stop” was entered and saved. The deduction will stop as soon as possible.
A couple of reminders:
- Deductions can be added during the campaign and throughout the year until the start of the next campaign.
- Deductions can be updated and stopped throughout the year.
- All deductions stop each December or sooner if you choose.
- Written instructions for adding, updating and stopping your donation are available on your self service Other Payroll page.

If you have questions about updating your deductions on the Voluntary Deductions page, contact your payroll office.
Thank You!

Thank you.