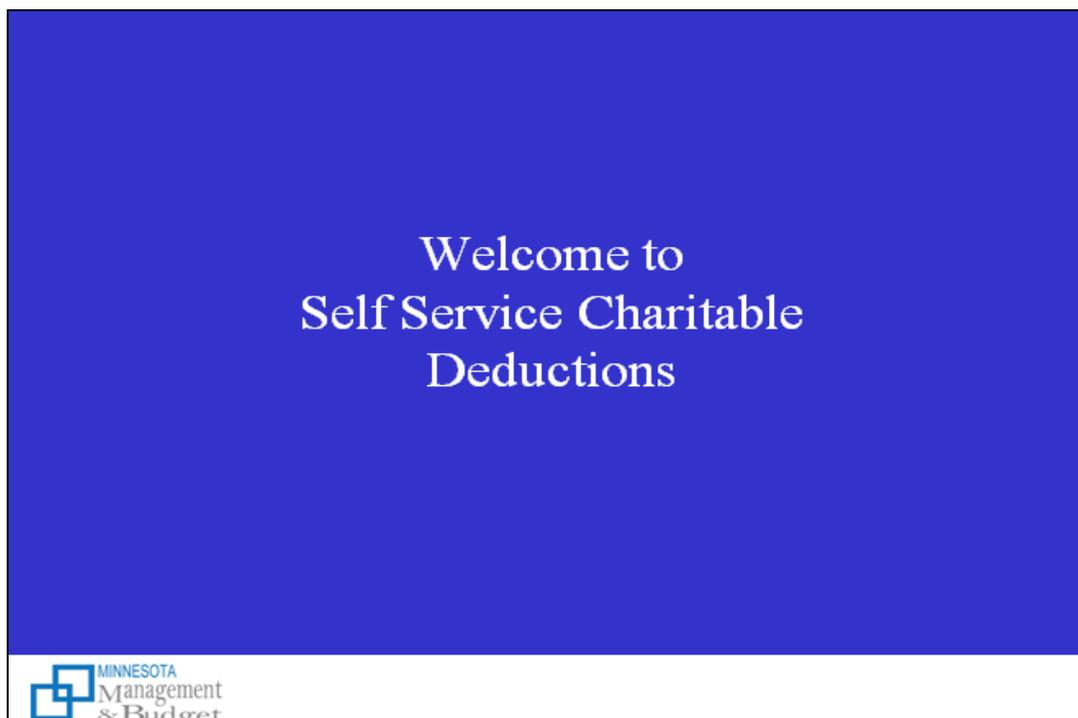


# Welcome to Self Service Charitable Deductions Part 1

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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.

## Objectives

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- Add a Deduction
- Update a Deduction
- Stop a Deduction
- Start and Stop Dates
- Request a Designation and Acknowledgement



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.

## Voluntary Deductions

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- Charitable Organization
- Amount
- Start and Stop Dates
- Multiple Organizations
- Calendar Year End
- Yearly



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.

Main Menu >

## State of MN Self Service

State of Minnesota Employee Self Service information and activities.

<p><b>My Paystub</b> View paystub information.</p> <ul style="list-style-type: none"> <li><a href="#">View Paystub</a></li> <li><a href="#">Pay Calculation</a></li> </ul>	<p><b>Time Entry</b> Enter time worked and leave taken.</p>	<p><b>Benefits</b> Link to insurance information and enrollment.</p> <ul style="list-style-type: none"> <li><a href="#">Benefits Summary</a></li> <li><a href="#">Dependent/Beneficiary Coverage</a></li> <li><a href="#">Pre-Tax Accounts</a></li> <li><a href="#">Benefits Enrollment</a></li> </ul>
<p><b>My Leave Activity</b> Review activity and leave balances for leave types such as vacation and sick.</p>	<p><b>Other Payroll</b> Update and view all other payroll self service such as tax data, W-2 forms and direct deposit.</p> <ul style="list-style-type: none"> <li><a href="#">W-4 and MWR</a></li> <li><a href="#">W-2 Information</a></li> <li><a href="#">Direct Deposit</a></li> <li><a href="#">6 More...</a></li> </ul>	<p><b>My Personal Information</b> Update home address, phone numbers, email address, and emergency contact information. View name and marital status.</p> <ul style="list-style-type: none"> <li><a href="#">Personal Information Summary</a></li> <li><a href="#">Home and Mailing Address</a></li> <li><a href="#">Phone Numbers</a></li> <li><a href="#">5 More...</a></li> </ul>
<p><b>State Employee Express</b> Review benefit plan designs, HR policies, Total Compensation Statement, and other information.</p>	<p><b>Announcements</b> Check for information employees need to know.</p>	<p><b>Need Assistance?</b> If you have questions or you are having problems with this website.</p> <ul style="list-style-type: none"> <li><a href="#">Problems with website?</a></li> <li><a href="#">Employee Contacts</a></li> </ul>
<p><b>My Profile</b> Change My Password and Password Hint. Set options to improve compatibility with screen reading software.</p>		

To access the Charitable Deductions page, from the State of Minnesota Self Service home page, select Other Payroll.

Main Menu > State of MN Self Service >

## Other Payroll

Update and view all other payroll self service such as tax data, W-2 forms and direct deposit.

<p><b>W-4 and MWR</b> Input your tax withholdings.</p> <ul style="list-style-type: none"> <li><a href="#">W-4 and MWR</a></li> <li><a href="#">W-4 Instructions</a></li> </ul>	<p><b>W-2 Information</b> View and print your W-2 forms.</p> <ul style="list-style-type: none"> <li><a href="#">View W-2 Forms</a></li> <li><a href="#">Required Disclosures</a></li> <li><a href="#">EIC and Box Instruction</a></li> <li><a href="#">W-2 Information</a></li> </ul>	<p><b>Direct Deposit</b> Input your direct deposits.</p> <ul style="list-style-type: none"> <li><a href="#">Direct Deposit</a></li> <li><a href="#">Instructions</a></li> </ul>
<p><b>Savings Plans</b> Input your savings plans.</p> <ul style="list-style-type: none"> <li><a href="#">Input Deferred Comp/TSA Deduct</a></li> <li><a href="#">Savings Plans Instructions</a></li> <li><a href="#">MN Deferred Comp Plan Website</a></li> <li><a href="#">MnSCU 403b TSA Plan Website</a></li> </ul>	<p><b>Charitable Deductions</b> Input your charitable deductions.</p> <ul style="list-style-type: none"> <li><a href="#">Charitable Deduction</a></li> <li><a href="#">Instructions</a></li> </ul>	<p><b>Leave Donations</b> Input your leave donations.</p> <ul style="list-style-type: none"> <li><a href="#">Input Your Leave Donations</a></li> <li><a href="#">Instructions</a></li> <li><a href="#">Recipient Flyers</a></li> </ul>
<p><b>Deferred Comp Conv/Mtch</b> Input your Deferred Comp Conv/Mtch Option.</p> <ul style="list-style-type: none"> <li><a href="#">Deferred Comp Conv/Mtch Option</a></li> <li><a href="#">Instructions</a></li> </ul>	<p><b>Payroll Forms</b> W-4, request for duplicate or corrected W-2, direct deposit and expense reports.</p> <ul style="list-style-type: none"> <li><a href="#">W-4</a></li> <li><a href="#">Payroll Calendar</a></li> <li><a href="#">Form MWR</a></li> <li><a href="#">7 More...</a></li> </ul>	<p><b>Business Expenses</b> Input your business expenses.</p>

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

Click the Charitable Deductions [Charitable Deductions](#) link.

Voluntary Deductions						
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance
<a href="#">Community Health Charities, MN</a>	12/14/2005	12/12/2006	Current	\$2.50		0.00 <a href="#">Edit</a>
<a href="#">Community Solutions Fund</a>	12/14/2005	12/12/2006	Current	\$1.50		0.00 <a href="#">Edit</a>
<a href="#">Open Your Heart Hngry/Homeless</a>	12/14/2005	12/12/2006	Current	\$3.50		0.00 <a href="#">Edit</a>
<a href="#">United Way Of Gtr Twin Cities</a>	12/14/2005	12/12/2006	Current	\$3.00		0.00 <a href="#">Edit</a>
<a href="#">Add Deduction</a>						
Go To: <a href="#">Other Payroll Page</a>						
<a href="#">Designations/Acknowledgements</a>						

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.

Voluntary Deductions							
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
<a href="#">Community Health Charities, MN</a>	12/14/2005	12/12/2006	Current	\$2.50		0.00	<a href="#">Edit</a>
<a href="#">Community Solutions Fund</a>	12/14/2005	12/12/2006	Current	\$1.50		0.00	<a href="#">Edit</a>
<a href="#">Open Your Heart Hngry/Homeless</a>	12/14/2005	12/12/2006	Current	\$3.50		0.00	<a href="#">Edit</a>
<a href="#">United Way Of Gtr Twin Cities</a>	12/14/2005	12/12/2006	Current	\$3.00		0.00	<a href="#">Edit</a>

[Add Deduction](#)

Go To: [Other Payroll Page](#)

[Designations/Acknowledgements](#)

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 the 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 [Edit](#) button. Click the Designation/Acknowledgement [Designations/Acknowledgements](#) 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 [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.

[Add Deduction](#)

**Go To:** [Other Payroll Page](#)

Click the Add Deduction [Add Deduction](#) button.

### Voluntary Deductions

## 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:  

\*Enter Deduction Stop Date:  

**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.

Cancel

### Search Results

View All

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

A list of all of the approved charitable organizations displays. Select the organization.

**Voluntary Deductions**

**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:  

\*Enter Deduction Stop Date:  

**Goal Balance:** 0.00

[Return to List](#)

\* **Required Field**

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.

[Return to List](#)

Click the Return to List [Return to List](#) link.

Voluntary Deductions						
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance
<a href="#">Community Health Charities, MN</a>	12/14/2005	12/12/2006	Current	\$2.50		0.00
						<input type="button" value="Edit"/>

The Voluntary Deductions page displays the list of deductions. The current deduction amount is \$2.50.

[Add Deduction](#)

**Go To:** [Other Payroll Page](#)

The record that was started was not saved. You can start over by clicking the Add Deduction [Add Deduction](#) button.

\*Type of Deduction:  

Click the Look up  button.

[Cancel](#)

**Search Results**  
View All

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

Select the organization.

\*Type of Deduction:

\*Enter Amount to be deducted:

Take deduction until I reach this Goal Amount:

\*Enter Deduction Start Date:

\*Enter Deduction Stop Date:

**Goal Balance:** 0.00

[Return to List](#)

Enter 2.50. The dates default.

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.

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.

Voluntary Deductions				
Deduction Type	Start Date	Stop Date	Status	Deduction
<a href="#">Community Health Charities, MN</a>	12/14/2005	12/12/2006	Current	\$2.50
<a href="#">Community Health Charities, MN</a>	12/13/2006	12/11/2007	Future	\$2.50
<a href="#">Community Solutions Fund</a>	12/14/2005	12/12/2006	Current	\$1.50
<a href="#">Open Your Heart Hngry/Homeless</a>	12/14/2005	12/12/2006	Current	\$3.50
<a href="#">United Way Of Gtr Twin Cities</a>	12/14/2005	12/12/2006	Current	\$3.00

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

## Example 2

John Elway  
State of Minnesota

Voluntary Deductions							
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
<a href="#">MN Environmental Fund</a>	12/14/2005	12/12/2006	Current	\$1.00	22.00	8.00	<input type="button" value="Edit"/>
<a href="#">United Way Of Central MN</a>	12/14/2005	12/12/2006	Current	\$2.00	44.00	16.00	<input type="button" value="Edit"/>

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:

Change the dollar amount to 2.25.

[Return to List](#)

Click the Save  button.

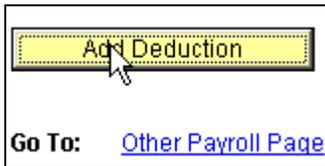
**Voluntary Deductions**  
**Save Confirmation**

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

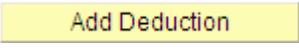
Click the OK  button on the Save Confirmation pop-up box.

## Part 2

Add a new donation.



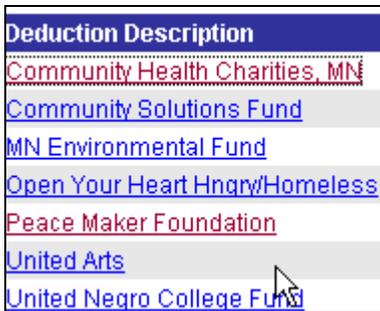
A screenshot of a web interface. At the top, there is a yellow button with the text "Add Deduction" and a mouse cursor pointing to it. Below the button, the text "Go To:" is followed by a blue hyperlink that says "Other Payroll Page".

Click the Add Deduction  button.



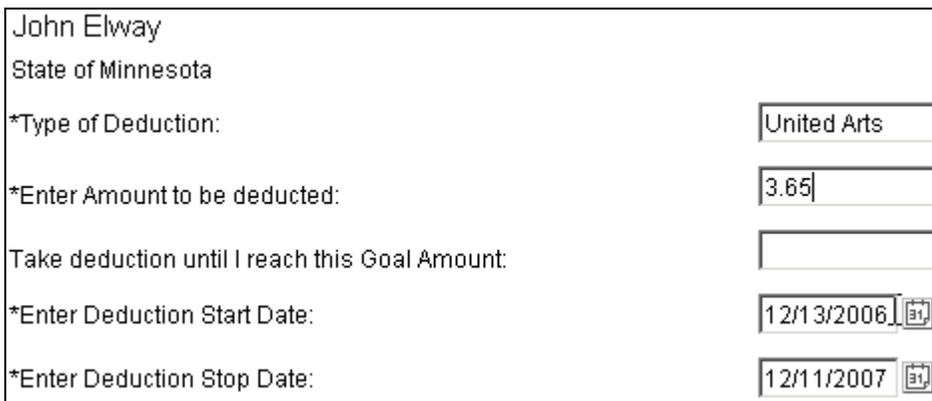
A screenshot of a form field labeled "\*Type of Deduction:". To the right of the text input area is a search icon (magnifying glass) with a mouse cursor pointing to it.

Click the Look up  button.



A screenshot of a dropdown menu. The menu is titled "Deduction Description" and lists several options: "Community Health Charities, MN", "Community Solutions Fund", "MN Environmental Fund", "Open Your Heart Hngry/Homeless", "Peace Maker Foundation", "United Arts", and "United Negro College Fund". A mouse cursor is pointing to "United Arts".

Select the organization.



A screenshot of a form for adding a deduction. The form contains the following fields and values:

- Name: John Elway
- State: State of Minnesota
- \*Type of Deduction: United Arts
- \*Enter Amount to be deducted: 3.65
- Take deduction until I reach this Goal Amount: (empty field)
- \*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.

John Elway  
 State of Minnesota

\*Type of Deduction:

\*Enter Amount to be deducted:

Take deduction until I reach this Goal Amount:

\*Enter Deduction Start Date:

\*Enter Deduction Stop Date:

In this case change the start date to March 1 of 2007 and change the end date to October 1.

[Return to List](#)

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.

Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance
<a href="#">MN Environmental Fund</a>	08/16/2006	12/12/2006	Current	\$2.25	22.00	8.00
<a href="#">United Arts</a>	03/01/2007	10/01/2007	Future	\$3.65		0.00
<a href="#">United Way Of Central MN</a>	12/14/2005	12/12/2006	Current	\$2.00	44.00	16.00

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						
Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance
<a href="#">Open Your Heart Hngrw/Homeless</a>	12/14/2005	12/12/2006	Current	\$10.00		0.00
<a href="#">United Way Of Gtr Twin Cities</a>	12/14/2005	12/12/2006	Current	\$1.00		0.00

Click the Add Deduction  button.

\*Type of Deduction:

Click the Look up  button.

Deduction Description
<a href="#">Community Health Charities, MN</a>
<a href="#">Community Solutions Fund</a>
<a href="#">MN Environmental Fund</a>
<a href="#">Open Your Heart Hngrw/Homeless</a>
<a href="#">Peace Maker Foundation</a>
<a href="#">United Arts</a>
<a href="#">United Negro College Fund</a>
<a href="#">United Way of Caring Rivers</a>

Select the organization.

\*Type of Deduction:

\*Enter Amount to be deducted:

Take deduction until I reach this Goal Amount:

\*Enter Deduction Start Date:

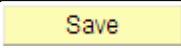
\*Enter Deduction Stop Date:

**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,

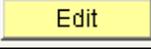
even though the date range is for the entire year. Note: You could change the start date to later in the year to delay when the deduction will be taken.



Click the Save  button.



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

Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
<a href="#">Open Your Heart Hungry/Homeless</a>	12/14/2005	12/12/2006	Current	\$10.00		0.00	
<a href="#">United Negro College Fund</a>	12/13/2006	12/11/2007	Future	\$150.00	150.00	0.00	
<a href="#">United Way Of Gtr Twin Cities</a>	12/14/2005	12/12/2006	Current	\$1.00		0.00	

The future-dated record is listed.

## Example 4

Stop a deduction as soon as possible.

Deduction Type	Start Date	Stop Date	Status	Deduction	Goal Amount	Goal Balance	
<a href="#">Peace Maker Foundation</a>	08/04/2006	12/12/2006	Current	\$6.00		0.00	<input type="button" value="Edit"/>
<a href="#">United Way Of St Croix</a>	08/16/2006	12/12/2006	Current	\$25.55	520.00	140.00	<input type="button" value="Edit"/>

Click the Edit  button.

Type of Deduction:	<input type="text" value="Peace Maker Foundati"/>
Enter Amount to be deducted:	<input type="text" value="6.00"/>
Take deduction until I reach this Goal Amount:	<input type="text"/>
Enter Deduction Start Date:	<input type="text" value="08/16/2006"/>
Enter Deduction Stop Date:	<input type="text" value="08/16/2006"/> <input type="button" value="E"/>
	<input type="button" value="Stop Deduction"/>

Click the Stop Deduction  button.

<input type="button" value="Save"/>	<a href="#">Return to List</a>
-------------------------------------	--------------------------------

Click the Save  button.

<b>Voluntary Deductions</b>	
<b>Save Confirmation</b>	
<input checked="" type="checkbox"/>	The Save was successful. However, due to timing, your change may not be reflected on the very next pay.
<input type="button" value="OK"/>	

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

Deduction Type	Start Date	Stop Date	Status	Deduction
<a href="#">Peace Maker Foundation</a>	08/16/2006	08/16/2006	Current	\$6.00
<a href="#">United Way Of St Croix</a>	08/16/2006	12/12/2006	Current	\$25.55

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.

# Reminders

---

- Added
- Updated and Stopped
- Stop each December
- Instructions



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.