*Desk Aid – Balance Adjustments*

**Summary:**

*This Desk Aid will explain how to adjust balances for*

* *Earnings*
* *Taxes*
* *Deductions*

# Earnings:

**Steps:**

1. Navigate to the page to adjust balances for earnings.
2. Enter required values, save Adjustment.
3. Review Adjustment.
4. Navigate to the page to adjust balances for earnings.

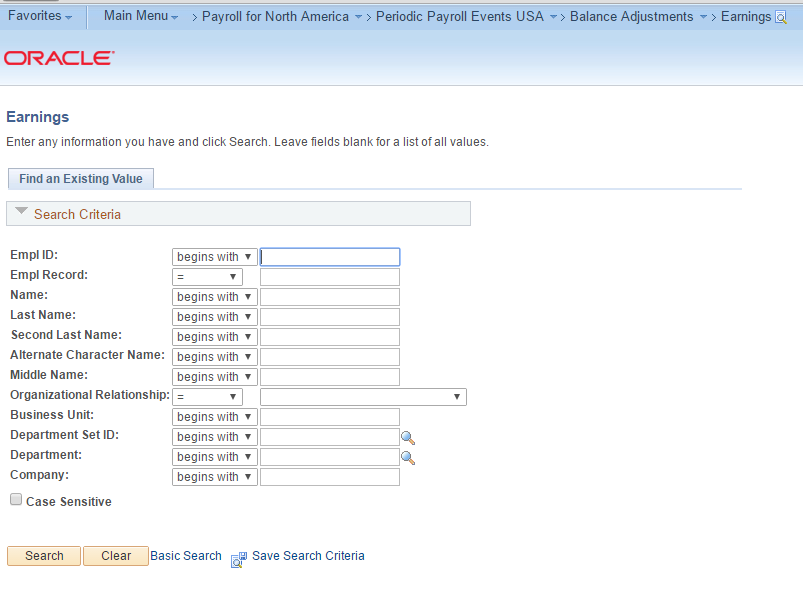
**Navigation:**

*Main Menu > Payroll for North America > Periodic Payroll Events USA > Balance Adjustments > Earnings*

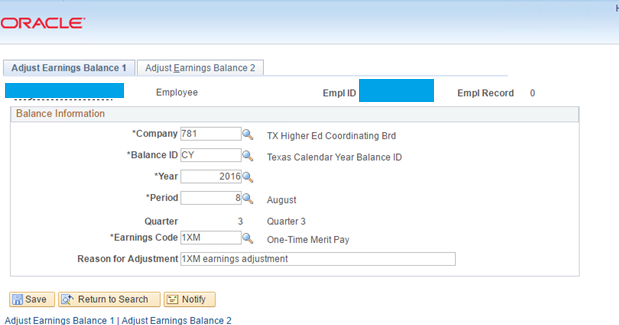
**Screen Shot:**

*Search Page:*

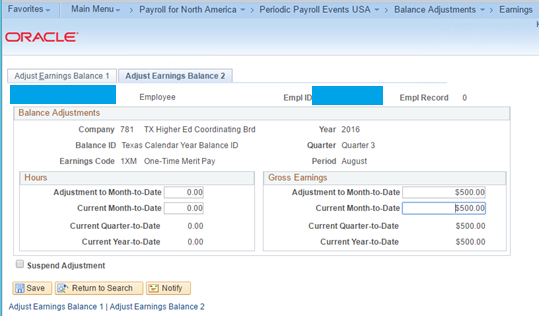
*Use the search page to look up the Employee for whom the Adjustment needs to be made, click Search.*



1. Enter required values: *Company, Balance ID, Year, Period, Earnings Code. Click Save.*



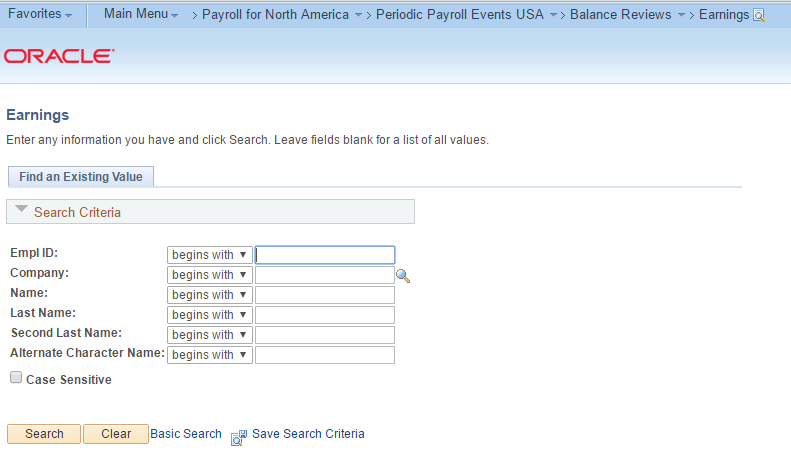
Enter the values that need to be adjusted, click Save:



1. Review Adjustment: Navigate to the page to review balances for earnings.

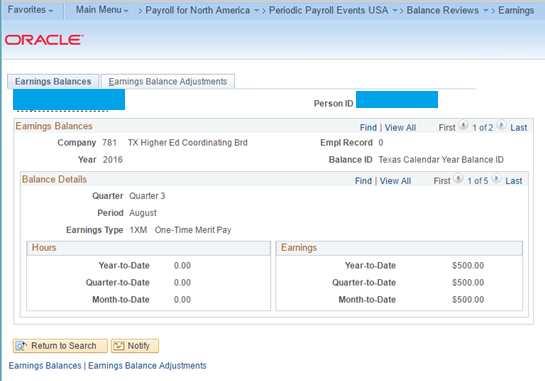
**Navigation:**

Navigate to: Main Menu > Payroll for North America > Periodic Payroll Events USA > Balance Reviews > Earnings



Look up the Employee, navigate to the adjustment done for Verification.

**Screen Shot:**



***Deductions:***

**Steps:**

1. Navigate to the page to adjust balances for deductions.
2. Enter required values, save Adjustment.
3. Review Adjustment.

1. Navigate to the page to adjust balances for earnings.

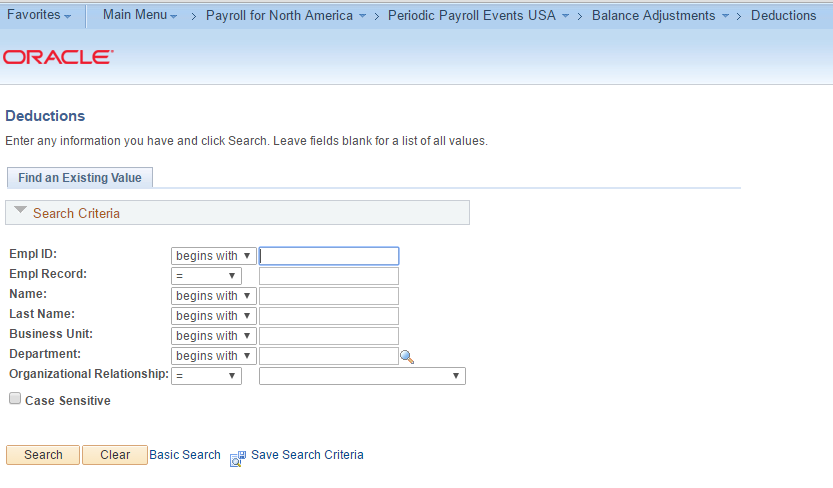
**Navigation:**

*Main Menu > Payroll for North America > Periodic Payroll Events USA > Balance Adjustments > Deductions*

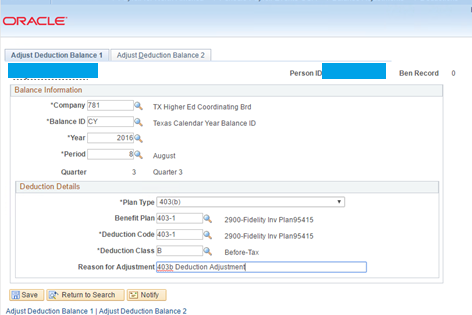
**Screen Shot:**

*Search Page:*

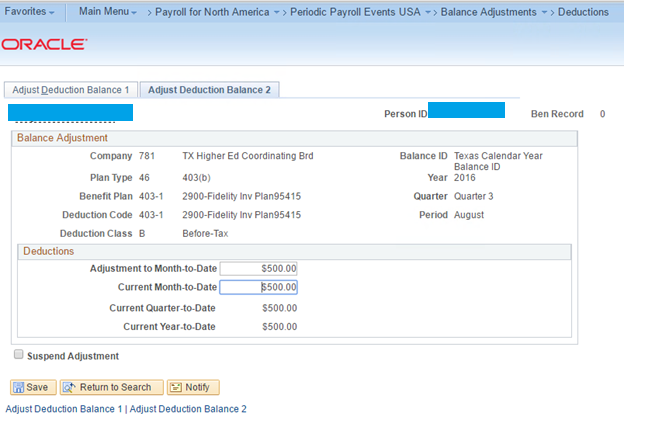
*Use the search page to look up the Employee for whom the Adjustment needs to be made, click Search.*



1. Enter required values: *Company, Balance ID, Year, Period, Plan Type, Deduction Code, Deduction Class. Enter appropriate non-required fields. Click Save.*



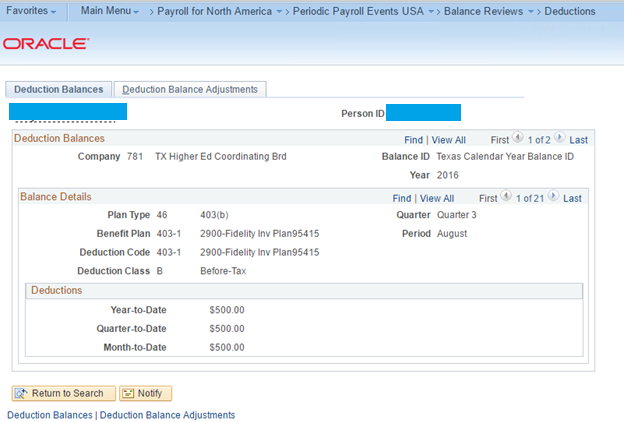
Enter the values that need to be adjusted, click Save:



1. Review Adjustment: Navigate to the page to review balances for deductions.

**Navigation:**

Navigate to: Main Menu > Payroll for North America > Periodic Payroll Events USA > Balance Reviews > Deductions



***Taxes:***

**Steps:**

1. Navigate to the page to adjust balances for Taxes.
2. Enter required values, save Adjustment.
3. Review Adjustment.
4. Navigate to the page to adjust balances for earnings.

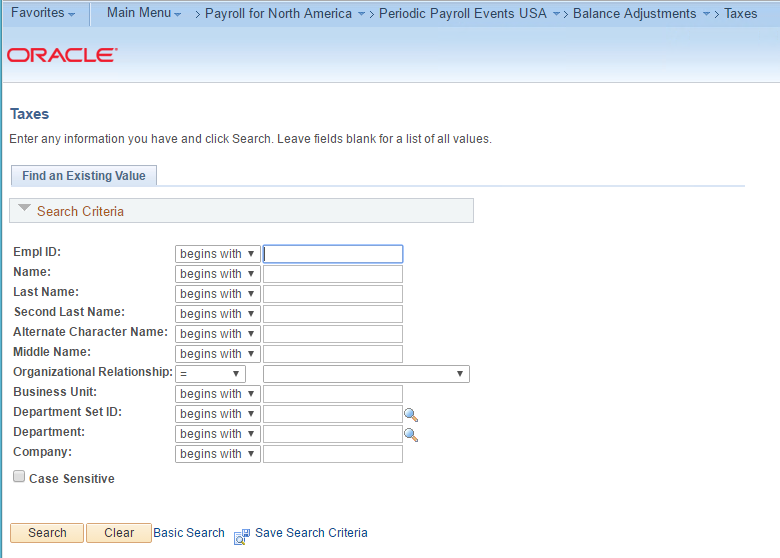
**Navigation:**

*Main Menu > Payroll for North America > Periodic Payroll Events USA > Balance Adjustments > Taxes*

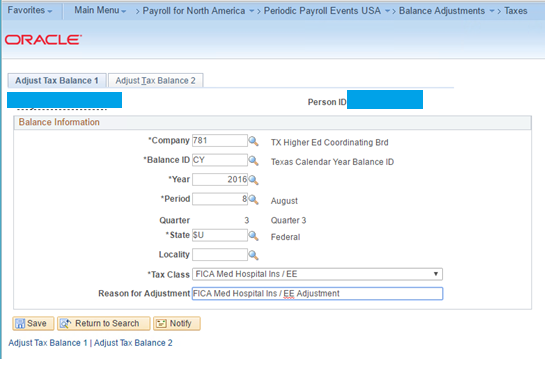
**Screen Shot:**

*Search Page:*

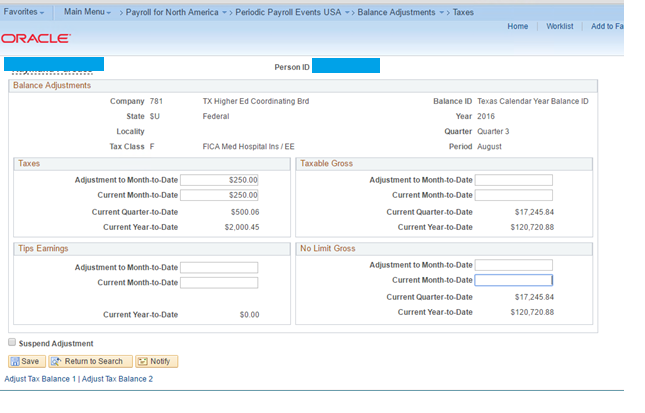
*Use the search page to look up the Employee for whom the Adjustment needs to be made, click Search.*



1. Enter required values: *Company, Balance ID, Year, Period, State, Tax Class. Enter appropriate non-required fields. Click Save.*

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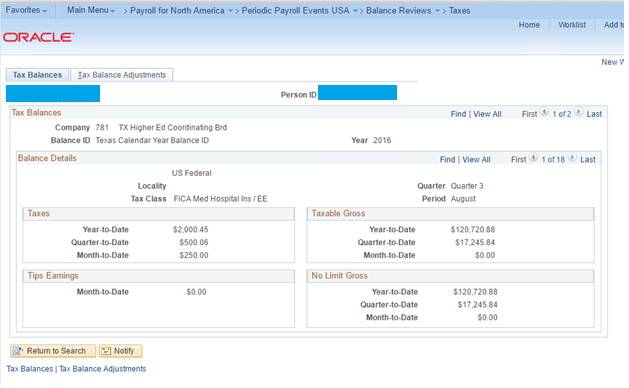
Enter the values that need to be adjusted, click Save:



1. Review Adjustment: Navigate to the page to review balances for deductions.

**Navigation:**

Navigate to: Main Menu > Payroll for North America > Periodic Payroll Events USA > Balance Reviews > Taxes



**NOTES**

1. **Use standard naming convention**
2. **Place all desk aids on the shared drive under CAPPS Processes - N:\HCM\CAPPS FM- Processes,Req,Config,Scripts\CAPPS Business Processes,Documentation\Process Documentation,Aids,Helpful Hints\HR,Benefits & Position Management**
3. **Open the footer and click in the template file name then right click and select Update Field to auto change to your file name**
4. **Follow the outline of this template**
5. **Add additional data and/or notes at the end of the document**