

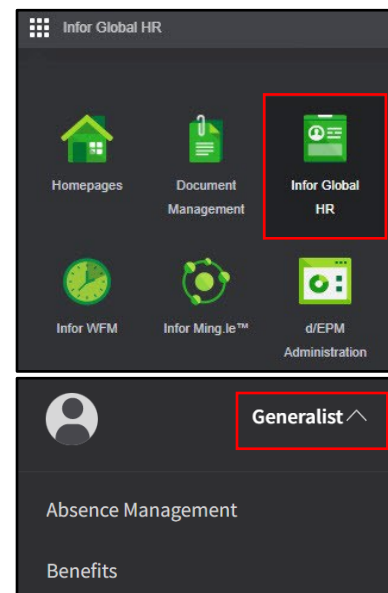


Add, Update, Remove Deductions

Luma Role: Generalist, Administrator

Reason: A generalist or administrator needs to add, update, or remove deductions.

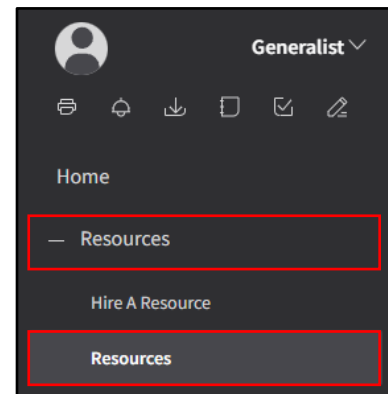
1. From the available application menu, select the **Infor Global HR** application.



Ensure **Generalist** is selected in the role switcher.

Note: This guide was developed using the *Generalist* role. An *Administrator* may also be used to complete this process.

2. Select **Resources** from the menu. Then select **Resources**.



- On the **Resource Search** page, enter the desired search criteria. Then, click the **Search** button.

The screenshot shows the 'Resource Search' interface with several search criteria fields: Keyword, Employment ID, Last Name, First Name, Organization Unit, Location, Position, Employment, Education, and Credential. A 'Search' button is highlighted with a red box in the bottom right corner.

- Next, double-click the desired employee.

The screenshot shows the search results table with columns: Preferred Name, Last, First, Employment..., Relationship, Location, Organization Unit, and Position. The first row is highlighted with a red box, indicating the selected employee.

- On the employee's **Profile** page, select the **Deductions** tab.

The screenshot shows the 'Employee Profile' page with a sidebar menu on the left containing 'At A Glance', 'Work Assignments', 'Personal Information', 'Dates & Service', 'Compensation', 'Payroll', and 'Deductions'. The 'Deductions' tab is highlighted with a red box.

- Click the **Ellipsis (...)** icon in the **Employee Deductions** section. Then select **Create** from the menu.

The screenshot shows the 'Employee Deductions' table with columns: De..., Description, De..., Begin, End, and Amo. A dropdown menu is open, showing options: Open, Save and New, Add Row, Create, and Options. A red box with the number '1' highlights the ellipsis icon, and another red box with the number '2' highlights the 'Create' option.

7. On the employee's **Deduction** form, complete the fields listed below. Reference DHR/Agency policy regarding required* and optional fields.

- Deduction Code*
- Begin*
- Amount or Percent*

Note: Fields will auto-populate based on the master deduction configurations.

The screenshot shows the 'Employee Deduction' form with the following fields highlighted in red boxes: Deduction Code, Begin, Amount, and Percent.

8. Click the **Save** icon.



9. To update an employee deduction, select the deduction you wish to change in the **Employee Deductions** section. Next, click the **Ellipsis (...)** icon. Then select **Update** from the menu.

The screenshot shows the 'Employee Deductions' table with the following data:

De...	Description	Deduction Type	Begin	End	Amo...	Percent	Bal...
<input checked="" type="checkbox"/>		Benefit			0.00	7.1600%	
<input type="checkbox"/>		Other			0.00	0.0000%	
<input type="checkbox"/>		Other			0.00	0.0000%	
<input type="checkbox"/>		Benefit			49.77	0.0000%	
<input type="checkbox"/>		Benefit			9.72	0.0000%	
<input type="checkbox"/>		Other			0.00	0.0000%	

The context menu is open, and the 'Update' option is highlighted with a red box. Red circles with numbers 1, 2, and 3 indicate the selection of the row, the ellipsis icon, and the 'Update' option, respectively.

10. On the employee's **Deduction** page, update any necessary fields listed below. Reference DHR/Agency policy regarding required* and optional fields.

- End
- Amount
- Percent

Note: An entry is required in either the *Amount* or *Percent* field.

The screenshot shows the 'Employee Deduction' form with the following fields highlighted: End, Amount, and Percent.

11. Click the **Save** icon.



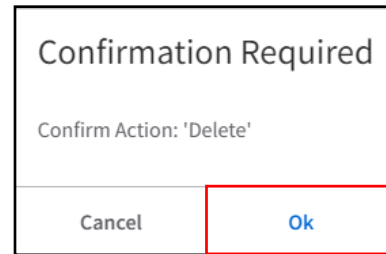
12. To delete an existing employee deduction, select the deduction you wish to remove in the **Employee Deductions** section. Next, click the **Ellipsis (...)** icon. Then select **Delete** from the menu.

The screenshot shows the 'Employee Deductions' table with the following data:

De...	Description	De...	Begin	End	Am...	Percent	Bal...
<input checked="" type="checkbox"/>		Benefit					
<input type="checkbox"/>		Other					
<input type="checkbox"/>		Other					
<input type="checkbox"/>		Benefit					
<input type="checkbox"/>		Benefit					
<input type="checkbox"/>		Other					
<input type="checkbox"/>		Other					

The context menu is open, and the 'Delete' option is highlighted with a red box. Red circles with numbers 1, 2, and 3 indicate the selection of the row, the ellipsis icon, and the 'Delete' option, respectively.

13. On the **Confirmation Required** pop-up, click the **Ok** button.



Result

You have successfully added, updated, or removed deductions in Luma.

Date (04/20/23)

Version 1