Taxes

Section 3

Introduction

In EHRP, capturing information pertaining to taxes (federal, state and local) is a two-step process. First, HR staff must perform a personnel action to start, change, or stop the tax (process completed 3 times – once for each Federal, State and Local tax) withholding. This is completed via PAR Processing in the **Administer Workforce** module of the system. HR staff must then enter information into the **Federal Tax Data, State Tax Data** and **Local Tax Data** pages in the **Maintain Payroll Data** module of the system so the information will be picked up by the payroll interface.

Because each pay action will have both a PAR action and a pay action in the EHRP system, it is imperative that the user ensures that the effective date for each pay action is the SAME as the effective date for the corresponding PAR action.

NOTE: Fields that are not required are not listed within the procedure. Optional fields that an end-user may choose to complete are not detailed.

Navigational Path

Home → Compensate Employees → Maintain Payroll Data (USF) Use → Employee Tax Data

PAR Processing

Do not proceed with any of the below procedures without ***first*** processing the appropriate payroll related action via PAR processing.

The following table illustrates the relationship between the three procedures contained in this section and the applicable NOA codes for each:

NOA CODES	Start	Change	Stop
Federal Tax	921-0	921-0	921-1
State Tax	925-1	925-1	926-0
City Tax	927-0	927-0	928-0
County Tax	929-0	929-0	929-1
Earned Income Credit	921-2	921-2	921-3

Navigational Tips

- The icon represents a look-up prompt. Clicking this button will allow you to look up all possible entry options for this field.
- The icon represents a date prompt. Clicking this button will produce

a pop-up calendar for reference. To select a specific date from the pop-up calendar as the field entry, simply click on the date. Use the arrows to move through the months and years.

Procedure **STARTING AN EMPLOYEE'S TAX WITHHOLDING.**

The following steps detail the procedure for starting an employee's tax withholding in EHRP:

The personnel actions for each Federal, State and Local Tax must be entered first.

NOTE: All tax information for an individual must be either entered on the same day at the same time (so that each piece of information shares an effective date), or on different days (so that each piece of information has a different effective date).

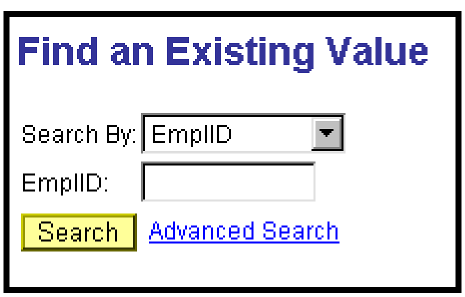
1 Follow the navigational path:

Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ HR Processing

Or

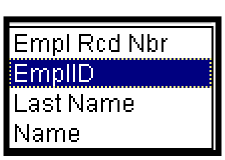
Access the item using the Worklist.

The **Find an Existing Value** page appears.



2 Select the variable you would like to **Search By** from the drop down list.

The search options include:

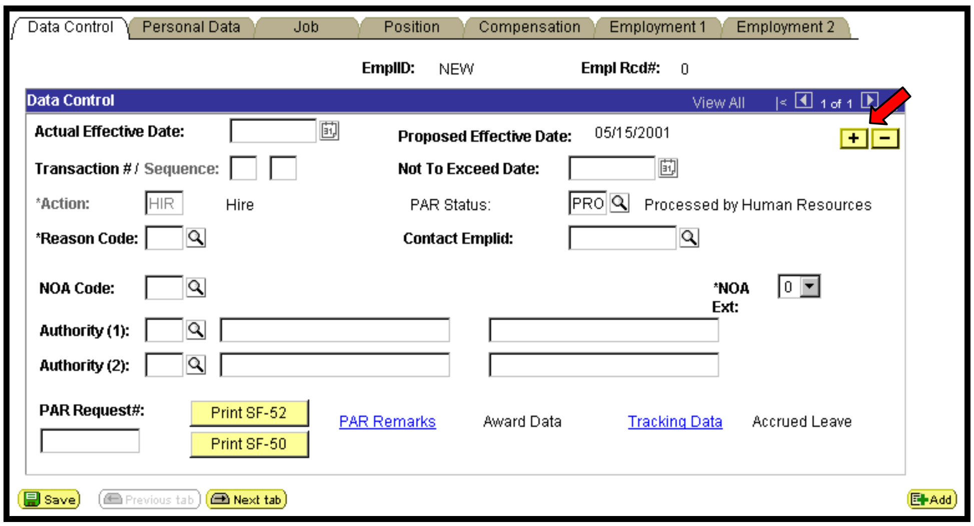


3 Enter the appropriate variable in the next field. (for example, Last Name)

4 Click Search.

5 Select the appropriate employee's record.

The following **Data Control** page appears:



*NOTE: The **Data Control** page will be populated with the most recent personnel action performed for the selected employee.*

6 Click the + in the **Data Control** box, as indicated by the arrow above, to insert another row into the employee's record.

7 Enter the **Actual Effective Date** of the action.

NOTE: The effective date of the Personnel Request Action (PAR) must be identical to the tax effective date.

8 Enter "DTA" (Data Change) in the **Action** field.

9 Enter "PRA" in the **Reason Code** field.

10 Enter the applicable **NOA Code** "921."

11 Enter the correct **NOA ext,** "0".

12 Click the + in the **Data Control** box to insert another row into the employee's record.

13 Enter the **Actual Effective Date** of the action.

NOTE: The effective date of the Personnel Request Action (PAR) must be identical to the tax effective date.

14 Enter “DTA” (Data Change) in the **Action** field.

15 Enter “PRA” in the **Reason Code** field.

16 Enter the applicable **NOA Code** “921.”

17 Enter the correct **NOA ext**, “2”**.**

18 Click the  in the **Data Control** box to insert another row into the employee’s record.

19 Enter the **Actual Effective Date** of the action.

20 Enter “DTA” (Data Change) in the **Action** field.

21 Enter “PRA” in the **Reason Code** field.

22 Enter the applicable **NOA Code “**925.”

23 Enter the correct **NOA ext.**

24 Click the  in the **Data Control** box to insert another row into the employee’s record.

25 Enter the **Actual Effective Date** of the action.

26 Enter “DTA” (Data Change) in the **Action** field.

27 Enter “PRA” in the **Reason Code** field.

28 Enter the applicable **NOA Code** “927” **(City),** “929” **(County)**.

29 Enter the correct **NOA ext, “**0**”** for each NOA**.**

30 Change the **PAR Status** according to your role.

31 Click 

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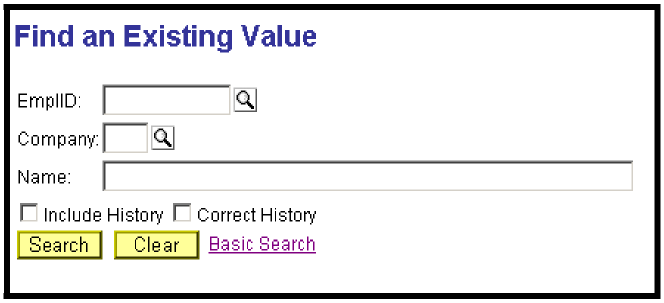
32 To enter the tax data, follow the navigational path:

Home ➔ Compensate Employees ➔ Maintain Payroll Data (USF) Use ➔ Employee Tax Data

The following page appears:

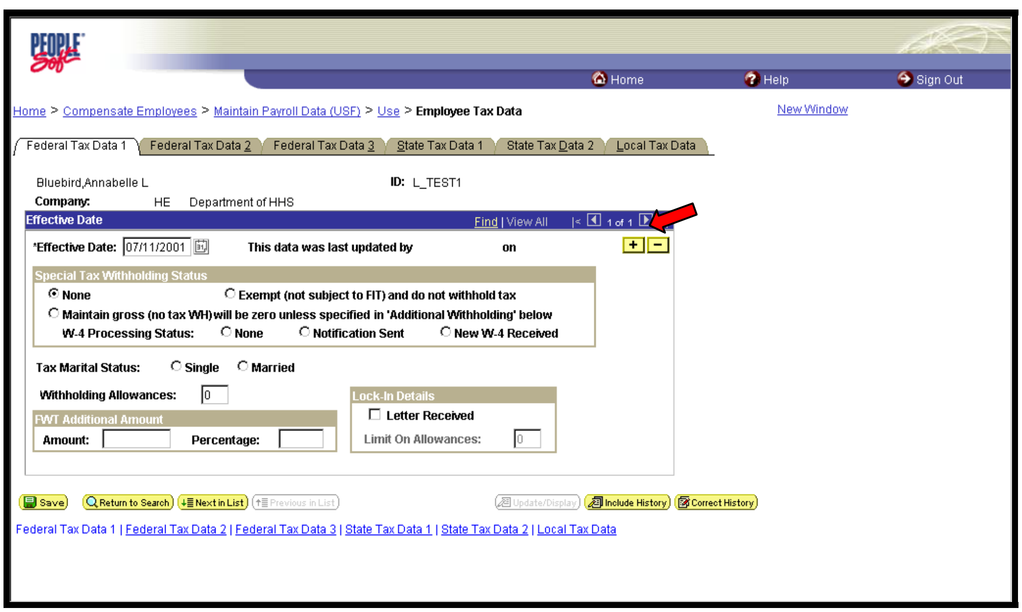


33 Enter either "EmplID," "Company," or "Name" to search for employees.

34 Click Search.

35 If applicable, select the appropriate employee from the search results.

The following page appears:



NOTE: Tax Withholding information must be entered at all three levels at the same time. Once Save *is clicked, any subsequent start data must be entered under a different and unique effective date and considered as a change.*

36 Enter the **Effective Date**.

NOTE: This effective date must be identical to the effective date on the PAR action.

*NOTE: If there is previous data in the page, insert a row in the **Effective Date** Box, as indicated by the arrow above.*

37 In the **Special Tax Withholding Status** area, use the radio buttons to select the category of withholding appropriate for the employee.

- **None**: No special tax withholding instructions exist for the employee.
- **Exempt**: Employee is not subject to withholding, nor are federal taxable wage figures calculated.

NOTE: For the vast majority of employees, "None" will be selected.

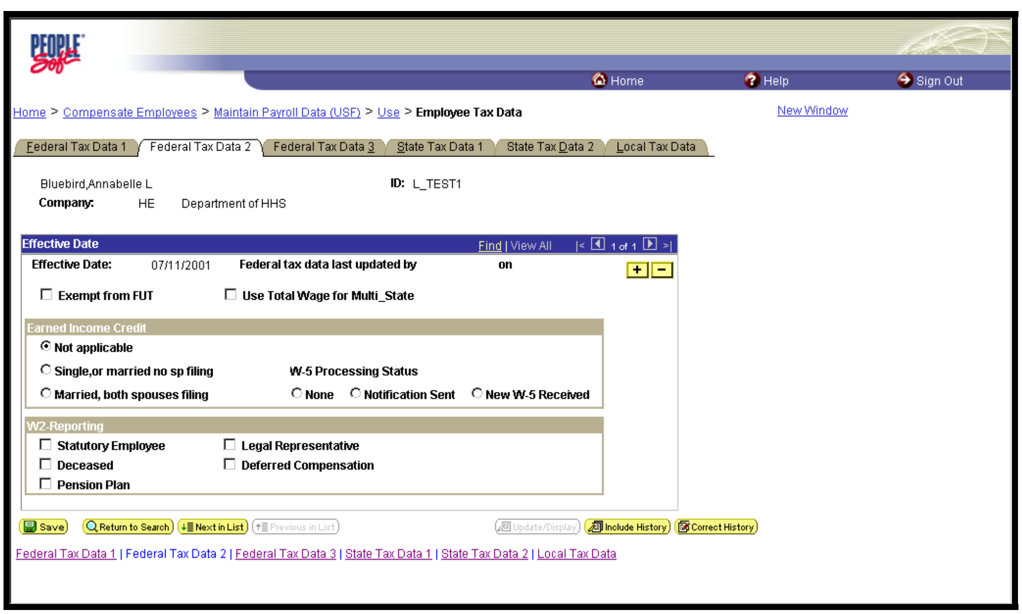
38 Select the employee's **Tax Marital Status**.

39 Enter the number of **Withholding Allowances** claimed.

40 If there is an additional withholding, enter it in the **FWT Additional Amount** area.

*NOTE: This entry can be made only as an **Amount**. It must be entered in as a whole dollar amount. An employee may not claim an **FWT Additional Amount** without first claiming **Withholding Allowances**.*

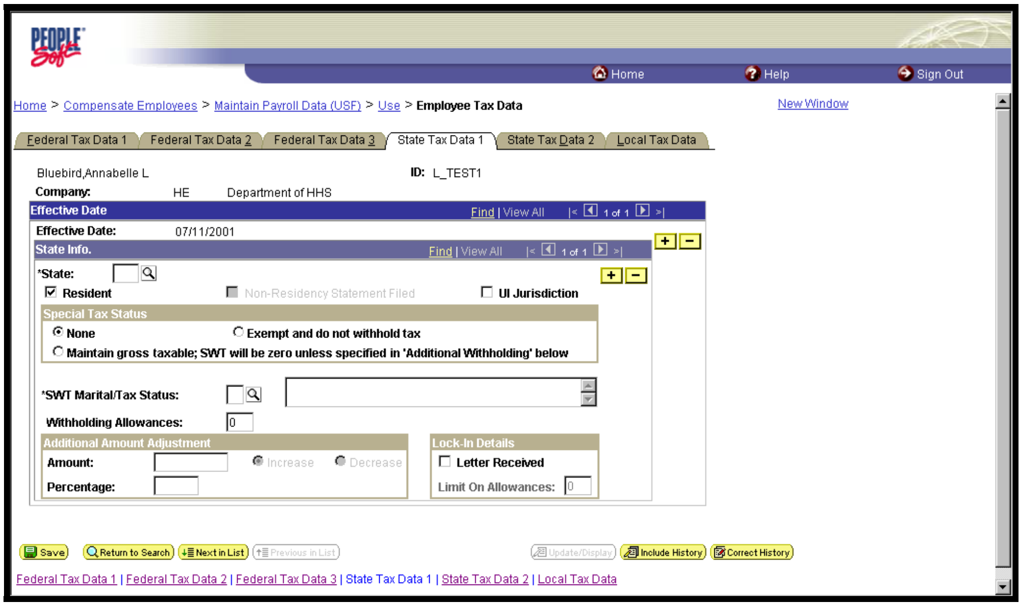
41 Click the **Federal Tax Data 2** tab. The following page appears:



42 Click the appropriate radio button for the **Earned Income Credit**.

43 Click the appropriate radio button for **W-5 Processing Status**.

44 Click on the **State Tax Data 1** tab and the following page appears:



45 Enter the **State** in which the employee claims residency.

46 Check the **Resident** checkbox.

47 In the **Special Tax Status** area, select the appropriate radio button.

- **None**: No special tax withholding instructions exist for the employee.
- **Exempt**: Employee is not subject to withholding, nor are state taxable wage figures calculated.

NOTE: For the vast majority of employees, "None" will be selected.

48 Enter the **SWT (State Withholding Tax) Marital/Tax Status**.

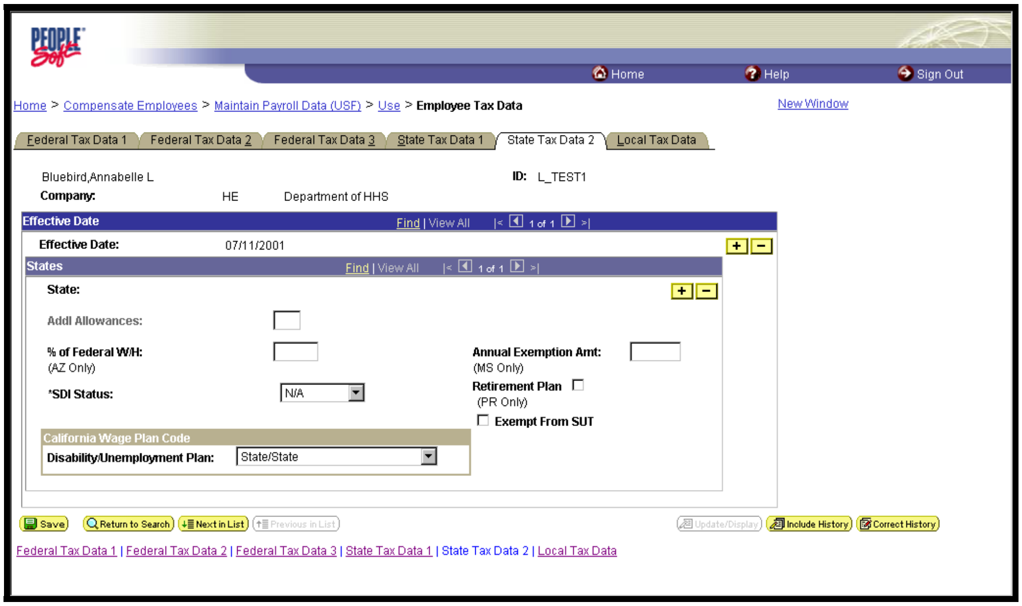
49 Enter the number of **Withholding Allowances** claimed.

50 If there is an additional withholding, enter it in the **Additional Amount Adjustment** area.

*NOTE: This entry can be made only as an **Amount**. It must be entered in as a whole dollar amount. An employee may not claim an **Amount** without first claiming **Withholding Allowances**.*

51 Navigate to the **State Tax Data 2** page.

The following page appears:

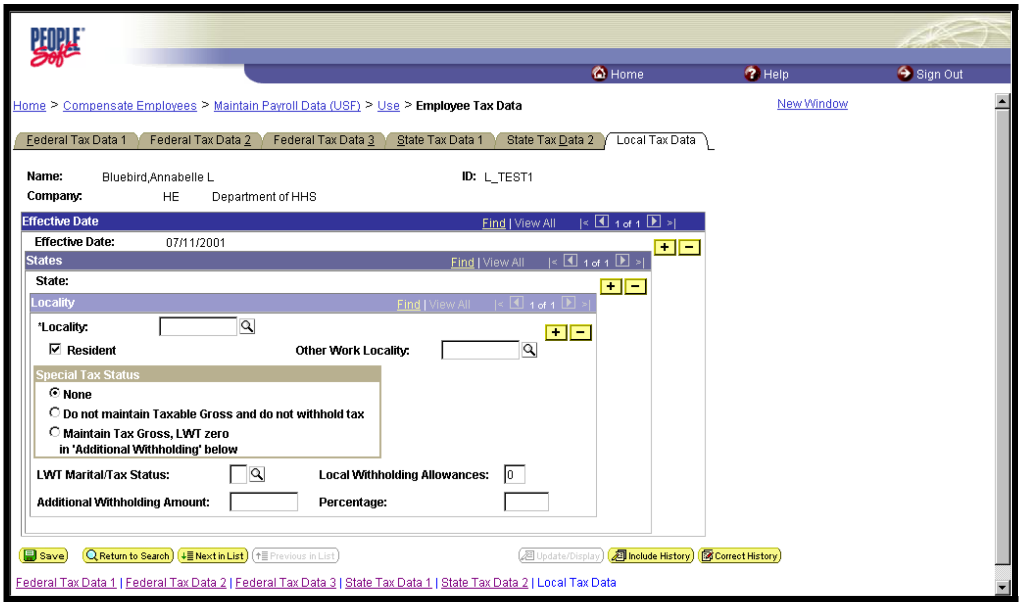


Enter the number of any **Addl (Additional) Allowances**.

NOTE: If the employee is a resident of Arizona, California, Mississippi or Puerto Rico, you may need to enter additional information in the appropriate field(s).

52 Click on the **Local Tax Data** tab.

The following page appears:



City and County Taxes

As applicable for the employee, both city and county taxes are entered on the **Local Tax Data** page. In the event that an employee pays both city and county taxes simultaneously, simply insert a row and use the appropriate **Locality** for the particular tax jurisdiction.

Procedure (cont'd)

Enter the **Locality** for the employee.

53 Click the **Resident** checkbox.

54 If applicable, enter an **Other Work Locality**.

55 In the **Special Tax Status** area of the page, select one of the following radio buttons:

- **None**: No special tax withholding instructions exist for the employee.
- **Do not maintain Taxable Gross and do not withhold tax**: Taxable wage figures are neither calculated nor withheld.

56 Enter the information for **LWT Marital/Tax Status**.

57 Enter the number of **Local Withholding Allowances** claimed.

58 If there is an additional withholding, enter it in the **Additional Withholding Amount** field.

*NOTE: This entry can be made only as an **Amount**. It must be entered in as a whole dollar amount.*

59 Click Save.

Procedure **EMPLOYEES WHO WORK AND LIVE IN DIFFERENT LOCATIONS AND NEED TO PAY SEPARATE LOCALITY TAXES.**

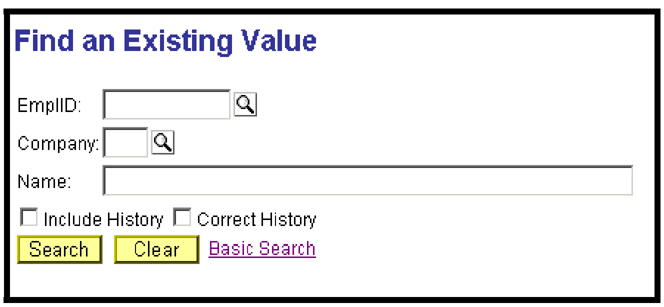
The following steps detail the procedure for starting an employee's tax withholding information in EHRP when the work and residence locations are different.

NOTE: Be sure the Personnel Action has been completed before proceeding. See Steps 1 through 30 of Starting an Employee's Tax Withholding.

1 To enter the tax data, follow the navigational path:

Home ➔ Compensate Employees ➔ Maintain Payroll Data (USF) Use ➔ Employee Tax Data

The following page appears:

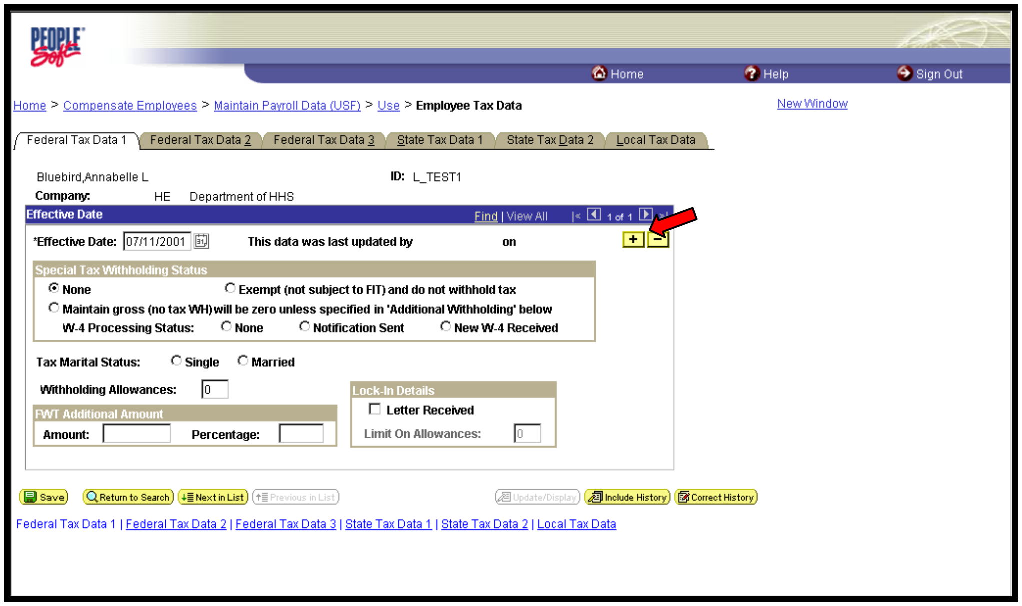


2 Enter either "EmplID," "Company," or "Name" to search for employees. Click the Correct History checkbox.

3 Click Search.

4 If applicable, select the appropriate employee from the search results.

The following page appears:

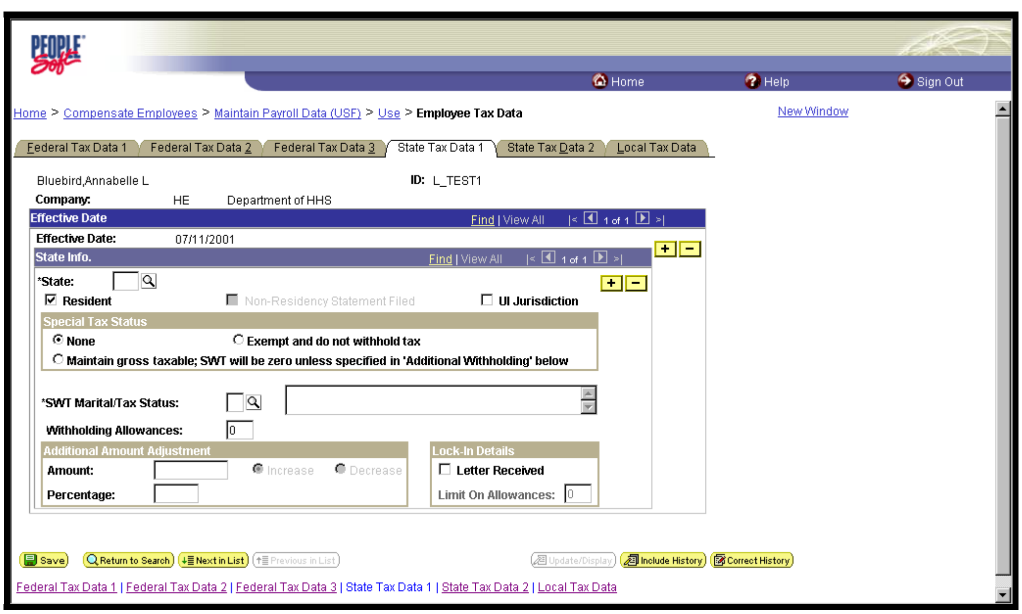


5 Click  in the **Effective Date** Box, as indicated by the arrow above to insert a new row.

6 Enter the **Effective Date**.

NOTE: This must be one day later than the prior row.

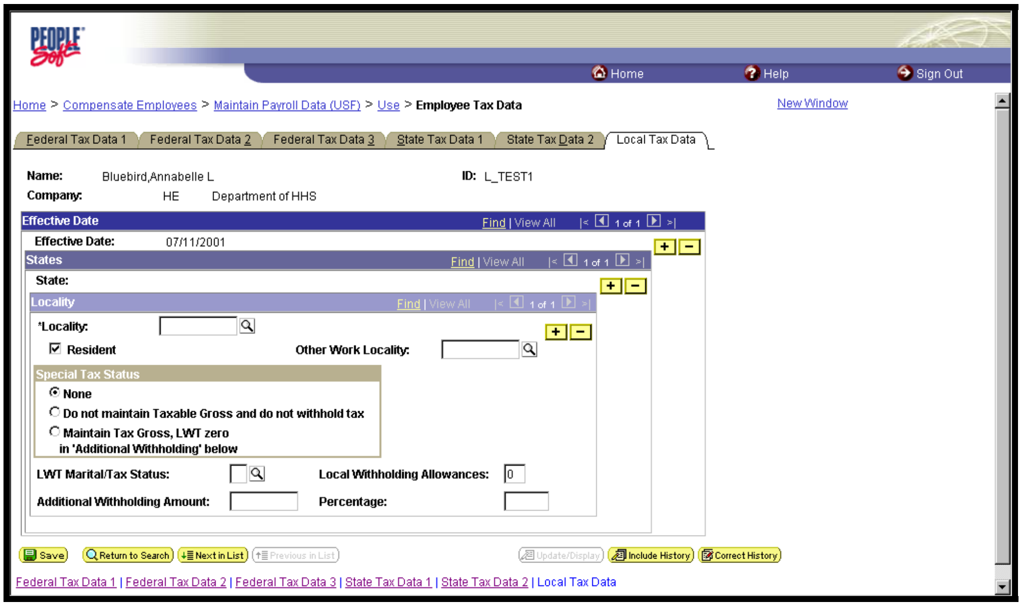
7 Click on the **State Tax Data 1** tab and the following page appears:



8 Enter the employee's work state.

9 Click on the **Local Tax Data** tab.

The following page appears:



10 Enter the employee's locality or use the lookup icon to select a locality.

NOTE: Some states do not list a locality. If no values are found for a particular state, the sytem will return with a message "No matching values were found." If you need a locality that is not in the system, call your Help POC and ask them to open a ticket.

12 Click  in the **Effective Date** Box, as indicated by the arrow above to insert a new row.

13 Enter the **Effective Date** as one day later than the current row (the date you entered in Step 6).

Procedure **CHANGING AN EMPLOYEE'S TAX WITHHOLDING.**

The following steps detail the procedure for changing an employee's tax withholding information in EHRP. A payroll related action processed in PAR Processing must be completed prior to proceeding:

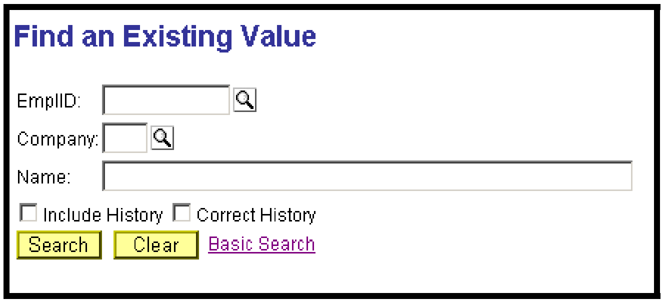
1 Be sure the Personnel Action has been completed before proceeding. See Steps 1 through 30 of Starting an Employee's Tax Withholding.

NOTE: Perform the Personnel Actions using the Change NOA Codes provided on page one.

2 To enter the tax data, follow the navigational path:

Home ➔ Compensate Employees ➔ Maintain Payroll Data (USF)
Use ➔ Employee Tax Data

The following page appears:

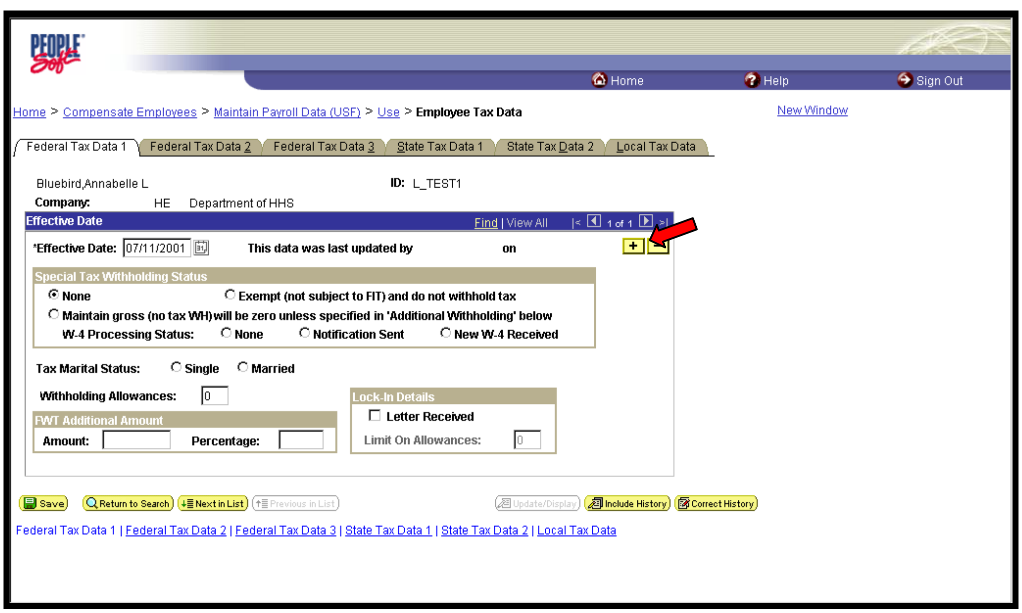


3 Enter either “EmplID,” “Company,” or “Name” to search for employees.

4 Click Search.

5 If applicable, select the appropriate employee from the search results.

The following page appears:



6 Click + in the **Effective Date** Box, as indicated by the arrow above to insert a new row.

7 Enter the **Effective Date** of the changes being made.

NOTE: This effective date must be identical to the effective date on the PAR action. Additionally, this effective date cannot be the same as the previous tax effective date.

8 Navigate to the applicable field(s) and make any necessary change(s).

9 Modify Information on all Tax pages as necessary.

10 Click 

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Procedure **STOPPING AN EMPLOYEE'S TAX WITHHOLDING.**

The following steps detail the procedure for stopping an employee's tax withholding information in EHRP:

1 Be sure the Personnel Action has been completed before proceeding. See Steps 1 through 22 of Starting an Employee's Tax Withholding.

NOTE: Use the applicable Stop NOA Codes provided on the first page of this section.

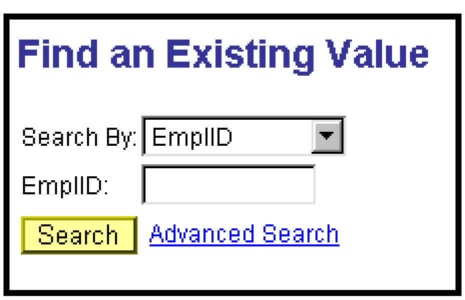
2 Follow the navigational path:

Home ➔ Administer Workforce ➔ Administer Workforce (USF) ➔ Use ➔ HR Processing

Or

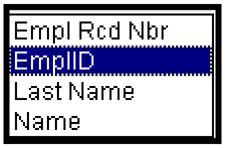
Access the item using the Worklist.

The **Find an Existing Value** page appears.



3 Select the variable you would like to **Search By** from the drop down list.

The search options include:

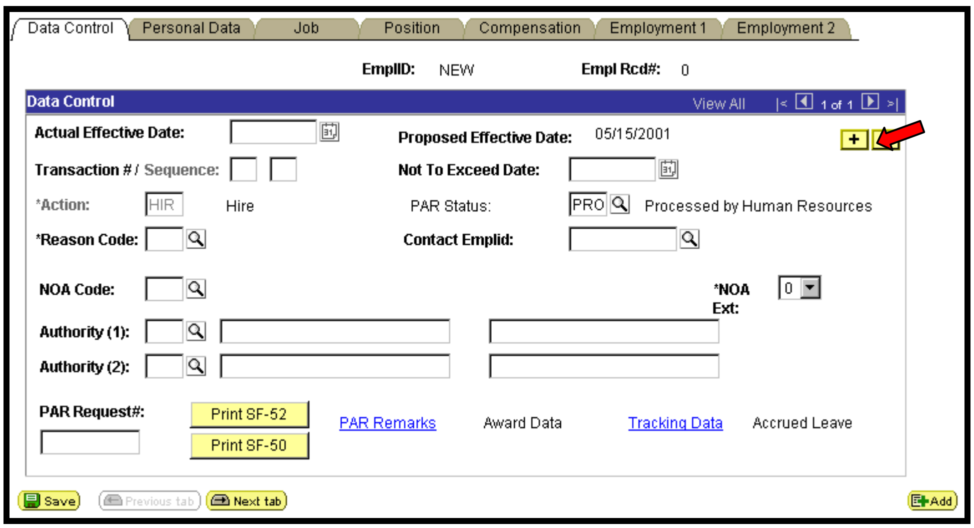


4 Enter the appropriate variable in the next field. (for example, Last Name)

5 Click Search.

6 Select the appropriate employee's record.

The following **Data Control** page appears:



*NOTE: The **Data Control** page will be populated with the most recent personnel action performed for the selected employee.*

7 Click + in the **Data Control** Box, as indicated by the arrow above, to insert a new row.

8 Be sure the personnel action has been completed before proceeding. See Steps 1 through 30 of Starting an Employee's Tax Withholding. Use the applicable NOA codes from page 1.

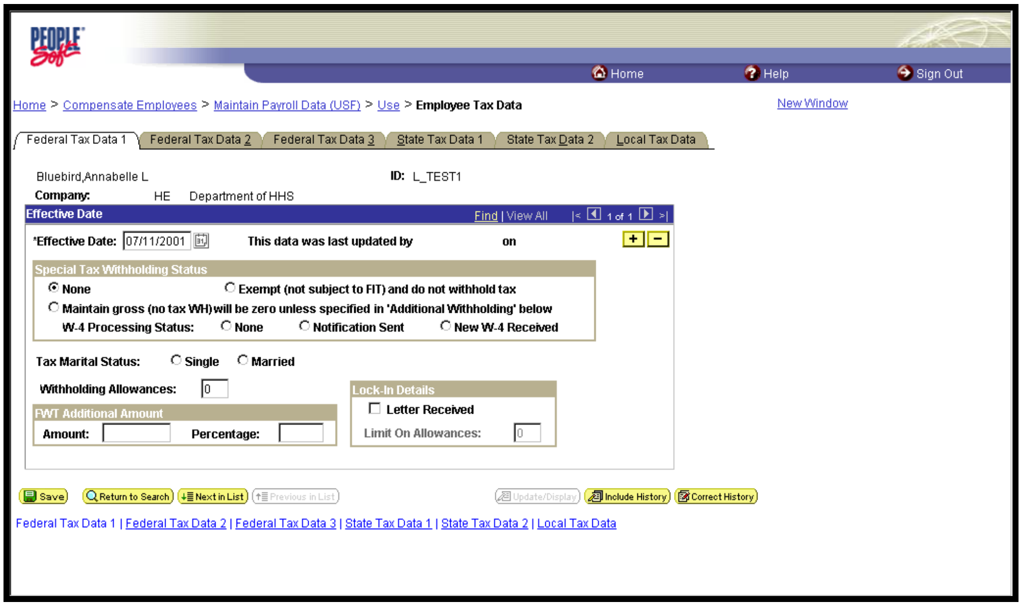
9 Follow the navigational path:

Home ➔ Compensate Employees ➔ Maintain Payroll Data (USF)
Use ➔ Employee Tax Data

10 In the **Search By** field, select either "Name" or "EmplID".

11 Type the appropriate employee information based on the Search By field selected.

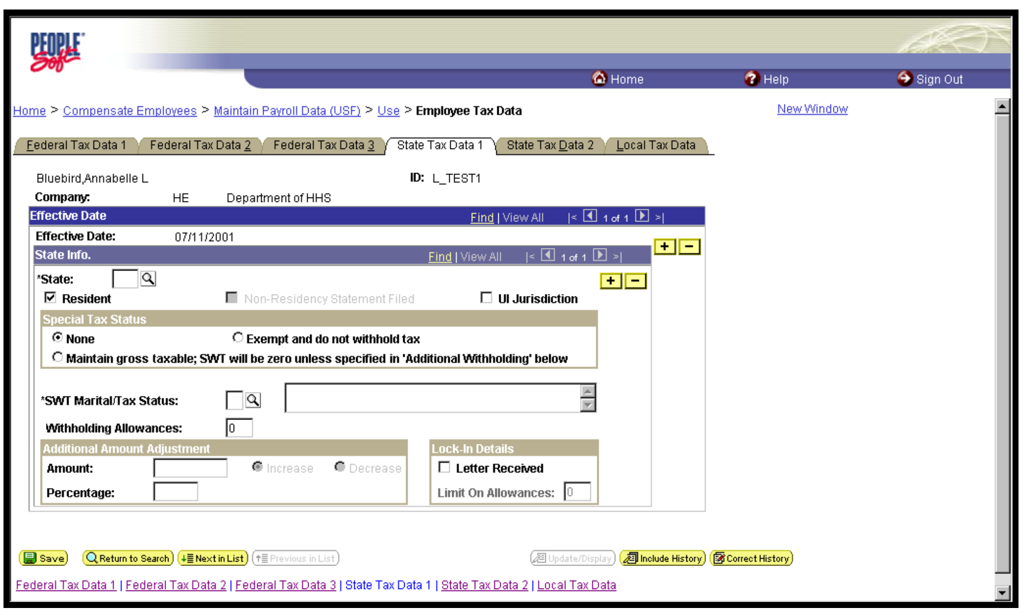
The following page appears:



12 Click  to insert a new row.

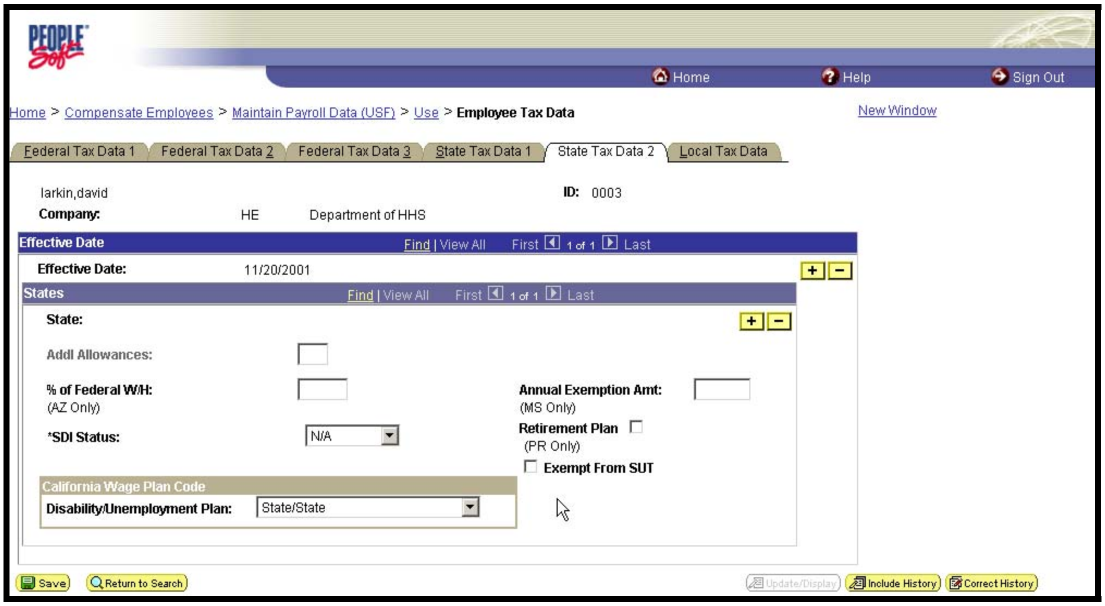
13 Enter the **Effective Date**.

14 Click on the **State Tax Data 1** tab. The following page appears:



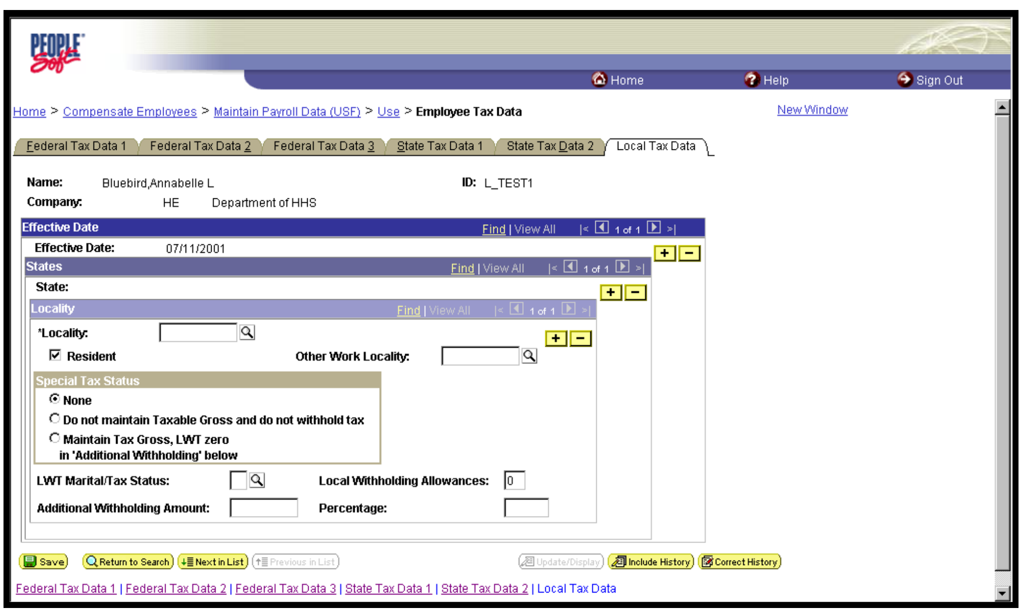
15 Clear all fields, and mark all radio buttons as "Not Applicable" or "None" as appropriate.

16 Click on the **State Tax Data 2** tab. The following page appears:



17 Clear all fields, and mark all radio buttons as "Not Applicable" or "None" as appropriate.

18 Click on the **Local Tax Data** tab. The following page appears:



19 Clear all fields, and mark all radio buttons as "Not Applicable" or "None" as appropriate.

20 Click 

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