Central Payroll Tax Form Entry on IU Admin Page Instructions

The preference is that employees use the Employee Center on One.iu to enter/update their own tax setup. If the employee cannot use self-service and completes paper W-4 and/or WH-4 tax forms, you should enter them into HRMS using the custom IU tax entry pages.

The IU tax entry pages were created to take advantage of the logic built into the Self-Service pages that will build/update appropriate 01/01/CY Local Tax rows. You will be able to enter the tax forms the day after the job is saved in HRMS and builds the 01/01/CY tax row.

Special tax setup must be updated in the HRMS client using the restricted, correction mode page (International, WH-47 Reciprocal Agreement, IRS Lock In Letter, IU2 Company, Exception for living/working outside IN/USA). If you do not have access to the HRMS client page, please fax your forms to the UCO Payroll fax: 812-856-0805 for entry.

Entry Guidelines:

1) Date stamp tax forms the day they are received in your office. This is the date you will use to record when the forms were received in the payroll office in the event of a dispute over withholding.

2) Verify the forms are valid; Name, SSN, signed, and dated. Look up the Employee ID using the SSN, *Main Menu>Payroll for North America>Employee Pay Data USA>Search by National ID*.

3) **Enter W-4 Federal Tax Information**:
   a. *Main Menu>Payroll for North America >Employee Pay Data USA>Tax Information>IU Tax Entry>Update Employee W-4 Tax Data*

   b. Enter ID and click the search button. If you receive an error, ****Please see error message information below****

   c. **Effective Date**: Will default to today's date.

   d. **Verify Name is correct and Review *Last Updated by* status and date**. If the information has been updated **AFTER** the date they signed the paper form, do not update and write over their entry. Make a note on the paper form that employee or central office updated and file the form.

   e. **W4 Received Date**: Enter the date the W-4 was received in the payroll office.

   f. **W-4 Tax Data**: Current values will be displayed on the right. Each value must be entered according to new form. Review differences between new form and current columns and enter changes.
      i. Enter **Allowances** indicated on **Line 5**.
      ii. Enter **Additional Amount** indicated on **Line 6**.
      iii. Enter **marital status** indicated on **Line 3**. If blank, you must default to single.
         1. Check the box if they have indicated married but w/h as single rate.
      iv. Check the box if they have indicated '**exempt**' on **Line 7**. Employees are not allowed to indicate an additional amount and also exempt status.

   g. Save the record (Submit). SAVE will be displayed upper right corner

SPECIAL NOTICE FOR NOVEMBER/DECEMBER:
When forms are received at the end of the calendar year claiming "exempt", an assumption is made that the form is intended to be for the following or new tax year.
After November 1:
- The system will Insert a new *Effective Dated* (today) row changing the status to "**exempt**" for the current year using the instructions above.

- **The system will create a second tax row with an *Effective Date* of 01/01/Next Year** to continue the exemption using the instructions above.

4) **Enter WH-4 State Tax Information**:
   a. *Main Menu>Payroll for North America>Employee Pay Data USA>Tax Information>IU Tax Entry>Update Employee WH-4 Tax Data*

   b. Enter ID and click the search button. If you receive an error, *****Please see error message information below***

   c. **Effective Date**: Will default to today's date.

   d. **Verify Name is correct and Review *Last Updated by* status and date**. If the information has been updated **AFTER** the date they signed the paper form, do not update and write over their entry. Make a note on the paper form that employee or central office updated and file the form.

   e. **WH-4 Received Date**: Enter the date the WH-4 was received in the payroll office.

   f. **WH-4 Tax Data**: Current values will be displayed on the right. Each value must be entered according to new form. Review differences between new form and current columns and enter changes.
      i. Enter **County of Residence** indicated on tax form. If form is blank, re-enter current displayed value.
      ii. Enter **County of Employment** indicated on tax form. If form is blank, re-enter current displayed value.
      iii. Enter total **Exemptions** indicated on **Line 5 only**. Ignore info on lines 1-4.
      iv. Enter total **Additional Exemptions** indicated on **Line 6**.
      v. Enter **Additional State Amount** indicated on **Line 7**.
      vi. Enter **Additional County Amount** indicated on **Line 8**.

   g. Save the record (Submit). SAVE will be displayed upper right corner.

SPECIAL NOTICE FOR DECEMBER:
When the locality is changed after Dec 1, the **01/01/CurrentYear** local tax row will not be updated. The system will insert a new current effective dated row with the new locality that will be used for local withholding after 01/01/NewYear.

**Error Message Information:

W-4 (federal) errors that will prevent entry on the IU Admin Tax page:
- If the job was saved today, the record needs to run thru a nightly update to create the 01/01/CY tax row.
- Employee lives and works outside of USA and has special tax status 'no taxable gross, no tax taken' entered by UCO tax area.
- Employee has International tax treaty information entered.
- Employee has an IRS 'lock in' letter entered by UCO tax area.
- Employee has active job in the IU2 Company (18/20).

WH-4 (state) errors that will prevent entry on the IU Admin Tax page:
- If the job was saved today, the record needs to run thru a nightly update to create the 01/01/CY tax row.
- Employee lives in a reciprocal state (MI, KY, WI, OH, PA) and has filed the WH-47 form to be exempt from IN state tax.
- Employee lives and works outside of IN (or USA).
- Employee has International tax treaty information entered.
- Employee has active job in the IU2 Company (18/20).