

Job Aid - A

New York State Office of the State Comptroller
Bureau of State Payroll Services
NY Paid Family Leave

Update Employee Tax Data – Paid Family Leave Waiver

The PayServ implementation of the NY Paid Family Leave program has resulted in a new procedure to update eligible employees who may have applied for a waiver or do not meet the eligibility criteria as defined in New York State Law for NY Paid Family Leave. Agency payroll officers will be required to update the employee's tax data to and from 'Exempt' if necessary.

- To review the **Federal/State Tax Data Page** go to **Payroll for North America> Employee Pay Data USA> Tax Information> Update Employee Tax Data**.
- Enter the **Empl ID (1)** and the **Company (2)**.
- Click **Search (3)**.

The screenshot shows a web browser window with the address bar displaying the path: Favorites | Main Menu > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data. The page title is "Update Employee Tax Data". Below the title, there is a instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." A blue button labeled "Find an Existing Value" is visible. A section titled "Search Criteria" contains several input fields, each with a "begins with" dropdown menu. Red arrows labeled "1" and "2" point to the input fields for "Empl ID" and "Company" respectively. Below these fields are fields for "National ID", "Name", and "Last Name". There is a checkbox for "Include History" and a text input for "Limit the number of results to (up to 300):" with the value "300" entered. At the bottom, there are buttons for "Search" and "Clear", along with links for "Basic Search" and "Save Search Criteria". A red arrow labeled "3" points to the "Search" button.

- The Employee Federal Tax Data Page is displayed.
- To update the FLI Status for the employee, click the **plus sign (4)** to add a new effective dated row. The **Effective Date (5)** field defaults to the current date. As long as this date is prior to the check date that the change should be impacted in, there is not a need to update the date from the current date.
- Click on the **State Tax Data (6)** tab.

The screenshot shows the 'Employee Federal Tax Data' interface. At the top, there are three tabs: 'Federal Tax Data', 'State Tax Data' (highlighted with a red arrow labeled '6'), and 'Local Tax Data'. Below the tabs, the 'Person ID' is 'N'. The main section is titled 'Tax Data' and includes a search bar with 'Find | View All' and a pagination control showing '1 of 2' with 'First' and 'Last' buttons. A red arrow labeled '4' points to a plus sign (+) in the top right corner of the table area. Below this, the 'Company' is 'NYS STATE OF NEW YORK'. The '*Effective Date' is '12/08/2017', with a red arrow labeled '5' pointing to the date field. The 'Updated By' is 'Online Usr' and the 'Date Last Updated' is blank. The 'Federal Withholding Elements' section contains several fields: '*Special Withholding Tax Status' (None), '*Tax Marital Status' (Single), 'Withholding Allowances' (2), 'Additional Amount' (\$0.00), 'Additional Percentage' (0.000), and '*Earned Income Credit Status' (Not applicable). There is a checked box for 'Exempt from FUT'. Below this are expandable sections: 'W-4 and W-5 Processing Status', 'Lock-In Letter Details', 'State Tax Options', 'Tax Treaty/Non-Resident Data', and 'W2-Reporting'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Update/Display', and 'Include History'. At the very bottom, there are links for 'Federal Tax Data | State Tax Data | Local Tax Data'.

- If the employee **does have** a waiver and does not meet the Paid Family Leave eligibility criteria, update the ***FLI Status (7)** drop down to 'Exempt' so the employee no longer has the Paid Family Leave deduction taken from future dated paychecks.

***FLI – Family Leave Insurance**

The screenshot displays a web-based form for entering tax data. At the top, there are tabs for 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'. The 'State Tax Data' tab is active. The form is for 'Person ID: N'. The 'Tax Data' section shows 'Company: NYS STATE OF NEW YORK' and 'Effective Date: 12/08/2017'. The 'State Information' section includes '*State: NY New York', '*Resident' (checked), '*Non-Residency Statement Filed' (unchecked), '*SDI Status: Exempt', and '*FLI Status: Exempt'. A red arrow with the number '7' points to the '*FLI Status' dropdown menu. The 'State Withholding Elements' section includes '*Special Withholding Tax Status: None', '*Tax Marital Status: S Single or Head of Household', 'Withholding Allowances: 2', 'Additional Amount: \$0.00', 'Additional Percentage: 0.000', and 'Additional Allowances: 0'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', and 'Update'.

- If the employee **does not have (or no longer has)** a waiver and does not meet the Paid Family Leave eligibility criteria, update the ***FLI Status (8)** drop down to 'Not Applicable' so the employee is processed by the PayServ system and updated to Subject automatically based on the eligibility criteria for the premium deduction.

***FLI – Family Leave Insurance**

Person ID: N

Tax Data | Find | View All | First | 1 of 2 | Last

Company: NYS STATE OF NEW YORK Effective Date: 12/08/2017

State Information | Find | View All | First | 1 of 1 | Last

*State: NY New York

Resident UI Jurisdiction

Non-Residency Statement Filed Exempt From SUT

*SDI Status: Exempt *FLI Status: Not Applicable

State Withholding Elements

*Special Withholding Tax Status: None

*Tax Marital Status: S Single or Head of Household

Withholding Allowances: 2

Additional Amount: \$0.00

Additional Percentage: 0.000

Additional Allowances: 0

Save | Return to Search | Previous in List | Next in List | Refresh | Update

Federal Tax Data | State Tax Data | Local Tax Data

- **Save (9)** the changes. The employee tax data is now updated.