

Employee Tax Data Page – Federal Tax Data


PayServ - The NYS Payroll System

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Federal Tax Data
State Tax Data
Local Tax Data

Company: NYS STATE OF NEW YORK

Effective Date: 3/19/2002    This data was last updated by: Online User on 03/19/2002

Exempt from FUT     Use Total Wage for Multi-State

Special Tax Withholding Status

None

Maintain gross; FWT will be zero unless specified in 'Additional Withholding' below

Non-Resident Alien; Tax Treaty/NR Data

W-4 Processing Status:     None     Notification Sent     New W-4 Received

Tax Marital Status:     Single     Married    Withholding Allowances: 5

FWT Additional Amount

Amount: -    Percentage: -

Lock-In Details

Letter Received    Limit On Allowances: 0

Earned Income Credit

Not applicable

Single or Head of Household

Married without spouse filing

Married, both spouses filing

W-5 Processing Status

None

Notification Sent

New W-5 Received

W2 Reporting

Statutory Employee     Legal Representative

Deceased     Deferred Compensation

Retirement Plan     Third Party Sick Pay

Tax Treaty/IRI Data

Date of Entry:     Eligible Income Code:

Country:     Treaty ID:     Treaty Exp Date:

Form 8233 Recd?: No    8233 In Effect Date:     8233 Exp Date:

Form W8 Recd?: No    W8 In Effect Date:     W8 Exp Date:

Form W9 Recd?     W9 In Effect Date:

Taxpayer ID Number:

Allowable Earnings Codes

Income Code (for 1042-S):	Max Earnings Eligible Per Year:	Tax Rate (after form):	Tax Rate (before form):
	\$0.00	0.000000	0.000000

Save
Return to Search
Refresh
Update Progress
Include History

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**Effective Date** group box – The title ‘Federal tax data last updated by’ has been changed to read ‘This data was last updated by’. The value populated will be either ‘Hire Prcss’ or ‘Online User’ depending on whether the values were defaulted through the hire process or populated by the agency.

**FWT Additional Amount** group box – ‘Percentage’ is not used.

**Lock-In Details** group box – This box is new to Federal Tax Data and includes:

- Letter Received – This box should be checked when a letter is received from the IRS stating that an employee can only claim a certain number of withholding allowances.
- Limit On Allowances – The number of allowances which the employee can claim, as stated in the letter received from the IRS.

**W2-Reporting** group box – This box has had several statuses added and the name of one existing status changed.

**The following are new statuses:**

- Statutory Employee – Not used.
- Deceased – Not used.
- Legal Representative – Not used.

The status ‘Pension Plan’ has been changed to ‘Retirement Plan’.

**Tax Treaty/NR Data** group box:

- Date of Entry – This is a new field and should be the date on Form 8233.
- Form 8233 Recd? – This field now has a dropdown box with values of ‘No’, ‘N/A’ and ‘Yes’. Enter a ‘Yes’ in this field when the form is received.
- 8233 In Effect Date – This has replaced 8233 Submit Date. Enter the date on the form in this field.

**The following are new fields, but are not currently being used:**

- 8233 Exp Date
- Form W8 Recd?
- W8 In Effect Date
- W8 Exp Date
- Form W9 Recd?
- W9 In Effect Date


**The following fields have been eliminated in Version 8:**

- Form 1001 Rec'd
- 1001 Submit Date

**Allowable Earnings Code** group box –this box includes a name change and an additional field.

- Tax Rate (after form) is now Tax Rate.
- Tax Rate (before form) – This new field shows the rate the employee will be taxed if the Form 8233 is not received.
- Tax Rate (after form) – This new field shows the rate the employee will be taxed if the Form 8233 is received.

### Employee Tax Data Page – State Tax Data

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Federal Tax Data State Tax Data Local Tax Data

[ ]	ID [ ]
Company:	NYS STATE OF NEW YORK

**Effective Date** Find | View All | First 1 of 1 | Last  
Effective Date: 12/19/2002 + -

**State Information** Find | View All | First 1 of 1 | Last  
\*State: NY Graduated Tax Table-Allowances + -

Resident  Non-Residency Statement Filed  UI Jurisdiction

**Special Tax Status**  
 None  
 Maintain gross taxable; SWT will be zero unless specified in 'Additional Withholding' below  
 Non-Resident Alien; Fed Rules

\*SWT Marital Tax Status: M Married

Withholding Allowances: 5

**Additional Amount Adjustment**  
Amount: [ ]  Increase  Decrease  
Percentage: [ ]

**Lock-In Details**  
 Letter Received  Limit On Allowances: 0

Add Allowances:

% of Federal WHT: [ ] Annual Exemption Amount: [ ]  
(AZ Only) (MS Only)

\*SDI Status: Exempt Retirement Plan  Exempt From SUT   
(PR Only)

**California Wage Plan Code**  
\*Disability/Unemployment Plan: State/State

Save Return to Search Refresh

Update/Display Include History [ ]

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**State Information** group box – Resident checkbox is automatically checked when a hire is entered. This checkbox should be checked at all times except when the employee is a Non-Resident Alien. (NRA).

**Additional Amount Adjustment** group box – Increase, Decrease, and Percentage fields are not used.

**Lock-In Details** group box – This new box includes:

- Letter Received – This box should be checked when a letter is received from the Department of Taxation and Finance stating that an employee can claim only a certain number of withholding allowances.
- Limit on Allowances – This is the number of allowances which the employee can claim as stated on the letter received from the Department of Taxation and Finance.

**California Wage Plan Code** group box is not used.

## Employee Tax Data Page – Local Tax Data

The screenshot displays the 'PayServ - The NYS Payroll System' interface. At the top, there is a navigation bar with 'Home', 'Help', and 'Sign Out' links. Below this, a breadcrumb trail reads 'Home > Compensate Employees > Maintain Payroll Data (US) > User > Employee Tax Data'. A 'New Window' link is also present. The main content area has three tabs: 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data', with 'Local Tax Data' being the active tab. The form includes several sections: 'Company' (NYS STATE OF NEW YORK), 'Effective Date' (12/19/2002), 'States' (NY), 'Locality' (with a search box and 'Resident' checkbox), 'Special Tax Status' (with radio buttons for 'None' and 'Maintain Tax Gross, LWT zero in 'Additional Withholding' below'), 'LWT Marital/Tax Status' (with a search box), 'Local Withholding Allowances' (set to 0), and 'Additional Withholding Amount' and 'Percentage' (both with search boxes). At the bottom, there are buttons for 'Save', 'Return to Search', 'Refresh', 'Update/Display', and 'Include History'.

**Locality** group box – Other Work Locality is not used.

**Special Tax Status** group box includes:

- None – This is a new field in the upgraded system (PayServ). Taxes will be calculated at the tax rates in the NYS-50-SUB – Revised City of New York Withholding Tax Tables and Methods.
- Maintain Tax Gross, LWT zero in 'Additional Withholding' below is a new field in the upgraded system (PayServ). No tax will be calculated unless the Additional Withholding Amount field is entered. Only that tax amount will be taken from the employee's check.
- LWT Marital/Tax Status – This is a new field in the upgraded system (PayServ) which was not available in the current system (PaySR). Look up box values are 'M'arried and 'S'ingle.
- Local Withholding Allowances are the number of allowances an employee requests upon the completion of Form IT-2104, Employee's Withholding Allowance Certificate.
- Percentage is not used.


### Job Data (Agency) Page – Payroll

The screenshot shows the 'Payroll' tab of the 'Job Data (Agency)' page in the PayServ system. The page header includes the NYS logo and navigation links for Home, Help, and Sign Out. The breadcrumb trail is: Home > Administer Workforce > Administer Workforce (GBL) > Use > Job Data (Agency). A 'New Window' link is also present. The main content area has tabs for Work Location, Job Information, Payroll, Salary Plan, and Compensation. The 'Payroll' tab is active, showing fields for Employee ID and Empl Rcd#: 0. Below this is a 'Payroll Info' section with a table of data: Effective Date (12/18/2002), Effective Sequence (0), Job Indicator (Primary Job), Action / Reason (Termination, Deceased), and Payroll System (Payroll for North America). A 'Current' status is also indicated. Further down, there are fields for Employee Type (S - Salaried), Tax Location Code (NY), Holiday Schedule (10DY - 10 Day Sch), and FICA Status (Subject). At the bottom, there are navigation links for Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation, along with utility buttons like Save, Return to Search, Previous tab, Next tab, Refresh, Update Tables, and Include History.

Payroll Info	
Effective Date:	12/18/2002
Effective Sequence:	0
Job Indicator:	Primary Job
Action / Reason:	Termination Deceased
Payroll System:	Payroll for North America
Employee Type:	S Salaried
Tax Location Code:	NY NYS
Holiday Schedule:	10DY 10 Day Sch
FICA Status:	Subject

**Job Data (Agency), Payroll** tab now has the Tax Location Code and FICA Status on one page instead of on two panels on Job Data 1 and Job Data 2.

Paycheck Data Page – Paycheck Taxes



## PayServ - The NYS Payroll System

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Paycheck Earnings
Paycheck Taxes
Paycheck Deductions

Company: NYS    Pay Group: ALE    Pay Period End: 01/01/2003    Page: 228  
 EmpID:     Name:     Line: 1  
 Confirmed    Advice    Off Cycle ?    Reprint    Adjustment    Corrected   Sep Chk #:

Issue Date	Check #	Earnings	Taxes	Deductions	Net Pay
01/15/2003	19452420	3,162.95	592.24	332.14	2,238.57

**Taxes** [Find](#) | [View All](#)    First  1-4 of 4  Last

State / Resident	Tax Entity	Tax Class	Tax Amount	Taxable Gross	No Limit Gross / Tax Not Taken	AP Status
US Federal	US Federal	MED/EE	44.88	3,095.38	3,095.38	
US Federal	US Federal	OASD/EE	191.91	3,095.38	3,095.38	
US Federal	US Federal	Withholding	208.51	2,847.75		
NY / Y	State	Withholding	146.94	2,847.75		

**Tax Tips** [Find](#) | [View All](#)    First  1-4 of 4  Last

State / Resident	Tax Entity	Tax Class	Tax Amount	Taxable Gross	Current Tips / Delayed Tips	AP Status
US Federal	US Federal	MED/EE	44.88	3,095.38		
US Federal	US Federal	OASD/EE	191.91	3,095.38		
US Federal	US Federal	Withholding	208.51	2,847.75		
NY / Y	State	Withholding	146.94	2,847.75		

**1042 Taxes**

[Paycheck Earnings](#) | [Paycheck Taxes](#) | [Paycheck Deductions](#)

**Tax Tips** group box – Will not be used even though each employee will have information shown in this area.