



HRIS Job Role Training

Maintain Tax Deductions

Forms: PR13

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Introduction

An Employee will have taxes withheld from his/her pay on a biweekly basis. These withholdings include:

- Federal
- State of Arizona
- FICA
- Medicare
- MQGE (where applicable),
- Earned Income Tax Credit (where applicable).

Employee tax withholdings will default as defined by Federal/State Laws. However, an Employee must complete the required legal documents (W-4, W-5, and A-4) to add or change tax withholdings. Employee taxes will be set up on the *Employee US Taxes Form (PR13.1)*.

Agency Human Resources and Payroll Initiators both have access to enter Federal and State tax information. **If the tax change involves starting or stopping MQGE Withholding or Earned Income Tax Credit, these updates must be sent to the Agency Payroll Initiators for processing.**

Once an Employee's taxes have been updated, you should file the applicable W-4, W-5 and A-4 form as determined by your agency.

Employee US Taxes Entry Tips

- Unlike many other HRIS Transactions, changes to an Employee's tax withholdings cannot be future dated.
- Changes can be made to the Employee taxes at any time, and these changes will be reflected on the next manual payment (handwrite) or regular payroll.
- Changes are effective in HRIS immediately.
- The State of Arizona does not withhold taxes for other states.
- An Employee who is rehired must complete new tax forms and his/her record must be updated in HRIS. If not, all previous withholdings will be reinstated.

Employee US Taxes Form (PR13.1)

HRIS State of Arizona

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pr13.1

Employee US Taxes (PR13.1)

Change Previous Inquire Next Inquire

Related Forms

Jobs and Reports

- Job Schedule
- Print Manager
- Job List

Change Password

Control-D Web Reports

Company

Employee

Resident

State

County

City

Sch Dst

Work

Workers Comp State

EIC Status

BSI Group Code

FC Ded Description Res Mar Sts Exemp Number Exempt Amount Tax Ex Cert Code

Row 1 Federal Withholding

Addl Exemptions Addl Tax Info Effective Dates

Tax Code Rate Amount Formula

Steps for Both Federal and State Withholdings Update

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
1	White Search Box	R	Type PR13.1 in the White Search Box. Press <i>Enter</i> on the keyboard	The Employee US Taxes Form (PR13.1) will open.	
2	Company field	R	If field is not Company '1', Type or Select '1'.	Field should default to Company '1'	Company should always be '1'
3	Employee field	R	Type the Employee's EIN.	EIN will appear. Employee's name is displayed next to the field after cursor is moved to the next field.	You must enter the correct EIN.
4	Inquire button	R	Click Inquire .	<p>If the Employee is new to the State – HRIS displays the defaults as setup for the Employee.</p> <p>If the Employee is current or has previously worked for the state – HRIS displays the last values stored for the Employee.</p>	<p>You must always verify that the selections displayed on this form (PR13.1) match the signed W-4 for federal taxes and the signed A-4 for state taxes. After comparing the information, you must complete one of the following steps:</p> <ul style="list-style-type: none"> • If information matches, no additional processing is required. OR • If information does not match, continue with the steps outlined in this document to change Federal/State Taxes. Next step will be Step 5 (Page 5) OR • If Employee indicated that he/she is exempt from taxes you must turn on the Exempt flag, skip to Step 8 (Page 7). <p>In addition, you must verify that the Employee is not requesting EIC or MQGE. If the Employee is requesting this special tax status, you must forward documentation to the Agency Payroll Office for processing.</p>
5	Resident Section State Field County Field City Field Sch Dst Field	R	<p>State Field – should default to AZ. County Field –will remain blank City Field –will remain blank Sch Dst Field –will remain blank.</p> <p>Do NOT change any of these setups.</p>	Fields will display as defined in Step/Action column.	Resident State field should default to 'AZ'

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
6	Work Section State Field County Field City Field Sch Dst field	N / A	State Field – should default to AZ. County Field –will remain blank City Field –will remain blank Sch Dst Field –will remain blank. Do NOT change any of these setups.	Fields will display as defined in Step/Action column.	Work State field should default to ‘AZ’
7	Workers Comp State field EIC Status field BSI Group Code field	N / A	Workers Comp State Field - should default to AZ. EIC Status Field – will remain blank BSI Group Code – information will appear if applicable to the Employee. Do NOT change any of these setups	Fields will display as defined in Step/Action column.	Workers Comp State should default to ‘AZ’ EIC Status – Field used by Agency Payroll in the starting/stopping of EIC. BSI Group Code – Field used by Nationwide to establish Deferred Compensation or Tax Shelter Annuities.  Notes <i>If you will be changing either Federal or Federal/State Taxes, continue with section ‘</i> <ul style="list-style-type: none"> • Additional Steps for Federal Withholdings Update’ – Page 7. • If you will be only changing State taxes, skip to section ‘Additional Steps for State Withholdings Update’ – Page 9

Additional Steps for Federal Withholdings Update

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
8	FC field – Row 1	R	Type 'C' in the FC field to change the Federal withholding data.		The 'C' should be next to the Ded Code 'T101' to update Federal Withholdings
9	Ded field	R	Field should default to 'T101'. No Action Required	Field contains 'T101'.	
10	Res field	R	Field should default to 'Y'. If field is not 'Y' - Type 'Y' or select Resident from the drop down in the Res field.	'Y' appears in the field.	
11	Mar Sts field	R	Select the Marital Withholding status as indicated on the Employee's W-4.		Available options for selection are: <ul style="list-style-type: none"> • 01 – Single • 02 – Married
12	Exemp Number field	R	Type the number of dependents claimed by the Employee		<p>After completing the Exemp Number field you can do one of the following:</p> <ul style="list-style-type: none"> • If the Exemp Number field is the only change, skip to Step 17 (Page 7). No other fields must be entered. <p style="text-align: center;">OR</p> <ul style="list-style-type: none"> • If the Employee wants an Additional Amount withheld, continue with Step 13 (Page 8). <p> Notes</p> <ul style="list-style-type: none"> • You cannot have a number in 'Exemp Number' and have a Y in 'Tax Ex'. If the Employee is claiming Tax Exempt, do not place a number in this field. <p>Exempt Amount Field is not used at the State of Arizona. Field should be blank.</p>

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
13	Tax Ex field	O	Type 'Y' or Select 'Yes – Exempt Tax Only' from the drop down menu if the Employee is Exempt from taxes.		<p> Notes</p> <ul style="list-style-type: none"> If this field is 'Y', the Employee will have no taxes withheld from his/her pay. <ul style="list-style-type: none"> You should only add a 'Y' in this field if the Employee has marked Exempt on his/her W-4 Form. If the Employee has not marked Exempt, you should leave this field blank. <p>Cert Code field is not used at the State of Arizona. Field should be blank..</p>
14	Addl Tax Info Tab	O	Click on the Addl Tax Info Tab if adding Additional Amounts	The Addl Tax Info Tab opens, displaying additional fields.	<p> Notes</p> <ul style="list-style-type: none"> Addl Exemptions and Effective Dates Tabs are not used by the State of Arizona. <p>The Addl Tax Info Tab is only used if the Employee has entered an additional dollar amount to be withheld on his/her Form W-4. If not, skip to Step 17 (Page 8)</p>
15	Tax Code field	O	Enter Tax Code '2' or Select 'Additional Amount, Tax Cannot exceed taxable wages' from the drop down menu.	Only the selection 'Additional Amount, Tax cannot exceed taxable wages' may be selected.	Rate field is not used at the State of Arizona. Field should be blank.
16	Amount field	O	Enter Additional Tax Amount		Amount cannot exceed: 9999999.99 DO NOT SELECT A BSI FORMULA. THIS FIELD IS FOR STATE TAXES ONLY.
17	Change button	R	<p>If no changes are required to State Taxes, Click Change.</p> <p>If changes are being made to State Taxes, continue with section 'Additional Steps for State Withholdings Update' (Page 9).</p>	Message "Change Complete – Continue" will appear in the lower left corner of the window.	

Additional Steps for State Withholdings Update

HRIS State of Arizona

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Employee US Taxes (PR13.1)

Change Previous Inquire Next Inquire

Related Forms

Company [] Tax Locations
Employee [] State Rpt
- Resident - Work

State []
County []
City []
Sch Dst []

Workers Comp State []
EIC Status []
BSI Group Code []

FC	Ded	Description	Res	Mar Sts	Exemp Number	Exempt Amount	Tax Ex	Cert Code
[]	[]	[]	[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]	[]	[]	[]

Add Exemptions Add Tax Info Effective Dates

Tax Code	Rate	Amount	Formula
[]	[]	[]	[]

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Annotations: 26 (Change), 4 (Inquire), 18 (FC), 19 (Ded), 20 (Res), 21 (Mar Sts), 22 (Tax Ex), 23 (Description), 24 (Tax Code), 25 (Formula)

Row 2 State Withholding

Additional Steps for State Withholdings Update

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
18	FC field – Row 2	R	Type 'C' in the FC field to Change the State withholding data.		The 'C' should be next to the Ded Code 'T201' to update State Withholdings
19	Ded field	R	Field should default to 'T201'. No Action Required	Field contains 'T201'.	
20	Res field	R	Field should default to 'Y'. If field is not 'Y' - Type 'Y' or select Resident from the drop down in the Res field.	'Y' appears in the field.	
21	Mar Sts field	R	Select the Marital Withholding status that matches the Federal Withholdings.		Mar Sts field for State should always match what is defined in the Federal Taxes row. Exemp Number Field is not used for State Taxes. Field should be blank. Exempt Amount field is not used at the State of Arizona. Field should be blank.
22	Tax Ex field	O	Type 'Y' or Select 'Yes – Exempt Tax Only' from the drop down menu if the Employee is Exempt from taxes.		Notes <ul style="list-style-type: none"> • If this field is 'Y', the Employee will have no taxes withheld from his/her pay. <ul style="list-style-type: none"> ○ You should only add a 'Y' in this field if the Employee has marked Exempt on his/her A-4 Form. • If the Employee has not marked Exempt, you should leave this field blank. Cert Code field is not used at the State of Arizona. Field should be blank..

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
23	Addl Tax Info Tab	R	Click on Addl Tax Info Tab if it is not displayed. If tab is displayed, skip to next step.	The Addl Tax Info Tab opens, displaying additional fields.	 Notes <ul style="list-style-type: none"> Addl Exemptions and Effective Dates Tabs are not used by the State of Arizona. <p>The Addl Tax Info Tab is only used if the Employee has entered an additional dollar amount to be withheld on his/her Form AZ-4. If not, skip to Step26 (Page 12)</p>
24	Tax Code field	O	Enter Tax Code '2' or Select 'Additional Amount, Tax Cannot exceed taxable wages' from the drop down menu.	Only the selection 'Additional Amount, Tax cannot exceed taxable wages' may be selected.	Rate field is not used at the State of Arizona. Field should be blank.
25	BSI Formula field	R	Enter the correct BSI Formula		Valid Values are: <ul style="list-style-type: none"> 1 - FED NRA 2 - STATE 3 - STATE 4 - STATE 5 - STATE 6 - STATE 7 - STATE 8 - STATE EXEMPT <p>Please refer to the GAO Publication, "Tables for Percentage Method of Withholding", to determine the applicable rates for these valid values.</p> <p>Tax Code field is not used for State Taxes. Field should be blank.</p> <p>Rate field is not used for State Taxes. Field should be blank.</p> <p>Amount field is not used for State Taxes. Field should be blank.</p>
26	Change button	R	Click Change	Message "Change Complete – Continue" will appear in the lower left corner of the window.	

