



# WORKFORCE ONE

Employee Tax Setup

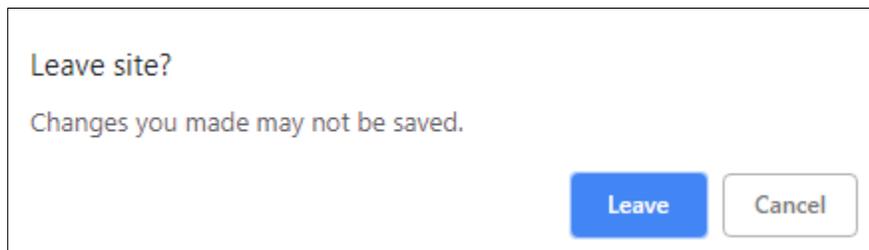
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## Introduction

This document is intended as a comprehensive resource for the payroll section of the system. Some things you should note about this document:

- Any time you see an item marked in **bold** it means it is a button or option to select.
- Tables below large screen shots are there to describe the various options in the screen shot above (which normally have a bold rectangle around them).
- Anything in *italics* is the name of the window you are viewing.
- If you ever see this popup below, it means you have not saved your work. Select cancel, save your work, and then you won't get that popup and can continue through the system.

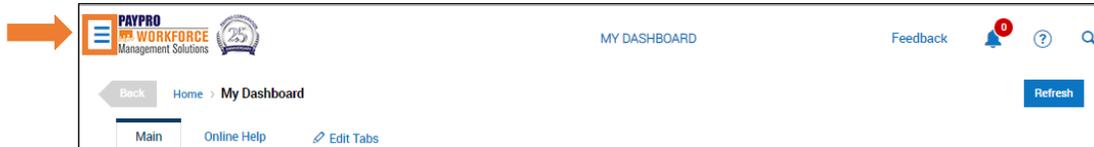


# Employee Tax Setup

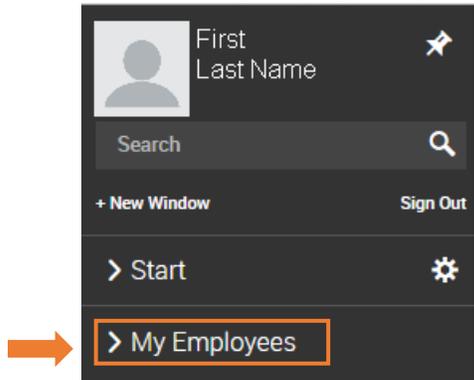
## Tax Options: Federal

The system default for Federal taxes is set to single with zero exemptions.

1. Select the **Hamburger Menu** (highlighted below).

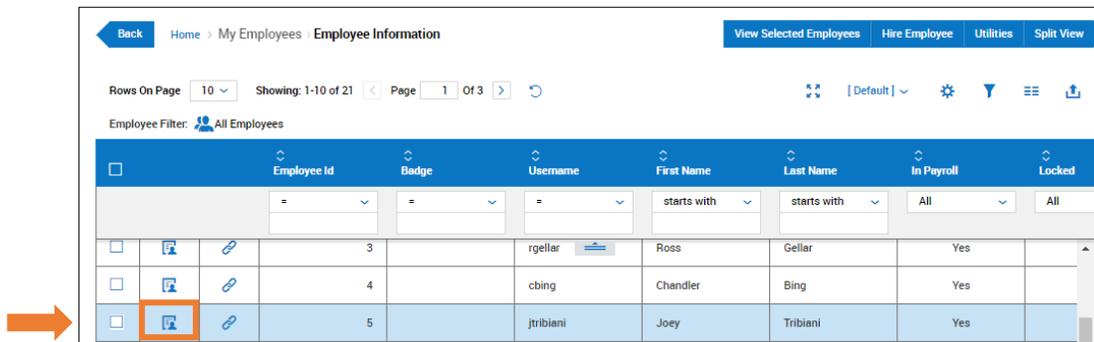


2. Select the **My Employees** option.

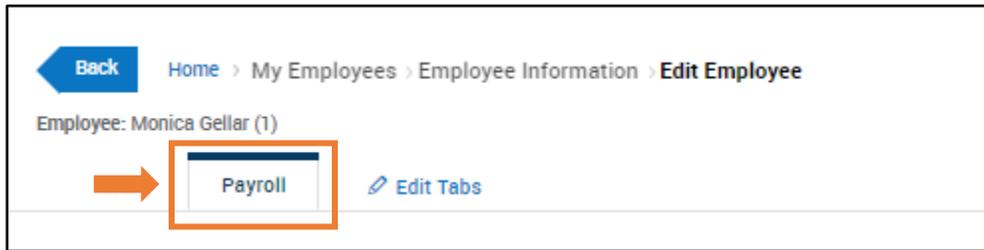


*The menu expands.*

3. Select **Employee Information** and the following window displays.



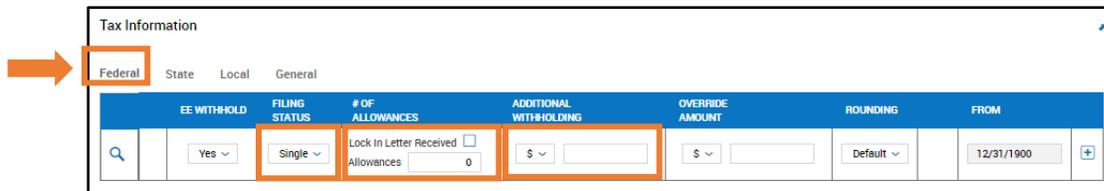
4. Select the  icon next to the employee you want to set up from the employee list.
5. Select the **Payroll Tab**.



Payroll Tab

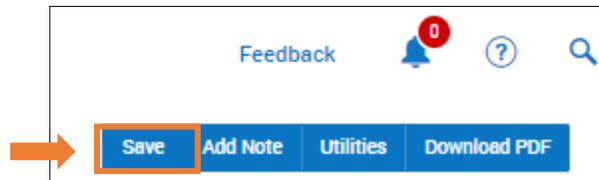
6. Scroll down to the Tax Information pane.
7. Select the **Federal Tab** (if not already selected).
8. In the pane, shown below, enter the new **Filing Status**, **# of Allowances**, and **From** date. *Allowances are commonly referred to as exemptions.*
9. If an employee has additional withholdings enter this number in the additional withholding section.

*The number of allowances changes how many people you are claiming. Additional withholding is additional money you want withdrawn from your check each pay period.*



Tax Information

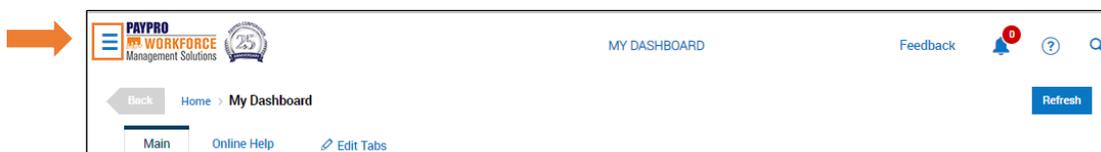
10. Select the **Save** button on the top right corner to save your work.



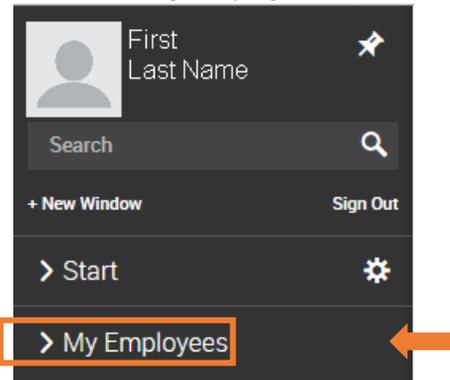
## Tax Options: State Tax Allowance Changes

Like Federal, the system default for new hire employees' State taxes is set to single with zero allowances (exemptions). If allowance changes are required, i.e., someone gets married, divorced, has a child, etc., these are the steps you would take to make those adjustments.

1. Select the **Hamburger Menu** (highlighted below).

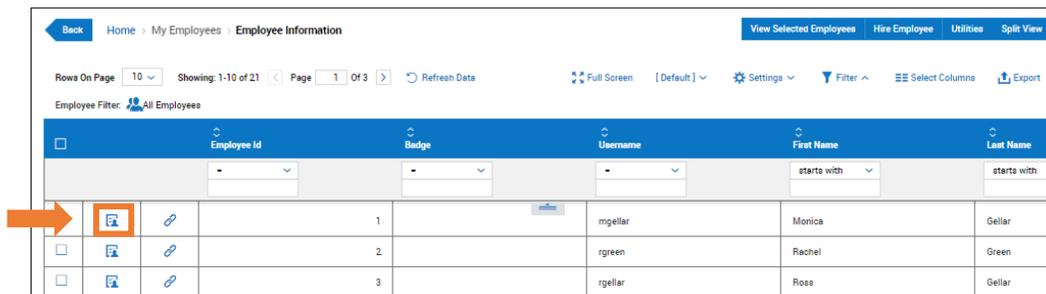


1. Select the **My Employees** option.



*The menu expands.*

2. Select **Employee Information** under My Employees.



	Employee Id	Badge	Username	First Name	Last Name
	1		mgellar	Monica	Gellar
	2		rgreen	Rachel	Green
	3		rgellar	Rosa	Gellar

*Employee Information Pane*

3. Select the  icon to select an employee.
4. Select the **Payroll** tab and scroll down to the Tax Information pane
5. Select the **State** tab.
6. Enter the number of allowances.
7. Enter any additional withholdings and update the filing status as necessary. (as highlighted in the picture below)

**Tax Information**

Federal State Local General

STATES

JURISDICTION	OUT-OF-STATE DEDUCTIONS REDUCE SUTA WAGE BASE	# OF ALLOWANCES
<input type="checkbox"/> New York	<input type="checkbox"/>	<input type="text" value="0"/>

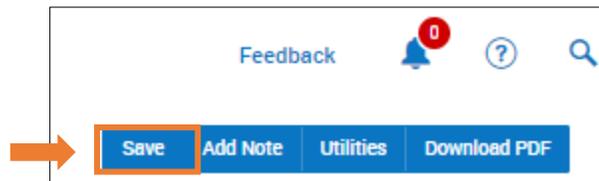
Additional Withholding - NYC  12/31/1900

Additional Withholding - Yonkers  12/31/1900

Filing Status  12/31/1900

Total Allowances - NYC  12/31/1900

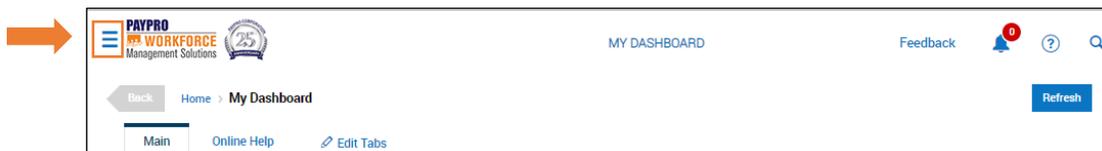
8. Select the **Save** button on the top right corner to save your work.



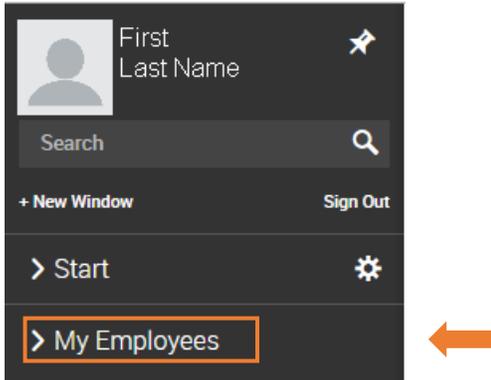
## Tax Codes: Unemployment

The system can be set up to default to a particular company home location, however if you have multiple locations you will need to select the appropriate state based on where the employee works.

1. Select the Hamburger Menu (highlighted below).

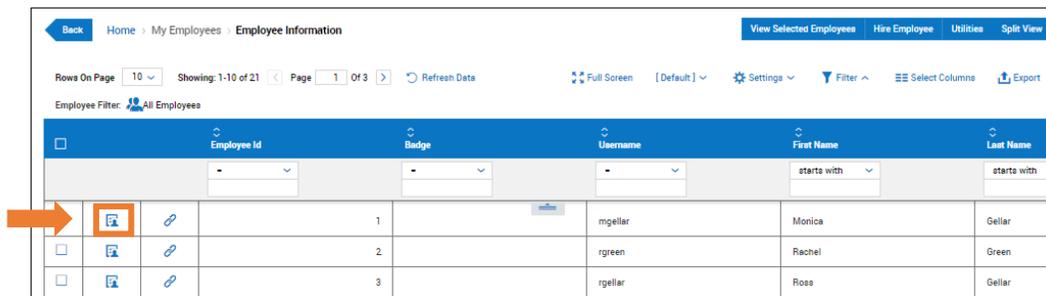


2. Select the My Employees option.



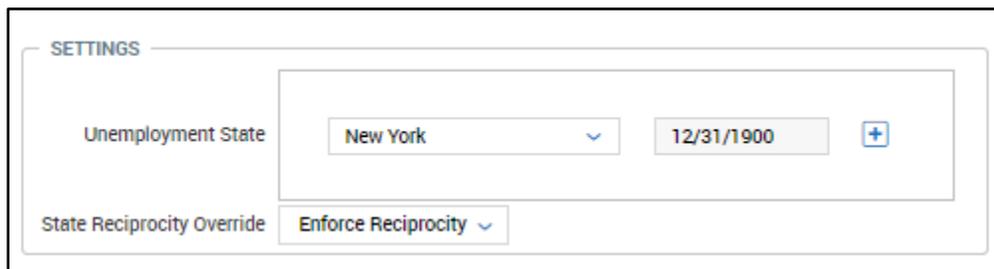
*The menu expands.*

3. Select Employee Information under My Employees.



*Employee Information Pane*

4. Select the  icon next to the employee you want to set up from the employee list.
5. Select the **Payroll tab** and scroll down to the Tax Information pane.
6. Select the Unemployment State drop-down menu and select the appropriate state for the employee.



*Unemployment Pane*

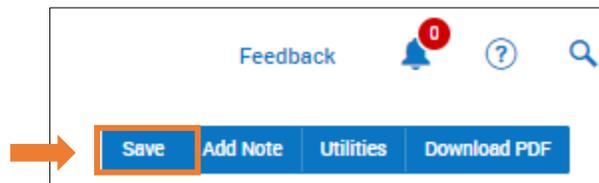
### *State Reciprocity Override*

The default is set to Enforce Reciprocity. However, several settings will override reciprocity rules.

Option	Explanation
<b>Enforce Reciprocity</b>	The tax engine calculates the correct taxes.
<b>Resident Only</b>	If this option is selected, only the Resident state income tax is withheld.

<b>Non-Resident Only</b>	If this option is selected, only Non- Resident state income tax is withheld.
<b>Zero in Both</b>	If this option is selected, there will be no state income tax withheld for both Resident and Non- Resident states.
<b>Full</b>	If this option is selected, then state income tax is withheld in both the Resident and Non- Resident states.
<b>Diff</b>	The greater of the difference in state income tax (SIT) withholding is withheld based on calculated SIT. For example, an employee lives in MO but works in IL. MO SIT calculates at \$100 and IL SIT calculates at \$75. In this case, \$25 would be withheld in MO SIT and \$75 in IL SIT.

7. Select the **Save** button on the top right corner to save your work.



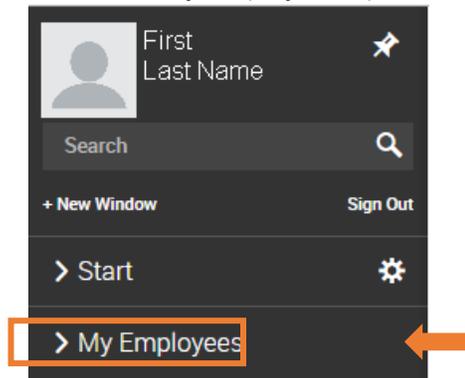
## View W2 Forms

All W2s that have been prepared for each employee and tax year are available for your review.

1. Select the Hamburger Menu (highlighted below).



2. Select the My Employees option.



*The menu expands.*

3. Select Forms, and then W2s option.



Back Home > My Employees > Forms > W2s View Selected Download PDF View By State

Rows On Page: 20 / 20 Rows Refresh Data Full Screen [Default] Settings Filter Select Columns Export

Employee Filter: All Employees Tax Year: 2018

All Page					Employee Id	First Name	Last Name	Employee Status	Year	Approval Status	Box 1: Wages, Tips, Other Compensation
<input type="checkbox"/>					4	Chandler	Bing	Active	2018	New	\$1,228.
<input type="checkbox"/>					6	Phoebe	Buffet	Terminated	2018	New	\$1,000.
<input type="checkbox"/>					19	Landry	Clarke	Active	2018	New	\$2,000.
<input type="checkbox"/>					18	Tyra	Collette	Active	2018	New	\$2,115.
<input type="checkbox"/>					17	Luke	Gafferty	Active	2018	New	\$1,250.
<input type="checkbox"/>					7	Lyla	Garrity	Active	2018	New	\$1,451.
<input type="checkbox"/>					14	Buddy	Garrity	Active	2018	New	\$1,538.

B/C Employee Listing

*Special Note: There are two columns with the same icon . One is copy D (or for the employer) and one is the W2 which are the copies for the employee. If you hover over the icons it will tell you which column is which.*

- Select the  and view the employee's W2.

**Preview**

Form W2 Employee: [Landry Clarke \(19\)](#) 2018

<input type="checkbox"/> Void <input type="checkbox"/> <b>8</b> Employee's social security number 123-00-2211					
<b>d</b> Employer identification number (EIN) 11-1234561		<b>1</b> Wages, tips, other compensation 2000.00		<b>2</b> Federal income tax withheld 252.52	
<b>c</b> Employer's name, address and ZIP code Claudine's Way Cool Co 100 Broadway Rocky Point NY 11778		<b>3</b> Social security wages 2000.00		<b>4</b> Social security tax withheld 124.00	
		<b>5</b> Medicare wages and tips 2000.00		<b>6</b> Medicare tax withheld 29.00	
		<b>7</b> Social security tips		<b>8</b> Allocated tips	
<b>d</b> Control number WA-57831623		<b>5</b>		<b>10</b> Dependent care benefits	
<b>e</b> Employee's first name and initial Last name Landry Clarke		Suff. <b>11</b> Nonspecified plans		<b>12a</b>	
3 Arlington Heights Rd Elk Grove Vlg, IL 60007		<b>13</b> Statutory Retirement Disparity <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		<b>12b</b>	
		<b>14</b> Other		<b>12c</b>	
				<b>12d</b>	
<b>f</b> Employer's address and ZIP code					
<b>15</b> State Employer's state ID number IL	<b>16</b> State wages, tips, etc. 2000.00	<b>17</b> State income tax 99.00	<b>18</b> Local wages, tips, etc.	<b>19</b> Local income tax	<b>20</b> Social security

Form **W-2** Wage and Tax Statement 2018 Department of the Treasury-Internal Revenue Service  
Copy D -- For Employer.

5. Select Download PDF or Close.