

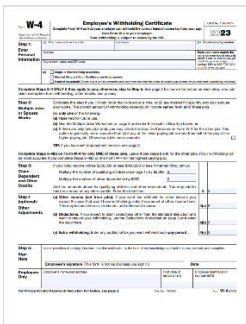
Employee Data Configuration Template

3. Federal Tab

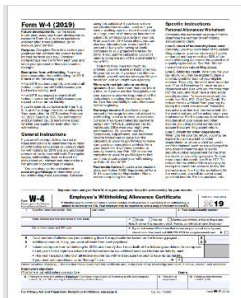
A) **Employee Number** – The employee number can be any alphanumeric combination you choose. Zeros can be added to the beginning of an Employee Number to create a uniform number of characters across all employees. This creates a uniform look and keeps the order consecutive. If you are using our HR solution, a new employee number will be created by that module once your information has been imported.

B) **Starting Date** – This can be easily confused with the employee’s hire date. What we need here is ***the starting date of the first pay period when the employee has paid hours for the current calendar year***

Columns C, D, E, and F all depend on if your organization is using the updated W4. This question is asked in Column I.



If you are using the new W4 form pictured above, then Column I is 'True' and you will not need to populate the fields C, D, E, or F.



If you are still using the old W4 pictured above, then column I is false, you will complete columns C, D, E, and F accordingly and use the next tab of the Employee Data Configuration Template titled Withholding Certificate Setup to complete the needed information for the W4s.

C) **Withholding Allowances** List how many dependents they are claiming.

D) **Additional Withholding Amount** – What dollar amount are they withholding

E) **Additional Withholding Percent** - lists their additional withholding as a percent.

F) **Bonus Withholding Percent** - Does your organization offer any Bonus Payments that you process at the supplemental rate? If so, you will fill in the Bonus Withholding Percent. The current supplemental rate is 22%.



Your people. Our priority.

Everyone will fill in the following columns:

- G) **Lock-in Letter** - The Lock-in Letter will always be false for everyone.
- H) **Payroll Tax Marital Status** - This will be either "Single or Married Filing Separately" or "Married Filing Jointly". Be sure to have the spelling and capitalizations correct. They must be identical to what is shown in the drop-down list that you can access by clicking the red corner triangle.
- I) **Use Updated W-4** - This is the column we mentioned earlier. If you are using the new W4, this will be True and you will not need to fill columns C, D, E, or F.
- J) **Multiple jobs or Spouse Works** - This is a check box on the new W4. Answer True or False if you are not using the new W4 form yet.
- K) **Federal Dependent One** – This is the number of dependents the employee has at \$2000.
- L) **Federal Dependent Two** – This is the number of dependents the employee has at \$500.