

Adding or Updating Employee Federal Tax Settings

15 Steps

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STEP 1

My Team > Employee Information > Employee Profile

You can add and update federal tax settings for individual employees from their personal employee information profile. Begin by navigating to the profile for the employee you need to update.

STEP 2

Payroll Tab

The payroll tab houses all of the pertinent information for processing payroll for an employee. All of the employee's tax settings are located here.

The screenshot shows the 'Employee Profile' page for Finn Mertens. The breadcrumb trail is 'My Team > Employee Information'. The page title is 'Employee Profile'. The employee's name is 'Finn Mertens', with a circular profile picture containing the initials 'FM'. Below the name, it shows 'Employee ID: 4' and 'Hired Date: 01 Jan, 2015 (9 Years, 3 Months, 16 Days)'. There are icons for email and a person. The navigation tabs are 'Main', 'Payroll' (highlighted with a red box), 'HR', 'Schedules', and 'Edit Tabs'. On the left, there is a 'Jump To' menu with options: 'Collapse All', 'Earnings', and 'W2/1099 Information'. The main content area shows the 'Earnings' section, which is currently empty, displaying 'Page 1 of 1 | 0 Rows' and 'Currently Scheduled'. A table header is visible with columns: 'Seq.', 'Earning', and 'Begin Date'. Below the header, a message states 'No Data to Display'.

STEP 3

Tax Information

Locate the tax information widget by using either the Jump-To panel, or by scrolling down to the Tax Information widget.

The screenshot displays a software interface with a sidebar on the left and a main content area on the right. The sidebar contains a 'Jump-To' panel with a 'Collapse All' button and several menu items: 'Earnings', 'W2/1099 Information', 'Deductions', 'Tax Information' (highlighted with a red box), 'Direct Deposits', 'Payroll Alerts', and 'Delivery Policies'. The main content area is divided into two sections. The top section is titled 'Earnings' and includes a pagination control showing 'Page 1 of 1' and '0 Rows', along with a 'Currently Scheduled' dropdown. Below this is a table with columns for 'Seq.', 'Earning', and 'Begin Date'. The table is currently empty, displaying 'No Data to Display'. The bottom section is titled 'W2/1099 Information' and contains an 'Employee Tax Type' section with three radio button options: 'W2', '1099', and 'Draw'. Below this is a 'Pension Box Type' dropdown menu set to 'System Rules' and a 'FEIN (will be used on fc)' text input field.

STEP 4

Federal Tax Settings

You will notice at the top of the widget that the Federal, State, and Local tax settings are located here. Ensure that the federal tax section is selected to continue.

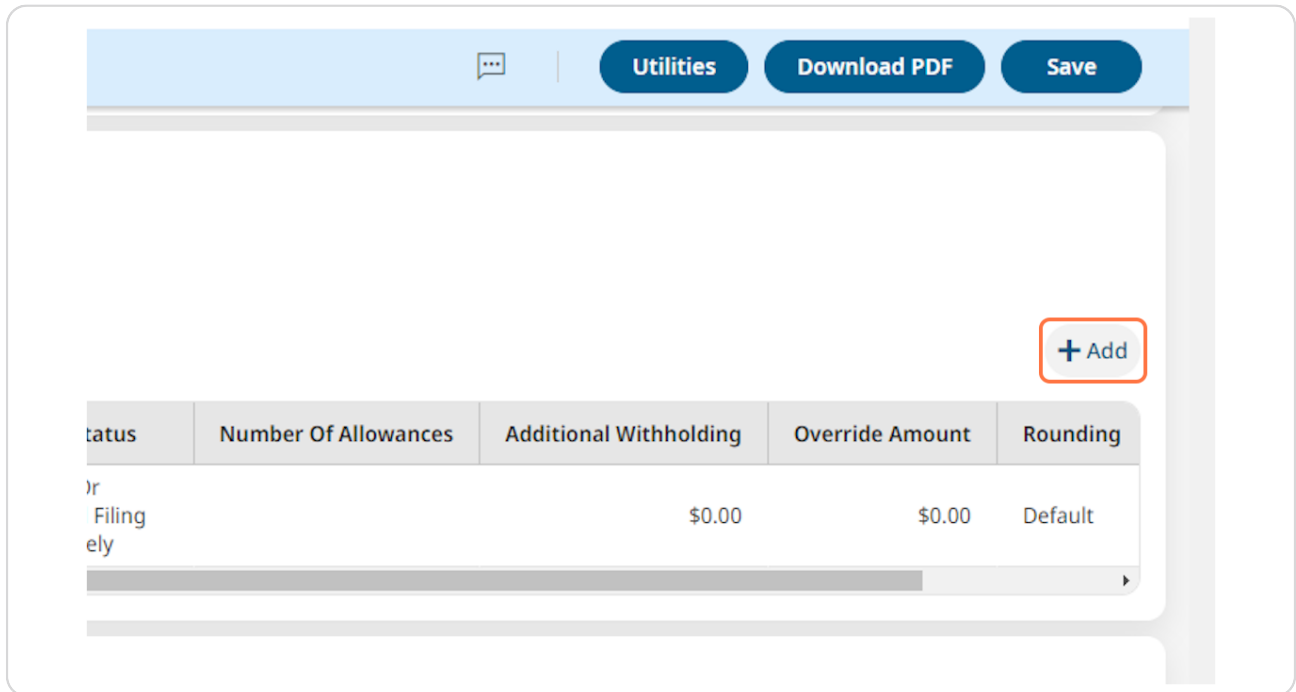
The screenshot displays the ARS Workforce Management interface. At the top, there is a navigation bar with the ARS logo, the time 03:27 PM (EDT), and a user profile for Finn Mertens (4). Below this is a secondary navigation bar with a 'Payroll' dropdown and a settings gear icon. A 'Jump To' sidebar on the left lists various sections: Collapse All, Earnings, W2/1099 Information, Deductions, Tax Information (highlighted), Direct Deposits, and Payroll Alerts. The main content area is titled 'Tax Information' and features four tabs: Federal (selected and highlighted with a red box), State, Local, and General. Below the tabs, the text 'Current' is displayed, followed by a pagination control showing 'Page 1 of 1' and '1 - 1 of 1 Rows'. A table with the following data is shown:

	Date From	Form W4 2020 And Later	EE W
	12/31/1900	Yes	Yes

STEP 5

Begin By Adding New Settings

Locate and click on the +Add button located on the right of the widget. This will open a popup to add federal withholding information. All information needed to fill out the federal withholding information will be found on the employee's W-4.



The screenshot shows a software interface with a light blue header bar containing a menu icon, a vertical separator, and three buttons: "Utilities", "Download PDF", and "Save". Below the header is a table with the following columns: "status", "Number Of Allowances", "Additional Withholding", "Override Amount", and "Rounding". A red box highlights a "+ Add" button located to the right of the table. The table contains one row of data:

status	Number Of Allowances	Additional Withholding	Override Amount	Rounding
or Filing ely		\$0.00	\$0.00	Default

STEP 6

Date From

For a new employee, this needs to be set to their hire date. For an existing employee whose settings you are updating, the date should be set based on the date the employee turned in a new W-4.

The screenshot shows a software interface with a modal window titled "Add Federal Withholding". The modal contains the following fields:

- Date From ***: A text input field containing "12/31/1900" with a calendar icon to its right.
- Form W4 2020 And Later ***: A text input field containing "Yes".
- EE Withhold ***: A dropdown menu with "Yes" selected.
- Filing Status ***: A dropdown menu with "Single Or Married Filing Separately" selected.
- Two Jobs**: A dropdown menu with "No" selected.
- Claim Dependent**: An empty text input field.
- Other Income**: A text input field with a dollar sign (\$) to its right.
- Deduction**: An empty text input field.
- Number of Allowances**: A text input field containing "0".
- Lock in Letter Received**

The background interface shows tabs for "State", "Local", and "General", and a table with columns for "Date From" and "Form W4 2020 And Later".

STEP 7

Filing Status

Select the filing status located in **Step 1.(c) of the W-4 form**. If the employee did not select a filing status, or selected more than one filing status, contact the employee to verify the correct setting.

The image shows a screenshot of a 'Federal Withholding' form. The form is titled 'Federal Withholding' and has a close button (X) in the top right corner. The form contains several fields and sections:

- Form W4 2020 And Later ***: A dropdown menu with 'Yes' selected.
- Filing Status ***: A dropdown menu with 'Single Or Married Filing Separately' selected. This dropdown is highlighted with a red border.
- Claim Dependent**: A dropdown menu.
- Deduction**: A text input field with a dollar sign (\$) on the right.
- Additional Withholding**: A text input field with '0.00' entered.
- Rounding ***: A dropdown menu with 'Default' selected.
- Lock in Letter Received**: A checkbox that is currently unchecked.

The form is overlaid on a background that shows parts of other forms, including 'Number Of Allowances', 'Additional W', 'IA # / Bank Routing #', and 'Account'.

STEP 8

Two Jobs

Select yes if the employee marked the box for **Step 2 of the W-4 form**, otherwise select no.

The screenshot shows a software interface with a modal window titled "Add Federal Withholding". The modal contains the following fields:

- Date From ***: 04/17/2024
- Form W4 2020 And Later ***: Yes
- EE Withhold ***: Yes
- Filing Status ***: Single Or Married Filing Separately
- Two Jobs**: No (highlighted with a red box)
- Claim Dependent**: [Empty]
- Other Income**: [Empty]
- Deduction**: [Empty]
- Number of Allowances**: 0
- Lock in Letter Received
- Type**: \$, **Additional Withholding**: 0.00, **Rounding ***: Default
- Type**: \$, **Override Amount**: 0.00

The background shows a sidebar with sections for "Deposits", "Alerts", and "Active Accounts".

STEP 9

Claim Dependent

Enter only the total dollar amount for Step 3 of the W-4 form. If the employee filled the total out incorrectly or only listed the total number of dependents and not a dollar amount, you will need to confirm with them the correct amount based on the calculation from the W-4 if they want their taxes to be withheld correctly.

General Withholding

Form W4 2020 And Later *

Filing Status *

Claim Dependent
 \$

Deduction
 \$

Lock in Letter Received

Additional Withholding

Rounding *

Override Amount

Number Of Allowances	Additional
IA # / Bank Routing #	Acc

STEP 10

Other Income

Enter the dollar amount from Step 4(a) of the W-4 form.

The screenshot shows a software interface for Step 10: Other Income. The form is divided into several sections. On the left, there are navigation elements like 'Deposits' and 'Alerts'. The main form area contains the following fields:

- Date From: 04/17/2024
- Form W4 2020 And Later: Yes
- EE Withhold: Yes
- Filing Status: Single Or Married Filing Separately
- Two Jobs: No
- Claim Dependent: 2,000
- Other Income: (highlighted in orange)
- Deduction: (empty)
- Number of Allowances: 0
- Lock in Letter Received:
- Additional Withholding: 0.00
- Rounding: Default
- Override Amount: 0.00

STEP 11

Deduction

Enter the dollar amount from Step 4(b) of the W-4 form.

The screenshot shows a software interface for Step 11: Deduction. The form is divided into several sections. The main form area contains the following fields:

- Form W4 2020 And Later: Yes
- Filing Status: Single Or Married Filing Separately
- Claim Dependent: 2,000.00
- Deduction: (highlighted in orange)
- Lock in Letter Received:
- Additional Withholding: 0.00
- Rounding: Default
- Override Amount: 0.00

STEP 12

Additional Withholding

Enter the dollar amount from Step 4(c) of the W-4 form.

The screenshot shows a configuration window for 'Additional Withholding'. The window is overlaid on a background interface that includes a table with columns like 'Active From' and 'By', and a 'Cancel' button at the bottom right. The configuration fields are as follows:

- Yes**: Yes (dropdown)
- Two Jobs**: No (dropdown)
- Other Income**: \$ (input field)
- Number of Allowances**: 0 (input field)
- Type**: \$ (dropdown)
- Additional Withholding**: 0.00 (input field, highlighted with a red border)
- Type**: \$ (dropdown)
- Override Amount**: 0.00 (input field)
- Single Or Married Filing Separately**: (input field)
- Claim Dependent**: 2,000.00 (input field)
- Deduction**: (input field)
- Lock in Letter Received**:
- Rounding ***: Default (input field)

At the bottom of the window, there are labels for 'W2s' and '1099s'.

STEP 13

Override Amount

Very rarely, an employee will want to withhold a different amount than what the federal income tax calculation is. You can use the Override Amount field to enter either a dollar or percentage for the employee's personal override to take effect. The "Type" field to the left of the Override Amount is where you select if the override amount is a dollar amount or a percentage of the employee's subject wages.

The screenshot displays a configuration window for an employee's withholding. The window is titled "Override Amount" and contains the following fields and options:

- Additional Withholding:** A dropdown menu set to "\$" and a text input field containing "0.00".
- Override Amount:** A dropdown menu set to "\$" and a text input field containing "0.00", which is highlighted with an orange border.
- Other Income:** A text input field with a "\$" symbol.
- Deduction:** A text input field.
- Number of Allowances:** A text input field containing "0".
- Lock in Letter Received:** An unchecked checkbox.
- Rounding *:** A dropdown menu set to "Default".
- Buttons:** A "Cancel" button in the bottom right corner.

At the bottom of the window, there are two dropdown menus labeled "W2s" and "1099s", both set to "Choose...".

STEP 14

Double Check and Add

Once you have completed entering the tax settings, click the Add button at the bottom of the popup to add the new tax settings.

The screenshot shows a software interface with a modal popup. The popup has a title 'Rounding*' and a dropdown menu currently set to 'Default'. Below the dropdown is a blue bracket icon. At the bottom of the popup are two buttons: 'Cancel' and 'Add'. The 'Add' button is highlighted with a red border. In the background, a table is partially visible with a '1099s' header and a 'Choose...' dropdown. A 'Print' button is also visible at the bottom of the background interface.

STEP 15

Completed

Once the system has accepted the new tax settings, a notification will show that it has been completed.

