



# Mini Guide: Exemption Expiration Report (S\_PH9\_46000360)

**Report Description:** Displays employees whose W-4 tax exemptions (entered on infotype 0210 Withholding Information) will expire during the selected time period. Because these exemptions do not renew automatically in most jurisdictions, running this report helps to identify which employees need to renew their exemptions so agency HR Departments may prompt them to do so before they expire.

**Report Timing:** Run the Exemption Expiration Report each pay period, on “blue” days on the Comptroller General’s Office payroll calendar.

**Who Can Run This Report:** Employees with the Agency Payroll Administrator security role.

1. Log into SCEIS and use one of the following methods to access the Exemption Expiration Report:
  - Enter **S\_PH9\_46000360** into the Command Field and click on the Enter button.
  - From the SAP menu path, select Human Resources > Payroll > Americas > USA > Info system > Tax > S\_PH9\_46000360 – Exemption Expiration Report.
2. When you reach the Exemption Expiration Report Screen shown below, start by specifying the **Period** for which you would like to view results (the Period section is boxed in red below).

**Exemption Expiration Report**

Further selections | Search helps | Sort order

**Period**

Today       Current month       Current year  
 Up to today       From today

Other period

Data Selection Period: [ ] To: [ ]  
Person selection period: [ ] To: [ ]

**Payroll period**

**Selection**

Personnel Number	[ ]	[ ]
Employment status	[ ]	[ ]
Company Code	[ ]	[ ]
Payroll area	[ ]	[ ]
Pers.area/subarea/cost cente	[ ]	[ ]
Employee group/subgroup	[ ]	[ ]

## Definitions: Period Options

- **Today:** The current date is the key date for both the Data and Person selection periods.
- **Current Month:** The first day of the current month is the start date and the last day of the current month is the end date for both the Data and Person selection periods.
- **Current Year:** The first day of the current year is the start date and the last day of the current year is the end date for both the Data and Person selection periods.
- **Up to Today:** January 1, 1800 is the start date and the current date is the end date for both the Data and Person selection periods.
- **From Today:** The current date is the start date and December 31, 9999 is the end date for both the Data and Person selection periods.
- **Other Period:** Allows you to set the start date (in the leftmost field) and end date (in the rightmost field) of the Data and Person selection periods for which you would like to view results. You will receive results only for records that overlap with the periods you set by at least one day. To maximize control over the results you get using Other Period, you have the following options for how to enter dates:
  - **To view Data and Person selection periods that include all the dates available in the system,** select the Other Period radio button, but leave all start and end date fields blank.
  - **To view all results up to a certain date,** enter that date in the end date fields (the rightmost fields) for both the Data and Person selection periods, and leave the start date fields blank. The system will display results going back from the date you entered to the earliest date available.
  - **To view results for a single date,** enter that date in the start date fields (the leftmost fields) for both the Data and Person selection periods, and leave the end date fields blank.
- **Payroll Period Button:** Click the Payroll Period button (circled in black in the screen shot on page 1) to change the period selection options to Payroll Period, as shown below. When the selection options are set as Payroll Period, this button changes to display the word “Period” instead, and clicking it changes the selection options back to Period, rather than Payroll Period, options.

The screenshot displays the 'Exemption Expiration Report' interface. At the top, there are navigation icons and buttons for 'Further selections', 'Search helps', and 'Sort order'. Below this is the 'Payroll period' section, which is highlighted with a red border. It contains a 'Payroll area' dropdown menu, a 'Current period' radio button (which is selected), and an 'Other period' radio button. A 'Period' button is located below these options. The 'Selection' section below contains several input fields for 'Personnel Number', 'Employment status', 'Company Code', 'Payroll area', 'Pers.area/subarea/cost cente', and 'Employee group/subgroup', each with a corresponding dropdown arrow button.

## Definitions: Payroll Period Options

- **Payroll Area (required):** Enter the Payroll Area. For the State of South Carolina, the Payroll Area is **SM – SC Semi-Monthly**.
  - **Current Period:** Select Current Period to view results for the current pay period.
  - **Other Period:** Select Other Period to view results for a pay period other than the current period. When you select Other Period, you must define the specific payroll accounting period for which you would like to receive results by entering that period in the field immediately to the right of the Other Period option. Enter the payroll year for which you would like to receive results in the field to the right of the field in which you entered the payroll period.
3. Complete the **Selection** criteria in the bottom half of the Exemption Expiration Report screen (boxed in red below).

The screenshot displays the 'Exemption Expiration Report' interface. At the top, there are navigation icons and three buttons: 'Further selections', 'Search helps', and 'Sort order'. Below these is the 'Period' section with radio button options: 'Today', 'Up to today', 'Other period' (selected), 'Current month', 'From today', and 'Current year'. The 'Other period' section includes input fields for 'Data Selection Period' (with a calendar icon), 'Person selection period', and 'To' fields. A 'Payroll period' button is located below the 'Person selection period' field. The 'Selection' section, which is highlighted with a red border, contains a list of criteria with input fields and arrow buttons: 'Personnel Number', 'Employment status', 'Company Code', 'Payroll area', 'Pers.area/subarea/cost cente', and 'Employee group/subgroup'.

## Definitions: Selection Criteria


- **Personnel Number:** The unique personnel number (unique identifier) of the employee or employees for whom you would like to view results. You may enter a single personnel number or a range of personnel numbers, or you may opt to exclude a single personnel number or a range of personnel numbers.

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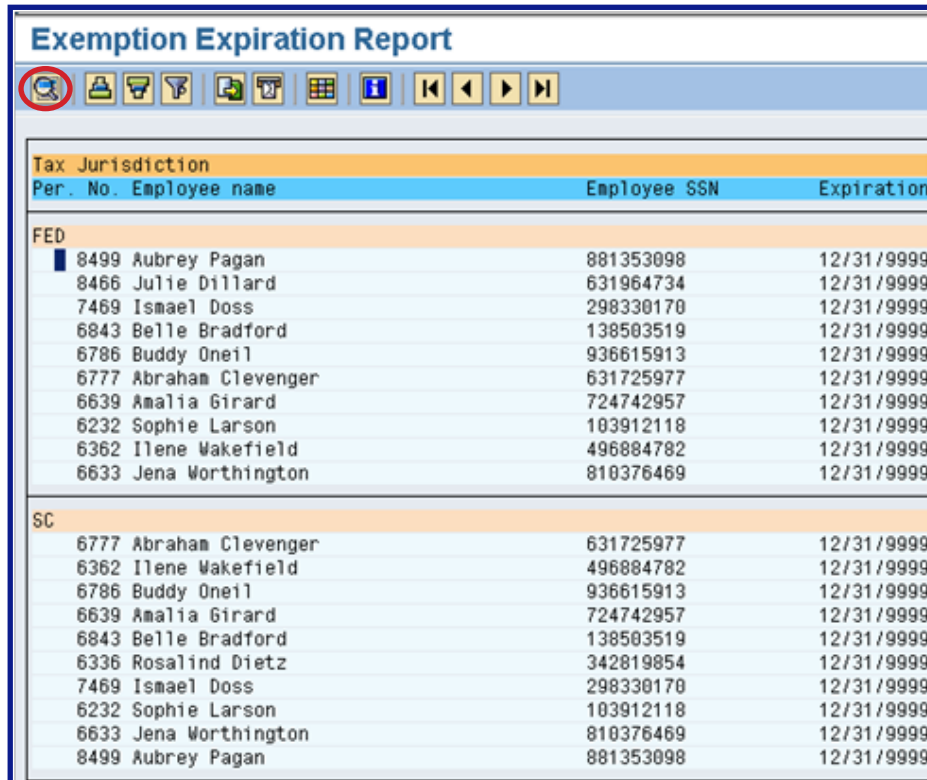
- **Employment Status:** You may view employees with the following status options: Active, Inactive, Withdrawn or Retiree.
  - **Company Code:** Enter your organizational unit number here.
  - **Payroll Area:** Enter the Payroll Area. For the State of South Carolina, the Payroll Area is **SM – SC Semi-Monthly**.
  - **Pers.area/subarea/costcente:** Enter a combination of the following organizational elements, as appropriate: Personnel Area, Personnel Subarea and/or Cost Center.
    - **Example Generic Entry:** Type 0001\* to receive results for all employees assigned to personnel area 0001.
    - **Example Masked Entry:** Type 0001++++1234567890 (enter appropriate number in this format) to select results for a single cost center. This will deliver results independent of the personnel subarea.
  - **Employee group/subgroup:** Enter a combination of the following organizational elements, as appropriate: Employee Group, Employee Subgroup.
    - **Example Generic Entry:** Type 1\* to include all employees assigned to employee group 1 (active employees), independent of the employee subgroup.
    - **Example Masked Entry:** Type +DU (or appropriate subgroup) to select all employees assigned to a particular subgroup, independent of the employee group.
- Note:** If you defined a Person Selection Period during Step 2, all personnel numbers assigned to the organizational unit defined in this (and others) field on at least one day during the identified time period will be selected.
- **Further Selections Button:** Click the **Further Selections** (circled below) button to customize your report by adding optional fields to your selection criteria.

The screenshot shows the 'Exemption Expiration Report' application window. At the top, there are icons for home, help, and search. Below these are buttons for 'Further selections' (circled in red), 'Search helps', and 'Sort order'. The 'Period' section has radio buttons for 'Today', 'Current month', 'Current year', 'Up to today', and 'From today'. The 'Other' option is selected, and a 'Choose Selection Fields' dialog box is open. This dialog has two columns: 'Selection options' and 'Selection fields'. The 'Selection options' column lists various criteria like 'Action type', 'Reason for action', 'Customer-specific status', etc. The 'Selection fields' column lists 'Personnel number', 'Employment status', 'Company code', 'Payroll area', 'Pers.area/subarea/cost cent...', and 'Employee group/subgroup'. At the bottom of the dialog, there is a 'Selection:' field with the value '6'.

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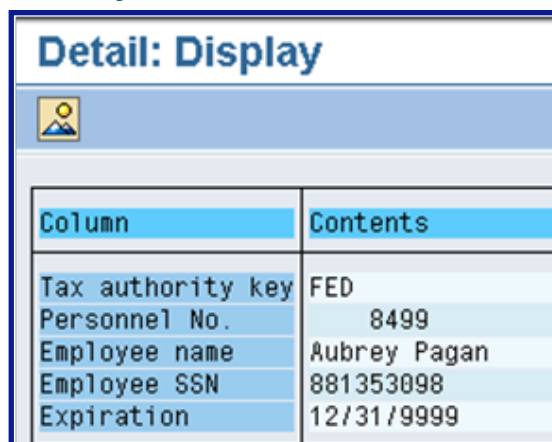
4. Once you have completed all of the appropriate Payroll or Payroll Period options and Selection criteria, click on the execute button to run your Exemption Expiration Report (S\_PH9\_46000360). **Execute Button:** 

After clicking execute, your Exemption Expiration Report will be displayed as shown in the screenshot below.



Exemption Expiration Report			
Tax Jurisdiction			
Per. No.	Employee name	Employee SSN	Expiration
<b>FED</b>			
8499	Aubrey Pagan	881353098	12/31/9999
8466	Julie Dillard	631964734	12/31/9999
7469	Ismael Doss	298330170	12/31/9999
6843	Belle Bradford	138503519	12/31/9999
6786	Buddy Oneil	936615913	12/31/9999
6777	Abraham Clevenger	631725977	12/31/9999
6639	Amalia Girard	724742957	12/31/9999
6232	Sophie Larson	103912118	12/31/9999
6362	Ilene Wakefield	496884782	12/31/9999
6633	Jena Worthington	810376469	12/31/9999
<b>SC</b>			
6777	Abraham Clevenger	631725977	12/31/9999
6362	Ilene Wakefield	496884782	12/31/9999
6786	Buddy Oneil	936615913	12/31/9999
6639	Amalia Girard	724742957	12/31/9999
6843	Belle Bradford	138503519	12/31/9999
6336	Rosalind Dietz	342819854	12/31/9999
7469	Ismael Doss	298330170	12/31/9999
6232	Sophie Larson	103912118	12/31/9999
6633	Jena Worthington	810376469	12/31/9999
8499	Aubrey Pagan	881353098	12/31/9999

5. To view details of any report entry, position your cursor on the line item you would like to view in detail, then click on the **Details Button**, circled in red in the screenshot above. When you click on the Details Button, you will receive the **Detail: Display** screen shown below.



Detail: Display	
Column	Contents
Tax authority key	FED
Personnel No.	8499
Employee name	Aubrey Pagan
Employee SSN	881353098
Expiration	12/31/9999

To return to the Exemption Expiration Report from the Detail: Display Screen, click one of the below buttons:

• **The Overview List Button:** 

• **The Back Button:** 