



Mini Guide: W-4 Withholding Allowance Report

(S_PH9_46000361)

Report Description: Displays W-4 withholding allowances stored on Infotype 0210 for one or a group of employees. This report will display results on employees who have made any of the following problematic claims:

- More allowances than allowed by the tax authority
- More allowances than are mandated by values stored in Infotype 0161 (IRS Mandates Record) for the tax authority
- A filing status that differs from that recorded on Infotype 0161 (IRS Mandates Record)

Report Timing: Run the W-4 Withholding Allowance 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.

Important Note: For this report to display useful results, all employees must have W-4 withholding allowance information stored on Infotype 0210. If W-4 withholding allowance information is not in place on Infotype 0210 for all of your agency’s employees, please load that data so that you may maintain it in SCEIS going forward and get the most out of this vital report.

1. Log into SCEIS, enter **S_PH9_46000361** into the Command Field and click on the Enter button. Then, make the following menu path selections to access the Exemption Expiration Report: Human Resources > Payroll > Americas > USA > Info system > Tax > S_PH9_46000361 – W-4 Withholding Allowance Report.
2. When you reach the W-4 Withholding Allowance 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).

W-4 Withholding Allowance 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 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 'W-4 Withholding Allowance Report' interface. At the top, there are three buttons: 'Further selections', 'Search helps', and 'Sort order'. Below these is the 'Payroll period' section, which is highlighted with a red border. This section contains a 'Payroll area' field with a dropdown arrow, a radio button for 'Current period' (which is selected), and another radio button for 'Other period'. Below the radio buttons is a 'Period' button. The 'Selection' section below contains several fields with dropdown arrows: 'Personnel Number', 'Employment status', 'Company Code', 'Payroll area', 'Pers.area/subarea/cost cente', and 'Employee group/subgroup'.

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 W-4 Withholding Allowance Report screen (boxed in red below).

The screenshot shows the 'W-4 Withholding Allowance Report' interface. At the top, there are navigation buttons for 'Further selections', 'Search helps', and 'Sort order'. Below this is the 'Period' section with radio buttons for 'Today', 'Current month', 'Current year', 'Up to today', and 'From today'. The 'Other period' option is selected, and there are input fields for 'Data Selection Period', 'Person selection period', and 'Payroll period'. The 'Selection' section, which is highlighted with a red box, contains dropdown menus for 'Personnel Number', 'Employment status', 'Company Code', 'Payroll area', 'Pers. area/subarea/cost cente', and 'Employee group/subgroup'.

Definitions: Selection Criteria

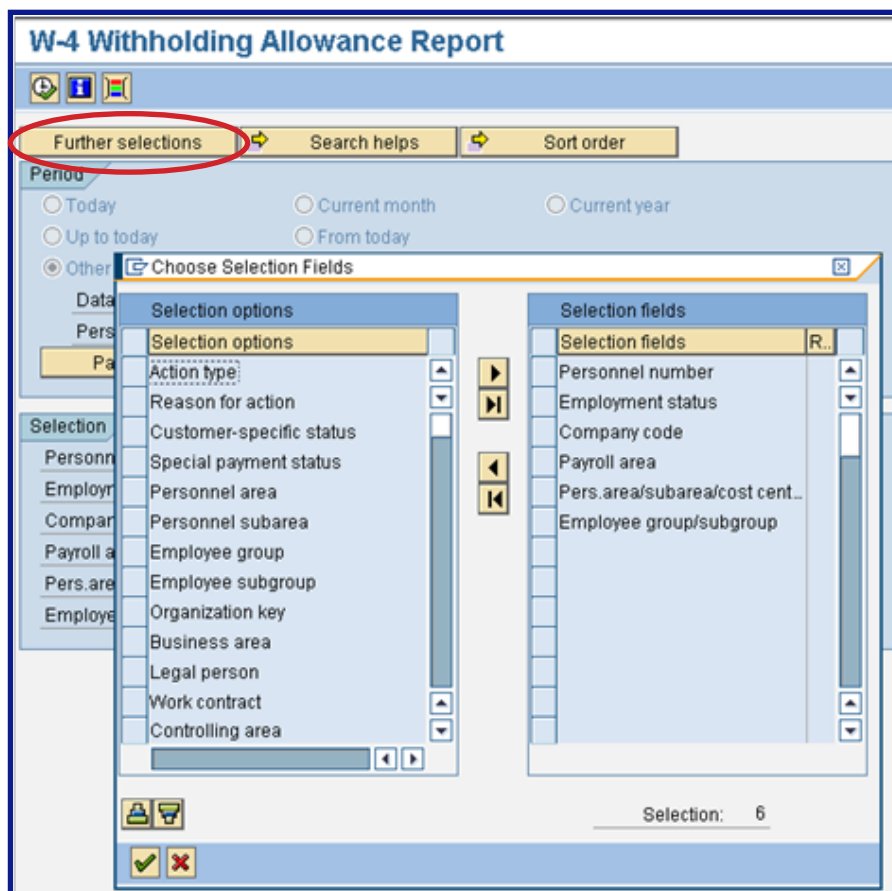
- **Personnel Number:** The unique personnel number (unique identifier) of the employee or employees for whom you would like to view results. You may enter a single personnel number or a range of personnel numbers, or you may opt to exclude a single personnel number or a range of personnel numbers.
-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

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- **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 number 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.



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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 W-4 Withholding Allowance Report (S_PH9_46000361). **Execute Button:** 


After clicking execute, your W-4 Withholding Allowance Report will be displayed as shown in the screenshot below.

W-4 Withholding Allowance Report							
Tax Jurisdiction Allowance Threshold							
Per. no.	Employee Name	Employee SSN	Effective date	Claimed Status	Claimed Allow	Mandated Status	Mandated Allow
FED					10		
10002063	Delma Sneed	229441497	12/17/2009	02	99	00	00
10002556	Ora Hong	464959972	12/17/2009	02	99	00	00
10014338	Libby Hargrove	705916774	12/17/2009	02	99	00	00
10003041	Jamey Maynard	465100540	12/17/2009	02	99	00	00
10013895	Mauro Witherspoon	608746245	12/17/2009	02	99	00	00
10004425	Bryce McNeill	988816376	12/17/2009	02	99	00	00
10013643	Milford Frost	181323421	12/17/2009	01	99	00	00
10004545	Spencer Coats	145657242	12/17/2009	02	99	00	00
10013483	Amanda Brandt	746964498	12/17/2009	01	99	00	00
10004840	Rhett Dawkins	180561534	12/17/2009	02	99	00	00
10005169	Elliot Bowles	914713838	12/17/2009	01	99	00	00
10012473	Phillip Alexander	461836428	12/17/2009	02	99	00	00
10006347	Abe Hanson	427532655	12/17/2009	02	99	00	00
10006877	Dino Hester	765675653	12/17/2009	02	99	00	00
10012282	Connie Lindsey	148859521	12/17/2009	02	11	00	00
10006994	Leeann Whitaker	436451165	12/17/2009	01	99	00	00

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	FED
Personnel No.	10002063
Employee Name	Delma Sneed
Employee SSN	229441497
Effective date	12/17/2009
Claimed Status	02
No. of exemptns	99

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:** 