

Update Employee Tax Data – Paid Family Leave Waiver

The PayServ implementation of the NY Paid Family Leave program has resulted in a new procedure to updating eligible employees who may have applied for a waiver or do not meet the eligibility criteria as defined in New York State Law for NY Paid Family Leave. Agency payroll officers will be required to update the employee's tax data to and from 'Exempt' if necessary.

- To review the **Federal/State Tax Data Page** go to **Payroll for North America> Employee Pay Data USA> Tax Information> Update Employee Tax Data**.
- Enter the **Empl ID (1)** and the **Company (2)**.
- Click **Search (3)**.

The screenshot shows a web browser window with the following breadcrumb trail: Favorites | Main Menu > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data. The page title is "Update Employee Tax Data". Below the title is a sub-header "Find an Existing Value" and a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." A section titled "Search Criteria" contains five input fields, each with a "begins with" dropdown menu: "Empl ID", "Company", "National ID", "Name", and "Last Name". Red arrows labeled "1" and "2" point to the input boxes for "Empl ID" and "Company" respectively. Below these fields is a checkbox for "Include History" and a text input for "Limit the number of results to (up to 300):" with the value "300" entered. At the bottom of the form are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria". A red arrow labeled "3" points to the "Search" button.

- The Employee Federal Tax Data Page is displayed.
- To update the FLI Status for the employee, click the **plus sign (4)** to add a new effective dated row. The **Effective Date (5)** field defaults to the current date. As long as this date is prior to the check date that the change should be impacted in, there is not a need to update the date from the current date.
- Click on the **State Tax Data (6)** tab.

The screenshot shows the 'Employee Federal Tax Data' page. At the top, there are three tabs: 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'. The 'State Tax Data' tab is selected, indicated by a red arrow labeled '6'. Below the tabs, the 'Tax Data' section is visible, showing 'Person ID: N'. In the top right of this section, there is a 'Find | View All' link and a pagination control showing '1 of 2' with a plus sign and a minus sign. A red arrow labeled '4' points to the plus sign. Below this, the 'Company:' is 'NYS STATE OF NEW YORK'. The '*Effective Date:' is '12/08/2017', with a calendar icon to its right. A red arrow labeled '5' points to this date field. Below the date, it shows 'Updated By: Online Usr' and 'Date Last Updated:'. The main section is titled 'Federal Withholding Elements' and contains several fields: '*Special Withholding Tax Status:' (None), '*Tax Marital Status:' (Single), 'Withholding Allowances:' (2), 'Additional Amount:' (\$0.00), 'Additional Percentage:' (0.000), and '*Earned Income Credit Status:' (Not applicable). There is a checked box for 'Exempt from FUT'. Below this section are several expandable sections: 'W-4 and W-5 Processing Status', 'Lock-In Letter Details', 'State Tax Options', 'Tax Treaty/Non-Resident Data', and 'W2-Reporting'. At the bottom, there are several buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Update/Display', and 'Include History'. At the very bottom, there are links for 'Federal Tax Data | State Tax Data | Local Tax Data'.

- If the employee **does have** a waiver and does not meet the Paid Family Leave eligibility criteria, update the ***FLI Status (7)** drop down to 'Exempt' so the employee no longer has the Paid Family Leave deduction taken from future dated paychecks.

***FLI – Family Leave Insurance**

Person ID: N

Tax Data | Federal Tax Data | State Tax Data | Local Tax Data

Company: NYS STATE OF NEW YORK Effective Date: 12/08/2017

State Information

*State: NY New York

Resident UI Jurisdiction

Non-Residency Statement Filed Exempt From SUT

*SDI Status: Exempt *FLI Status: Exempt

State Withholding Elements

*Special Withholding Tax Status: None

*Tax Marital Status: S Single or Head of Household

Withholding Allowances: 2

Additional Amount: \$0.00

Additional Percentage: 0.000

Additional Allowances: 0

Lock-In Letter Details

Save Return to Search Previous in List Next in List Refresh Update

- If the employee **does not have (or no longer has)** a waiver and does not meet the Paid Family Leave eligibility criteria, update the ***FLI Status (8)** drop down to 'Not Applicable' so the employee is processed by the PayServ system and updated to Subject automatically based on the eligibility criteria for the premium deduction.

***FLI – Family Leave Insurance**

The screenshot displays a web application interface for managing tax data. At the top, there are tabs for 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'. The 'State Tax Data' tab is active. The main content area is titled 'Tax Data' and includes a 'Person ID: N'. Below this, there are sections for 'Company' (NYS STATE OF NEW YORK), 'Effective Date' (12/08/2017), and 'State Information'. The 'State Information' section shows the state as 'NY' (New York) with checkboxes for 'Resident' (checked), 'Non-Residency Statement Filed' (unchecked), 'UI Jurisdiction' (checked), and 'Exempt From SUT' (checked). The '*SDI Status' is set to 'Exempt' and the '*FLI Status' is set to 'Not Applicable', with a red arrow and the number '8' pointing to the dropdown menu. Below this is the 'State Withholding Elements' section, which includes fields for '*Special Withholding Tax Status' (None), '*Tax Marital Status' (S - Single or Head of Household), 'Withholding Allowances' (2), 'Additional Amount' (\$0.00), 'Additional Percentage' (0.000), and 'Additional Allowances' (0), with a red arrow and the number '9' pointing to the 'Additional Allowances' field. At the bottom, there are navigation buttons: 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', and 'Update'. The 'Save' button is highlighted with a red arrow.

- **Save (9)** the changes. The employee tax data is now updated.