

**Exemption Expiration Report**

**Transaction Code:** S\_PH9\_46000360

**Purpose** Use this procedure to identify employees who's tax exemption is set to expire.

**Trigger** Perform this procedure when you need to identify the employees whose tax exemption status is going to expire

**Prerequisites** The employee must have a tax exemption

**End User Roles** In order to perform this transaction you must be assigned the following role:  
Financial Reporting Processor, Payroll Analyst, Payroll Processor, Tax Reporter

Change History	
Date	Change Description
1/22/15	Procedure Created

**Transaction Code** S\_PH9\_46000360

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Scenario:

Use this report to identify employees who's exemption *Withholding Info W4/W5 US (0210)* is expiring

Infotype Edit Goto Extras System Help

Display Withholding Info W4/W5 US (0210)

Personnel No. 092012 Name SWEET BONNIE

PersArea 1790 Dept of Enterprise Services EEGroup 0 Permanent

PSubarea 0002 WMS EESubgroup 01 Monthly(M) OT Exe... Status

Start 12/15/2014 to 01/15/2015 Chg. 01/16/2015

Status

Tax authority FED Federal Tax level A Fede

Filing Status 01 Single

Exemptions

Allowances 0

Tax Exempt Ind. Y Exempt, not reportable  IRS mandates

Foreign Earned Income

Withholding adjustments

Add.withholding 0.00 USD  Non-resident tax calculation

Default formula 01 PCT MTHD-RES. U Alternative formula

Additional Information

Check here if the last name differs from that shown on the Social Security card

Overrides (from Infotype 0234)

From date	End Date	Supplemental method	Tax override	Empl. Override Gr
10/25/2011	12/31/9999		0.00	0509

Procedure

1. Start the transaction using the transaction code **S\_PH9\_46000360**.



Program Edit Goto System Help

**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 center

Employee group/subgroup

- 2. Click the **Payroll period** to enter the desired payroll period

**Exemption Expiration Report**

Further selections Search helps Sort order

Payroll period


Payroll area

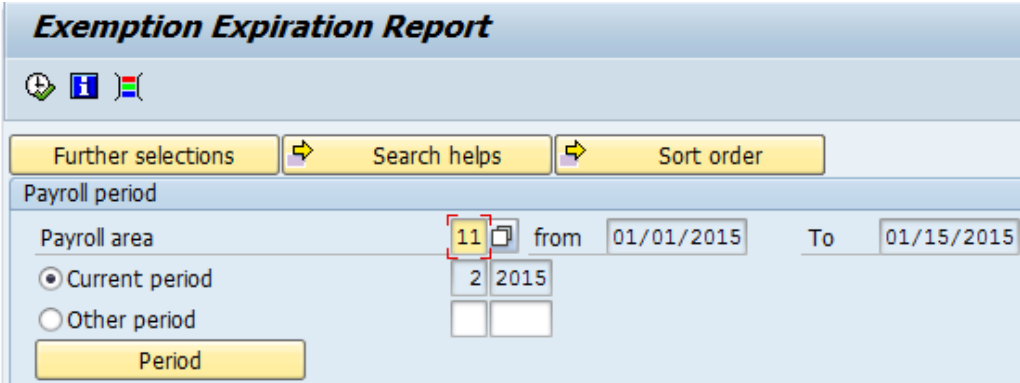
Current period

Other period

Period

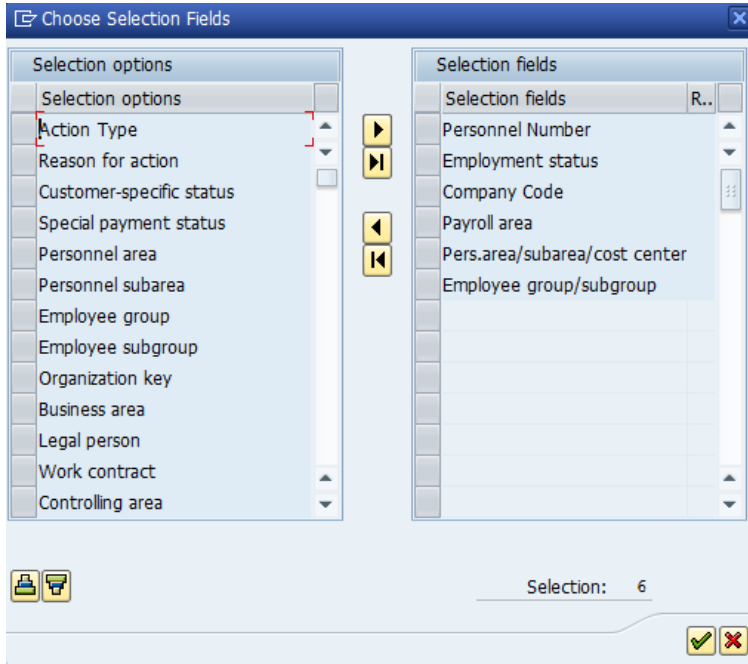
3. Complete the following fields:



R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Payroll Area	R	Description of the Payroll Area.  Payroll Area 11 is the default for the State of Washington. Payroll Area 10 is the default for the Board of Volunteer Firefighters only. <b>Example:</b> 11
Current Period	C	To run the report for the current payroll processing period. (default)
Other Period	C	To view results for a previous payroll period select this radio button and enter the payroll period.  <b>Example: 02/2015</b>




The screenshot shows 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 a 'Payroll period' section with a 'Payroll area' dropdown menu set to '11', a date range from '01/01/2015' to '01/15/2015', and radio buttons for 'Current period' (selected) and 'Other period'. A 'Period' button is located at the bottom of the section.

4. Click **Further selections** to add additional fields to the the **Selection** screen.




5. Select the box to the left of **Personnel Area** and click  (select) to add to the **Selection Fields column**.
6. Click  (continue) to return to the selection screen.
7. Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personal Area	R	A specific agency/sub agency in the State of Washington  <b>Example</b> 1790 – Department of Enterprise Services

8. Click  (Execute) to generate the report.

Tax Jurisdiction			
Per. No.	Employee name	Employee SSN	Expiration
FED			
7092012	BONNIE SWEET	999551212	01/15/2015

 The report results will display the employees Personnel Number, Name, Social Security Number and the expiration date of their *Withholding Infot W4/W5 (0210)*