

Tax Exempt Status Report

Transaction Code:
ZHR_RPTPY661

- Purpose** Use this procedure to view active employees who have indicated "EXEMPT" on their W-4, Employee's Withholding Allowance Certificate.
- Trigger** Perform this procedure at year end to identify employee's who's exempt status will expire.
- Prerequisites** None.
- End User Roles** In order to perform this transaction you must be assigned one of the following roles: Payroll Analyst, Payroll Inquirer, Payroll Processor, Payroll Supervisor, Tax Reporter

Change History	Change Description
11/15/06	Draft
4/29/2011	User procedure updated to match current system. Additional information on reporting period selections added.


Transaction Code ZHR_RPTPY661

Procedure

1. Start the transaction using the transaction code **ZHR_RPTPY661**.

The screenshot displays the SAP transaction interface for ZHR_RPTPY661. At the top, there is a menu bar with 'Program', 'Edit', 'Goto', 'System', and 'Help'. Below the menu is a toolbar with various icons. The main title 'Tax Exempt Status Report' is centered. Below the title, there are two buttons: 'OrgStructure' and 'Search Help'. The 'Period' section shows 'Reporting Period' set to 'D Today'. The 'Selection Criteria' section includes fields for 'Personnel Number', 'Employment Status', 'Personnel area', 'Personnel subarea', 'Employee group', and 'Employee subgroup', each with a dropdown arrow. The 'Program selections' section has 'Start Date' and 'Tax exemption indicator' (set to 'Y') with corresponding 'to' fields and dropdown arrows. The 'Output format' section shows 'SAP List Viewer' selected with a dropdown arrow.

2. Under the **Period** use the dropdown to select the appropriate reporting period:

Current Payroll Period	<input type="radio"/>	It is the most recent pay period that has not been paid yet and will be paid during the next payroll run.  Payroll Area: A payroll area groups and designates the employees whose payroll is run on the same date. Payroll Area 11 is the default for the State of Washington. Payroll Area 10 is the default for the Board of Volunteer Firefighters only. Example: 8/2011
Other Payroll Period	<input type="radio"/>	This is a selection option that allows the user to run a report, execute a transaction, or run a program for a specific pay period Example: 2/2011
Today	<input type="radio"/>	This selection option will run the report using the system date (current date)
Key Date	<input type="radio"/>	This is the date on which a search for information is being performed. The key date can be one day or a period. Example: 4/1/2011 to 4/30/2011
Current Month	<input type="radio"/>	This selection option will run the report using the first date and the last date of the month
Current Year	<input type="radio"/>	This selection option that allows the user to run a report and view results as of date in current year.

Payroll Period

Period

Payroll Area -

Period

3. Under **Selection Criteria** Complete the following fields:

R=Required Entry O=Optional Entry C=Conditional Entry		
Field Name	R/O/C	Description
Personnel Number	C	An employee's unique identifying number. Example: 400000000
Employment Status	O	Describes the employee's employment status within the agency.

		Example: 3 (Active)
Personnel Area	R	A specific agency/sub-agency in the State of Washington. Example: 1110(Dept. of Personnel)
Personnel Subarea	O	A subdivision of Personnel Area that identifies Bargaining Units, WMS, Exempt and non-Represented positions. Example: 0001 Non Represented
Employee Group	O	Status of an employee or position within the State of Washington. Note: This is the status of the position only, not the employee Example: 0 (Permanent)
Employee Subgroup	O	This is within an employee group for which personnel provisions have been defined. Employee sub-group defines employees who are processed according to similar payroll or time rules. Example: 00 (Hourly OT Exempt)

Selection Criteria

Personnel Number	<input type="text"/>	
Employment Status	<input type="text"/>	
Personnel area	1110	
Personnel subarea	<input type="text"/>	
Employee group	<input type="text"/>	
Employee subgroup	<input type="text"/>	


4. Under the **Program selections** Complete the following field:

R=Required Entry O=Optional Entry C=Conditional Entry											
Field Name	R/O/C	Description									
Start Date	R	This is the date on which a record begins Example: 1/01/2011 to 3/31/2011									
Tax exemption indicator	R	This allows the user to identify a tax type from which the employee is exempt from paying <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 10%; text-align: center;">Y</td> <td style="width: 60%;">Exempt, not reportable</td> <td style="width: 30%;">Using this indicator will make wages exempt from taxation and not reportable to the IRS</td> </tr> <tr> <td style="text-align: center;">R</td> <td>Exempt, reportable</td> <td>Using this indicator will make wages exempt from taxation and earnings are reported to the IRS.</td> </tr> <tr> <td style="text-align: center;">X</td> <td>Exempt, partly reportable</td> <td>Do not use, not configured for SOW use.</td> </tr> </table>	Y	Exempt, not reportable	Using this indicator will make wages exempt from taxation and not reportable to the IRS	R	Exempt, reportable	Using this indicator will make wages exempt from taxation and earnings are reported to the IRS.	X	Exempt, partly reportable	Do not use, not configured for SOW use.
Y	Exempt, not reportable	Using this indicator will make wages exempt from taxation and not reportable to the IRS									
R	Exempt, reportable	Using this indicator will make wages exempt from taxation and earnings are reported to the IRS.									
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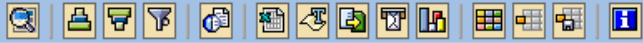
Program selections

Start Date to

Tax exemption indicator to

5. Click  (**Execute**) to generate the report results.

Tax Exempt Status Report



PA	Personnel Area	Pers.No.	Last name First name	Tax Exempt	Tax exemption indicator
1110	Dept of Personnel	40000117	FILLER, CHRIS	Y	Exempt, not reportable
	Dept of Personnel	40000085	GILBERT, COLETTE	Y	Exempt, not reportable
	Dept of Personnel	40000087	HARMON, JOSEPH	Y	Exempt, not reportable
	Dept of Personnel	40000088	JOHNSON, KATHRYN	Y	Exempt, not reportable
	Dept of Personnel	40000116	JONES, ABBY	Y	Exempt, not reportable
	Dept of Personnel	40000118	JONSON, HEATHER	Y	Exempt, not reportable
	Dept of Personnel	40000115	MILES, JENNIFER	Y	Exempt, not reportable
	Dept of Personnel	40000086	ROY, ROLAND	Y	Exempt, not reportable
	Dept of Personnel	40000119	SAMSUN, GENE	Y	Exempt, not reportable
	Dept of Personnel	40000089	ZIEGLER, KIMBERLY	Y	Exempt, not reportable

Results
You have generated the Tax Exempt Status Report

Comments
None.