



checkwriters

# CHECKWRITERS

TAX GUIDE

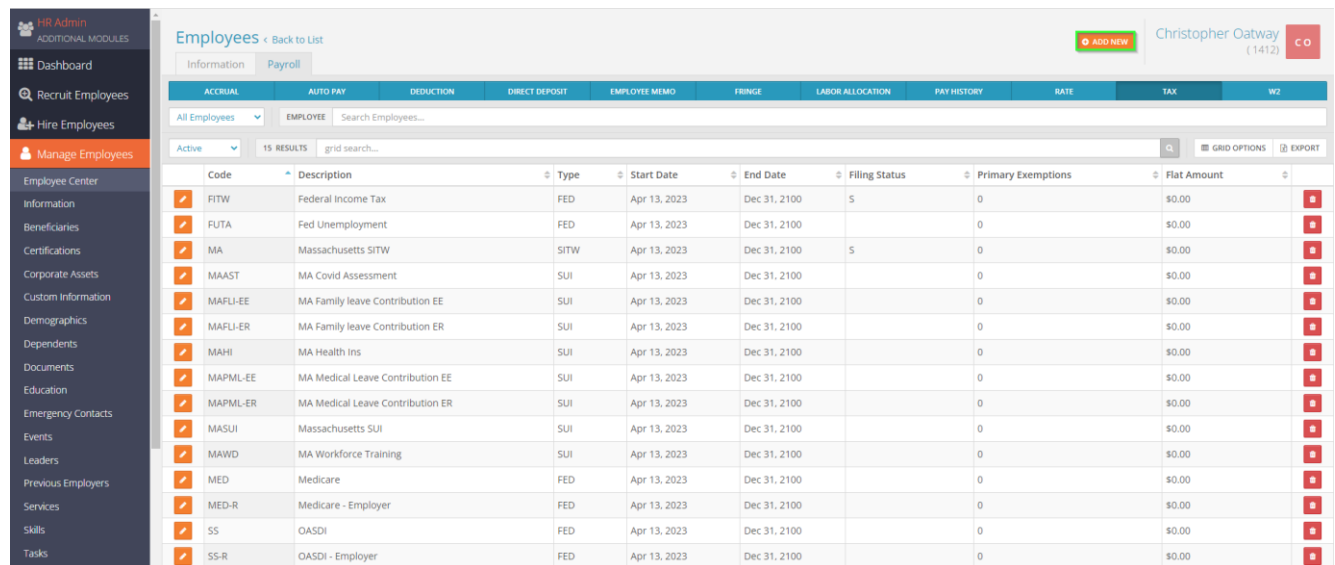
## Adding in a new Filing Status

Select the employee you would like to edit under **Manage Employees > Employee Center** in the *HR Admin* module. Navigate to their **Tax** tab. You will see all taxes currently assigned to the employee here.

While there may be numerous individual lines (each line would reflect a different tax such as income tax, FICA, unemployment, etc), you will typically only ever need to edit two taxes\*:

1. **FITW** – this is for Federal Income Tax Withholding.
2. **State Tax Withholding** – the code for this will be your state abbreviation.
  - a. *\*Depending on your state, you may have additional local taxes that you would edit, or no state income tax to edit at all. If your state does not have income tax, the status will default to 'N/A'.*

To add in a new filing status, select 'Add New' in the top right.



The screenshot shows the 'Employees' page in the HR Admin system, specifically the 'Tax' tab for an employee named Christopher Oatway. The page displays a table of taxes assigned to the employee. The table has columns for Code, Description, Type, Start Date, End Date, Filing Status, Primary Exemptions, and Flat Amount. The 'Filing Status' column is highlighted in green, indicating it is the focus of the current task. The 'ADD NEW' button is visible in the top right corner of the table area.

Code	Description	Type	Start Date	End Date	Filing Status	Primary Exemptions	Flat Amount
FITW	Federal Income Tax	FED	Apr 13, 2023	Dec 31, 2100	S	0	\$0.00
FUTA	Fed Unemployment	FED	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MA	Massachusetts SITW	SITW	Apr 13, 2023	Dec 31, 2100	S	0	\$0.00
MAAST	MA Covid Assessment	SUI	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MAFLJ-EE	MA Family leave Contribution EE	SUI	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MAFLJ-ER	MA Family leave Contribution ER	SUI	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MAHI	MA Health Ins	SUI	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MAPML-EE	MA Medical Leave Contribution EE	SUI	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MAPML-ER	MA Medical Leave Contribution ER	SUI	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MASUI	Massachusetts SUI	SUI	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MAWD	MA Workforce Training	SUI	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MED	Medicare	FED	Apr 13, 2023	Dec 31, 2100		0	\$0.00
MED-R	Medicare - Employer	FED	Apr 13, 2023	Dec 31, 2100		0	\$0.00
SS	OASDI	FED	Apr 13, 2023	Dec 31, 2100		0	\$0.00
SS-R	OASDI - Employer	FED	Apr 13, 2023	Dec 31, 2100		0	\$0.00

This will bring up the edit screen. In the *Tax Code* box, select the tax you would like to add in a new filing status for. Once this is pulled in, select the box the employee indicated a change for on their tax form (W4 or state withholding form) and input the new status. For example, if an employee was changing from Single to Married for their withholding status, you would select the *Filing Status* box and change it to **M**.

Once all the boxes you wish to change are highlighted green, you can hit **Save** to update the employee's withholding.

## Tax

CO

Christopher Oatway  
(1412)

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**Tax Code\*** HELP

FITW - Federal Income Tax
▼

Exempt HELP

**Start Date\***

05/06/2022
📅

**End Date\***

12/31/2100
📅

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**Filing Status\***

M
▼

Nonresident Alien HELP

Supplemental

▼

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Primary Tax

Apply Tax Credit

Employee submitted 2020 (or later) W-4

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Override Tax Calculations

If these Override Tax Calculations are employed, the Claim Dependents and Other Adjustments sections below will be grayed out and not available for input/edit.

Override Tax Calc

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Multiple Jobs or Spouse Works

HELP

Use special "Multiple Jobs" rate

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Claim Dependents

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Total Dependent Amount

\$

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Other Adjustments

✕ CANCEL

✔ SAVE

You will notice that a start date of your next check date automatically gets applied here. After this is added, it will automatically end the old filing status so that will be in a historical status, similar to how rate changes function. This will enable you to review an employee's past filing statuses.

Employees [Back to List](#) ADD NEW Christopher Oatway (1412) CO

Information Payroll

ACCRUAL AUTO PAY DEDUCTION DIRECT DEPOSIT EMPLOYEE MEMO FRINGE LABOR ALLOCATION PAY HISTORY RATE TAX W2

All Employees EMPLOYEE Search Employees...

All 72 RESULTS grid search...

Code	Description	Type	Start Date	End Date	Filing Status	Primary Exemptions	Flat Amount
<input checked="" type="checkbox"/> FITW	Federal Income Tax	FED	Jan 1, 2021	May 5, 2022	M	0	\$150.00
<input checked="" type="checkbox"/> FITW	Federal Income Tax	FED	May 6, 2022	Dec 31, 2100	M	0	\$0.00

## Things to Note

If an employee is requesting an additional amount to be withheld each payroll, you will need to fill in the 'Additional Amount' box with the extra amount they indicated.

While you can delete tax codes from an employees' profile, it is strongly recommended that you consult with your Client Support Specialist prior to doing so. If an employee is changing state taxes, please consult with your Client Support Specialist on adding/removing taxes and how it will impact payroll.

You will see an option for *Override Tax Calc.* If you check this off, then any amount or percentage you input will be withheld instead of having the system calculate the taxes for you.

You can mark an employee as exempt for Federal by checking off the **Exempt** box next to the *Tax Code*. For your State tax, you can mark an employee as exempt by inputting 99 in the exemptions box.