



Human Capital Management

Image 38 Overview

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Introduction

The Image/Upgrade Overview Document is intended to provide ctcLink users with a summary of the changes that will be made in the system as a result of the upcoming image or PeopleTools upgrade implementation. Oracle releases multiple PeopleSoft updates, called images, for each pillar every year. Each Image contains bug fixes and features that are important for PeopleSoft to work well. PeopleTools upgrades update the underlying framework of the system. There are minimal changes that are noticeable to the end users. Below is an overview of the changes that you can expect to see as part of this upgrade.

Benefits

Benefits Summary

The look of the Search Results under Select Employee has changed. There is no change in the Functionality.

1. The Empl Record\Business Unit is now displayed as Business Unit by itself and Empl Rcd is next to the Employee id above the Employee Name
2. The Benefit Record Number\Department is now displayed in separate columns as Benefit Record Number and Department

Navigation

Workforce Administrator > Benefits Admin (Tile) > Benefits Summary (Tile)

Image: Benefits Admin

Before:

Benefits Summary

▼ Search Options

Empl ID (begins with)

Empl Record =

Name (begins with)

Last Name (begins with)

Business Unit (begins with)

Department Set ID = 🔍

Department = 🔍

Select Employees 1 row

Name / Title	Empl ID \ Last Name	Empl Record \ Business Unit	Benefit Record Number \ Department
██████████ FUNCTIONAL ANALYST	██████████ ██████████	0 HR ██████	██████ ██████

After:

Benefits Summary

▼ Search Options

Empl ID (begins with)

Empl Record =

Name (begins with)

Last Name (begins with)

Business Unit (begins with)

Department Set ID = 🔍

Department = 🔍

Select Employees 1 row

Job Title	Benefit Record Number	Last Name	Business Unit
FUNCTIONAL ANALYST	██████	██████	HR ██████

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N/A

Payroll

Employee State Tax Data changes for specific states

The ability to enter Withholding Allowances on State Tax Data for an employee in specific states has been removed.

Prior to the modifications, the State Tax Data tab displayed the Withholding Allowance, allowing entry for the allowances for states: AZ (Arizona), CT (Connecticut), KY (Kentucky), MO (Missouri), MS (Mississippi), and (PA) Pennsylvania.

Navigation

NavBar > Navigator > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data, State Tax Data

Image: Update Employee Tax Data, State Tax Data

The screenshot displays a web application interface for updating employee tax data. At the top, there are three tabs: 'Federal Tax Data', 'State Tax Data' (which is active), and 'Local Tax Data'. Below the tabs, the 'Person ID' is shown as a redacted black box. The main content area is titled 'Tax Data' and includes a search icon, navigation arrows, and a '1 of 2' indicator. Below this, the 'Company' and 'Effective Date' (05/01/2020) are displayed. The 'State Information' section shows the state set to 'AZ' (Arizona) with a search icon. Checkboxes are present for 'Resident', 'Non-Residency Statement Filed', 'UI Jurisdiction', and 'Exempt From SUT'. The 'State Withholding Elements' section contains a dropdown for 'Special Withholding Tax Status' (set to 'None'), a 'Tax Status' field (set to 'N'), and a search box containing 'Not applicable'. Below these are input fields for 'Additional Amount' (\$0.00), 'Additional Percentage' (0.000), and 'AZ Withholding Percent' (2.700). A yellow highlight is placed over the 'Tax Status' field. At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'. The footer of the page shows navigation links for 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'.

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[9.2 Entering U.S. Employee Tax Data](#)

Updated Federal / State Tax Table

OR - The Oregon state minimum wage is increased from \$13.25 to \$14.00 per hour, effective July 1, 2021.

[Oregon Minimum Wage Increase Schedule](#)

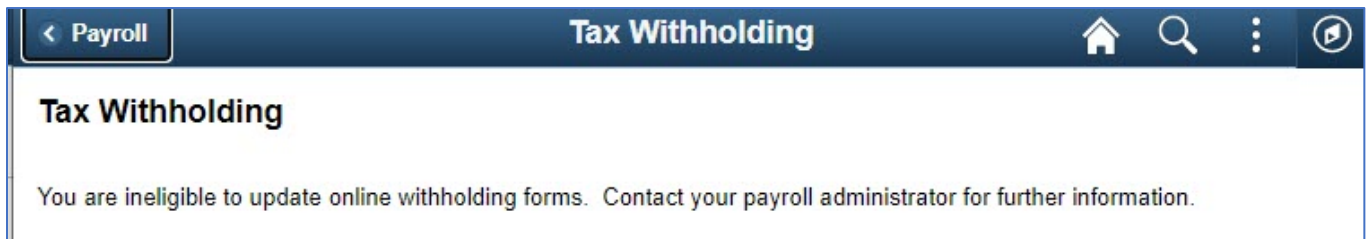
ESS Tax Withholding Lock-In Message

Modifications have been made to issue Lock-In letter warning message once. Prior to this change, the system would issue the same warning message twice.

Navigation

Employee Self Service > Payroll Tile > Tax Withholding

Image: Tax Withholding



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[9.2 ESS W-4 Withholding](#)

ESS Federal W-4 PDF

The 2021 Federal W-4 Form has been delivered.

Navigation

Employee Self Service > Payroll Tile > Tax Withholding

Image: Federal W-4 Form

Form W-4 (Rev. December 2020) Department of the Treasury Internal Revenue Service		Employee's Withholding Certificate ▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. ▶ Give Form W-4 to your employer. ▶ Your withholding is subject to review by the IRS.		OMB No. 1545-0074 <div style="border: 2px solid red; padding: 5px; display: inline-block; font-weight: bold; font-size: 1.2em;">2021</div>
Step 1: Enter Personal Information	(a) First name and middle initial [REDACTED]		Last name [REDACTED]	
	Address [REDACTED]		(b) Social security number XXX-XX-[REDACTED]	
	City or town, state, and ZIP code [REDACTED]		▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov .	
	(c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying widow(er) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)			
Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App , and privacy.				
Step 2: Multiple Jobs or Spouse Works Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following. (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld. <input type="checkbox"/> TIP: To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.				
Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)				
Step 3: Claim Dependents If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ [REDACTED] Multiply the number of other dependents by \$500 ▶ \$ [REDACTED] Add the amounts above and enter the total here 3 \$ [REDACTED]				
Step 4 (optional): Other Adjustments (a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income 4(a) \$ [REDACTED] (b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here 4(b) \$ [REDACTED] (c) Extra withholding. Enter any additional tax you want withheld each pay period 4(c) \$ [REDACTED]				
Exemption from withholding. By claiming exemption from withholding, you certify that you owed no Federal income tax in 2020, and that you expect to owe no Federal income tax in 2021. If you claim exemption from withholding, no income tax will be withheld from your paycheck. Not Applicable ▼				
Step 5: Sign Here Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete. [REDACTED] 05/07/2021 ▶ Employee's signature (This form is not valid unless you sign it.) ▶ Date				
Employers Only Employer's name and address [REDACTED] First date of employment [REDACTED] Employer identification number (EIN) [REDACTED]				
For Privacy Act and Paperwork Reduction Act Notice, see page 3. Cat. No. 10220Q Form W-4 (2021)				
<div style="background-color: green; color: white; padding: 5px 15px; border-radius: 5px;">Submit</div>				

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[9.2 ESS W-4 Withholding](#)

ESS W-4 PDF: Updated AZ A-4

New template for Arizona Form A-4 is delivered, revised for 2021.

Navigation

Employee Self Service > Payroll Tile > Tax Withholding

Image: A-4 Form

Arizona Form A-4	Employee's Arizona Withholding Election	2021
Type or print your Full Name ██████████		Your Social Security Number XXX-XX-██████
Home Address – number and street or rural route ██████████		
City or Town ██████████	State AZ	ZIP Code ██████
Choose either box 1 or box 2:		
<input type="checkbox"/> 1 Withhold from gross taxable wages at the percentage checked (check only one percentage): <input type="checkbox"/> 0.8% <input type="checkbox"/> 1.3% <input type="checkbox"/> 1.8% <input type="checkbox"/> 2.7% <input type="checkbox"/> 3.6% <input type="checkbox"/> 4.2% <input type="checkbox"/> 5.1%		
<input type="checkbox"/> Check this box and enter an extra amount to be withheld from each paycheck		\$ <input style="width: 50px;" type="text"/>
<input type="checkbox"/> 2 I elect an Arizona withholding percentage of zero, and I certify that I expect to have no Arizona tax liability for the current taxable year.		
I certify that I have made the election marked above.		
_____ SIGNATURE		05/07/2021 DATE
Employee's Instructions		Submit
<p>Arizona law requires your employer to withhold Arizona income tax from your wages for work done in Arizona. The amount withheld is applied to your Arizona income tax due when you file your tax return. The amount withheld is a percentage of your gross taxable wages from every paycheck. You may also have your employer withhold an extra amount from each paycheck. Complete this form to select a percentage and any extra amount to be withheld from each paycheck.</p> <p>What are my "Gross Taxable Wages"?</p> <p>For withholding purposes, your "gross taxable wages" are the wages that will generally be in box 1 of your federal Form W-2. It is your gross wages less any pretax deductions, such as your share of health insurance premiums.</p> <p>New Employees</p> <p>Complete this form within the first five days of your employment to select an Arizona withholding percentage. You may also have your employer withhold an extra amount from each paycheck. If you do not give this form to your employer the department requires your employer to withhold 2.7% of your gross taxable wages.</p> <p>Current Employees</p> <p>If you want to change your current amount withheld, you must file this form to change the Arizona withholding percentage or to change the extra amount withheld.</p> <p>What Should I do With Form A-4?</p> <p>Give your completed Form A-4 to your employer.</p>		
<p>Electing a Withholding Percentage of Zero</p> <p>You may elect an Arizona withholding percentage of zero if you expect to have no Arizona income tax liability for the current year. Arizona tax liability is gross tax liability less any tax credits, such as the family tax credit, school tax credits, or credits for taxes paid to other states. If you make this election, your employer will not withhold Arizona income tax from your wages for payroll periods beginning after the date you file the form. To keep this election for the next calendar year, you must give your employer an updated Form A-4. If you do not, your employer may withhold Arizona income tax from your wages and salary until you submit an updated Form A-4.</p> <p>Zero withholding does not relieve you from paying Arizona income taxes that might be due at the time you file your Arizona income tax return. If you have an Arizona tax liability when you file your return or if at any time during the current year conditions change so that you expect to have a tax liability, you should promptly file a new Form A-4 and choose a withholding percentage that applies to you.</p> <p>Voluntary Withholding Election by Certain Nonresident Employees</p> <p>Compensation earned by nonresidents while physically working in Arizona for temporary periods is subject to Arizona income tax. However, under Arizona law, compensation paid to certain nonresident employees is not subject to Arizona income tax withholding. These nonresident employees need to review their situations and determine if they should elect to have Arizona income taxes withheld from their Arizona source compensation. Nonresident employees may request that their employer withhold Arizona income taxes by completing this form to elect Arizona income tax withholding.</p>		

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9.2 ESS W-4 Withholding




ESS Idaho W-4 PDF

The template for Idaho Form W-4 has been updated to match the latest 12-22-2020 version published by the Idaho State Tax Commission.

Navigation

Employee Self Service > Payroll Tile > Tax Withholding

Image: Form ID W-4

	Form ID W-4 Employee's Withholding Allowance Certificate	
<p>Complete Form ID W-4 so your employer can withhold the correct amount of state income tax from your paycheck. Sign the form and give it to your employer. Use the information on the back to calculate your Idaho allowances and any additional amount you need withheld from each paycheck. If you plan to itemize deductions, use the worksheet at tax.idaho.gov/w4.</p>		
Withholding Status		
Check the "A" box (Single) if you're:		
<ul style="list-style-type: none">• Single with one job or single with multiple jobs• Filing as head of household		
Check the "B" box (Married) if you're:		
<ul style="list-style-type: none">• Married filing jointly with one job and your spouse doesn't work• A qualifying widow(er)		
Check the "C" box (Married, but withhold at Single rate) if you're:		
<ul style="list-style-type: none">• Married filing jointly and both people work (or you have multiple jobs)• Married filing separately		
- - - - -  - - - - -		
	Form ID W-4 Employee's Withholding Allowance Certificate	
WITHHOLDING STATUS (see information above)		
A <input type="checkbox"/> (Single) B <input type="checkbox"/> (Married) C <input type="checkbox"/> (Married, but withhold at Single rate)		
1. Total number of Idaho allowances you're claiming	<input type="text" value="0"/>	
2. Additional amount (if any) you need withheld from each paycheck (Enter whole dollars)	<input type="text"/>	
Your Social Security number (required) XXX-XX-███		
Your first name and initial ███	Last name ███	
Current mailing address ███		
City ███	State ID ███	ZIP Code ███
Under penalties of perjury, I declare that to the best of my knowledge and belief I can claim the number of withholding allowances on line 1 above.		
Your signature ███	Date ███	
EFO00307 12-22-2020	Page 1 of 2	
<input type="button" value="Submit"/>		

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[9.2 ESS W-4 Withholding](#)

ESS Minnesota W-4 PDF

New template for Minnesota Form W-4 is delivered, revised for 2021.

Navigation

Employee Self Service > Payroll Tile > Tax Withholding

Image: Form MN W-4

DEPARTMENT OF REVENUE

2021 W-4MN, Minnesota Employee Withholding Allowance/Exemption Certificate

Employees

Complete Form W-4MN so that your employer can withhold the correct Minnesota income tax from your pay. Consider completing a new Form W-4MN each year or when your personal or financial situation changes.

Employee's First Name and Initial ██████████	Last Name ██████████	Employee's Social Security Number XXX-XX-██████
Permanent Address ██████████		Marital Status (Check one): <input type="checkbox"/> Single, Married, but legally separated, or Spouse is a nonresident alien <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate
City ██████████	State MN	

Read instructions on back. Complete Section 1 OR Section 2, then sign and give the completed form to your employer. Do not complete both Section 1 and Section 2. Completing both sections will make the form invalid.

Section 1 — Determining Minnesota Allowances

A Enter "1" if no one else can claim you as a dependent A

B Enter "1" if any of the following apply: B

- You are single and have only one job
- You are married, have only one job, and your spouse does not work
- Your wages from a second job or your spouse's wages are \$1500 or less

C Enter "1" if you are married. You may choose to enter "0" if you are married and have either a working spouse or more than one job. (Entering "0" may help you avoid having too little tax withheld.) C

D Enter the number of dependents (other than your spouse or yourself) you will claim on your tax return. ... D

E Enter "1" if you will use the filing status Head of Household (see instructions). E

F Total number of allowances claimed. Add steps A through E.
If you plan to itemize deductions on your 2021 Minnesota income tax return, you may also complete the Itemized Deductions and Additional Income Worksheet. F

Section 2 — Exemption From Minnesota Withholding

Complete Section 2 if you claim to be exempt from Minnesota income tax withholding (see Section 2 instructions for qualifications). If applicable, check one box below to indicate why you believe you are exempt:

A I meet the requirements and claim exempt from both federal and Minnesota income tax withholding

B Even though I did not claim exempt from federal withholding, I claim exempt from Minnesota withholding, because:

- I had no Minnesota income tax liability last year
- I received a refund of all Minnesota income tax withheld
- I expect to have no Minnesota income tax liability this year

C All of these apply:

- My spouse is a military service member assigned to a military location in Minnesota
- My domicile (legal residence) is in another state
- I am in Minnesota solely to be with my spouse. My state of domicile is

D I am an American Indian that resides and works on a reservation

E I am a member of the Minnesota National Guard or an active duty U.S. military member and claim exempt from Minnesota withholding on my military pay

F I receive a military pension or other military retirement pay as calculated under U.S. Code, title 10, sections 1401 through 1414, 1447 through 1455, and 12733, and I claim exempt from Minnesota withholding on this retirement pay

Minnesota Allowances and Additional Withholding

1 Minnesota Allowances. Enter Step F from Section 1 above or Step 10 of the Itemized Deductions Worksheet . . . 1

2 Additional Minnesota withholding you want deducted each pay period (see instructions) 2

I certify that all information provided in Section 1 OR Section 2 is correct. I understand there is a \$500 penalty for filing a false Form W-4MN.

Employee's Signature ██████████	Date 2021-05-07	Daytime Phone Number ██████████
------------------------------------	--------------------	------------------------------------

Employees: Give the completed form to your employer. Submit

Employers

See the employer instructions to determine if you must send a copy of this form to the Minnesota Department of Revenue. If required, enter your information below and mail this form to the address in the instructions. (Incomplete forms are considered invalid.) We may assess a \$50 penalty for each required Form W-4MN not filed with us. Keep a copy for your records.

Name of Employer ██████████	Federal Employer ID Number (FEIN) ██████████	Minnesota Tax ID Number ██████████
Address ██████████	City ██████████	State ██████
		ZIP Code ██████

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[9.2 ESS W-4 Withholding](#)

Changes to Paycheck Modeling

Paycheck Modeler has been modified not to exclude garnishment amount in modeled check result, unless the garnishment amount was cleared during the modeling process. Prior to the modifications, the modeled check result for employees with garnishment would exclude the garnishment in the following situations:

- Adding a new deduction
- Adding a new earning and new deduction

Navigation

Employee Self Service > Payroll Tile > Paycheck Modeler

Image: Paycheck Modeler, Deductions

Deductions - Step 4 of 7

Job Title: [REDACTED]

This step provides a list of the proposed deductions for your modeled check. You can modify or clear the amounts in the list, as well as add additional deductions. Deductions using a percentage will be based on the total gross earnings from the modeled check and will automatically be calculated in a subsequent step.

Deduction	Type	Amount	Percentage of Gross	Edit	Clear Amount
Garnishment	After-Tax	[REDACTED]			👉
Kaiser WA Classic	Before-Tax	[REDACTED]		✏️	👉
Long Term Disability	After-Tax	[REDACTED]		✏️	👉
MedAid EE	After-Tax	[REDACTED]		✏️	👉
Paid Family Leave EE	After-Tax	[REDACTED]		✏️	👉
Paid Medical Leave EE	After-Tax	[REDACTED]		✏️	👉
SBRP (TIAA-CREF)	Before-Tax	[REDACTED]		✏️	👉
Pretx [REDACTED] Parkng	Before-Tax	[REDACTED]		✏️	👉
Tobacco User Medical Surcharge	Before-Tax	[REDACTED]		✏️	👉
VEBA Reduction	Before-Tax	[REDACTED]		✏️	👉
WEA Dues	After-Tax	[REDACTED]		✏️	👉
Student Loan	After-Tax	\$100.00		✏️	👉

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[9.2 ESS Paycheck Modeler \(Fluid\)](#)

Time and Labor

Printing Fluid Timesheet

A new feature has been added to print the Fluid Timesheet. Clicking on the 'Print Timesheet' on the page opens up a PDF file with details of reported time for each day of the current timesheet as well as a summary of the total hours per day.

Navigation

Employee Self Service > Time (Tile) > Enter Time (Tile)

Image: Printing Fluid Timesheet

The screenshot shows the 'Enter Time' interface for the week of May 1-15, 2021. The job title is 'IT CUSTOMER SUPPORT ENTRY'. The period is 'Semi-Monthly Period' with 80.00 scheduled hours and 73 hours reported. The current view is 'Week 2 of 3' with 40.00 scheduled and 16.00 hours reported. The interface displays a table for time reporting with columns for days from Saturday to Friday. The table includes reporting codes, scheduled and reported hours, and a comments section. A 'Print Timesheet' button is highlighted with a red box.

*Time Reporting Code / Time Details	8-Saturday	9-Sunday	10-Monday	11-Tuesday	12-Wednesday	13-Thursday	14-Friday
01 REG - Regular	Scheduled OFF Reported 0	Scheduled OFF Reported 0	Scheduled 8 Reported 8	Scheduled 8 Reported 8	Scheduled 8 Reported 0	Scheduled 8 Reported 0	Scheduled 8 Reported 0
CSL - Compensable Sick Leave			8.00				
Comments							

Image: PDF Version of Timesheet

Timesheet

Date: 2021-05-11

Employee ID: ██████████

Name: ██████████

Department: IT - CLIENT SERVICES DIVISION

Employee Record: 0

Jobcode:

Timesheet Data:

Day	Date	TRC	Quantity	Reported Status	Elements
Monday	2021-05-03	REG	8	SB	REG, H, PST, N, ONL, 0, CTCTSKGRPN, HR110,
Monday	2021-05-03	REG	1	SB	REG, H, PST, N, ONL, 0, CTCTSKGRPN, HR110,
Tuesday	2021-05-04	REG	8	SB	REG, H, PST, N, ONL, 0, CTCTSKGRPN, HR110,
Wednesday	2021-05-05	REG	8	SB	REG, H, PST, N, ONL, 0, CTCTSKGRPN, HR110,
Wednesday	2021-05-05	PRL	8	NW	PRL, H, PST, N, AM, 0, CTCTSKGRPN, HR110,
Thursday	2021-05-06	REG	8	SB	REG, H, PST, N, ONL, 0, CTCTSKGRPN, HR110,
Friday	2021-05-07	REG	8	SB	REG, H, PST, N, ONL, 0, CTCTSKGRPN, HR110,
Friday	2021-05-07	CSL	8	NW	CSL, H, PST, N, AM, 0, CTCTSKGRPN, HR110,
Monday	2021-05-10	CSL	8	NW	CSL, H, PST, N, AM, 0, CTCTSKGRPN, HR110,
Tuesday	2021-05-11	REG	8	SB	REG, H, PST, N, ONL, 0, CTCTSKGRPN, HR110,

Total Reported Hours :

Day	5/01 Sat	5/02 Sun	5/03 Mon	5/04 Tue	5/05 Wed	5/06 Thu	5/07 Fri	5/08 Sat	5/09 Sun	5/10 Mon	5/11 Tue	5/12 Wed	5/13 Thu	5/14 Fri	5/15 Sat	5/16 Sun	5/17 Mon	5/18 Tue	5/19 Wed	5/20 Thu	5/21 Fri	5/22 Sat	
Select valid alert program ID	0.00	0.00	9.00	8.00	16.00	8.00	16.00	0.00	0.00	8.00	8.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

I hereby certify that the time reported is a true and accurate representation of the time and assignments worked in the period.

Employee Signature: _____

Date: _____

Approver#1 Signature: _____

Date: _____

Approver#2 Signature: _____

Date: _____

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N/A

Accessibility - W-2 2020 US Year End Accessibility Setup Updates

PeopleSoft for North America supports the display of year-end tax forms in accessibility mode in Employee Self-Service. By providing accessibility setup configurations for tax forms, it allows self-service users to access tax form information using screen readers in non-PDF format when they log on to the PeopleSoft system with screen reader mode enabled.

Year End Accessibility Definitions for Tax Forms W-2, W-2AS, W2-GU, W2-VI and W-2c

Year End Accessibility definitions for the Year 2020 for Tax Forms W-2, W-2AS, W2-GU, W2-VI and W-2c were not provided prior to Image 38.

Navigation

Navigator > Payroll for North America > U.S. Annual Processing > Define Annual Tax Reporting > Year End Accessibility

Image: Year End Accessibility Definitions Search Results Prior to Image 38

Year End Accessibility definitions for Effective Dates 2012 to 2019 were available prior to the update.

Search Criteria

Tax Form Identification =

Effective Date =

Include History
 Correct History

W-2
W-2AS
W2-GU
W2-VI
W-2c

Search Results		Search Results		Search Results		Search Results		Search Results	
Tax Form Identification	Effective Date	Tax Form Identification	Effective Date	Tax Form Identification	Effective Date	Tax Form Identification	Effective Date	Tax Form Identification	Effective Date
W-2	01/01/2019	W-2AS	01/01/2019	W-2GU	01/01/2019	W-2VI	01/01/2019	W-2c	01/01/2019
W-2	01/01/2018	W-2AS	01/01/2018	W-2GU	01/01/2018	W-2VI	01/01/2018	W-2c	01/01/2018
W-2	01/01/2017	W-2AS	01/01/2017	W-2GU	01/01/2017	W-2VI	01/01/2017	W-2c	01/01/2017
W-2	01/01/2016	W-2AS	01/01/2016	W-2GU	01/01/2016	W-2VI	01/01/2016	W-2c	01/01/2016
W-2	01/01/2015	W-2AS	01/01/2015	W-2GU	01/01/2015	W-2VI	01/01/2015	W-2c	01/01/2015
W-2	01/01/2014	W-2AS	01/01/2014	W-2GU	01/01/2014	W-2VI	01/01/2014	W-2c	01/01/2014
W-2	01/01/2013	W-2AS	01/01/2013	W-2GU	01/01/2013	W-2VI	01/01/2013	W-2c	01/01/2013
W-2	01/01/2012	W-2AS	01/01/2012	W-2GU	01/01/2012	W-2VI	01/01/2012	W-2c	01/01/2012

Year End Accessibility Definitions for Tax Forms W-2, W-2AS, W2-GU, W2-VI and W-2c after Image 38

Year End Accessibility definitions for the Year 2020 for Tax Forms W-2, W-2AS, W2-GU, W2-VI and W-2c are added after the Image 38 update.

Image: Year End Accessibility Definitions Search Results after the Image 38

Search Criteria

Tax Form Identification =

Effective Date =

Include History
 Correct History

Tax Form Identification	Effective Date	Tax Form Identification	Effective Date	Tax Form Identification	Effective Date	Tax Form Identification	Effective Date	Tax Form Identification	Effective Date
W-2	01/01/2020	W-2AS	01/01/2020	W-2c	01/01/2020	W-2GU	01/01/2020	W-2VI	01/01/2020
W-2	01/01/2019	W-2AS	01/01/2019	W-2c	01/01/2019	W-2GU	01/01/2019	W-2VI	01/01/2019
W-2	01/01/2018	W-2AS	01/01/2018	W-2c	01/01/2018	W-2GU	01/01/2018	W-2VI	01/01/2018
W-2	01/01/2017	W-2AS	01/01/2017	W-2c	01/01/2017	W-2GU	01/01/2017	W-2VI	01/01/2017
W-2	01/01/2016	W-2AS	01/01/2016	W-2c	01/01/2016	W-2GU	01/01/2016	W-2VI	01/01/2016
W-2	01/01/2015	W-2AS	01/01/2015	W-2c	01/01/2015	W-2GU	01/01/2015	W-2VI	01/01/2015
W-2	01/01/2014	W-2AS	01/01/2014	W-2c	01/01/2014	W-2GU	01/01/2014	W-2VI	01/01/2014
W-2	01/01/2013	W-2AS	01/01/2013	W-2c	01/01/2013	W-2GU	01/01/2013	W-2VI	01/01/2013
W-2	01/01/2012	W-2AS	01/01/2012	W-2c	01/01/2012	W-2GU	01/01/2012	W-2VI	01/01/2012

W-2/W-2c Forms

Year End Accessibility definitions for year 2020 were not provided prior to Image 38. As a result, the Tax Forms opened in PDF format for the Year 2020. Since PDF versions are not accessible, screen reader users could not access Tax Forms for the year 2020.

Navigation

Employee Self Service > Payroll Tile > W-2 W-2c Forms Tile

Image: View W-2/W-2c Forms Prior To Image 38

View W-2 Form button and the Filing Instructions link opened a PDF version of the page.

Tax Form	Issue Date	Year End Form	Printer Version	Filing Instructions
W-2	01/15/2021	<input type="button" value="View W-2 Form"/>	<input type="button" value="Printable W-2"/>	<input type="button" value="Filing Instructions"/>

W-2/W-2c Forms after Image 38

Screen reader users will be able to access the Tax Forms for the year 2020 in Non-PDF format after the update.

Navigation

Employee Self Service > Payroll Tile > W-2 W-2c Forms Tile

Image: View W-2/W-2c Forms after Image 38

Payroll View W-2/W-2c Forms

Tax Year: 2020

Company Name: State Board for Comm. and Tech

Tax Form	Issue Date	Year End Form	Printer Version	Filing Instructions
W-2	01/15/2021	View W-2 Form	Printable W-2	Filing Instructions

View W-2 Form button and the Filing Instructions link opens a Non-PDF version of the page.

View W-2 Form 2020

Instructions

This page has two views: Default and View All. The Default view will display all W-2 boxes and codes that contain values. The View All option will also display W-2 boxes and codes even if the value is blank. In addition, if the employee has multiple PDF forms, the data is consolidated and displayed on the online page by State.

[View All Boxes](#)

Employer Details

Employer identification number (EIN) 91-0823768

Name STATE BOARD FOR COMM. AND TECH

Address 1 1300 QUINCE STREET SE

Address 2 OLYMPIA WA 98501-7329

Filing Instructions link opens a Non-PDF page

Filing Instructions

Notice to Employee
Do you have to file? Refer to the Instructions for Forms 1040 and 1040-SR to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit. Earned income credit (EIC). You may be able to take the EIC for 2020 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if your investment income is more than the specified amount for 2020 or if income is earned for services provided while you were an inmate at a penal institution. For 2020 income limits and more information, visit www.irs.gov/EIC. See also Pub. 596, Earned Income Credit. Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.

Clergy and religious workers. If you aren't subject to social security and Medicare taxes, see Pub. 517, Social Security and Other Information for Members of the Clergy and Religious Workers.

Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the Social Security Administration (SSA) to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but aren't the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 800-772-1213. You may also visit the SSA website at www.SSA.gov.

Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in box 12, using code DD, of the cost of employer-sponsored health coverage is for your information only. The amount reported with code DD is not taxable. Credit for excess taxes. If you had more than one employer in 2020 and more than \$8,537.40 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than \$5,012.70 in Tier 2 RRTA tax was withheld, you may also be able to claim a credit. See the Instructions for Forms 1040 and 1040-SR and Pub. 505, Tax Withholding and Estimated Tax.

Instructions (continued from the back of Copy B.)
Note: If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.
A-Uncollected social security or RRTA tax on tips. Include this tax on Form 1040 or 1040-SR. See the Instructions for Forms 1040 and 1040-SR.
B-Uncollected Medicare tax on tips. Include this tax on Form 1040 or 1040-SR. See the Instructions for Forms 1040 and 1040-SR.
C-Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to social security wage base), and 5).
D-Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.
E-Elective deferrals under a section 403(b) salary reduction agreement.
F-Elective deferrals under a section 408(k)(6) salary reduction SEP.
G-Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan.
H-Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See the Instructions for Forms 1040 and 1040-SR for how to deduct.
I-Nonrecurring catch-up contributions made and included on Form 4, 9, or 6.

Accessibility Filing Instructions Text for W-2, W-2c And W2 Territories for The Year 2019

Navigation

Employee Self Service > Payroll Tile > W-2 W-2c Forms Tile

Image: View W-2/W-2c Forms for Tax Year 2019

Payroll View W-2/W-2c Forms

Tax Year: 2019

Company Name: State Board for Comm. and Tech

Tax Form	Issue Date	Year End Form	Printer Version	Filing Instructions
W-2	01/16/2020	View W-2 Form	Printable W-2	Filing Instructions

Before Image 38

Non-PDF Filing Instructions text for Year End Tax Forms W-2, W-2c and W2 for the screen reader users was not defined for the Year 2019. As a result, when the Filing Instructions link was accessed, it displayed only one line of text “2019 W-2 Filing Instructions” for the screen reader users.

After Image 38

Non-PDF Filing Instructions text for the Year End Tax Forms W-2, W-2c and W2 for the screen reader users is added for the Year 2019. The Filing Instructions link displays the Filing Instructions Text in Non-PDF format for the screen reader users.

Filing Instructions

Notice to Employee

Do you have to file? Refer to the Form 1040 instructions to determine if you are required to file a tax return. Even if you don't have to file a tax return, you may be eligible for a refund if box 2 shows an amount or if you are eligible for any credit.
 Earned income credit (EIC). You may be able to take the EIC for 2019 if your adjusted gross income (AGI) is less than a certain amount. The amount of the credit is based on income and family size. Workers without children could qualify for a smaller credit. You and any qualifying children must have valid social security numbers (SSNs). You can't take the EIC if your investment income is more than the specified amount for 2019 or if income is earned for services provided while you were an inmate at a penal institution. For 2019 income limits and more information, visit www.irs.gov/eflc. Also see Pub. 596, Earned Income Credit. Any EIC that is more than your tax liability is refunded to you, but only if you file a tax return.
 Clergy and religious workers. If you aren't subject to social security and Medicare taxes, see Pub. 517, Social Security and Other Information for Members of the Clergy and Religious Workers.
 Corrections. If your name, SSN, or address is incorrect, correct Copies B, C, and 2 and ask your employer to correct your employment record. Be sure to ask the employer to file Form W-2c, Corrected Wage and Tax Statement, with the Social Security Administration (SSA) to correct any name, SSN, or money amount error reported to the SSA on Form W-2. Be sure to get your copies of Form W-2c from your employer for all corrections made so you may file them with your tax return. If your name and SSN are correct but aren't the same as shown on your social security card, you should ask for a new card that displays your correct name at any SSA office or by calling 800-772-1213. You also may visit the SSA website at www.ssa.gov.
 Cost of employer-sponsored health coverage (if such cost is provided by the employer). The reporting in box 12, using code DD, of the cost of employer-sponsored health coverage is for your information only. The amount reported with code DD is not taxable.
 Credit for excess taxes. If you had more than one employer in 2019 and more than \$8,239.80 in social security and/or Tier 1 railroad retirement (RRTA) taxes were withheld, you may be able to claim a credit for the excess against your federal income tax. If you had more than one railroad employer and more than \$4,836.30 in Tier 2 RRTA tax was withheld, you also may be able to claim a credit. See your Form 1040 instructions and Pub. 505, Tax Withholding and Estimated Tax.

Instructions for Employee

Box 1. Enter this amount on the wages line of your tax return.
 Box 2. Enter this amount on the federal income tax withheld line of your tax return.
 Box 3. You may be required to report this amount on Form 8859, Additional Medicare Tax. See the Form 1040 instructions to determine if you are required to complete Form 8859.
 Box 4. This amount includes the 1.45% Medicare Tax withheld on all Medicare wages and tips shown in box 5, as well as the 0.9% Additional Medicare Tax on any of those Medicare wages and tips above \$200,000.
 Box 5. This amount is not included in box 1, 3, 5, or 7. For information on how to report tips on your tax return, see your Form 1040 instructions.
 You must file Form 4137, Social Security and Medicare Tax on Unreported Tip Income, with your income tax return to report at least the allocated tip amount unless you can prove that you received a smaller amount. If you have records that show the actual amount of tips you received, report that amount even if it is more or less than the allocated tips. On Form 4137, you will calculate the social security and Medicare tax owed on the allocated tips shown on your Form(s) W-2 that you must report as income and on other tips you did not report to your employer. By filing Form 4137, your social security tips will be credited to your social security record (used to figure your benefits).
 Box 10. This amount includes the total dependent care benefits that your employer paid to you or incurred on your behalf (including amounts from a section 125 (cafeteria) plan). Any amount over \$5,000 also is included in box 1. Complete Form 2441, Child and Dependent Care Expenses, to compute any taxable and nontaxable amounts.
 Box 11. This amount is (a) reported in box 1 if it is a distribution made to you from a nonqualified deferred compensation or nongovernmental section 457(b) plan or (b) included in box 3 and/or 5 if it is a prior year deferral under a nonqualified or section 457(b) plan that became taxable for social security and Medicare taxes this year because there is no longer a substantial risk of forfeiture of your right to the deferred amount. This box shouldn't be used if you had a deferral and a distribution in the same calendar year. If you made a deferral and received a distribution in the same calendar year, and you are or will be age 62 by the end of the calendar year, your employer should file Form SSA-131, Employer Report of Special Wage Payments, with the Social Security Administration and give you a copy.
 Box 12. The following list explains the codes shown in box 12. You may need this information to complete your tax return. Elective deferrals (codes D, E, F, and S) and designated Roth contributions (codes AA, BB, and EE) under all plans are generally limited to a total of \$19,000 (\$13,000 if you only have SIMPLE plans; \$22,000 for section 403(b) plans if you qualify for the 15-year rule explained in Pub. 571). Deferrals under code G are limited to \$19,000. Deferrals under code H are limited to \$7,000. However, if you were at least age 50 in 2019, your employer may have allowed an additional deferral of up to \$6,000 (\$3,000 for section 401(k)(11) and 408(p) SIMPLE plans). This additional deferral amount is not subject to the overall limit on elective deferrals. For code G, the limit on elective deferrals may be higher for the last 3 years before you reach retirement age. Contact your plan administrator for more information. Amounts in excess of the overall elective deferral limit must be included in income. See the instructions for Form 1040.

Instructions (continued from the back of Copy B)

Note: If a year follows code D through H, S, Y, AA, BB, or EE, you made a make-up pension contribution for a prior year(s) when you were in military service. To figure whether you made excess deferrals, consider these amounts for the year shown, not the current year. If no year is shown, the contributions are for the current year.
 A Uncollected social security or RRTA tax on tips. Include this tax on Form 1040. See the Form 1040 instructions.
 B Uncollected Medicare tax on tips. Include this tax on Form 1040. See the Form 1040 instructions.
 C Taxable cost of group-term life insurance over \$50,000 (included in boxes 1, 3 (up to social security wage base), and 5)
 D Elective deferrals to a section 401(k) cash or deferred arrangement. Also includes deferrals under a SIMPLE retirement account that is part of a section 401(k) arrangement.
 E Elective deferrals under a section 403(b) salary reduction agreement.
 F Elective deferrals under a section 408(k)(9) salary reduction SEP.
 G Elective deferrals and employer contributions (including nonelective deferrals) to a section 457(b) deferred compensation plan.
 H Elective deferrals to a section 501(c)(18)(D) tax-exempt organization plan. See the Form 1040 instructions for how to deduct.
 J Nontaxable sick pay (information only, not included in box 1, 3, or 5).
 K 2019 SIMPLE plan contributions. See the Form 1040 instructions.



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Washington State Board for Community and Technical Colleges