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
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**

**QRG**

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

QRG
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
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
Choose either box 1 or box 2:

1. Withhold from gross taxable wages at the percentage checked (check only one percentage):
   - □ 0.8%
   - □ 1.3%
   - □ 1.8%
   - □ 2.7%
   - □ 3.8%
   - □ 4.2%
   - □ 5.1%

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: __________________________
Date: 05/07/2021

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.

What are my “Gross Taxable Wages”? 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.

New Employees
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.

Current Employees
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.

What Should I Do With Form A-4?
Give your completed Form A-4 to your employer.

Electing a Withholding Percentage of Zero
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.

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.

Voluntary Withholding Election by Certain Nonresident Employees
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.

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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
Form ID W-4

Employee’s Withholding Allowance Certificate

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.

Withholding Status

Check the “A” box (Single) if you’re:
- Single with one job or single with multiple jobs
- Filing as head of household

Check the “B” box (Married) if you’re:
- 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:
- Married filing jointly and both people work (or you have multiple jobs)
- Married filing separately

WITHHOLDING STATUS

A [ ] (Single) B [ ] (Married) C [ ] (Married, but withhold at Single rate)

1. Total number of Idaho allowances you’re claiming

2. Additional amount (if any) you need withheld from each paycheck (Enter whole dollars)

Your first name and initial

Last name

Current mailing address

City

State

ZIP Code

Your Social Security number (required)

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

EFO00387 12-22-2020

Submit
QRG

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
**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:**
- **City:**
- **State:**
- **ZIP Code:**

- **Marital Status:**
  - Single
  - Married, but withholds at single rate
  - Married, but withholds at higher single rate

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.
- **B** Enter “1” if any of the following apply:
  - 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.)
- **D** Enter the number of dependents (other than your spouse or yourself) you will claim on your tax return.
- **E** Enter “1” if you will use the filing status Head of Household (see instructions).
- **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.

**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
  - I am an American Indian that resides and works on a reservation
  - 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
  - I receive a military pension or other military retirement pay as calculated under U.S. Code, title 10, sections 1401 through 1414, 1447 through 1445, and 12738, and I claim exempt from Minnesota withholding on this retirement pay

**Minnesota Allowances and Additional Withholding**

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

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.

**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.

<table>
<thead>
<tr>
<th>Name of Employer</th>
<th>Federal Employer ID Number (FEIN)</th>
<th>Minnesota Tax ID Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address</td>
<td>City, State, ZIP Code</td>
<td></td>
</tr>
</tbody>
</table>

**Submit**

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**QRG**

*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

QRG

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

Image: PDF Version of Timesheet
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
Year End Accessibility definitions for Effective Dates 2012 to 2019 were available prior to the update.

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.
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.

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

**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**

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 W-2 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.