


Monterey County Office of Education

Dr. Nancy Kotowski
County Superintendent of Schools

Finance and Business Services

Bulletin No. 14-012

TO: Chief Business Officials and Payroll Clerks

FROM:  Suzette Burns, Administrator – Business Services

DATE: November 18, 2013

RE: **This Memorandum Serves as Guidance Regarding Employees Claiming Exempt Status**

Employees claiming exempt during 2013 on their IRS Form W-4, Employee's Withholding Allowance Certificate must complete a new form by February 15, 2014 to keep their "exempt" status. If a new form is not received by this date, you must withhold tax at the single rate with zero allowances.

Attached are instructions to generate a list of your employees that are set-up in Escape with 99 exemptions for their Federal allowances.

If you have any questions, please contact me at (831) 755-0305.

Instructions Printing Exempt Employees List

HR/PAYROLL-EMPLOYMENT-EMPLOYEE MANAGEMENT

Section 1-Personal

- Active Employees criteria select "Yes" from drop-down menu

The screenshot shows a window titled "Search Criteria - Employees". Under the "1 - Personal" section, the following fields are visible: Employee Id, SSN, Last Name, Include Previous Name (with a value of "Yes - include in last name search"), First Name, SEID State Id, Person Id, PERS Member Id, Employee Ref Number, and Employment Status. The "Employment Status" field has a dropdown menu with "Active Employees" selected and "Yes" displayed next to it. Other options in the dropdown include "Employees Only".

Section 9-Tax Setup

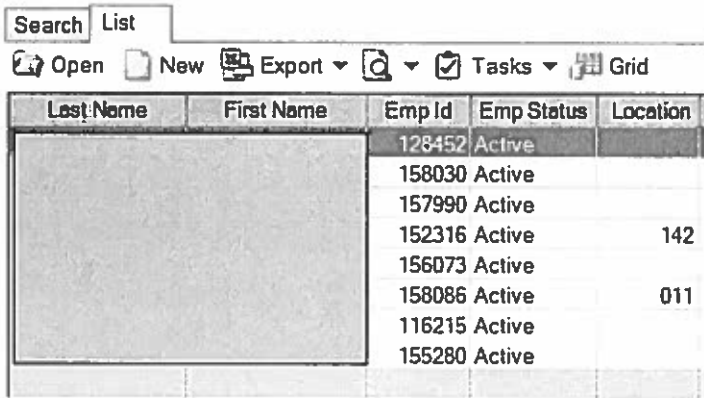
- Federal Exemptions criteria enter "99"

The screenshot shows the same "Search Criteria - Employees" window, but with the "9 - Tax Setup" section expanded. The fields visible are: Tax As Of Date, Tax Start Date, Tax End Date, Federal Marital Status, Federal Exemptions (with a value of "99"), and Federal Additional Amount Minimum. The "Federal Exemptions" field has a dropdown menu with "99" selected.

- <click> Go button

The screenshot shows a search bar with the text "Search" and a search icon. Below the search bar are four buttons: "Go", "Clear", "New", and "Favorites".

List will appear on screen



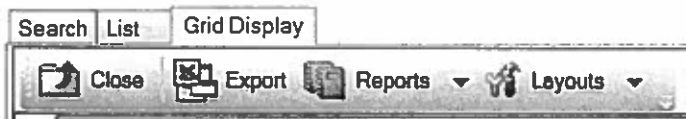
Last Name	First Name	Emp Id	Emp Status	Location
		128452	Active	
		158030	Active	
		157990	Active	
		152316	Active	142 f
		156073	Active	
		158086	Active	011 f
		116215	Active	
		155280	Active	

➤ <click> Grid button



➤ <click> Reports button

➤ Select "Make Report" from drop-down menu



➤ <click> button w/ printer icon