


Monterey County Office of Education

Dr. Nancy Kotowski
County Superintendent of Schools

Finance and Business Services

Bulletin No. 15-006

TO: Chief Business Officials and Payroll Clerks

FROM:  Suzette Burns, Administrator – Business Services

DATE: December 10, 2014

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

Employees claiming exempt during 2014 on their IRS Form W-4, Employee's Withholding Allowance Certificate must complete a new form by February 15, 2015 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.

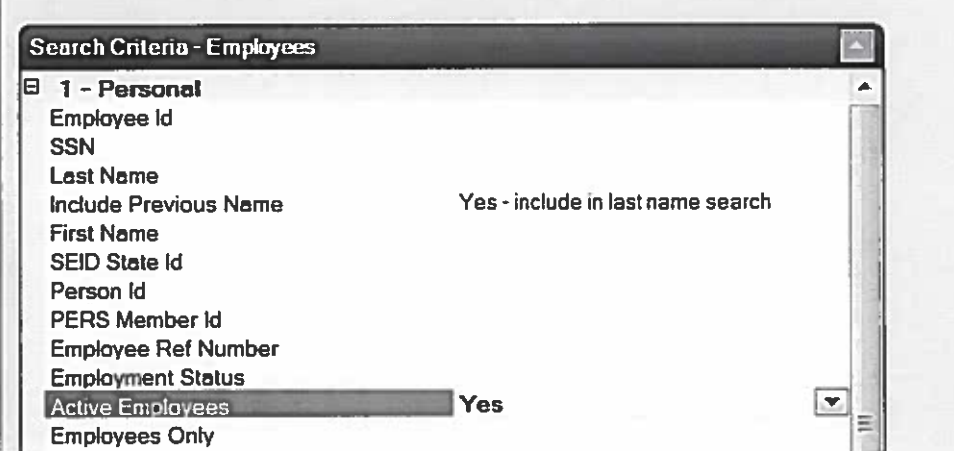
If you have any questions, please contact me at (831) 755-0305.

Instructions Printing Exempt Employees List

HR/PAYROLL-EMPLOYMENT-EMPLOYEE MANAGEMENT

Section 1-Personal

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

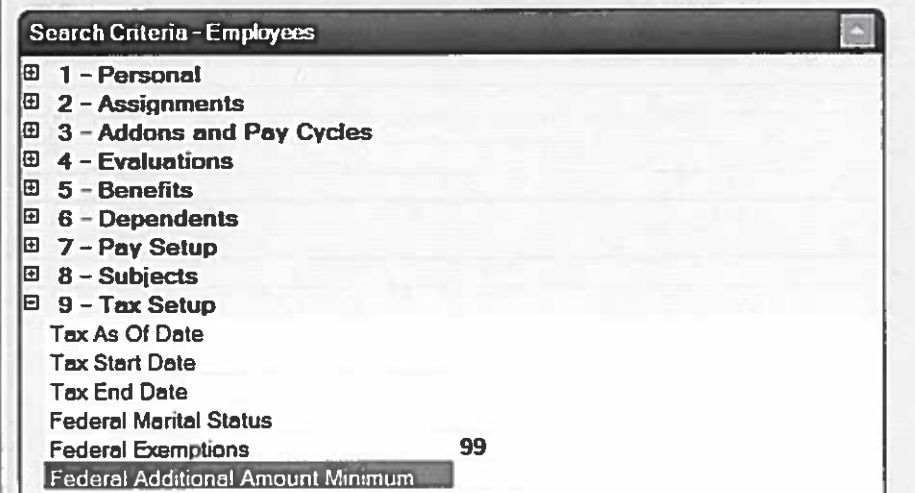


Search Criteria - Employees

- 1 - Personal
 - Employee Id
 - SSN
 - Last Name
 - Include Previous Name Yes - include in last name search
 - First Name
 - SEID State Id
 - Person Id
 - PERS Member Id
 - Employee Ref Number
 - Employment Status
 - Active Employees** Yes
 - Employees Only

Section 9-Tax Setup

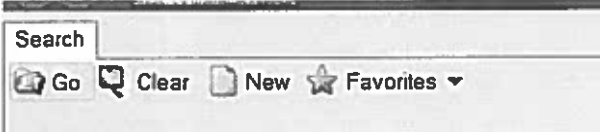
- Federal Exemptions criteria enter "99"



Search Criteria - Employees

- 1 - Personal
- 2 - Assignments
- 3 - Addons and Pay Cycles
- 4 - Evaluations
- 5 - Benefits
- 6 - Dependents
- 7 - Pay Setup
- 8 - Subjects
- 9 - Tax Setup
 - Tax As Of Date
 - Tax Start Date
 - Tax End Date
 - Federal Marital Status
 - Federal Exemptions 99
 - Federal Additional Amount Minimum**

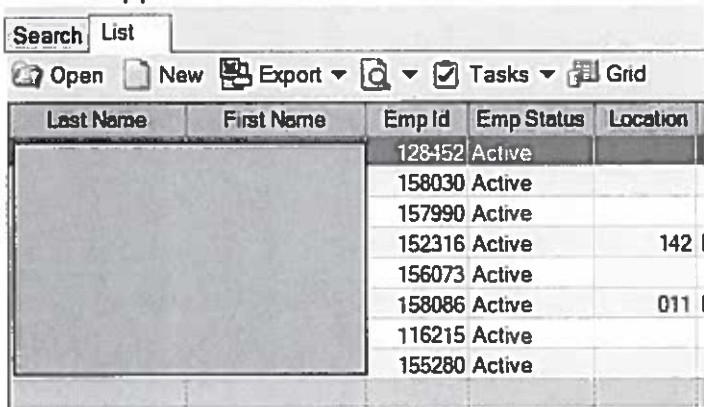
- <click> Go button



Search

Go Clear New Favorites

List will appear on screen



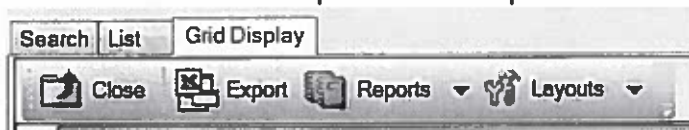
| Last Name | First Name | Emp Id | Emp Status | Location |
|-----------|------------|--------|------------|----------|
| | | 128452 | Active | |
| | | 158030 | Active | |
| | | 157990 | Active | |
| | | 152316 | Active | 142 I |
| | | 156073 | Active | |
| | | 158086 | Active | 011 I |
| | | 116215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

➤ <click> Grid button



➤ <click> Reports button

➤ Select "Make Report" from drop-down menu



➤ <click> button w/ printer icon