

# Monterey County Office of Education

Dr. Nancy Kotowski  
County Superintendent of Schools


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Finance and Business Services

Bulletin No. 16-006

TO: Chief Business Officials and Payroll Clerks

FROM:  Suzette Burns, Administrator – Business Services

DATE: December 1, 2015

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

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Employees claiming exempt during 2015 on their IRS Form W-4, Employee's Withholding Allowance Certificate must complete a new form by February 15, 2016 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**

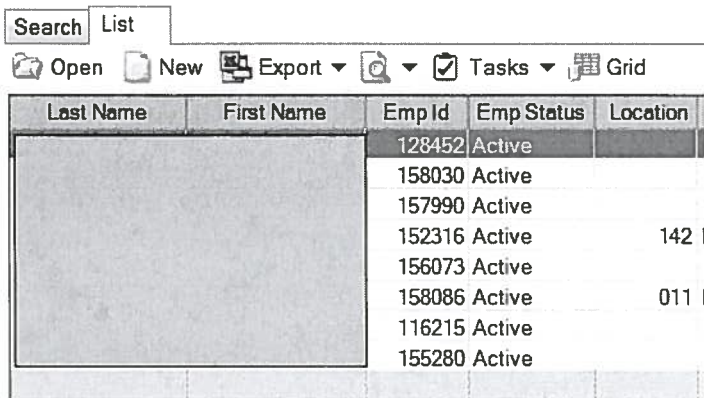
- 1 - Personal
- 2 - Assignments
- 3 - Addons and Pay Cycles
- 4 - Evaluations
- 5 - Benefits
- 6 - Dependents
- 7 - Pay Setup
- 8 - Subjects
- 9 - Tax Setup
  - Tax As Of Date
  - Tax Start Date
  - Tax End Date
  - Federal Marital Status
  - Federal Exemptions 99
  - Federal Additional Amount Minimum

- <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
		156073	Active	
		158086	Active	011
		116215	Active	
		155280	Active	

➤ <click> Grid button



➤ <click> Reports button

➤ Select "Make Report" from drop-down menu



➤ <click> button w/ printer icon