Addendum to Service Request 14844

Final

12/01/00

This addendum addresses two additional requirements that were not included in the original service request.

The requirements document for service request 14844 asks, among other things, that PPS be modified to store specified federal and state withholding tax data on the History Data Base (HDB).

It has been subsequently noted that a new on-line history inquiry screen needs to be provided to display tax data.

PPS Modifications

New On-line Screen

A new on-line history inquiry screen needs to be provided to display tax data. The new screen should display the following data elements:

EDB 0127 - FEDERAL TAX-MARITAL STATUS CODE
EDB 0128 - FEDERAL TAX-WITHHOLDING ALLOWANCES
EDB 0320 - FEDERAL TAX-MAXIMUM WITHHOLDING ALLOWANCES
EDB 0130 - STATE TAX-MARITAL STATUS CODE
EDB 0131 - STATE TAX-PERSONAL WITHHOLDING ALLOWANCES
EDB 0132 - STATE TAX-ITEMIZED DEDUCTION WITHHOLDING ALLOW
EDB 0321 - STATE TAX-MAXIMUM WITHHOLDING ALLOWANCES
EDB 0340 - TAX PROCESSOR ID
EDB 0338 - W-4 PROCESS DATE
EDB 0339 - DE4 PROCESS DATE
EDB 6301 - ADDL NONRES ALIEN FED TAX
EDB 6010 - ADDITIONAL FED TAX
EDB 6011 - ADDITIONAL CAL TAX
Field level help should be provided for each data element on the screen. As with existing history inquiry screens, field level help for the corresponding EDB data elements should be used.

Screen level help text should be developed for the new “Tax Data” screen. Suggested text for the screen:

**HDBHIHW4  Tax Data**

**Function:** IHW4 is displayed when the user requests the IHW4 function. IHW4 enables the user to view general historical tax data for an employee, one historical entry per screen. The IHW4 function allows the user to both view and enter a value in the "Incorrect Flag" field. The user can view historical records for a specific entry date by entering that date in the field labeled 'Date:' in the footer. If the user leaves the 'Date:' field blank, the record with the most recent date will be displayed first.

The user can avoid viewing records flagged as incorrect by entering "N" in the field labeled "View Incorrect Records?". A "Y" entered in the field will retrieve both correct and incorrect records.

The user can update the "Incorrect Flag" field to change the designation from "correct" to "incorrect" by entering an "X" in the "Incorrect Flag" field. If the field is set to "X", the user may change the designation from "incorrect" to "correct" by entering an "*" in the Incorrect Flag field, which will reset the field to blank.
**Nature of Information:** IHW4 displays tax information for the employee.

There are no highly abbreviated or group fields on IHW4.

**Command ===>>**
F1=Help  F2=EX help  F3=eXit  F4=copy  F6=move  F7=BKwd  F8=FWd  F12=Cancel

**Existing On-line Screen**

**IHDB Screen**

The new function code IHW4 should be added to the IHDB menu, as follows:

```
| UCFM140-M0967                  | History Inquiry            | 11/29/00 08:21:36 |
| Inqury Function Code Menu     | Userid: PAYPCW             |

_ IATN Action Code Data_                  _ ILIC License Data_
_ IAPN Appointment Data_                  _ IMBR Membership Data_
_ IAWD Award Data_                       _ IMTH Monthly Accumulators_
_ IBA1 Basic Employment Data 1_           _ IOFF Layoff Data_
_ IBA2 Basic Employment Data 2_           _ IQTR Quarterly Accumulators_
_ IBKG Background Check Data_             _ ISAB Sabbatical Credit_
_ IBN1 Benefits Data 1_                   _ ISVC Service Credit Data_
_ IBN2 Benefits Data 2_                   _ IYRL Yearly Accumulators_
_ ICBG Collective Bargaining Date_        _ ILOK Selection_
_ IDST Appointment Distribution Data_     _ UHDB Update Function Code Menu_
_ IFSC Fiscal Accumulators_               _ IHW4 Tax Data_
_ IHNR Honors Data_                       _ _
_ ILCR Layoff Seniority Credit Data_      _ _
_ ILEV Leave of Absence Data_             _ _

Next Func: ID: Name: SSN: View incorrect records?

===>>
F: 1-Help 3-PrevMenu 4-Print
F: 9-MainMenu 12-Exit
```

**Derivation of W-4 Form Processed Indicator**

The PPP130 process that handles transaction from the web/IVR application should be modified to set the W-4 Form Processed Indicator (EDB0164) to “1” whenever one or more of the following data elements are updated:

- EDB 0127 - Federal Tax-Marital Status Code
- EDB 0128 - Federal Tax-Withholding Allowances
- EDB 6010G - Federal Tax-Additional Amount
- EDB 0130 - State Tax-Marital Status Code
- EDB 0131 - State Tax-Personal Withholding Allowances
- EDB 0132 - State Tax-Itemized Deduction Withholding Allowances
- EDB 6011G - Additional California Tax