

SCREEN 102 - TAX <OASI/UCI/EIC/FIT/SIT>

This screen contains information relating to Social Security/Old Age & Survivors Income insurance (OASI), Benefit Replacement Pay (BRP), (the replacement for employer paid Social Security (EOASI)), unemployment compensation insurance (UCI), federal income tax (FIT), and state income tax (SIT). Advanced payment of earned income credit (EIC) was discontinued 1/1/2011.

Processing Notes

The FIT and OASI/OAHI Deduction Codes of 'S' (Student exemption) are set through the processing of the student exemption files generated from the student enrollment systems for each university campus. If enrolled and not benefit eligible (the program determines that by checking the retirement deduct codes), then they are given the student exemption. This flag is verified from data submitted immediately prior to the processing of each payroll. This automated process may override flags set manually. If there is a need to adjust the flag for a student employee, please contact BPP Production Control to assist in the adjustment of the flag on the appropriate campus file.

102 TAMUS B/P/P - OASI/UCI/EIC/FIT/SIT - Inquiry						02/05/14 16:39	
						P BPP0009 R019	
Screen: A1							
UIN: A2		Name: A3					
Ded Cd	YTD-Ded	YTD-Pymt	YTD-CE	Grad Tuition Wvr:		B5	
OASI B1	B2	B3	B4	BRP: Elig C4 Amt		C5	
OAHI	C1	C2	C3	Thrshld C8 Rt		C9	
OAHI-ADDL	C6		C7				
UCI-Ded-Cd D1	County D2	Exp-Ern	D3	FYTD-Cvrd-Ern D4			
FIT-Ded-Cd E1	Marital E2	Allow E3	Addl-Amt E4	YTD-Ded	E5		
	FIT-Lock E6		Exp-Amt	E7	YTD-Adj-CE E8		
Frn-Natl	Arrvl-Dt F1		Prior-Vst F2	YTD-Trty-CE	F3		
	Exp-Dt F4		Treaty F5	Subs-PRS F6	ETD-Trty-CE F7		
	Glacier Complete F8	Wrk-Wtn F9					
Form 673	Arrvl-Dt G1	Exp-Dt G2	YTD-Exp-Amt		G3		
SIT-Ded-Cd H1	Marital H2	Dep H3	Addl-Amt H4	YTD-Ded	H5		
	State H6	Ad-Dep H7	Exp-Dt H8	YTD-Adj-CE	H9		
Comments							
F1=Help, F2=Comm, F3=Exit, F4=Main, F5=Prev, F6=Next, F9=Log, F10=Exp							

Field Name		Description
A1	Screen	See System Overview
A2	UIN	See System Overview
A3	Name	Employee Name, must be greater than four (4) characters in length.
B1	OASI/OAHI Ded Cd	Old Age, Survivors and Disability Insurance (Social Security)/ Health Insurance (Medicare) Deduction Code: F - Foreign National, Exempt G - Government Employee (Federal Retirement, Exempt) S - Student exemption from OASI/OAHI deduction (see <i>Processing Notes</i> , above) Y - Compute OASI, Subject up to the Cutoff Less Exempt Amount
B2	OASI YTD-Ded	Year to date total of employee's OASI deduction
B3	OASI YTD-Empr-Pmt	Year to date total of employer's payment toward employee's OASI
B4	OASI YTD-Emp-CE	Year to date total employee's earnings subject to OASI withholding
B5	Grad Tuition Waver	YTD amount of tuition waived.
C1	OAHI YTD-Emp-Ded	Year to date total of employee's OAHI deductions
C2	OAHI YTD-Empr-Pmt	Year to date total of employer's payments toward employee's OAHI
C3	OAHI YTD-Emp-CE	Year to date total of employee's earnings subject to OAHI withholding
C4	BRP-Elig	Y - Eligible for Benefit Replacement Pay (New State employees after 9/1/95 are not eligible) N - Not Eligible (New State employees after 9/1/95 are not eligible)
C5	BRP -Amt	OAHI Benefit Replacement Pay: Blank or not less than zero nor greater than 1034.01
C6	OAHI-Addl YTD-Emp-Ded	Year to date total of employee's additional OAHI deductions
C7	OAHI-Addl-YTD-Emp-CE	Year to date total of employee's earnings above the threshold subject to additional OAHI withholding
C8	OAHI-ADDL Threshold	Year to date OAHI covered earnings amount above which an additional deduction amount is taken
C9	OAHI-Addl Rate	The rate used to calculate the additional OAHI deduction amount
D1	UCI-Ded-Cd	Unemployment Compensation Insurance: N - Do not compute deduction (on0) Y - Compute deduction

Field Name		Description
D2	County	UCI County Code: 1 through 254, code for county where employed, See Code Book – this is a BPP number not the county code assigned by the State
D3	Exp-Ern	UCI Exempt Earnings: Blank or dollar amount greater than or equal to zero
D4	FYTD-Cvrd-Ern	Fiscal year to date total of employee’s earnings subject to UCI withholding
E1	FIT-Ded-Cd-	Federal Income Tax Deduction Code: B - Deduct Additional Amount Only (phasing out) E - Exempt F - Foreign National, Exempt (under tax treaty program) P - U. S. citizen residing outside country eligible for exemption based upon Form 673 R - Residency Outside US - Exempt S - Student exemption from FIT deduction (see <i>Processing Notes</i> , above) T - Tax Employee’s Total Income (Ignore Exemption Amount) Y - Compute Tax in Normal Manner (include additional amount, if any) HRConnect will not allow the employee to make updates if this flag is “F”.
E2	Marital	M - Married S - Single
E3	Allow	Number of exemptions – Zero through 99
E4	Addl-Amt	Additional Amount – Blank or a dollar amount greater than or equal to zero (#5 on W4)
E5	YTD-Ded	Year to date total of employee’s federal income tax withholding
E6	FIT-Lock	Y - Cannot change the marital status and number of dependents (to remove the lock, enter “-”) Blank - Not locked (to remove the lock, enter “-”) HRConnect will not allow the employee to make updates if this flag is “Y”.
E7	Exp-Amt	Exempt Earnings – Blank or a dollar amount greater than or equal to zero (must be blank for all non-federal employees)
E8	YTD-Adj-CE	Year to date total of employee’s adjusted gross income subject to FIT withholding
F1	Frn Natl Arrvl Dt	FIT Foreign National Arrival Date - MM DD YYYY (required if FIT Deduction Code is ‘F’)
F2	Prior Vst	FIT Foreign National Prior Visit: Y - Has been to U.S. previously Blank or N - No previous visit to U.S.
F3	YTD Trty CE	Year to date total of employee’s earnings exempt from FIT withholding under a tax treaty
F4	Exp-Dt	Exemption Date - MM DD YYYY (must be present if FIT Deduction Code is E, F or R), FIT Deduction Code will be reset in February if date is less than current calendar year for deduction

Field Name		Description
		code 'E'; in November/December for deduction code 'F' (#6 on W4)
F5	Treaty	FIT Treaty Code - Numeric, validated against Tables File (required if FIT Deduction Code is F)
F6	Subs-PRS	Substantial Presence: Blank - does not meet substantial presence test N - does not meet substantial presence test Y - Does meet substantial presence test, not subject to the single and one with additional amount withholding status for foreign nationals
F7	ETD-Trty-CE	Earnings to date Treaty Covered Earnings - Amount exempt from FIT withholding under a tax treaty
F8	Glacier Complete	Tracks Glacier completion status of resident and nonresident aliens. Blank - Not applicable N - Has not been completed Y - Has been completed
F9	Glacier Wrk-Stn	Work Station receiving the Glacier paperwork
G1	Form 673 Arrvl-Dt	MM DD YYYY (required if FIT deduct code is P)
G2	Exp-Dt	Form 673 Exemption Date MM DD YYYY - Must be present if FIT deduct code is P. FIT Exemption Date will be re-posted in November/December
G3	YTD-Exp-Amt	Year to date earnings subject to be exempt from FIT
<i>EIC was discontinued 1/1/2011</i>		
H1	SIT-Ded-Cd	State Income Tax Deduction Code: Y - Compute deduction B - Boarder City State Employee Exemption (will only have their covered wage incremented) E - Wage Exemption (will only have their covered wage incremented) Blank - Do not compute deduction N - Do not compute deduction
H2	Marital	SIT Marital Status: - Blank, not required (MD, PA, VA) A - 0.8% (AZ) Cd A (CT, NJ) (AZ, CT, NJ) B - 1.3% (AZ) Cd B (CT, NJ) (AZ, CT, NJ) C - 1.8% (AZ) Cd C (CT, NJ) (AZ, CT, NJ) D - 2.7% (AZ) Cd D (CT, NJ) (AZ, CT, NJ) E - 3.6% (AZ) Cd E (NJ) (AZ, NJ) F - Mrd as sngl (AL) Cd F (CT) (AL, CT) H - Head of household (AL, CA, MA, MO, NC) I - 4.2% (AZ) J - 5.1% (AZ) M - Married (All, not AZ, CT) O - No personal exemptions (AL) S - Single (All, not AZ, CT) T - Two income (GA, MO)
H3	Dep	SIT Dependents - Number of Exemptions zero through 30. Valid values for the State of Arkansas are Zero through 2 (1 = self, 2 = self and spouse).

Field Name		Description
H4	Addl-Amt	SIT Additional Amount – Either leave blank or enter a dollar amount greater than or equal to zero. (Less than zero allowed for Connecticut only to accommodate a reduction amount entered on an employee’s Connecticut form W4.)
H5	YTD-Ded	Year to date total of employee’s state income tax withholding
H6	State	SIT State Code - Valid state abbreviation on Tables File
H7	Ad-Dep	SIT Additional Dependents - Zero through 30. If > zero, the state MUST = CA or AR. For the state of Arkansas, this is the number of dependents in addition to self and spouse. 1 is also allowed for Massachusetts, signifying a blindness exemption.
H8	Exp-Dt	SIT Exemption Post Date MM DD YYYY
H9	YTD-Adj-CE	Year to date Adjusted Covered Earnings - Year to date total of employee’s adjusted gross income subject to SIT withholding

Function Keys

F1 = Help

This function key can be used on any field that is set up for extended help. An example is OASI-Ded-Cd, pressing the PF1 key on this field will bring up a pop up window showing all codes and their associated descriptions.

F2 = Comm

This function key will bring up the generic comment utility program. Exentend documentation for the generic comment utility program can be found on the B/P/P Website. Go to the **User Resources** Tab, the comment Documentation along with a comment video can be found under the **BPP System** section.

F3 = Exit

Back to the 100 TAMUS B/P/P - Personnel Maintenance Menu.

F4=Main

Back to the 000 TAMUS Budget/Payroll/Personnel System Menu

F5 = Prev

This function key will take you back to the Previous Screen.

F6 = Next

This function key will take you back to the Next Screen.

F9 = Log

F9 Log function key will allow you to see Fields that have been logged. Logging information can also be viewed By using Screen 680. Both the PF9 Key and Screen 680 work the same and are similar to the Comment Utility.

For detailed operation instructions to view logged data, please refer to Screen 680 documentation.

<http://www.tamus.edu/assets/files/bpp/pdf/screens/680.pdf>

F10 = Exp

This function key will provide a menu of Expanded Tax Screens. The Expanded Screens have expanded Descriptions of the fields shown on Screen 102. These screens provide more information and also will Display the last update of any logged fields. The pop-up window and associated expanded screens are shown Below.

Expanded Tax Screens

Below is the pop-up window that is shown after pressing the PF10 Key. To select an expanded screen simply place any character next to the Expanded Screen of your choice.

```
+-----+
|
|          TAMUS B/P/P Expanded Tax Screens
|
|  _ OASI/OAHI Old Age Survivors & Health Insurance
|  _ UCI  - Unemployment Compenstation Insurance
|  _ FIT  - Federal Income Tax
|  _ SIT  - State Income Tax
|
|  _
|  _
|  _
|  _
|  _
|
|          F3=Exit
|
+-----+
```

```
102 TAMUS B/P/P - Expanded OASI/OAHI Deductions          02/05/14 07:48
                                                    BPP0009 R019
UIN: XXX00XXXX      Name: AGGIE JOE                    Wrk Stn: X      Status: A

OASI-Ded-Cd  Y - Compute OASI/OAHI

Old Age, Disability & Survivors Income Insurance Deduction (Social Security)
  YTD Employee  9999.99      YTD Covered Earnings Subject to OASI  999999.99
  YTD Employer  9999.99      OASI Covered Earnings Cap  999999.99
  Employee Rate  0.9999      Employer Rate  0.0620

Old Age Health Insurance (Medicare)
  YTD Employee  99999.99      YTD Covered Earnings Subject to OAHI  9999999.99
  YTD Employer  99999.99
  OAHI Rate  0.9999      No OAHI Covered Earnings Cap
  YTD Addl Employee  99999.99      YTD CE subject to additional OAHI  9999999.99
  Additional Rate  0.9999      Threshold at which addl OAHI applies  999999.99
```

Logging - Last Update
Field Code

	UpdUIN	Id	Ip
Old			

F1=Help, F3=Exit

Screen 102 TAMUS B/P/P - Expanded UCI Deduction

09/14/12 14:18

Function _ (F3=Exit)

UIN XXX00XXXX Name AGGIE JOE

Unemployment Compensation Insurance

UCI Ded Cd Y Compute deduction County 021 BRAZOS

UCI Exempt Earnings

UCI FYTD Covered Earnings

Comment testing summary comment

Screen 102 TAMUS B/P/P - Expanded FIT Deduction

09/14/12 14:22

Function _ (F3=Exit)

UIN XXX00XXXX Name AGGIE JOE

Federal Income Tax Deduction

FIT Ded Cd Y Compute tax in normal manner Marital M

Additional-Amount No Dep 3

Exempt-Amount

Comment testing summary comment

Logging - Last Update

Field Code FIT 02/19/2008 09:02:50 HRCONNECT WEB PAGE Wrk Stn S

UpdUin Id PDWUHR47 Ip 128.194.93.42

Old FIT NO DEP 9 FIT LAST UPDT 20070226

Screen 102 TAMUS B/P/P - Expanded FIT Deduction

09/14/12 14:24

Function _ (F3=Exit)

UIN XXX00XXXX Name AGGIE JOE

State Income Tax

SIT-Ded-Cd Y Compute deduction Marital M Married

State WI STATE OF WISCONSIN

Additional-Amount Dependents 5 Addl-Dep

Exemption-Post-Date 08 16 2011

Comment testing summary comment

