

Update Employee Tax Info Federal Tax Data Tab Job Aid

Core-CT 9.1 brings several changes to the **Federal Tax Data** tab of the **Update Employee Tax Data** component. These changes are described in this section.

Navigation: Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data

The **Special Withholding Tax Status** field is a drop down list in Core-CT 9.1 located in the Federal Withholding Elements group Box. In Core-CT 8.9, the option for special withholding was indicated by selecting a radio button in the **Special Withholding Tax Status** group box. The drop down list options on the new page are the same as the radio button options on the old page.

Core-CT 9.1

Federal Withholding Elements

*Special Withholding Tax Status: None

*Tax Marital Status: Single Single

Check here and select Single status if married but withholding at single rate.

Withholding Allowances: 0

Additional Amount: \$20.00

Additional Percentage: 0.000

*Earned Income Credit Status: Not applicable

Exempt from FUT

Core-CT 8.9

Special Withholding Tax Status

None

Do Not Maintain Taxable Gross and Do Not Withhold Tax

Maintain Taxable Gross

Non-Resident Alien; Tax Treaty/NR Data

W-4 Processing Status: None Notification Sent New W-4 Received

In Core-CT 9.1 the options for **W-4 Processing** status are located in their own group box. In Core-CT 8.8, these options are listed in the the **Special Withholding Tax Status** group box.

Core-CT 9.1

W-4 Processing Status

None

Notification Sent

New W-4 Received

Core-CT 8.9

Special Withholding Tax Status

- None
- Do Not Maintain Taxable Gross and Do Not Withhold Tax
- Maintain Taxable Gross
- Non-Resident Alien; Tax Treaty/NR Data

W-4 Processing Status: None Notification Sent New W-4 Received

The **Tax Marital Status** field in Core-CT 9.1 is a drop down list located in the **Federal Withholding Elements** group box. In Core-CT 8.9, **Tax Marital Status** options are selected using radio buttons in the **Federal Withholding Status** Group box.

Core-CT 9.1

Federal Withholding Elements

*Special Withholding Tax Status: ▼

*Tax Marital Status: ▼

Check here and select Single status if married but withholding at single rate.

Withholding Allowances:

Additional Amount:

Additional Percentage:

*Earned Income Credit Status: ▼

Exempt from FUT

Core-CT 8.9

Federal Withholding Status

Tax Marital Status: Single Married

Withholding Allowances:

Check here and select Single status if married but withholding at single rate.

In Core-CT 9.1 the **Withholding Allowances**, **Additional Amount**, and **Additional Percentage** fields are located in the **Federal Withholding Elements** group box. In Core-CT 8.9 two of the last two of these fields have different names—**Amount** and **Percentage**. These fields are located in the **FWT Additional Amount** group box.

Core-CT 9.1

Federal Withholding Elements	
*Special Withholding Tax Status:	None
*Tax Marital Status:	Single <input type="checkbox"/> Single
<input type="checkbox"/> Check here and select Single status if married but withholding at single rate.	
Withholding Allowances:	0
Additional Amount:	\$20.00
Additional Percentage:	0.000
*Earned Income Credit Status:	Not applicable
<input checked="" type="checkbox"/> Exempt from FUT	

Core-CT 8.9

Federal Withholding Status	
Tax Marital Status: <input checked="" type="radio"/> Single <input type="radio"/> Married	Withholding Allowances: 0
<input type="checkbox"/> Check here and select Single status if married but withholding at single rate.	
Flagged for IRS	
<input type="checkbox"/> W4 Flagged for Transmission	
FWT Additional Amount	
Amount: \$200.00	Percentage:

Core-CT 9.1 and Core-CT 8.9 contain the same fields related to Tax Treaties and Non-residents. In some cases these fields have different labels or are located in a different order on the page. For example, the Core-CT 8.9 **Form 8233 Recd** field is **Form 8233 Received** in Core-CT 9.1 and the **Date of Entry** field in Core-CT 8.9 displays in the **Tax Treaty/NR Data** group box and in the **Education and Government** group box in Core-CT 9.1.

Core-CT 9.1

▼ Tax Treaty/Non-Resident Data

Country:	<input type="text"/>	Treaty ID:	<input type="text"/>
*Form W-9 Received:	<input type="text" value="No"/>	Form W-9 Effective Date:	<input type="text"/>
Taxpayer ID Number:	<input type="text"/>	NRA Withholding Rule:	<input type="text" value="Subj Rule"/>

▼ Education and Government

Date of Entry:	<input type="text"/>	Treaty Expiration Date:	<input type="text"/>
*Form 8233 Received:	<input type="text" value="No"/>	Form 8233 Effective Date:	<input type="text"/>
Form 8233 Expiration Date:	<input type="text"/>	*Form W-8 Received:	<input type="text" value="No"/>
Form W-8 Effective Date:	<input type="text"/>	Form W-8 Expiration Date:	<input type="text"/>

Core-CT 8.9

Tax Treaty/NR Data

Date of Entry:	<input type="text"/>	Country:	<input type="text"/>	Treaty ID:	<input type="text"/>	Treaty Exp Date:	<input type="text"/>
*Form 8233 Recd:	<input type="text" value="No"/>	8233 In Effect Date:	<input type="text"/>	8233 Exp Date:	<input type="text"/>	W8 In Effect Date:	<input type="text"/>
*Form W8 Recd:	<input type="text" value="No"/>	W8 Exp Date:	<input type="text"/>	W9 In Effect Date:	<input type="text"/>	W9 Exp Date:	<input type="text"/>
*Form W9 Recd:	<input type="text" value="No"/>	Taxpayer ID Number:	<input type="text"/>	NRA Withholding Rule:	<input type="text" value="Subject to Rule"/>		

Core-CT 9.1 contains a new field, not present in Core-CT 8.9, the **Earned Income Credit Status** field located in the **Federal Withholding Elements** group box.

Core-CT 9.1

Federal Withholding Elements

*Special Withholding Tax Status:

*Tax Marital Status: Single

Check here and select Single status if married but withholding at single rate.

Withholding Allowances:

Additional Amount:

Additional Percentage:

Earned Income Credit Status:

Exempt from FUT