

When EDD DE-4 Military Spouse Box is Checked

The DE-4 form has been modified and provides a specific line for military spouse to attest under penalty of perjury exemption from State of California withholdings. If an audit is performed, it may be requested from the employer, or the employee, to verify the tax exemption. Two example documents that meet verification requirements are a recent service member's Leave and Earnings Statement or the Military Spouse's driver's license. A copy of the driver's license is part of the I-9 requirement.

ESCAPE Tax Tab Setup

Step 1 - Go to HR/Payroll – Employment – Employee Management – Tax Tab

- State Marital Status: S {Single}
- State Exemptions: 99
- Save/Close

The screenshot shows a web application interface for 'HR / Payroll - Employment - Employee Management'. The 'Taxes.2' tab is selected and highlighted in yellow. The form displays the following settings:

Section	Field	Value
1 - General Tax Setup	Begin Date	5/1/2020
	End Date	
	Subject to OASDI	Yes
	Subject to Medicare	Yes
	Subject to SUI	Yes
	Subject to Work Comp	Yes
	Subject to SDI	No
	Supplemental Tax	No
2 - Federal Withholding Setup	W-4 Form	2 (2020 and later)
	Federal Marital Status	M (Married)
	Federal Exemptions	0
	Multiple Jobs	No
	Federal Dependent Amount	0.00
	Federal Other Income	0.00
	Federal Deduction Amount	0.00
	Federal Extra Amount	0.00
	Federal Extra Percent	0.00
	3 - State Withholding Setup	State Marital Status
State Exemptions		99

This will still report State Wages. For reporting purposes, there should be no State Wages. At the end of each quarter need to zero out subject gross wages in Adjust Pay for the employee using the Z-SIT Addon. It is on this last payroll of the quarter that you will know the year-to-date total for that ending quarter.

Step 2 – Go to HR/Payroll – Payroll – Adjust Payroll

- Highlight or Open the Pay Period at end of Quarter
- Go to the Preview Button and select the Employee Payroll to review the Pay99 Report
- Get the Amount of the State Withholdings Subject Gross
- Add the Z-SIT Addon with a negative amount

Pay99		Employee Payroll Snapshot					
		CLS #10 - Classified Supplemental			Gross to Net		
Employee Address		Pay Period	10, 04/01/20 - 04/30/20 on 05/08/20	Status	Future		
Pay Check Site		(Last Final Computed	CL0A#9 - Ending 04/30/20 on 04/30/20)				
Time Sheet Site		FTE	.00000	Benefit FTE	.43375		
		SS#	###-##-	Empld	000207		
		Bargaining Unit	2C	Approved	Last Calc'd KALINGLE, 4/30/20 8:20 am		
EARNINGS		Employee	Pay Period Other	Rate	Employee	Calendar Year To Date Other	Subj Gross
POSITION #41-7(0)'				5,040.00	8,744.40		
ADJUST (ADDLHRLY) Afterschool Aide				16.14	56.49		
ADJUST (ADDLHRLY) Inst Aide				16.14	88.77		
ADJUST (ADDLHRLY) Lunch/After Sports				16.14	59.23		
ADJUST (ADDLHRLY) PE Coordinator		35.00		35.00	35.00		
ADJUST (ADDLHRLY) soccer				16.14	157.37		
ADJUST (ADDLHRLY) Sub Aide				16.14	227.41		
Total		35.00	.00		9,368.67	.00	
TAXES							
(FIT) [M.D.] Federal Withholding				35.00	457.36		9,368.67
(SIT) [S 99.0] State Withholding				35.00	88.40		9,368.67

Addons:1	Assignments	Deductions	Contributions	Details	Payroll Errors	Notes
Open	New	Copy	Export	Delete	Prev	Next
					Save/Close	Cancel
1 - Adjustment						
Addon	Z-SIT {SIT Gross}					
Units	(1.0000)					
Rate 1 Override						
Rate 1 Amount	9,368.6700					
Effective Date	6/30/2020					
Description	SIT Adjustment					
Days Worked						
ACA Hours						
Account						

NOTE: Employees claiming EXEMPT on form W4 are required to complete a new W4 form no later than February 15 of each year. If the employee fails to complete a new W4 form by the 2/15 date, the employer is required to withhold as single and no allowances.