

Flexible Employee Data – IRS Mandates

- Purpose** Use this procedure to identify employees in the agency who have had their withholding status and exemptions adjusted due to an IRS mandate.
- Trigger** Perform this procedure when identifying employees with the IRS Mandate indicator checked.
- Prerequisites** Infotype *Withholding Info W4/W5 US (0210)* and Infotype *IRS Limits USA (0161)* exists.
- End User Roles** In order to perform this transaction you must be assigned the following role: Personnel Administration Inquirer/Processor/Supervisor, Leave Correction Processor, Payroll Supervisor, Time And Attendance Inquirer/Supervisor

| Change History | |
|----------------|--------------------|
| Date | Change Description |
| 4/27/2012 | Procedure created. |

Transaction Code ZHR_RPTPAN02

Helpful Hints

- The standard Flexible Employee Data report is also available using the transaction code **S_AHR61016362**. This report has the same selection concepts, but provides additional field options.
- The Business Intelligence (BI) may also provide you will additional information, please see your agency’s BI user for assistance.
- Department of Enterprise Services has created various state-wide variants to help agencies with their reconciliations. Use the procedure [Variants – Create and Retrieve](#) for steps to access the state-wide variants. When accessing the variants remember to input your personnel area and update the payroll dates. There is no need to save your own variants. DES recommends that you retrieve the state-wide variants for these are maintain by DES and will stay current. See [Statewide Variant List](#) for additional information.

The state-wide variants are:

| Variant Name | Description |
|----------------|---------------------|
| SWV DATESPECS | Date Specifications |
| SWV EMP SHAPSH | Employee Snapshot |
| SWV PID | PID Variant |

Procedure

1. Start the transaction using the transaction code **ZHR_RPTPAN02**.



This report can also be used for searching for other criteria. (See the procedure [Flexible Employee Data](#))

2. In the Period section, complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry | | |
|---|-------|--|
| Field Name | R/O/C | Description |
| Today | C | This selection option will run the report using the system date (current date). |
| Other keydate | C | This selection option will run the report using the specified values for the person and data selection period. Example: 04/27/2012 (The report will display data as of the date entered). |

Program Edit Goto System Help

State of Washington Flexible Employee Data Report

Further selections Search helps Sort order Org. structure

Key date
 Today
 Other keydate
 Key Date

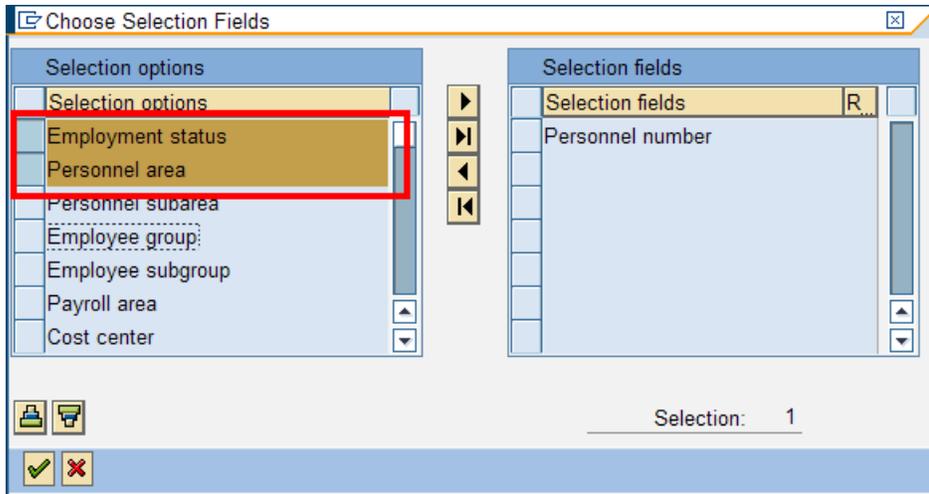
Selection
 Personnel Number

Data Limiter
 Number of Employees

Additional data
 Field selection

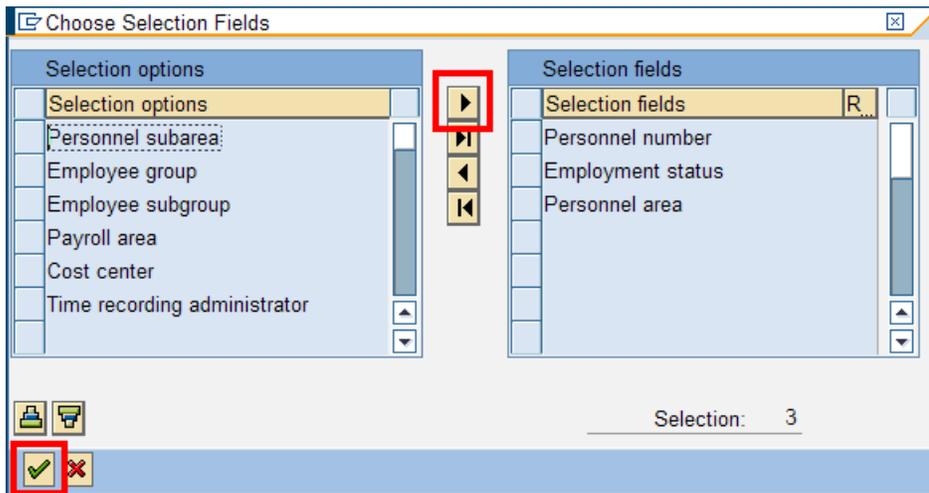
3. To add additional selection fields, click **Further selections** (Further selections). For this example, the Employment Status and Personnel Area will be added. For this report, the Employment Status and Personnel Area will be added. Based on these criteria, information will only display for Active employees in the specified Personnel Area.

| | |
|-----|--|
| 3.1 | Click Employment status (Employment Status) |
| 3.2 | Click Personnel area (Personnel Area) |



There is no limit to the selections. Follow the steps above to add more fields.

4. Once the selections have been made, click  (Choose) to move the selected fields over to the *Selection fields* column.



5. Click  (Continue) to accept selections.

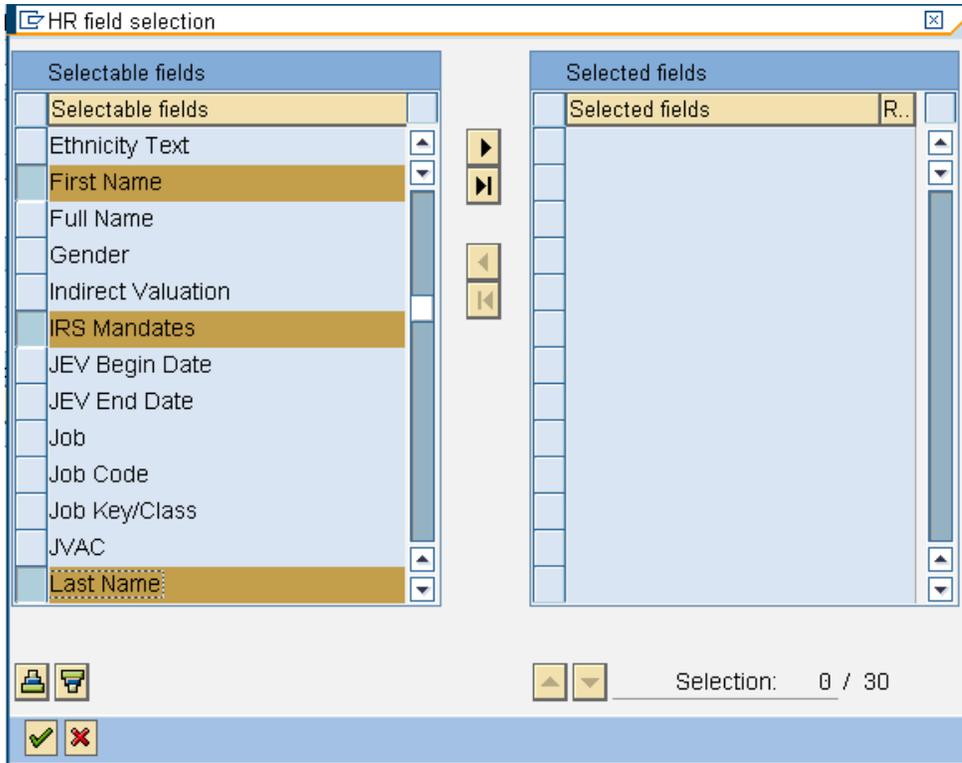
6. In the Selection section, complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry | | |
|---|-------|---|
| Field Name | R/O/C | Description |
| Employment status | R | Describes the employee's employment status with the agency. Example: 3 (Active) |
| Personnel area | R | A specific agency/sub-agency in the State of Washington. Example: 2350 (Department of Labor & Industries) |

7. In the Additional data section, click the  **Field selection** (Field selection) to include and display additional data on the report. For this report, the First Name, Last Name, IRS Mandates and Personnel Number will be added.

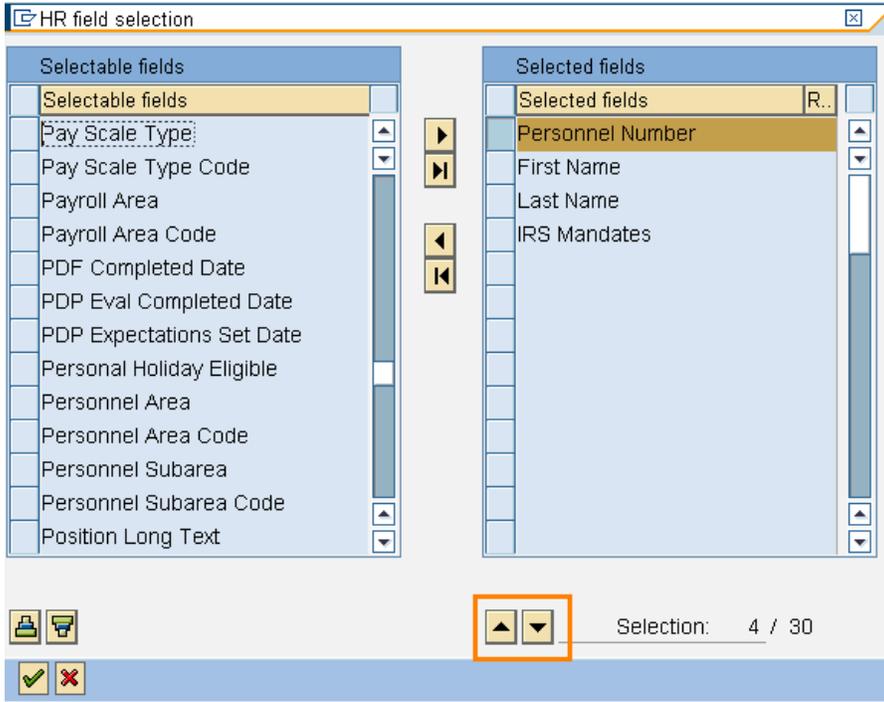
| | |
|-----|---|
| 7.1 | Click  First Name (First Name). |
| 7.2 | Click  IRS Mandates (IRS Mandates). |
| 7.3 | Click  Last Name (Last Name). |

7.4 Click  Personnel Number (Personnel Number).



There is a maximum of 30 selections allowed. Follow the steps above to add more fields.

7.5 Once the selections have been made, click  (Choose) to move the highlighted fields to the Selected fields column.



 Notice the  (Move Entry Up/Down) buttons. This allows you to change the order of the column results based on your Selected fields.

| | |
|-----|--|
| 7.5 | Click  (Continue) to accept selections. |
|-----|--|



Notice the  **Field selection** (Field selection active) button now has a green box indicating the additional data entered for this field.

8. In the Data Limiter section, complete the following fields:

| R=Required Entry O=Optional Entry C=Conditional Entry | | |
|---|-------|---|
| Field Name | R/O/C | Description |
| Number of Employees | O | Indicates the number of employee records to display on your report results. Example: 100 (Default amount) |

9. Click  (Execute) to execute a process or action.

State of Washington Flexible Employee Data Report

Date Range: 04/27/2012 - 04/27/2012

| Personnel Number | First Name | Last Name | IRS Mandates |
|------------------|------------|-----------|--------------|
| 40000255 | LUCILLE | TILLMAN | |
| 40000256 | TERESA | OKELLEY | X |
| 40000257 | KATHARINA | WITHROW | |
| 40000258 | KIMBERLY | HERR | |
| 40000259 | KAREN | CARROLL | |

10. You have completed this transaction.

Results

You have generated the Flexible Employee Data Report with results including the employee's Name, Personnel Number and IRS Mandates field value.