Vision Municipal Solutions

New W4 Workflow

Vision Payroll

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Vision Software Team
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Vision Payroll

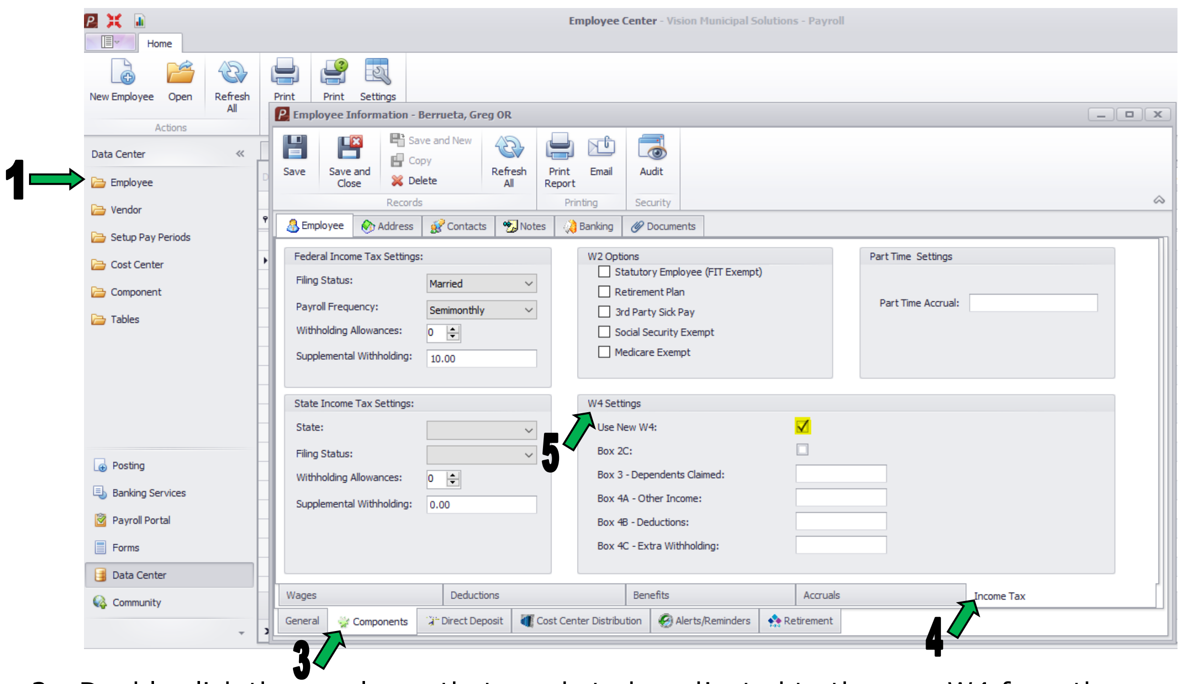
Introduction

The W4 Settings are accessed via each Employee's individual record by selecting the Components sub-tab and then selecting the Income Tax tab.

Payroll Workflow: W4 Setup

Employee Information

1. Select Employee from the Data Center Menu.



2. Double click the employee that needs to be adjusted to the new W4 from the Employee Center list.
3. Click the Components tab at the bottom left of the Employee Information screen.
4. Click the Income Tax tab.
5. Fill in the boxes under the W4 Settings – Using the data directly from the W4.
    - The "Use New W4" box must be checked to use the "new W4" data (as highlighted above)
    - Box 2C (below "Use New W4" box): If this box is checked there must be an "Automated" Table setup under the Federal Taxes Table. The tax table was added during the last Payroll update.
    - Fill in the additional boxes, save and close.