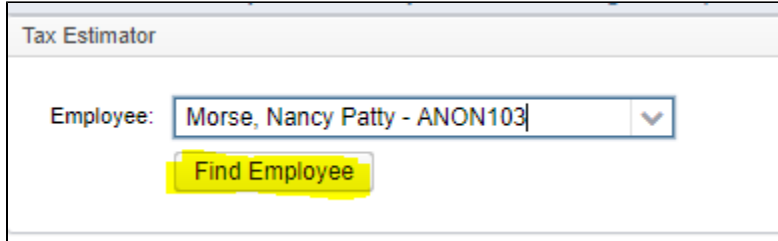


# Using the Tax Estimator

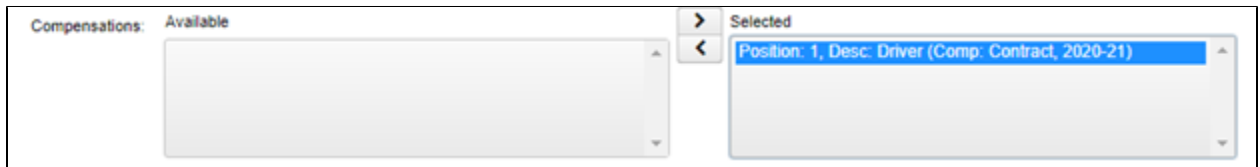
Have you ever found yourself in a situation where an employee is changing their W4 and asking you how this will affect their payroll check? The tool called Tax Estimator can be helpful in seeing these changes - without having to process a payroll.

1. Go to Utilities/Tax Estimator.
2. Find the employee by entering their SSN, ID, or name in the Employee field and click Find Employee.



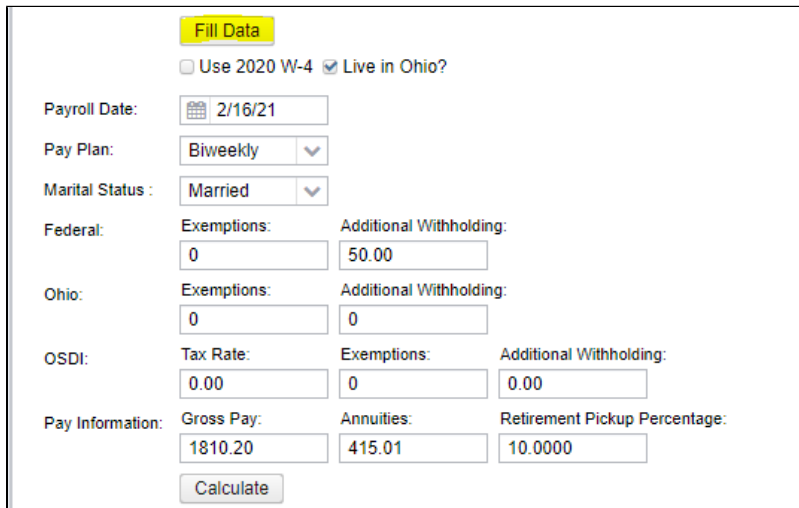
The screenshot shows a window titled "Tax Estimator". Inside, there is a label "Employee:" followed by a text input field containing "Morse, Nancy Patty - ANON103" and a dropdown arrow. Below the input field is a yellow button labeled "Find Employee".

3. Move all compensations involved to the Selected (right) side.



The screenshot shows a window with two panes. The left pane is titled "Compensations: Available" and is currently empty. The right pane is titled "Selected" and contains one item: "Position: 1, Desc: Driver (Comp: Contract, 2020-21)".

4. If the employee is not currently using the new W-4, unclick the Use 2020 W-4. If the employee is already using the new W-4, leave the Use 2020 W-4 box checked. Click Fill Data.



The screenshot shows a "Fill Data" section with a yellow "Fill Data" button at the top. Below it are several input fields and checkboxes:

- Use 2020 W-4  Live in Ohio?
- Payroll Date:
- Pay Plan:
- Marital Status:
- Federal: Exemptions:  Additional Withholding:
- Ohio: Exemptions:  Additional Withholding:
- OSDI: Tax Rate:  Exemptions:  Additional Withholding:
- Pay Information: Gross Pay:  Annuities:  Retirement Pickup Percentage:

At the bottom of the section is a "Calculate" button.

5. Then select Calculate. The current Federal, Ohio, and School District withholding amounts will be displayed.

Fill Data

Use 2020 W-4  Live in Ohio?

Payroll Date: 2/16/21

Pay Plan: Biweekly

Marital Status: Married

Federal: Exemptions: 0 Additional Withholding: 50.00

Ohio: Exemptions: 0 Additional Withholding: 0

OSDI: Tax Rate: 0.00 Exemptions: 0 Additional Withholding: 0.00

Pay Information: Gross Pay: 1810.20 Annuities: 415.01 Retirement Pickup Percentage: 10.0000

Calculate

Federal: Current Estimation: 124.49

Ohio: Current Estimation: 25.70

School District: Current Estimation: 0.00

6. Next check the Use 2020 W-4 box.

Use 2020 W-4

7. Enter the information on the employee's W-4. Click Calculate.

Use 2020 W-4  Live in Ohio?  Two Like Jobs

Payroll Date: 2/17/21

Pay Plan: Biweekly

Marital Status: Married

Filing Status: Single or Married Filing Separately

2020 W-4 Fields: Dependent Amount: 6000 Other Income: 0 Deduction Amount: 0

Federal: Additional Withholding:

Ohio: Exemptions: 1 Additional Withholding: 0

OSDI: Tax Rate: 0.00 Exemptions: 0 Additional Withholding: 0.00

Pay Information: Gross Pay: 1810.20 Annuities: 415.01 Retirement Pickup Percentage: 10.0000

Calculate

8. The tax amounts withheld prior are listed in the Previous Estimation column and the new calculations are listed in the Current Estimation column.

	Current Estimation:	Previous Estimation:
Federal:	0.00	124.49
Ohio:	24.93	25.70
School District:	0.00	0.00