OFFICE OF STATE UNIFORM PAYROLL MEMORANDUM #2003-43

TO: All ISIS HR Paid Agencies

FROM: Jena W. Cary
Director

SUBJECT: Federal/State Tax Exempt Status and Completion of Forms W4/L4

2002 Forms W-4 for employees claiming exempt will expire February 15, 2003. A list of employees that are claiming this status can be produced by running ZP65 (Employee Tax Report). When reviewing ZP65, ensure that all employees whose records end 02/15/2003 or 02/16/2003 have a subsequent IT210 record. If there is no subsequent tax record, the employee(s) will fail payroll processing for period 04/2003.

If you have not received a new withholding form for 2003 from the employee(s), you must change their federal filing status to “single” with “zero” withholding allowances. For employees that are claiming exempt in 2003 and a new withholding form has been received, a new IT210 record must be created following ISIS On-Line Help, Maintain Withholding Information. Agencies must forward a copy of the exempt 2003 Form W-4 to OSUP. Louisiana state tax rules mirror the federal requirements; therefore, you should follow the same guidelines above for anyone who claimed state exempt status in 2002.

Responsibilities of OSUP and the agency regarding Forms W-4 were noted in OSUP Memorandum #2001-69 dated June 22, 2001. Refer to this memorandum for information that needs to be completed prior to forwarding forms to OSUP. Note: When referring to Memorandum #2001-69, OSUP’s physical address has changed. When completing Box 8 of Form W-4 and Box 9 of Form L-4, use the mailing address of P. O. Box 94095, Baton Rouge, LA 70804-9095. A second memorandum, #2002-02 dated July 13, 2001, was also issued advising agencies of action needed for incomplete forms. Agencies must review these forms to be sure they are complete and the information is legible.

Questions on ZP65 and how to set up IT210 records should be directed to the ISIS HR Help Desk at (225) 342-2677. Any other questions should be directed to a member of the OSUP Wage and Tax Administration Unit at (225):

Dorothy Piazza 342-1652  Wendy Eggert 219-0191
Rachel Bryant 342-1651  Lawanna Green 342-0714

JWC:DAP/kmb