

# **Changing Deductions — W-4 Form**

APTAWEB-10768, APTAWEB-10778, APTAWEB-10781

## Introduction

AptaFund has a new feature where employees have the ability to fill out a W-4 form online and submit it to the payroll administrator, as well as print a copy. This option can be found under **My AptaFund > Employee Self-Service > My Deductions**.

When a new W-4 form has been submitted by an employee, an email can be scheduled to go out to any user who has the permission to approve a deduction set. The user can view and accept the changes by going into **Human Resources > Deduction Change Requests**.

*My AptaFund* > *Employee Self-Service* > *My Deductions* 

From the **My AptaFund > Employee Self-Service** menu, select **My Deductions**.

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(Add favorites from the Reports screen)	My Information	My Purchase Requisition Approvals
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My Dashboard Change Password Security Question My Job Queue Help	My Paychecks My W-2 Forms My W-2 Consent Elections My Vear to Date Totals My Decement My Deductions	Reports Reports Exports
User Guide Create a new AptaFund Support Ticket Access the AptaFund Support Website Submit an Idea	Purchasing My Budget Accounts My Purchase Requisitions	

Figure 1: My AptaFund Menu Showing the New My Deductions Option

On the screen shown below, click on **New Federal W-4** to display, populate and submit the new W-4 form. From this screen W-4s can be viewed, deleted, or printed.

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Figure 2: My Deductions Screen

Contact Support: apta41support@harriscomputer.com https://schoolfinancialsolutions.na2.teamsupport.com © 2020, Harris School Solutions. All rights reserved.



#### Make Changes to the W-4 Form and Submit the New W-4 Form

Make the necessary changes to the W-4 form, and click **Submit**. Employees can print the form after submitting.

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Figure 3: W-4 Form – Ready for Changes

#### Setup Scheduled Jobs to Email Approvers when Requests are Submitted

Approvers — i.e., Payroll Manager or Administrator, Fund Administrator, or any user who has the Deduction Assignment – Approve permission level — can be notified via email when a W-4 form is submitted by an employee. To configure it, go to **Administration** and click **Scheduled Jobs**, and configure the job called *Employee Deduction Request Reminder Emails*.

Configuration	Home -> Administration -> Scheduled J	lobs -> Scheduled Jobs Detail			Save Cancel
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Figure 4: Scheduled Job – Employee Deduction Request Reminder Emails

#### Human Resources > Deduction Change Requests

On the **HR, Payroll & ESS** menu, select **Deduction Change Requests**. Select the employee deduction change request record. **Note**: Only Fund Administrators, Payroll Administrators or Payroll Managers can approve or reject the W-4 Change Requests.

AptaFund			F/20-21 Log out
My AptaFund ▼ Budget & G/L ▼	Banking & COA • Purchasing & Payabl	es • Receivables • HR, Payroll & ESS •	Administration • Harris Admin •
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Position Management Position Management Detail	Payroll Liabilities Employee W-2 Information		

Figure 5: Deduction Change Request

#### Approve the W-4 Change Request

Click the **Approve** button to approve the W-4 changes. Once the W-4 changes have been approved, the record will disappear from the *Deduction Change Request* screen, and the employee's *New* deduction set will be updated with the changes. AptaFund will approve the deduction set with the new settings automatically.

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10/28/2020         10019           10/28/2020         10019           10/29/2020         10019	(c)	Single or Married filing separately Married filing jointly (or Qualifying widow) Head of household (Check only if you're ui	er)) Imarried and pay more than half the costs of keeping up	a home for yourself and a qualifying individual.)	
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HARRIS School Solutions	Claim rove teject Close				is Computer Systems. All rights reserved. Monday, November 9, 2020 10:11 AM rision: 2020.11.6.1544 J: 11/6/2020 11:18:50 PM

Figure 6: Approving the W-4 Form

### Reject the W-4 Change Request

Click on the **Reject** button to reject the W-4 change request. Enter a comment in the Rejection Reason Comment field, then click **OK**. If Reject was selected by mistake, click **Close** in the Rejection Reason popup, and then either select the **Approve** or **Close** button on the W-4 screen.

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Figure 7: Rejected W-4 Comments

After a W-4 change request is approved or rejected, the employee will get an email explaining what happened.