

Reimbursable Employee Expenses

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All Option #1 scenarios, the employee pays any Federal, Ohio and OSDI taxes on amount paid through warrant as a part of the year-end tax return filing. However, if desired, the district can enter an Error Adjustment(s) for the calculated amount prior to the last calendar year payroll and appropriate taxes will be withheld.

Scenario 1

If paid through a USAS disbursement and district wants the amount to appear on the W2 as wages but not in Box 14 as Fringe Benefits:

Option #1

- Calculate the amount of Medicare tax as it applies to the total. If there is Medicare pickup, be sure to inflate the Medicare amount as well as the Total and Applicable Gross.
- Go to Core>Adjustments
 - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the applicable (taxable) gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Before the last pay of the calendar year:
 - Enter the Medicare amount due on the Medicare Payroll Item record as an Error Adjustment both Employee and Employer amounts
 - If City withholding is needed:
 - Calculate the amount of City tax as it applies to the total
 - Enter above calculated amount on the City Payroll Item(s) as an Error Adjustment
- Manually increase the Total and Applicable Gross amount on the Federal, Ohio, OSDI, City Payroll Items.
 - Go to Core>Adjustments
 - Click 'Create'

- Employee - Find employee by typing in a few characters of first or last name
- Payroll Item - Choose Federal Tax
- Type - Choose Total Gross
- Transaction Date - Enter or choose date from calendar
- Amount - Enter in the amount to be included in the total gross
- Description - Enter in a description (optional)
- Click 'Save'
- Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Applicable Gross
 - Transaction Date- Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the applicable (taxable) gross
 - Description - Enter in a description (optional)
 - Click 'Save'
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- Repeat the same process for State, OSDI and City records.

Option #2

- Prior to the last pay of the calendar year, total the amounts paid through a USAS disbursement.
- Add a Payroll Item Configuration record payable to the district using the type of Regular.
- Add the Payroll Item record for each employee. Enter the reimbursed amount paid to the employee in the Rate field. Enter a Stop Date (a date prior to the next payroll pay date) so the Payroll Item is active for only one pay.
- Add a Miscellaneous Pay Type in Payroll Payments - Future or Current for the amount reimbursed to the employee.
- Deposit Outstanding Payables check as a reduction of expenditure against the benefit account.

Scenario 2

If paid through warrant check and district wants the amount to appear on the W2 as wages and in Box 14 as Fringe Benefits:

Option #1

- Calculate the amount of Medicare tax as it applies to the total. If there is Medicare pickup, be sure to inflate the Medicare amount as well as the Total and Applicable Gross.
- Before the last pay of the calendar year, enter withholding amount on the Medicare Payroll Item record as an Error Adjustment both Employee and Employer amounts.
- Manually increase the Total and Applicable Gross amount on the Medicare Payroll Item record (if applicable):
 - - Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the total gross
 - Description- Enter in a description (optional)
 - Click 'Save'
 - - Go to Core>Adjustments
 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the applicable (taxable) gross
 - Description- Enter in a description (optional)
 - Click 'Save'
- Before the last pay of the calendar year, if City withholding is needed:
 - Calculate the amount of City tax as it applies to the total
 - Enter above calculated amount on the City Payroll Item(s) as an Error Adjustment
- Manually increase the Total and Applicable Gross amount on the City record(s) as it applies:
 - - Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name

- Payroll Item - Choose City Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'
-
- Go to Core>Adjustments
-
- - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose City Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the applicable (taxable) gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Manually increase the Total and Applicable Gross on the OSDI record as it applies:
 -
 - Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose OSDI Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'
 -
 - Go to Core>Adjustments
 -
 - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose OSDI Tax
 - Type - Choose Applicable Gross

- Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the applicable (taxable) gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Enter the amount as a Fringe Benefit field on the Federal record:
 - - Go to Core>Adjustments
 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Fringe Benefits
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount of the Fringe Benefit
 - Description - Enter in a description (optional)
 - Click 'Save'

Option #2

- Prior to the last payroll of the calendar year, total the amounts paid through a USAS disbursement.
- Add a Payroll Item Configuration record payable to the district using the type of Regular.
- Add the Payroll Item record for each employee. Enter the reimbursed amount paid to the employee in the Rate field. Enter a Stop Date (a date prior to the next payroll pay date) so the Payroll Item is active for only one pay.
- Add a Miscellaneous Pay Type in Payroll Payments - Future or Payroll Payments - Current for the amount reimbursed to the employee.
- Deposit Outstanding Payables check as a reduction of expenditure against the benefit account.
- Manually reduce the Total and Applicable Gross amounts on the Federal and Ohio records by the total amount entered as the Miscellaneous Pay Type:
 - - Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar

- Amount - Enter in the amount to be reduced from the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- - Go to Core>Adjustments
- -
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be reduced from the applicable gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Repeat the process for the State Tax record as well.
 - Enter the amount as a Fringe Benefit on the Federal record:
 -
 - Go to Core>Adjustments
 -
 -
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Fringe Benefits
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount of the Fringe Benefit
 - Description - Enter in a description (optional)
 - Click 'Save'

Scenario 3

If paid through USPS and district want the amounts to appear on the W2 in Box 14 as Fringe Benefits:

- Enter the amount as the Fringe Benefit field on the Federal record:

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- Go to Core>Adjustments
-
- - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Fringe Benefits
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount of the Fringe Benefit
 - Description - Enter in a description (optional)
 - Click 'Save'
- Manually reduce the applicable (taxable) and total gross amounts on the 001 Federal and 002 Ohio records by this amount.

W2 Report and Submission will add it back to these figures based on the fringe benefit amount.

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- Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be reduced from the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'
-
- Go to Core>Adjustments
-
- - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount- Enter in the amount to be reduced from the applicable (taxable) gross
 - Description- Enter in a description (optional)
 - Click 'Save'

Scenario 4

If paid through USPS and district does not want this included with the salary account charges in USAS:

- - In USAS go to Transactions>Receipts:
- - - Post a reduction of expenditure to the 1XX object account and a negative reduction of expenditure to the desired object code.

Scenario 5

If paid part of the calendar year through warrant and part of the calendar year through USPS and district wants the amount to appear on the W2 as wages but not in Box 14 as Fringe Benefits:

Option #1

- Determine total the amount paid through a USAS disbursement.
- Calculate the amount of Medicare tax as it applies to the total. If there is Medicare pickup, be sure to inflate the Medicare amount as well as the Total and Applicable Gross.
- Before the last pay of the calendar year, enter the withholding amount on the Medicare Payroll Item record as an Error Adjustment for both Employee and Employer amounts.
- If City withholding is needed, calculate the amount of City tax as it applies to the total.
- Before the last pay of the calendar year, enter this amount on the City Payroll Item(s) as an Error Adjustment.
- Manually increase the Total and Applicable Gross amount on the Federal, Ohio, OSDI, city and Medicare records (if applicable) by the amount paid through the USAS disbursement:
 - - Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Total Gross

- Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'
-
- Go to Core>Adjustments
-
- - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item -Choose Federal Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the applicable gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Repeat this process for State, OSDI and Medicare records as well.

Option #2

- Prior to the last pay in the calendar year, determine total the amount paid through a USAS disbursement.
- Add a Payroll Item Configuration record payable to the district using the type of Regular.
- Add the Payroll Item record for each employee. Enter the reimbursed amount paid to the employee in the Rate field. Enter a Stop Date (a date prior to the next payroll pay date) so the Payroll Item is active for only one pay.
- Add a Miscellaneous Pay Type in Payroll Payments - Future or Current for the amount reimbursed to the employee.
- Deposit Outstanding Payables check as a reduction of expenditure against the benefit account.

Scenario 6

If paid part of the calendar year through USAS disbursement and part of the calendar year through USPS and district wants the amount to appear on the W2 as wages in Box 14 as Fringe Benefits:

Option #1

- Determine the total the amount paid through the USAS disbursement.
- Calculate the amount of Medicare tax as it applies to the total. If there is Medicare pickup be sure to inflate the Medicare amount as well as the Total and Applicable Gross.
- Before the last pay of the calendar year, enter this amount on the Medicare Payroll Item record as an Error Adjustment for both Employee and Employer amounts.
- If City withholding is needed, calculate the amount of City tax as it applies to the total.
- Before the last pay of the calendar year, enter this amount on the City Payroll Item(s) as an Error Adjustment.
- Manually reduce the Total and Applicable Gross amount on the Federal and Ohio record by the amount paid through USPS.

W2 Report and Submission will add it back to these figures based on the fringe benefit amount.

- - Go to Core>Adjustments
- - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be reduced from the total gross
 - Description- Enter in a description (optional)
 - Click 'Save'
- - Go to Core>Adjustments
- - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be reduced from the applicable gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Repeat the same process for the State record.
- Manually increase the Total and Applicable Gross amounts on the OSDI records by the amount paid through the USAS disbursement:

- - Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose OSDI Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'

- - Go to Core>Adjustments

- - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the applicable gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Enter both the amount paid through warrant and the amount paid through USPS as a Fringe Benefit on the Federal record:
 - - Go to Core>Adjustments

 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Fringe Benefits
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount of the Fringe Benefit
 - Description - Enter in a description (optional)
 - Click 'Save'

Option #2

- Prior to the last pay in the calendar year, total the amount paid through the USAS disbursement.
- Add a Payroll Item Configuration record payable to the district using the type of Regular.
- Add the Payroll Item record for each employee. Enter the reimbursed amount paid to the employee in the Rate field. Enter a Stop Date (a date prior to the next payroll pay date) so the Payroll Item is active for only one pay.
- Add a Miscellaneous Pay Type in Payroll Payments - Future or Current for the amount reimbursed to the employee.
- Deposit Outstanding Payables check as a reduction of expenditure against the benefit account.
- Manually reduce the Total and Applicable (taxable) Gross amount on the Federal and Ohio records by the amount paid through USPS previously plus the amount of the Miscellaneous pay amount.

W2 Report and Submission will add it back to these figures based on the fringe benefit amount.

- - Go to Core/Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be reduced from the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- - Go to Core>Adjustments
- - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be reduced from the applicable gross
 - Description - Enter in a description (optional)
 - Click 'Save'
- Enter the amount paid through the USAS disbursement and the amount paid through USPS as a Fringe Benefit on the Federal record:

- - Go to Core>Adjustments
- - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Fringe Benefits
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount of the Fringe Benefit
 - Description - Enter in a description (optional)
 - Click 'Save'

Scenario 7

District has paid the amounts through warrant and does not want anything on the W2:

- **No action is needed**

Non-Cash Amounts for W2 Reporting

Scenario 1 is used **prior** to the last calendar year payroll, using the Non-cash Taxable Benefit type and district wants the amount to appear on the W2 as wages but NOT in Box 14 as Fringe Benefits:

Scenario 2 is **NOT** used before last calendar year payroll and district wants the amount to appear on the W2 as wages in Box 14 as Fringe Benefits

Scenario 3 is **NOT** used before last calendar year payroll and district wants the amount to appear on the W2 as wages but NOT in Box 14 as Fringe Benefits

Scenario 1

Using Non-cash Taxable Benefit type **prior** to the last calendar year payroll and NOT in box 14 as Fringe Benefits

If the district wants the amount to appear on the W2 as wages but **Not** in box 14 as Fringe Benefits.

- Use the 'Non-cash Taxable Benefit' pay type in Payroll Payments CURRENT or FUTURE and this will represent the non-cash taxable benefits amount (NC3).

Scenario 2

If the Non-cash Taxable Benefit Pay Type **was not** used during a payroll, the following would need to be done.

If the district wants the amount to appear on the W2 as wages and in Box 14 as Fringe Benefits:

- Calculate the amount of Medicare tax as it applies to the total. If there is Medicare pickup be sure to inflate the Medicare amount as well as the Total and Applicable Gross.
- If City withholding is needed, calculate the amount of City tax as it applies to the total.
- If OSDI withholding is needed, calculate the amount of the OSDI tax as it applies to the total.
- Manually increase the total and applicable (taxable) gross amount on the Medicare records:
 - - Go to Core>Adjustments
 - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Total Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the total gross
 - Description - Enter in a description (optional)
 - Click 'Save'
 - - Go to Core>Adjustments
 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type -Choose Applicable Gross
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount to be included in the applicable gross
 - Description - Enter in a description (optional)
 - Click 'Save'
 - **Repeat** the same process for OSDI and City records.

- To add employee Medicare Amount Withheld and Board Amount of Payroll Item (district will pay for both or ask employee for reimbursement)
 - - Go to Core>Adjustments
 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Amount Withheld
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the withholding amount of Employee Medicare
 - Description - Enter in a description (optional)
 - Click 'Save'
 - Go to Core>Adjustments
 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Board Amount of Payroll Item
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the Board Amount of Medicare
 - Description - Enter in a description (optional)
 - Click 'Save'
- **OR if fully paid by Board:**
 - - Go to Core>Adjustments
 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Board Pickup Amount of the Payroll Item
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the Board Pickup Amount of Medicare (1.45%) This will update both Medicare Pickup and Medicare on the employee's W2

- Description - Enter in a description (optional)
 - Click 'Save'
- Enter the amount as a Fringe Benefit on the Federal record: (this will update the Federal and State Total and Applicable Gross amounts and show in Box 14)
 - - Go to Core>Adjustments
 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Federal Tax
 - Type - Choose Fringe Benefits
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the amount of the Fringe Benefit
 - Description - Enter in a description (optional)
 - Click 'Save'

Scenario 3

If 'Non-cash Taxable Benefit' pay type **was not** used during payroll processing, the Taxable Benefits (NC3) payment amount must be entered under the CORE/ADJUSTMENT JOURNAL, the following would need to be done.

If the district wants the amount to appear on the W2 as wages and **NOT** in Box 14 as Fringe Benefits:

- Using the Taxable Benefits Type, this amount would only be entered under the 001 Federal Payroll Item. This will **update the total and taxable gross totals on the Federal , State, City (If applicable) OSDI and Medicare** records during W2 Report. *No manual adjustments are needed for the Gross and Taxable Gross amounts.*
 - - Enter the amount as a 'Taxable Benefits' on the 001 Federal record:
 - - - Go to Core>Adjustments
 - - - Click 'Create'

- Employee - Find employee by typing in a few characters of first or last name
- Payroll Item - Choose Federal Tax
- Type - Choose Taxable Benefits
- Transaction Date - Enter or choose date from calendar
- Amount - Enter in the amount of the Fringe Benefit
- Description - Enter in a description (optional)
- Click 'Save'

Medicare Total and Taxable Amounts will automatically be increased by the Taxable Benefit Amount so Medicare tax will need to be recorded and paid. If the Medicare withholding is paid by the employee (1.45%) and employer (1.45%), adjustments must be made to the Amount Withheld and Board Amount of Payroll Item.

If Medicare is fully board paid (Pickup), then an Adjustment should be made to the Board's Pickup Amount of Payroll Item (1.45%) only. This will update both Medicare Pickup and Medicare on the Employee's W2.

- - Go to Core>Adjustments
- - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Amount Withheld
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the withholding amount of Employee Medicare
 - Description - Enter in a description (optional)
 - Click 'Save'
 - Go to Core>Adjustments
- - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Board Amount of Payroll Item
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the Board Amount of Medicare
 - Description - Enter in a description (optional)
 - Click 'Save'

- **OR if fully paid by Board:**
 - - Go to Core>Adjustments
 - - - Click 'Create'
 - Employee - Find employee by typing in a few characters of first or last name
 - Payroll Item - Choose Medicare Tax
 - Type - Choose Board Pickup Amount of the Payroll Item
 - Transaction Date - Enter or choose date from calendar
 - Amount - Enter in the Board Pickup Amount of Medicare (1.45%) This will update both Medicare Pickup and Medicare on the employee's W2
 - Description - Enter in a description (optional)
 - Click 'Save'