

U. S. Coast Guard
Pay & Personnel Center (PPC)
Global Payroll
How to Create Tax Accumulators

Table of Contents

Create a FWT YTDA Accumulator	2
Create a FWT GRS TOT YTD Accumulator	4
Create a SWT GRS TOT YTD Accumulator	6
Create a CG AC DITY UNTAXED Accumulator	8

CREATE A FWT YTDA ACCUMULATOR

Take the following action if needing to create a FWT YTDA accumulator on a member in Global Payroll:

Step	Action
1	Log into Global Payroll.
2	Follow the path below to access the accumulator adjustment page. Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Accumulators Note: 'Add to Favorites" for quicker access for future adjustments.
3	Enter the member's EMPLID and Empl Record #.
4	Click the SEARCH button.
5	Click on the last finalized pay calendar on the member. For instance, if mid-march is the last finalized Calendar ID, then CG ACT 2015M03M should be selected. You'll be able to tell if the right calendar is brought up by checking the Calendar Group ID on the Accumulator page. It should tell you what pay period the adjustment will be done on, as highlighted in red below. <div style="border: 1px solid black; padding: 5px;"> <p>Accumulators</p> <p>Employee ID: Empl Record: 0</p> <p>Calendar Group ID: C115030 201503 On-Cycle AD Mid Month Calendar ID: CG ACT 2015M03M</p> <p>Pay Group: USCG USCG Active Duty</p> <p>Pay Entity: USCG United States Coast Guard</p> <p>Accumulator</p> <p>Accumulator: <input type="text"/></p> </div>
6	Click on the Accumulator field and enter FWT_YTDA.
7	Click on the From Date field and enter the beginning of the tax year. If doing the accumulator adjustment for 2015, then 1/1/2015 would be entered.
8	Click on the Through Date field and enter the last day of the tax year. If doing accumulator adjustment for 2015, then 12/31/2015 would be entered.
9	Click on the User Key 1 field and enter 529980000.
10	Click on the User Key 2 field and enter 10.
11	Click on the User Key 3 field and enter S.
12	Click on the Amount field and enter the amount that needs to be applied to the accumulator.
13	Click on the Reason field and enter DITY ADJUSTMENT.
14	Click the SAVE button.

An example of what the accumulator should look like is provided below:

Accumulators

Employee ID: Empl Record: 0
 Calendar Group ID: C115011 201501 On-Cycle AD End Month Calendar ID: CG ACT 2015M01E
 Pay Group: USCG USCG Active Duty
 Pay Entity: USCG United States Coast Guard

Accumulator	
Accumulator:	FWT_YTDA FIT Withholding

Instances		Find View All First 1 of 1 Last
From Date:	01/01/2015	Through Date: 12/31/2015
User Key 1:	529980000	User Key 2: 10
User Key 3:	S	User Key 4:
User Key 5:		User Key 6:
Value:	0.000000	Applied Adjustment: 100.000000

Accumulator Empl Record: 000

Adjustments		Customize Find View All First 1 of 1 Last	
Amount	Reason	Updated at	Updated by
100.000000	DITY ADJUSTMENT	03/11/2015 1:30PM	DBUNGER

CREATE A FWT GRS TOT YTD ACCUMULATOR

Take the following action if needing to create a FWT GRS TOT YTD accumulator on a member in Global Payroll:

Step	Action
1	Log into Global Payroll.
2	Follow the path below to access the accumulator adjustment page. Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Accumulators Note: 'Add to Favorites" for quicker access for future adjustments.
3	Enter the member's EMPLID and Empl Record #.
4	Click the SEARCH button.
5	Click on the last finalized pay calendar on the member. For instance, if mid-march is the last finalized Calendar ID, then CG ACT 2015M03M should be selected. You'll be able to tell if the right calendar is brought up by checking the Calendar Group ID on the Accumulator page. It should tell you what pay period the adjustment will be done on, as highlighted in red below. Accumulators Employee ID: Empl Record: 0 Calendar Group ID: C115030 201503 On-Cycle AD Mid Month Calendar ID: CG ACT 2015M03M Pay Group: USCG USCG Active Duty Pay Entity: USCG United States Coast Guard Accumulator Accumulator: <input type="text"/>
6	Click on the Accumulator field and enter FWT GRS TOT YTD.
7	Click on the From Date field and enter the beginning of the tax year. If doing the accumulator adjustment for 2015, then 1/1/2015 would be entered.
8	Click on the Through Date field and enter the last day of the tax year. If doing accumulator adjustment for 2015, then 12/31/2015 would be entered.
9	Click on the User Key 1 field and enter 529980000.
10	Click on the User Key 2 field and enter 10.
11	Click on the User Key 3 field and enter S.
12	Click on the User Key 4 field and enter A.
13	Click on the Amount field and enter the amount that needs to be applied to the accumulator.
14	Click on the Reason field and enter DITY ADJUSTMENT.
15	Click the SAVE button. A recalc will need to be done on the member so that the adjustment will be applied to the current pay calendar. Note: If member doesn't have a current pay calendar then the adjustment will only show on the accumulator page that it was done on.

An example of what the accumulator should look like is provided below:

Accumulators

Employee ID:
Calendar Group ID: C115011 201501 On-Cycle AD End Month **Empl Record:** 0
Pay Group: USCG USCG Active Duty **Calendar ID:** CG ACT 2015M01E
Pay Entity: USCG United States Coast Guard

Accumulator

Accumulator:  FWT YTD Taxable Gross Total

Instances

Find | View All | First 1 of 1 Last

From Date:	<input type="text" value="01/01/2015"/> 	Through Date:	<input type="text" value="12/31/2015"/>  
User Key 1:	<input type="text" value="529980000"/>	User Key 2:	<input type="text" value="10"/>
User Key 3:	<input type="text" value="S"/>	User Key 4:	<input type="text" value="A"/>
User Key 5:	<input type="text"/>	User Key 6:	<input type="text"/>
Value:	0.000000	Applied Adjustment:	1,000.000000

Accumulator Empl Record: 000

Adjustments

Amount	Reason	Updated at	Updated by	
1000.000000	DITY ADJUSTMENT	03/11/2015 1:24PM	DBUNGER	

CREATE A SWT GRS TOT YTD ACCUMULATOR

Take the following action if needing to create a SWT GRS TOT YTD accumulator on a member in Global Payroll:

Step	Action
1	Log into Global Payroll.
2	Follow the path below to access the accumulator adjustment page. Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Accumulators Note: 'Add to Favorites" for quicker access for future adjustments.
3	Enter the member's EMPLID and Empl Record #.
4	Click the SEARCH button.
5	Click on the last finalized pay calendar on the member. For instance, if mid-march is the last finalized Calendar ID, then CG ACT 2015M03M should be selected. You'll be able to tell if the right calendar is brought up by checking the Calendar Group ID on the Accumulator page. It should tell you what pay period the adjustment will be done on, as highlighted in red below. Accumulators Employee ID: Empl Record: 0 Calendar Group ID: C115030 201503 On-Cycle AD Mid Month Calendar ID: CG ACT 2015M03M Pay Group: USCG USCG Active Duty Pay Entity: USCG United States Coast Guard Accumulator Accumulator: <input type="text"/>
6	Click on the Accumulator field and enter SWT GRS TOT YTD.
7	Click on the From Date field and enter the beginning of the tax year. If doing the accumulator adjustment for 2015, then 1/1/2015 would be entered.
8	Click on the Through Date field and enter the last day of the tax year. If doing accumulator adjustment for 2015, then 12/31/2015 would be entered.
9	Click on the User Key 1 field and enter 529980000.
10	Click on the User Key 2 field and enter the state abbreviation. For instance, Virginia would be entered in as VA.
11	Click on the User Key 3 field and enter S.
13	Click on the Amount field and enter the amount that needs to be applied to the accumulator.
14	Click on the Reason field and enter DITY ADJUSTMENT.
15	Click the SAVE button. A recalc will need to be done on the member so that the adjustment will be applied to the current pay calendar. Note: If member doesn't have a current pay calendar then the adjustment will only show on the accumulator page that it was done on.

An example of what the accumulator should look like is provided below:

Accumulators

Employee ID: **Empl Record:** 0
Calendar Group ID: C115011 201501 On-Cycle AD End Month **Calendar ID:** CG ACT 2015M01E
Pay Group: USCG USCG Active Duty
Pay Entity: USCG United States Coast Guard

Accumulator	
Accumulator:	<input type="text" value="SWT GRS TOT YTD"/> SWT YTD Taxable Gross Total

Instances	
Find View All First 1 of 1 Last	
From Date:	<input type="text" value="01/01/2015"/> Through Date: <input type="text" value="12/31/2015"/>
User Key 1:	<input type="text" value="529980000"/>
User Key 2:	<input type="text" value="VA"/>
User Key 3:	<input type="text" value="S"/>
User Key 4:	<input type="text"/>
User Key 5:	<input type="text"/>
User Key 6:	<input type="text"/>
Value:	0.000000
Applied Adjustment:	1,000.000000

Accumulator Empl Record: 000

Adjustments			
Customize Find View All Print Refresh First 1 of 1 Last			
Amount	Reason	Updated at	Updated by
1000.000000	DITY ADJUSTMENT	03/11/2015 1:59PM	DBUNGER

CREATE A CG AC DITY UNTAXED ACCUMULATOR

Take the following action if needing to create a CG AC DITY UNTAXED accumulator on a member in Global Payroll:

Step	Action
1	Log into Global Payroll.
2	Follow the path below to access the accumulator adjustment page. Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Accumulators Note: 'Add to Favorites" for quicker access for future adjustments.
3	Enter the member's EMPLID and Empl Record #.
4	Click the SEARCH button.
5	Click on the last finalized pay calendar on the member. For instance, if mid-march is the last finalized Calendar ID, then CG ACT 2015M03M should be selected. You'll be able to tell if the right calendar is brought up by checking the Calendar Group ID on the Accumulator page. It should tell you what pay period the adjustment will be done on, as highlighted in red below. <div style="border: 1px solid black; padding: 5px;"> <p>Accumulators</p> <p>Employee ID: Empl Record: 0</p> <p>Calendar Group ID: C115030 201503 On-Cycle AD Mid Month Calendar ID: CG ACT 2015M03M</p> <p>Pay Group: USCG USCG Active Duty</p> <p>Pay Entity: USCG United States Coast Guard</p> <p>Accumulator</p> <p>Accumulator: <input type="text"/></p> </div>
6	Click on the Accumulator field and enter CG AC DITY UNTAXED.
7	Click on the From Date field and enter the beginning of the tax year. If doing the accumulator adjustment for 2015, then 1/1/2015 would be entered.
8	Click on the Through Date field and enter the last day of the tax year. If doing accumulator adjustment for 2015, then 12/31/2015 would be entered.
9	Click on the Amount field and enter the amount that needs to be applied to the accumulator.
10	Click on the Reason field and enter DITY ADJUSTMENT.
11	Click the SAVE button. A recalc will need to be done on the member so that the adjustment will be applied to the current pay calendar. Note: If member doesn't have a current pay calendar then the adjustment will only show on the accumulator page that it was done on.

An example of what the accumulator should look like is provided below:

Accumulators

Employee ID: . **Empl Record:** 0
Calendar Group ID: C115011 201501 On-Cycle AD End Month **Calendar ID:** CG ACT 2015M01E
Pay Group: USCG USCG Active Duty
Pay Entity: USCG United States Coast Guard

Accumulator	
Accumulator:	CG AC DITY UNTAXED Box 12 DITY Untaxed Portion

Instances		Find View All First 1 of 1 Last
From Date:	01/01/2015	Through Date: 12/31/2015
User Key 1:	<input type="text"/>	User Key 2: <input type="text"/>
User Key 3:	<input type="text"/>	User Key 4: <input type="text"/>
User Key 5:	<input type="text"/>	User Key 6: <input type="text"/>
Value:	0.000000	Applied Adjustment: 50.000000

Accumulator Empl Record: 000

Adjustments					Customize Find View All First 1 of 1 Last
Amount	Reason	Updated at	Updated by		
50.000000	DITY ADJUSTMENT	03/11/2015 1:56PM	DBUNGER		