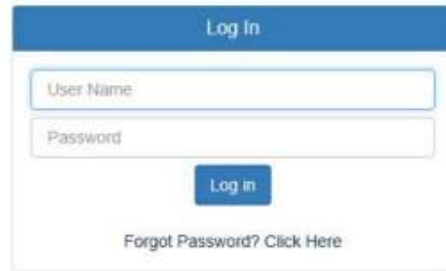


# Iowa Jobs Training (260E) Training Management System

## Withholding Guide

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## Contents

Choosing a Role, Using the Dashboard	p 2-3
Adding A Withholding Period	p 3
Adding Employees	p 4
Adding Wages	p 5-7
Submitting Withholding Period(s)	p 8-9
Uploading Confirmation Page	p 10
Managing Employees - During Reimbursement Period	p 11
Managing Employees - When Reimbursement is Over	p 12

## Choosing a role

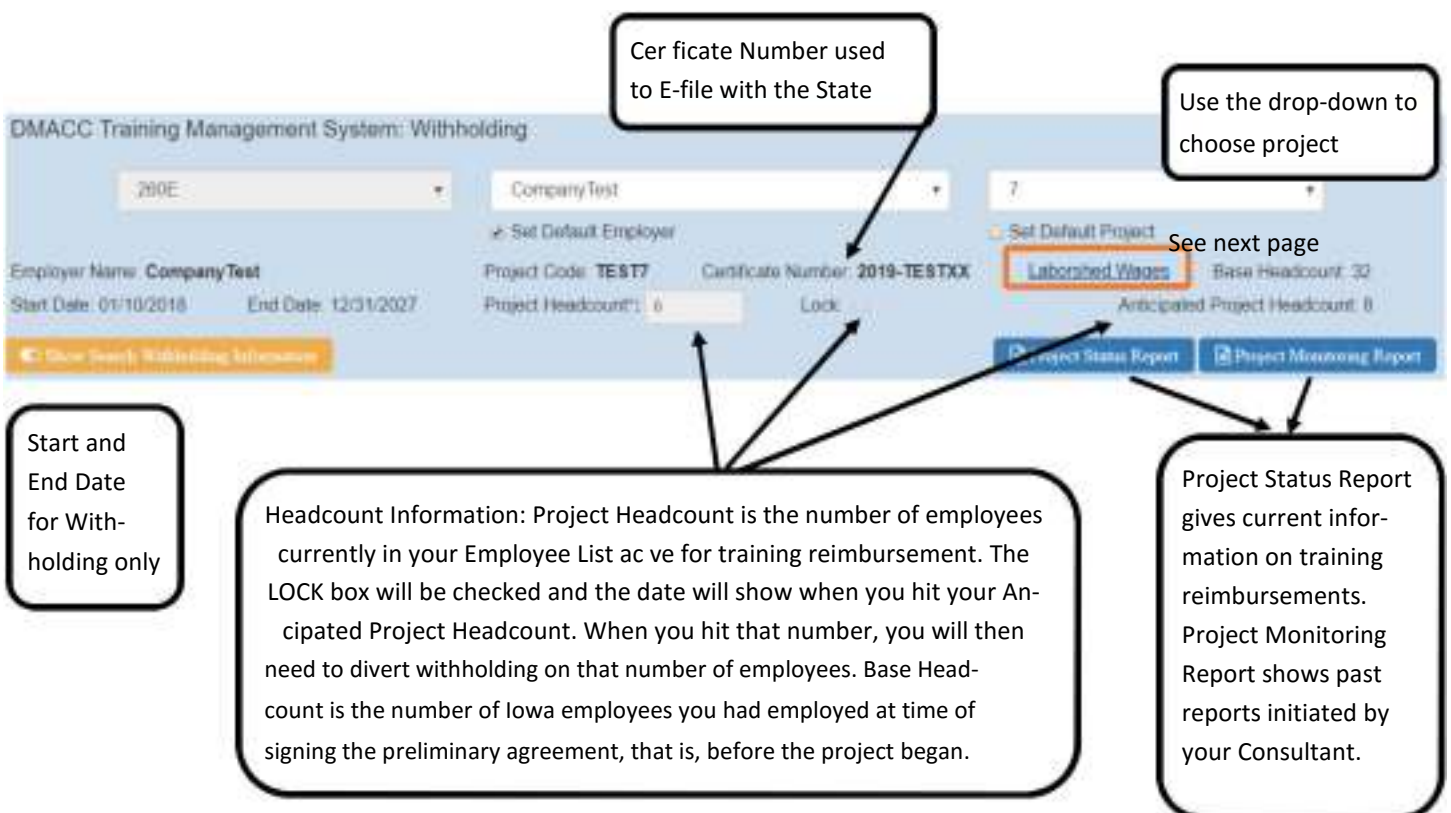
You may have two roles in the system. To manage the Withholding process, select **Payroll Specialist**.

(The Employer User role is to submit reimbursement for training, and keep Employee List up to date with who is active in the project.)



## Using the dashboard

When you login, you can use the dashboard to choose the project you want to work on, then see information about Withholding and get some status about training reimbursement dollars as well.



DMACC Training Management System: Withholding

200E CompanyTest 7

Employer Name: CompanyTest Project Code: TEST7 Certificate Number: 2019-TESTXX Laborized Wages Base Headcount: 32  
Start Date: 01/10/2018 End Date: 12/31/2027 Project Headcount: 6 Lock Anticipated Project Headcount: 8

Project Status Report Project Monitoring Report

Cer ficate Number used to E-file with the State

Use the drop-down to choose project

See next page

Start and End Date for Withholding only

Headcount Information: Project Headcount is the number of employees currently in your Employee List ac ve for training reimbursement. The LOCK box will be checked and the date will show when you hit your Anticipated Project Headcount. When you hit that number, you will then need to divert withholding on that number of employees. Base Headcount is the number of Iowa employees you had employed at time of signing the preliminary agreement, that is, before the project began.

Project Status Report gives current information on training reimbursements. Project Monitoring Report shows past reports initiated by your Consultant.

## Laborshed Wages

Click on the Laborshed Wages link in the dashboard for a popup that will show the wages in your location(s) that determine whether a position is withheld at NJC 1.5% or the supplemental SJC 1.5% (total 3%).

The screenshot shows a popup window titled "Locations & Laborshed Wages" with a close button in the top right corner. It contains a table with two columns: "Location" and "Laborshed Wage".

Location	Laborshed Wage
Main Location	24.27
Branch 2	18.73

Below the table is a "Close" button. At the bottom of the popup, there are two checkboxes: "Set Default Employer" (checked) and "Set Default Project" (unchecked).

## Adding a Withholding period

The screenshot shows the main dashboard with various fields and buttons. The "Add New Withholding" button is highlighted with a red box. The dashboard includes fields for "Employer Name: CompanyTest", "Project Code: TEST7", "Certificate Number: 2019-TESTXX", and "Laborshed Wages". There are also buttons for "Project Status Report" and "Project Monitoring Report".

Click Add New Withholding then choose dates in calendar for the period you are diver ng on.

Can be pay period, month, or quarter.

The screenshot shows the "Add New Withholding" popup window. It has two input fields for "From Date\*" and "To Date\*". A calendar is open, showing the month of January 2018. The date 10 is highlighted in yellow. There is a "Close" button next to the calendar.

Once dates are entered, the period you are working on opens, automatically. If you have NO employees entered yet for your project your screen looks like this. There are two ways to enter employees. You can enter them through the reimbursement side as a bulk upload or individually here, using the green button.

DMACC Training Management System: Withholding

260E CompanyTest 7

Set Default Employer  Set Default Project

Employer Name: **CompanyTest** Project Code: **TEST7** Certificate Number: **2019-TESTXX** [Laborshed Wages](#)

Start Date: 01/10/2018 End Date: 12/31/2027 Project Headcount\*:  Lock:  Anticipated Project Headcount: 8

[Back](#)

**Withholding Periods:**

Period ID	From Date	To Date	Submitted Date	Submitted Amount	Status
1	01/01/2010	01/31/2010		\$0.00	Active

**Employees:**

[Employee List From Project](#) [+Add Employee To Project For Training](#) [+ Employee List For Withholding Only](#) [+ Add Employee For Withholding Only](#)

Import Gross Wages: [Download Gross Wages Import Template and Encryption Tool](#) [Instructions](#) Excel File:  No file chosen

Total Employees: 0

Cert #: 2019-TESTXX Total: \$0.00 \$0.00

#	Employee ID	First Name	Last Name	Job Title	Hourly Rate	Gross Wages	Withholding Rate	Withholding Amount	Position Start Date	Assign Funding Types & Projects
1	102	Severus	Snape	Director, HR	44.65	7144	3		12/01/2017	260E 7
2	103	Hermione	Granger	Researcher II	29.63		3		12/04/2017	260E 7
3	104	Ron	Weasley	Accountant I						

**Annotations:**

- Using the green button lets you add employees to the list on the training side too.
- Click the green button to get a pop up to enter new employees who will do training in the project. Entering the hourly rate will calculate the withholding rate based on the laborshed wage for their location.
- The blue button is for adding people to withhold on ONLY. THEY WILL NOT BE DOING TRAINING WITH PROJECT FUNDS. More on that later.
- Click the blue plus sign to add another employee.
- Click the red x to delete that line.
- Click the green locator sign to choose which location that employee belongs to (if applicable).
- Use radio button to choose location if needed

Select Location & Laborshed Wage

Location	Laborshed Wage
Main Location	24.27
Branch 2	18.73

## Adding Wages—Individually

When adding a new withholding period, active employees will automatically populate. You will need to add their gross wages for that period. You can do that two ways: individually, or in an upload.

To individually add Gross Wages for the withholding period, just click the underlined \$0.00 of the employee and type in their wages. Click the check mark to save. The Withholding Amount will calculate automatically.

You will see employees split into NJC (1.5%) and SJC—supplemental 1.5% (3%) groups. Those who are at the higher rate are shaded yellow, and will be in both groups. Click the next page arrow to see the rest of the employees in that group.

Period ID	From Date
3	03/01/2018

First Name	Last Name	Current Title	Hourly Rate	Gross Wages*	Withholding Rate	Withholding Amount	Position Start Date	Status	For Withholding Only	
Harry	Potter	Accountant I	.....	<u>\$0.00</u>	1.5%	\$0.00	12/20/2017	Active	<input type="checkbox"/>	
Severus	Snape	Director, HR	.....	<u>\$0.00</u>	1.5%	\$0.00	12/01/2017	Active	<input type="checkbox"/>	
Hermione	Granger	Researcher II	.....	<u>\$0.00</u>	1.5%	\$0.00	12/04/2017	Active	<input type="checkbox"/>	
Ron	Weasley	Accountant I	.....	<u>\$0.00</u>	1.5%	\$0.00	12/01/2017	Active	<input type="checkbox"/>	
Draco	Malfoy	Clerk	.....	<u>\$0.00</u>	1.5%	\$0.00	11/30/2017	Active	<input type="checkbox"/>	
Cert #: 2019-TESTXX NJC Total (1.50 %):						\$0.00				
<span>1</span> <span>2</span> <span>»</span>										
Harry	Potter	Accountant I	.....	<u>\$0.00</u>	1.5%	\$0.00	12/20/2017	Active	<input type="checkbox"/>	
Severus	Snape	Director, HR	.....	<u>\$0.00</u>	1.5%	\$0.00	12/01/2017	Active	<input type="checkbox"/>	
Hermione	Granger	Researcher II	.....	<u>\$0.00</u>	1.5%	\$0.00	12/04/2017	Active	<input type="checkbox"/>	
Cert #: 2019-TESTXX SJC Total (Supplemental 1.50 %):						\$0.00				
Cert #: 2019-TESTXX Total:						\$0.00				

Emp ID	First Name	Last Name	Current Title	Hourly Rate	Gross Wages*	Withholding Rate	Withholding Amount	Position Start Date	Status	For Withholding Only
106	Luna	Lovegood	Communications Specialist	.....	<u>\$0.00</u>	1.5%	\$0.00	12/04/2017	Active	<input type="checkbox"/>
Cert #: 2019-TESTXX NJC Total (1.50 %):						\$0.00				
<span>«</span> <span>1</span> <span>2</span>										
101	Harry	Potter	Accountant I	.....	<u>\$0.00</u>	1.5%	\$0.00	12/20/2017	Active	<input type="checkbox"/>
102	Severus	Snape	Director, HR	.....	<u>\$0.00</u>	1.5%	\$0.00	12/01/2017	Active	<input type="checkbox"/>
103	Hermione	Granger	Researcher II	.....	<u>\$0.00</u>	1.5%	\$0.00	12/04/2017	Active	<input type="checkbox"/>
Cert #: 2019-TESTXX SJC Total (Supplemental 1.50 %):						\$0.00				
Cert #: 2019-TESTXX Total:						\$0.00				

## Adding Wages—Encrypted Upload

When you have employees already added, you may upload using an Excel template and copying information in from your own HR system.

Emp ID	First Name	Last Name	Current Title	Hourly Rate	Gross Wages	Withholding Rate	Withholding Amount	Position Start Date	Status	For Withholding Only
102	Severus	Scope	Director HR	44.65	50.00	1.5%	50.00	12/01/2017	Active	

Click Step 1: 'Download Gross Wages Import

Template' Open Excel template and Enable Editing

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing](#)

	A	B	C	D	E	F
	First Name*	Last Name*	SSN*	Gross Wages*	Hourly Rate	
1	(exact value)	(exact value)	(no dashes)	(exact value)	(exact value)	

Fill in employee information (you can copy/paste from your HR system without sorting out project participants; this system will match and filter for you)

**NOTE:** Hourly Rate is optional

Save and Close Excel document

Click Step 2: 'Encrypt a File'

Find the Gross Wages Import Template—Usually in your Downloads Folder, based on your computer settings

Click 'Open' to create the encrypted file

The encrypted file will also be placed in your Downloads Folder

Click Step 3: 'Import Encrypted File'

Click 'Open' and you will see the file listed to

upload

Step 3  
Import Encrypted File: [Choose File](#) ImportGrossWag...xl [Upload](#)

Step 2

Step 3

## Adding Wages—Encrypted Upload

Click 'Upload'

You will be notified of successful updates

You will see the Gross Wages added and withholding calculated on the screen

**NOTE:** you will not need to download the template each time, just copy and paste new data for the new pay period and start from Step 2

04/01/2018 5 record(s) updated successfully. Active

Employees:

Employees List From Project Add Employee To Project For Training Employees List For Withholding Only Add Employee For Withholding

Import Gross Wages:

Step 1 Download Gross Wages Import Template

Step 2 Encrypt a File

Step 3 Import Encrypted File: Choose File No file chosen

Total Employees: 6

Emp ID	First Name	Last Name	Current Title	Hourly Rate	Gross Wages	Withholding Rate	Withholding Amount	Position Start Date	Status	For Withholding Only
102	Severus	Snape	Director, HR	44.65	\$5,295.22	1.5%	\$79.43	11/01/2017	Active	
103	Hermione	Granger	Researcher II	29.63	\$4,101.99	1.5%	\$61.53	11/04/2017	Active	
101	Harry	Potter	Accountant I		\$3,190.23	1.5%	\$47.85	11/20/2017	Active	
104	Ron	Weasley	Accountant I	24.20	\$3,007.33	1.5%	\$45.11	11/01/2017	Active	
106	Luna	Lovegood	Communications Specialist	18.52	\$2,300.77	1.5%	\$34.51	11/04/2017	Active	

Wages added and Withholding calculated automatically

## Submitting Withholding Period(s)

When all Gross Wages are entered, you will have the amount to divert calculated and you may submit. There are two ways to submit.

Withholding Periods:

Period ID	From Date	To Date	Submitted Date	Submitted Amount	Status
2	02/01/2018	02/28/2018		\$0.00	Active

Employees:

Import Gross Wages:

Total Employees: 6

Emp ID	First Name	Last Name	Current Title	Hourly Rate	Gross Wages*	Withholding Rate	Withholding Amount	Position Start Date	Status	For Withholding Only
101	Harry	Potter	Accountant I		\$4,112.33	1.5%	\$61.68	12/20/2017	Active	<input type="checkbox"/>
102	Severus	Snape	Director, HR		\$4,596.33	1.5%	\$68.94	12/01/2017	Active	<input type="checkbox"/>
103	Hermione	Granger	Researcher II		\$4,815.03	1.5%	\$72.23	12/04/2017	Active	<input type="checkbox"/>
104	Ron	Weasley	Accountant I		\$3,312.59	1.5%	\$49.69	12/01/2017	Active	<input type="checkbox"/>
105	Draco	Malfoy	Clerk		\$3,018.25	1.5%	\$45.27	11/30/2017	Active	<input type="checkbox"/>

Cert #: 2019-TESTXX NJC Total ( 1.50 %): \$357.84

1 2 x

101	Harry	Potter	Accountant I		\$4,112.33	1.5%	\$61.68	12/20/2017	Active	<input type="checkbox"/>
102	Severus	Snape	Director, HR		\$4,596.33	1.5%	\$68.94	12/01/2017	Active	<input type="checkbox"/>
103	Hermione	Granger	Researcher II		\$4,815.03	1.5%	\$72.23	12/04/2017	Active	<input type="checkbox"/>

Cert #: 2019-TESTXX SJC Total (Supplemental 1.50 %): \$202.85

Cert #: 2019-TESTXX Total: \$23,856.65 \$560.69

Attach an image(s) of the Confirmation Page: See Sample of the Confirmation Page [Add Files](#)

Uploaded Date	Uploaded by	Attachment Filename	Do not Convert
			<input type="checkbox"/>

[Submit Withholding](#)

Submit inside the session by clicking the green arrow box, then blue Submit Withholding button below.

Submit multiple periods from the main screen by clicking the green arrow box(es), then blue Submit Withholding button below.

3 Period(s) found

Quarter Of Year	Period ID	From Date	To Date	Submitted Date	Submitted Amount	Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View Package
Q1 2018	Select 1	01/01/2018	01/31/2018	01/14/2019	\$730.70	Submitted	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	View
Q1 2018	Select 2	02/01/2018	02/28/2018		\$0.00	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Q1 2018	Select 3	03/01/2018	03/31/2018		\$0.00	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

[Upload Confirmation Page file](#) [Confirmation Page Info](#) [Submit Withholding](#)



# Submitting Withholding Period(s)

You will confirm the accuracy of the submission and have the opportunity to hide sensitive employee information at that time, if you choose, if you need to send the documentation on to another department to cut a check, etc.

**Confirm Submission**

I certify this withholding information is true and accurate to the best of my knowledge

Hide Employee Information

First Name

Last Name

Current Title

Position Start Date

Withholding Periods: Status Any + Add New Withholding

2 Period(s) found

Quarter Of Year	Period ID	From Date	To Date	Submitted Date	Submitted Amount	Status	View Package
Q1 2018	Select 1	01/01/2018	01/31/2018	01/14/2019	\$730.70	Submitted	View
Q1 2018	Select 2	02/01/2018	02/28/2018		\$0.00	Active	

[Confirmation Page Info](#)

From the main page, you can see what has been submitted & what is active. You can also click view to see/print/save the documentation created.

## Withholding Summary and Employee List

Company: CompanyTest  
 Project Code: TEST70  
 Multiple Number:

Period ID	From Date	To Date	Total Cost	Submitted Date
1	1/1/2018	1/31/2018	\$730.70	01/14/2019
Totals:			\$730.70	

Employee ID	First Name	Last Name	Current Title	Position Start Date	Hourly Rate	Gross Wages	Withholding Rate	Withhold Amt
104	Ron	Wesley	Accountant I	12/1/2017	24.20	\$4,452.80	1.50%	\$66.79
105	Dance	Malfoy	Clerk	11/30/2017	17.82	\$3,297.12	1.50%	\$49.46
106	Luna	Lovegood	Communication & Specialist	12/4/2017	18.92	\$3,765.08	1.50%	\$56.48
101	Harry	Peter	Accountant I	12/20/2017	26.12	\$4,806.08	1.50%	\$72.09
102	Severus	Snape	Director, HR	12/1/2017	44.45	\$8,215.80	1.50%	\$123.24
103	Hermione	Granger	Researcher II	12/4/2017	29.43	\$5,622.38	1.50%	\$84.34
6 Cert #2019-TESTXX: NJC Total (1.50%)								
101	Harry	Peter	Accountant I	12/20/2017	26.12	\$4,806.08	1.50%	\$72.09
102	Severus	Snape	Director, HR	12/1/2017	44.45	\$8,215.80	1.50%	\$123.24
103	Hermione	Granger	Researcher II	12/4/2017	29.43	\$5,622.38	1.50%	\$84.34
3 Cert #2019-TESTXX: SJC Total (Supplemental 1.50%)								
6 Cert #2019-TESTXX: Totals:						\$30,009.06		\$450.14

## Withholding Summary and Employee List

Company: CompanyTest  
 Project Code: TEST70  
 Multiple Number:

Period ID	From Date	To Date	Total Cost
2	2/1/2018	2/28/2018	\$0.00
Totals:			\$0.00

Employee ID	First Name	Last Name	Current Title	Position Start Date	Hourly Rate	Gross Wages	Withhold Amt
104			Accountant I	12/1/2017		\$3,312.59	1.5%
105			Clerk	11/30/2017		\$5,018.25	1.5%
106			Communication & Specialist	12/4/2017		\$4,002.12	1.5%
101			Accountant I	12/20/2017		\$4,112.33	1.5%
102			Director, HR	12/1/2017		\$4,596.33	1.5%
103			Researcher II	12/4/2017		\$4,815.03	1.5%
6 Cert #2019-TESTXX: NJC Total (1.50%)							
101			Accountant I	12/20/2017		\$4,112.33	1.5%
102			Director, HR	12/1/2017		\$4,596.33	1.5%
103			Researcher II	12/4/2017		\$4,815.03	1.5%
3 Cert #2019-TESTXX: SJC Total (Supplemental 1.50%)							
6 Cert #2019-TESTXX: Totals:						\$23,866.66	

Examples of reports 'Package' created: the report from the session, plus any other documents you upload. The one to the right has information on hidden.

Please PRINT and send this report to your college's Business Office with your check.

## Uploading Confirmation Page

Once per quarter, you will upload the Confirmation Page from the State E-file system.

Click **black** upload arrow box for ALL applicable sessions for that quarter. Then click **blue Upload Confirmation Page file** button.

3 Period(s) found

Quarter Of Year	Period ID	From Date	To Date	Submitted Date	Submitted Amount	Status				View Package
Q1 2018	Select 1	01/01/2018	01/31/2018	01/14/2019	\$730.70	Submitted				View
Q1 2018	Select 2	02/01/2018	02/28/2018	01/15/2019	\$560.71	Submitted				View
Q1 2018	Select 3	03/01/2018	03/31/2018		\$0.00	Active				

If you need information about the State system/ Confirmation page, follow the link below the button.

[Upload Confirmation Page file](#) [Submit Withholding Confirmation Page Info](#)

A popup will open for you to drag and drop the file.  
Then click Start Upload.

Add new file

DROP FILE HERE

BROWSE

Capture PNG 30.14 KB

Close

Quarter Of Year	Period ID	From Date	To Date	Submitted Date	Submitted Amount	Status				View Package
Q1 2018	Select 1	01/01/2018	01/31/2018	01/14/2019	\$730.70	Submitted				View
Q1 2018	Select 2	02/01/2018	02/28/2018	01/15/2019	\$560.71	Submitted				View
Q1 2018	Select 3	03/01/2018	03/31/2018		\$0.00	Active				

The Confirmation Page file will be added to all sessions you indicated.

## Managing Employees for Withholding

The employee list can be managed on the reimbursement side for training, and will carry over to withholding.

Employees:

Employee List From Project

Add Employee To Project For Training

Employee List For Withholding Only

Add Employee For Withholding Only

When you start a new withholding period, it will autopopulate with all ACTIVE employees. If an employee has been made INACTIVE on the reimbursement/training side, but still had wages and can have withholding tax diverted for that period, you can find them in the Employee List From Project Button, under Inactive.

### Employee From Project

Active	Inactive	Employee ID	First Name	Last Name	Current Title	Withholding Rate	Inactive Date in Project	Employee Inactive Date	<input type="checkbox"/>
		105	Draco	Malfoy	Clerk	1.50	01/28/2019	01/25/2019	<input checked="" type="checkbox"/>

To add them back to the list so you can add their gross wages, just check the box, then click Add. You will see them with the rest of the employees.

Add

Close

## Managing Withholding Once Reimbursement is Over

You must continue withholding even after Reimbursement Funds are no longer available. You continue to track employees from the project and keep the employee list up to date.

Employees:

[←Employee List From Project](#)
[→Add Employees To Project For Training](#)
[←Employee List For Withholding Only](#)
[→Add Employees For Withholding Only](#)

Use the blue buttons AFTER the time for Reimbursements is over. The blue buttons are for managing employees FOR WITHHOLDING ONLY. These are employees who were **NOT** hired as part of the project parameters, but may be part of the base headcount, and help fulfill your withholding requirements.

For example, if your base headcount was 20, and your anticipated project headcount was 8, and you hired 8, your total headcount was 28, that's great! But then five years into withholding, you lost 2 people and couldn't fill those positions. You're down to 6 in that project, but since you hired 8, you must withhold on 8, so you can go to that base of 20 and choose two similar positions and use the blue button to [Add Employee for Withholding Only](#).

When adding a withholding period even after Reimbursement is over, it will populate with employees who are active in that project. If you have added employees from the base for withholding only, access them by clicking the [Employee List for Withholding Only](#) button. Choose the employee, check the box, and click Add.

For Withholding Only List

Employee ID	First Name*	Last Name*	Hourly Rate	Current Title*	Position Start Date*	Withholding Rate*	<input type="checkbox"/>
	Hedwig	TheOwl	14.22	Communications	02/01/2018	1.5%	<input checked="" type="checkbox"/>

[Add](#) [Close](#)

They will be added to the list of employees, with a checkbox in "For Withholding Only"

Emp ID ⇅	First Name ⇅	Last Name ⇅	Current Title ⇅	Hourly Rate	Gross Wages*	Withholding Rate	Withholding Amount	Position Start Date ⇅	Status ⇅	For Withholding Only ⇅	<input type="checkbox"/>
.....	Hedwig	TheOwl	Communications	14.22	\$0.00	1.5%	\$0.00	02/01/2018	Active	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Cert #: 2019-TESTXX NJC Total ( 1.50 %): \$0.00