



2017 VOLUNTARY PAYROLL WITHHOLDING (CTAZ/CTSO) REQUEST FORM
(Please Print Clearly)

FORM MUST BE RE-SUBMITTED ANNUALLY TO HR/PAYROLL (payroll@diocesetucson.org or fax: 520.838.2583) TO SET UP OR CONTINUE PAYROLL WITHHOLDING FOR TUITION TAX CREDIT CONTRIBUTION

Employee Name: \_\_\_\_\_ Spouse: \_\_\_\_\_

Address: \_\_\_\_\_ email: \_\_\_\_\_

City: \_\_\_\_\_ Zip: \_\_\_\_\_ Phone: \_\_\_\_\_

DT# / Employment Location: \_\_\_\_\_

Tax Filing Status (Mandatory! Needed for correct processing of tax credit receipt!)

[ ] Single or Married Filing Separately [ ] Married Filing Jointly

You may choose one or a combination of both options to reach your projected state tax liability. Please read the explanation of each option (below) prior to filling in your selected option and compute your request so that participation will be honored. For additional clarification, call CTSO @ (520) 838-2571 or 2572.

Option 1 (CTAZ): Please redirect \$\_\_\_\_\_ per paycheck from my state tax withholding until I reach my requested contribution of \$\_\_\_\_\_ for the 2017 tax year. See below to understand how this option impacts your paycheck! Please note, if you write in an amount that is greater than is being withheld from your paycheck, \$0 (none) will be redirected. Check your pay stub for guidance when filling in this form and see the explanation below!

Option 2 (CTSO): Please deduct \$\_\_\_\_\_ per paycheck until I reach my requested (additional or straight) contribution of \$\_\_\_\_\_ for 2017. See below to see how this option impacts your paycheck!

Beneficiary School: \_\_\_\_\_ RP# \_\_\_\_\_ (if applicable)

Explanations: Option 1 shows up on your pay stub as CTAZ. By selecting this option, you see no change to your net pay. Your contribution is taken from your state withholding "box" until your total contribution is reached. Your net pay is not impacted. Because net pay is not impacted, this is the more popular option; however, it is also the option that employees tend to miscalculate because they do not correlate their CTAZ request with what they have elected in terms of their state withholding for their paycheck. To best calculate this amount, please refer to your State Withholding selection and do not put a dollar amount that is larger than is being withheld. Otherwise, HR/Payroll cannot process your request and you will have to resubmit it for processing or you will not have any withholding for a tax credit!

Option 2 shows up on your pay stub as CTSO. Selection of this option DOES affect your bottom line/net pay. Because some employees know that they may have a larger state tax liability than is being withheld from their state tax "box", OR they may have opted to not have any state tax withheld from their paycheck, this option is available to make "scheduled payments" in order to supplement option 1, or to simply make their CTSO contribution via an automatic payroll deduction.

2017 Maximums based on filing status & liability:

\$2177 (if filing married/jointly)

\$1089 (if filing single or head of household/filing single)

Employee Signature \_\_\_\_\_