HMTAX010 – MEDICARE REPORT

Departments are responsible for determining and/or verifying the Medicare tax status of each of their employees, and entering that status correctly in HR/CMS. This requires confirming whether an employee has a concurrent job and ensuring that both jobs have the same/correct Medicare status in HR/CMS. Because HR/CMS security does not allow for cross department view, errors sometimes occur.

In order to assist departments in ensuring compliance, the Office of the Comptroller created a new online report named HMTAX010 – Medicare Report that will allow departments to view any inconsistent Medicare tax status for any concurrent job from any department. The report is available through MobiusView and is updated monthly. You need to request access to this report from your Department Security Officer.

If your department's employee(s) appear on this report, it is necessary to communicate with other departments to resolve inconsistencies and to take corrective action prior to the next pay period.

DATA ELEMENTS

Emplid Name Empl Rcd	Identifies employee	**Jobcode**	Most current effective dated job code for the corresponding job record
Deptid	Dept the employee was/is employed in the current calendar year per job record	**Jobcode**	Description of the jobcode
Original Hire Date	Initial hire date into the Commonwealth. This date will assist in identifying the employee's correct Medicare status	**Posn Type**	Most current effective dated position type for the corresponding job record
Medicare Status	Most current effective dated Medicare status for the corresponding job record	**Dept Entry Date**	Date of hire per department of the corresponding job record
Empl Status	Most current effective dated status for the corresponding job record	**Taxgrs**	Taxable gross for the current calendar year to date for the corresponding job record
Tax	Amount of Medicare tax the corresponding job record paid in the current calendar year to date based on 1.45% of the taxable gross		

Important: If departments agree that an inconsistency exists, the department whose employee record has the incorrect FICA status should determine if that employee OWES Medicare tax or is eligible for a REFUND.

Owes Medicare tax:

Please contact Dan O'Neil at Daniel.j.oneil@mass.gov to determine the amount owed. Employee may choose to pay in one lump sum or a minimum of $50.00 increments until balance is satisfied.

Completing these steps will ensure these employees Forms W-2 will be accurate for current calendar year.

Please refer to the Office of the Comptroller's Determining Medicare Status Job Aid for guidance on determining an employee's Medicare status. If you need additional assistance please contact Dan O'Neil at Daniel.j.oneil@mass.gov.