

Update Employee Tax Data – Employees Living and Working outside New York State, eligible for the Paid Family Leave Premium Deduction.

The PayServ implementation of the NY Paid Family Leave program has resulted in a new procedure to updating eligible employees who currently live and work in a state other than New York State and are currently being withheld taxes for the non-New York State. Agency payroll officers will be required to update the employee’s tax data to include NY as one of their withholding states in order to have the premium deduction withheld for Paid Family Leave.

- To review the **Federal/State Tax Data Page** go to **Payroll for North America> Employee Pay Data USA> Tax Information> Update Employee Tax Data.**
- Enter the **Empl ID (1)** and the **Company (2).**
- Click **Search (3).**

Update Employee Tax Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Empl ID: begins with []

Company: begins with []

National ID: begins with []

Name: begins with []

Last Name: begins with []

Include History

Limit the number of results to (up to 300): 300

Search Clear Basic Search Save Search Criteria

- The Employee Federal Tax Data Page is displayed.
- To update the State data for the employee, click the **plus sign (4)** to add a new effective dated row. The **Effective Date (5)** field defaults to the current date. As long as this date is prior to the check date that the change should be impacted in, there is not a need to update the date from the current date.
- Click on the **State Tax Data (6)** tab.

The screenshot shows the 'Employee Federal Tax Data' page. At the top, there are three tabs: 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'. The 'State Tax Data' tab is selected. Below the tabs, the 'Person ID' is 'N'. The 'Tax Data' section shows 'Company: NYS STATE OF NEW YORK' and '*Effective Date: 12/08/2017'. The 'Updated By' is 'Online Usr' and 'Date Last Updated' is blank. The 'Federal Withholding Elements' section includes: '*Special Withholding Tax Status: None', '*Tax Marital Status: Single', 'Withholding Allowances: 2', 'Additional Amount: \$0.00', 'Additional Percentage: 0.000', '*Earned Income Credit Status: Not applicable', and a checked box for 'Exempt from FUT'. Below this are expandable sections for 'W-4 and W-5 Processing Status', 'Lock-In Letter Details', 'State Tax Options', 'Tax Treaty/Non-Resident Data', and 'W2-Reporting'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Refresh', 'Update/Display', and 'Include History'. Navigation links for 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data' are at the very bottom.

- The current **State (7)** that the employee is being withheld State taxes from will be displayed.
- To update the State data for NY for the employee, click the **plus sign (8)** to add a new row for a new state.

Federal Tax Data | **State Tax Data** | Local Tax Data

Person ID: N

Tax Data Find | View All First 1 of 2 Last

Company: NYS **7** STATE OF NEW YORK Effective Date: 12/08/2017 + -

State Information Find | View All First 1 of 1 Last

*State: DC District of Columbia + -

Resident UI Jurisdiction
 Non-Residency Statement Filed Exempt From SUT

State Withholding Elements

*Special Withholding Tax Status: None

*Tax Marital Status: [Text Area]

Withholding Allowances: 2

Additional Amount: \$0.00

Additional Percentage: 0.000

Additional Allowances: 0

▶ Lock-In Letter Details

Save Return to Search Refresh Update/

- The **State (9)** field should default to blank. The user should enter 'NY' in this field.

Federal Tax Data | **State Tax Data** | Local Tax Data

Person ID: N

Tax Data Find | View All First 1 of 2 Last

Company: NYS **9** STATE OF NEW YORK Effective Date: 12/08/2017 + -

State Information Find | View All First 2 of 2 Last

*State:  

Resident UI Jurisdiction
 Non-Residency Statement Filed Exempt From SUT

State Withholding Elements

*Special Withholding Tax Status: None

*Tax Marital Status: 

Withholding Allowances: 0

Additional Amount: \$0.00

Additional Percentage: 0.000

Additional Allowances: 0

Lock-In Letter Details

Save Return to Search Refresh Update

Federal Tax Data | State Tax Data | Local Tax Data

Federal Tax Data | State Tax Data | Local Tax Data

Person ID: N

Tax Data Find | View All First 1 of 2 Last

Company: NYS STATE OF NEW YORK Effective Date: 12/08/2017

State Information Find | View All First 2 of 2 Last

*State: NY New York

Resident

Non-Residency Statement Filed

*SDI Status: Exempt

*FLI Status: Not Applicable

UI Jurisdiction

Exempt From SUT

State Withholding Elements

*Special Withholding Tax Status: None

*Tax Marital Status: S Single or Head of Household

Withholding Allowances: 0

Additional Amount: \$0.00

Additional Percentage: 0.000

Additional Allowances: 0

Lock Letter Details

Save Return to Search Refresh Update

- The ***FLI Status Field (10)** should then display
- Users should then uncheck the **Resident checkbox (11)**.
- Users should check the **UI Jurisdiction checkbox (12)**.
- Users should check the **Exempt from SUT checkbox (13)**.
- The user will then need to enter in the **Tax Marital Status (14)** in order to save the record.
- **Save (15)** the changes. The employee tax data is now updated.

***FLI – Family Leave Insurance**

- There is no change to the **Tax Distribution (16)** for this employee. It should remain as the non-NY state and only the Federal and State Taxes will be withheld using the non-NY state tax tables. The only deduction that will occur for this change will be a deduction for the Paid Family Leave premium.

[Favorites](#) | [Main Menu](#) > [Payroll for North America](#) > [Employee Pay Data USA](#) > [Tax Information](#) > [Update Tax Distribution](#)

[Employee Tax Distribution](#) ← **16**

Update Tax Distribution

----- EMP ID: N Empl Record: 0

Tax Distribution Find | View All First 1 of 2 Last

*Effective Date: 12/08/2017

Country: USA

Insert Pre-filled Tax Location

States/Localities Personalize | Find | View All First 1 of 1 Last

*State	Locality	Locality Name	Percent of Distribution
DC		NEW YORK	100.000

[Save](#) | [Return to Search](#) | [Refresh](#) | [Update/Display](#) | [Include History](#)