

## 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)**.

The screenshot shows a web browser window with the following breadcrumb trail: Favorites | Main Menu > Payroll for North America > Employee Pay Data USA > Tax Information > Update Employee Tax Data. The page title is "Update Employee Tax Data". Below the title is the instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." There is a "Find an Existing Value" button. A "Search Criteria" section contains five input fields, each with a "begins with" dropdown menu: "Empl ID", "Company", "National ID", "Name", and "Last Name". Red arrows labeled "1" and "2" point to the text input boxes for "Empl ID" and "Company" respectively. Below these fields is an "Include History" checkbox and a text input for "Limit the number of results to (up to 300):" with the value "300" entered. At the bottom are "Search" and "Clear" buttons, along with links for "Basic Search" and "Save Search Criteria". A red arrow labeled "3" points to the "Search" button.

- 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 main section is titled 'Tax Data' and contains the following information:

- Company: NYS STATE OF NEW YORK
- \*Effective Date: 12/08/2017
- Updated By: Online Usr
- Date Last Updated:

Below this information is a section for 'Federal Withholding Elements' with the following fields:

- \*Special Withholding Tax Status: None
- \*Tax Marital Status: Single (with a 'Single' label next to it)
- Withholding Allowances: 2
- Additional Amount: \$0.00
- Additional Percentage: 0.000
- \*Earned Income Credit Status: Not applicable
- Exempt from FUT

At the bottom of the page, there are several buttons: Save, Return to Search, Previous in List, Next in List, Refresh, Update/Display, and Include History. Below the buttons are links for 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'.

- 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 14 of 1 | Last

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

State Information 11 12 10 13 14 Find | View All | First 2 of 2 | Last

\*State:   + -

Resident  UI Jurisdiction 10

Non-Residency Statement Filed  Exempt From SUT

\*SDI Status:  \*FLI Status:  10

State Withholding Elements

\*Special Withholding Tax Status:  13

\*Tax Marital Status:   13

Withholding Allowances:

Additional Amount:

Additional Percentage:

Additional Allowances:

Lock-In Letter Details

Save Return to Search Notify Refresh Update/Display Include P

- The **\*FLI Status Field (10)** should then display.
- Users should then uncheck the **Resident checkbox (11)**.
- Users should check the **UI Jurisdiction checkbox (12)**.
- The user will then need to enter in the **Tax Marital Status (13)** in order to save the record.
- The user should then click on the **Arrow (14)** to view the previous row for the Non-NY row.

**\*FLI – Family Leave Insurance**

- Users should then uncheck the **UI Jurisdiction** checkbox – for the non-NY State row (15).
- **Save (16)** the changes. The employee tax data is now updated.

The screenshot shows a software interface for entering tax data. At the top, there are tabs for 'Federal Tax Data', 'State Tax Data', and 'Local Tax Data'. The 'State Tax Data' tab is active. The form is for 'Person ID: N'. The 'Company' is 'NYS STATE OF NEW YORK' and the 'Effective Date' is '12/08/2017'. The 'State Information' section shows the state as 'DC District of Columbia'. The 'Resident' checkbox is checked, while 'Non-Residency Statement Filed' and 'UI Jurisdiction' are unchecked. 'Exempt From SUT' is checked. The 'State Withholding Elements' section includes fields for 'Special Withholding Tax Status' (None), 'Tax Marital Status' (Single), 'Withholding Allowances' (1), 'Additional Amount' (\$0.00), 'Additional Percentage' (0.000), and 'Additional Allowances' (0). A red arrow labeled '15' points to the 'UI Jurisdiction' checkbox. At the bottom left, a red arrow labeled '16' points to the 'Save' button. Other buttons at the bottom include 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include H'.

- There is no change to the **Tax Distribution (17)** 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](#) ← 17 →

## Update Tax Distribution

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

**Tax Distribution** [Find](#) | [View All](#) | [First](#) | 1 of 2 | [Last](#)

\*Effective Date:  + -

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 <input type="text"/>	<input type="text"/>	NEW YORK	100.000 <span style="float: right;">+ -</span>

Save
 Return to Search
 Refresh
 Update/Display
 Include History