



Lay Employee New Hire Guide for Business Managers

As of October 2025

Multi-location Employees

- Step 1: Ask the employee if they are working at multiple Archdiocesan locations.
 - If they say yes, **STOP** you need to contact **Mary Jones** prior to entering data into the new hire template. There is a special process for multi-location Employees (MLE) that **NEEDS** to be followed.
 - If no, you can continue with the checklist and following slides.

Mary Jones: mjones@catholicaoc.org, 513-263-3353

Possible Rehire?

- Does this employee exist in your company database? Within HR&P navigate to Employee Search and search for the employee's SSN. If the employee already exists you will need to follow the separate rehire guide. **STOP: DO NOT process this employee as a new hire.**

New Hire Template

New Hire Benefits & T&L UPDATED

Employee

• Employee Id	7092
• Last Name	
• First Name	
Middle Name	
Salutation	
Suffix	-- Select --
Nickname	
Prior Last Name	
• SSN / EIN	
• Birth Date	
• Gender	-- Select --
Ethnicity	-- Select --
Marital Status	-- Select --
Smoker	<input type="checkbox"/>
Disability	
Veteran	

- All **green** fields are required fields to complete the New Hire process.
- Leave the pre-populated Employee ID value as is.

Department & Position

Dept/Position

Current Effective Date

• Level 1

• Level 2

• Level 3

• Employment Type

• Supervisor 

Reviewer 

Is Supervisor / Reviewer?

• Position

Job Title

EEO Class

Work Comp

Work Phone/Ext Ext

• Work Email

OT Exempt

- All **green** fields are required fields to complete the New Hire process.
- Please **see slides 6 & 7** if you are unsure what value to select for Employment Type and Position.

An employee's employment type plays a critical role in determining what fields need to be filled out correctly on their record for Benefits and reporting purposes. Please review the charts on the next 2 slides in detail to determine what category your employee belongs to.

If you have any questions about what employment type to utilize please reach out to Mary Jones at the Archdiocese.

- mjones@catholicaoc.org
- 513-263-3353

Lay Employee Classification Grid

<u>Employment Type Code (K)</u>	<u>Note Ref</u>	<u>Measurement</u>	<u>Health Benefit Eligibility Code</u>	<u>Healthcare Offered (G)</u>	<u>Life, AD&D and LTD (H)</u>	<u>FLSA Exempt? (J)</u>					<u>Employee Required to Use the Time & Labor Module in PCTY</u>	
							<u>401K Status</u>	<u>401K Loan</u>	<u>401K SH (I)</u>	<u>401K Deferral Eligibility</u>		
Reg GE 30h	A	Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Full Time	Y	Y	Y	Not Required	
Reg GE 30h	A	Hours	I - Benefits Eligible Lay Employee	Y	Y	N	Full Time	Y	Y	Y	Yes - FLSA	
Reg GE 20h	A	Hours	XI - Life and LTD Only	N	Y	N	Full Time	Y	Y	Y	Yes - ACA Rptg + FLSA	
Reg LT 20h	A	Hours	NBE - Not Benefits Eligible	N	N	N	Part Time	N	N	Y	Yes - FLSA	
Tea GE 15h	B	Classroom Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Full Time	Y	Y	Y	Not Required	
Tea GE 12h	B	Classroom Hours	XI - Life and LTD Only	N	Y	Y	Full Time	Y	Y	Y	No-Default Hrs will be used for ACA Reporting	
Tea LT 12h	B	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Part Time	N	N	Y	No-Default Hrs will be used for ACA Reporting	
Tea LT Sub	B	Classroom Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Part Time	N	N	Y	No-Default Hrs will be used for ACA Reporting	
Tea ST Sub	B	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Part Time	N	N	Y	No-Default Hrs will be used for ACA Reporting	
Tea OC Sub	B	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Part Time	N	N	Y	No-Actual Hours will be entered on Pay grid	
Occasional	C	Hours	NBE - Not Benefits Eligible	N	N	N	Part Time	N	N	Y	No-Actual Hours will be entered on Pay grid	
Temporary	D	Hours	NBE - Not Benefits Eligible	N	N	N	Part Time	N	N	Y	Yes - FLSA	
Sem GE 14h	E	Semester Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Full Time	Y	Y	Y	Not Required	
Sem GE 9h	E	Semester Hours	XI - Life and LTD Only	N	Y	Y	Full Time	Y	Y	Y	No-Default Hrs will be used for ACA Reporting	
Sem GE 4.5	E	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Full Time	Y	Y	Y	No-Default Hrs will be used for ACA Reporting	
Sem LT 4.5	E	Classroom Hours	NBE - Not Benefits Eligible	N	N	Y	Part Time	N	N	Y	No-Default Hrs will be used for ACA Reporting	
Prj GE 30h	F	Hours	I - Benefits Eligible Lay Employee	Y	Y	Y	Full Time	Y	Y	Y	Not Required	
Prj GE 30h	F	Hours	I - Benefits Eligible Lay Employee	Y	Y	N	Full Time	Y	Y	Y	Yes - FLSA	
Prj GE 20h	F	Hours	XI - Life and LTD Only	N	Y	N	Full Time	Y	Y	Y	Yes - ACA Rptg + FLSA	
Prj LT 20h	F	Hours	NBE - Not Benefits Eligible	N	N	N	Part Time	N	N	Y	Yes - FLSA	

Lay Employee Classification Grid cont.

Notes												
A	For Non-Teachers, this is the most common classification											
B	Teachers include a board-certified teacher <u>or</u> individual with primary instructional control of a classroom. This classification <u>does not include Aides</u> . The ratio of classroom hours to regular hours is measured on a ratio of 2:1.											
B		<u>Long Term subs</u> (Defined as an individual that is expected to work fifteen or more classroom hours per week for 2 or more consecutive months) should be classified as "Tea LT Sub".										
B		<u>Short Term</u> (Defined as an individual that is expected to work less than fifteen classroom hours per week OR less than 2 consecutive months) should be classified as "Tea ST Sub"										
B		<u>Occasional subs</u> (Defined as an individual that fills in occasionally. I.e. only when needed and NOT regularly scheduled) should be classified as "Tea OC Sub". Default Hours will be zero. When these employees are paid, hours must be entered in the pay grid for ACA Reporting purposes.										
C	Occasional Workers include Coaches, Musicians, Police Officers and others who are only paid occasionally throughout the year. When these employees are paid, hours must be entered in the pay grid for ACA Reporting purposes. DOES NOT INCLUDE SUBSTITUTE TEACHERS.											
D	Temporary employees are hired for a specific length of time not to exceed three months. If employment lasts longer they should be transferred to Regular status. DOES NOT INCLUDE SUBSTITUTE TEACHERS.											
E	Teachers employed by the Athenaeum of Ohio include a board-certified teacher <u>or</u> individual with primary instructional control of a classroom											
F	Project workers are hired for a specific project > 3 mos in duration. If less than three months classify as Temporary											
G	Benefit threshold for Medical Benefits is 30 hours or more. Stated as >29 above											
H	Benefit Threshold for Life, AD&D and LTD is 20 hours or more. Stated as >19 above											
I	Benefit Threshold for 401K safe Harbor is 20 hours or more. Stated as >19 above											
J	If an employee meets the FLSA exemption rules for OT and Minimum wage, that employee must be paid on a salaried basis.											

Employee Status & Pay Rate

Employee Status

• Employee Status Active

• Effective Date 2/17/2025

• Begin Check Date 02/28/2025 - Bi-Weekly

Pay Rate

Current Effective Date

• Pay Type Salary Hourly
Per Check Salary 0.00

Base Rate / Per 0.0000 / Hour

• Pay Frequency B - Bi-Weekly

Default Hours 0.00

Annual Salary 0.00

• Auto Pay -- Select --

Notes

Pay Grade -- Select --

Min / Mid / Max \$0.00 / \$0.00 / \$0.00

Annual Salary 0.00

% Min / Mid / Max 0.00 / 0.00 / 0.00

- All **green** fields are required fields to complete the New Hire process.
- The effective date of the Employee Status section is the employee's hire date.
- Auto Pay for hourly employees should be filled out as 'None'.
- Auto Pay for salaried employees should be filled out as 'Salary'.
- Default Hours: For all regularly paid employees (Salary OR hourly) default hours **NEED** to be entered. Enter the number of hours that the employee is normally scheduled in the two-week pay period. (Reference Lay Employee Classification Grid on slides 6 & 7)

Address and Contact

- All **green** fields are required fields to complete the New Hire process.
- Address 1 requirements:
 - Common Street Abbreviations should be utilized:
 - Ave: Avenue
 - Blvd: Boulevard
 - Cir: Circle
 - Ct: Court
 - Dr: Drive
 - Ln: Lane
 - Rd: Road
 - St: Street
- Email Address is a required field.
- Mobile Phone is a preferred field for reporting purposes.

^ **Address and Contact**

Country	<input type="text" value="UNITED STATES"/>
• Address 1	<input type="text"/>
Address 2	<input type="text"/>
County	<input type="text"/>
• City	<input type="text"/>
• State	<input type="text" value="--"/>
• Zip Code	<input type="text"/>
Home Phone	<input type="text"/>
Mobile Phone	<input type="text"/>
• Email Address	<input type="text"/>
Additional Address	<input type="text"/>
Additional Address Type	<input type="text" value="-- Select --"/>
Additional Country	<input type="text" value="-- Select --"/>

Work Location

^ Work Location

• Work Location

-- Select --

Country

UNITED STATES

Address 1

Address 2

County

City

State

--

Zip Code

Currency

US Dollar (USD) ▾

- All **green** fields are required fields to complete the New Hire process.

Benefit Class

^ Benefits Setup

<input checked="" type="checkbox"/>	Effective Date	Benefit Class	Benefit Location	Benefit Division	Part Time	Benefit Termination Date
<input type="checkbox"/>	02/17/2025					

Add **Delete**

^ Direct Deposit

<input checked="" type="checkbox"/>	Priority	Bank Name	Transit	Account Number	Type	Amount Type	Amount	Prenote Date
<input type="checkbox"/>								

Add **Delete**

Benefits Setup

• Effective Date 2/17/2025

• Benefit Class

Benefit Location

Benefit Division

Part Time?

Benefit Termination Date

Benefit Salary Effective Date

Benefit Salary \$0.00

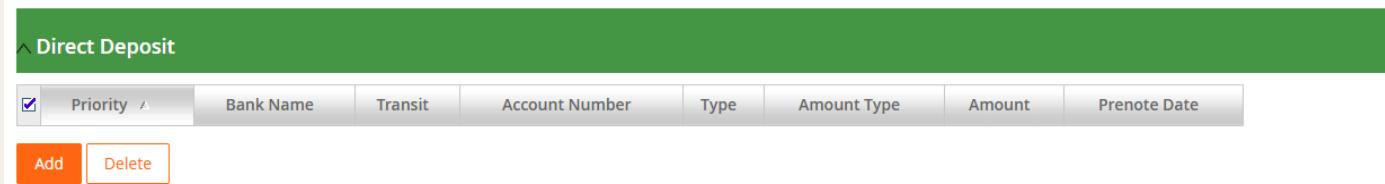
Benefit Hours per Week 0.00

Current Rate Annual Salary \$0.00

Save **Save & Return** **Cancel**

- All **green** fields are required fields to complete the New Hire process.
- The Benefit Class effective date **NEEDS** to be the same value as the hire date/status effective date on slide 4.
- The Benefit Class **MUST** align with the Employment Type Code assigned to the employee. Please review slides 6&7.

Direct Deposit – Skip for Now



Priority	Bank Name	Transit	Account Number	Type	Amount Type	Amount	Prenote Date
<input checked="" type="checkbox"/>							

Add **Delete**

- Do **NOT** use the Direct Deposit field in the New Hire Template. Direct Deposit information can be entered on the employee record after the employee is hired.
- **SEE AFTER NEW HIRE SECTION**

Taxes – Lay Employees

^ Taxes

• Tax Form **W2** ▾ 1099R Distribution Code -- Select -- SSN / EIN

^ Federal Taxes

- W-4 Tax Form **Current**
- Filing Status **-- Select --**
- Multiple Jobs or Spouse Works (Line 2c) **□**
- Dependents (Line 3) **0.00**
- Other Income (Line 4a) **0.00**
- Deductions (Line 4b) **0.00**
- Extra Withholding **Default Amount**
- Amount **0.00**
- 943 Agricultural Employee **□**

^ Primary State Taxes

- Primary State **-- Select --**
- Filing Status **-- Select --**
- Exemption 1 **0**
- Exemption 2 **0**
- Amount Type **Default Amount**
- Amount **0**
- Percentage **0**
- Supplemental Check **Use Supplemental Tax Rate - Code**
- Notes
- SUI State **-- Select --**
- Custom Text Field 1
- Custom Text Field 2
- Custom Text Field 3
- Custom Text Field 4
- Custom Drop Down Field 1 **-- Select --**
- Custom Drop Down Field 2 **-- Select --**
- Custom Number Field 1

- All **green** fields are required fields to complete the New Hire process.
- The Tax Form **MUST ALWAYS** be W2.
- Payments for form 1099M and 1099NEC are to be processed through your accounts payable system, **NOT** through Paylocity.
- SUI State: Ohio SUI

Taxes cont.

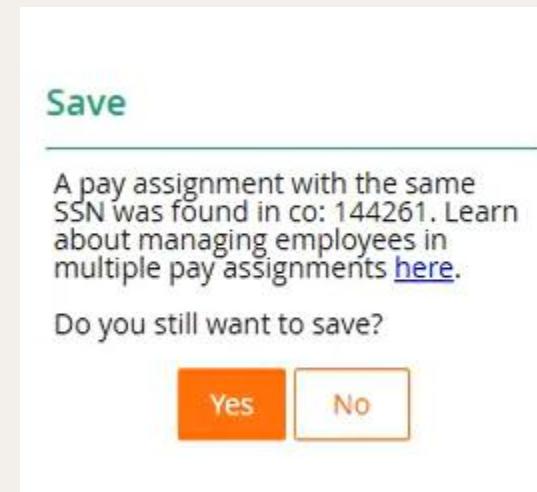
- All **green** fields are required fields to complete the New Hire process.
- Local taxes can be added via the new hire template but should be verified once hired . **SEE AFTER NEW HIRE SECTION.**
- Deductions should **NOT** be entered on the new hire template.

<input checked="" type="checkbox"/>	Tax Code ▾	Filing Status	Exemption 1	Exemption 2	Type	Amount

Add **Delete**

Duplicate SSN Notification

- If this notification pops up at the end of your new hire process you need to **STOP** and contact **Mary Jones**. This notification means the employee's SSN is present in another location within the Archdiocese. Do **NOT** merge the records. There is a special process for multi-location Employees (MLE) that **NEEDS** to be followed.
- Mary Jones: mjones@catholicaoc.org, 513-263-3353





Lay Employee After New Hire

As of February 2025

Custom/Additional Fields

< Additional Fields

DA Active

Priest Ordained Date	<input type="text"/> 
Alternate 401K Safe Harbor Benefit Eligibility Date - NOT USED IN CALCULATION INFORMATIONAL PURPOSES ONLY	<input type="text"/> 
Alternate Health Benefit Eligibility Date	<input type="text"/> 
Check this box if school employee is Eligible for ACA Education Exception	<input type="checkbox"/>
401k Safe Harbor ELIGIBLE PRIESTS ONLY. Ordained after 1/1/2015. Also Foreign Priests on Canonical Assignment	<input type="checkbox"/>
Check this box if need to Force 401k Safe Harbor Contribution for Non-Priest Employee	<input type="checkbox"/>
Check this box UNLESS another location pays for benefits	<input checked="" type="checkbox"/>

Save Cancel

- Once the employee record is created via the New Hire Template the custom/additional fields section needs to be updated if applicable.
- To locate the custom/additional fields navigate to the employee record via Employee search > Personal > Additional Fields > Edit Additional Fields.

Lay Employee - Custom/Additional Fields

< Additional Fields

DA Active

Priest Ordained Date

Alternate 401K Safe Harbor Benefit Eligibility Date - NOT USED IN CALCULATION INFORMATIONAL PURPOSES ONLY

Alternate Health Benefit Eligibility Date

Check this box if school employee is Eligible for ACA Education Exception

401k Safe Harbor ELIGIBLE PRIESTS ONLY. Ordained after 1/1/2015. Also Foreign Priests on Canonical Assignment

Check this box if need to Force 401k Safe Harbor Contribution for Non-Priest Employee

Check this box UNLESS another location pays for benefits

Save **Cancel**

- The primary location for an employee **MUST** have the bottom checkbox labeled “Check this box UNLESS another location pays for benefits” checked. Employees that are multi-location employees should have the box unchecked if not at their primary location.
- Secondary locations where an employee is benefit eligible at another location **NEED** to check the box labeled “Check this box if need to Force 401k Safe Harbor Contribution for Non-Priest Employee”.
- If an employee is employed at a school location they **NEED** to have the box labeled “Check this box if school employees is Eligible for ACA Education Exception” checked.

Direct Deposit

- If adding Direct Deposit on a new hire's behalf please navigate to their record > Pay > Direct Deposit. Please note it is recommended that employees enter their direct deposit information themselves.
- In this section you will see the option to add a bank account.

Dunder Mifflin [031692] 

HR & Payroll Employees HR Payroll User Access

Advanced Last Name, First Name, SSN, Employee Id

Active Filters: Status: Active Save search as... Save Delete

Display SSN Export Employees Add New Hire

	Last Name ▲	Preferred / First Name	Emp Id
<input type="checkbox"/>	Baker	Chet	72
<input type="checkbox"/>	Baker	Stan	105
<input type="checkbox"/>	Barclay5	Reginald	39
<input type="checkbox"/>	Beasley	Pamela	170
<input type="checkbox"/>	Beckman	Daniel	97
<input type="checkbox"/>	Bell	Darius	27
<input type="checkbox"/>	Bison	Dave	69
<input type="checkbox"/>	Brownell	Buster	164
<input type="checkbox"/>	Burgamy	Otelia	124
<input type="checkbox"/>	Cal	Benjamin	1
<input type="checkbox"/>	Captain	Stanton	157
<input type="checkbox"/>	Carmichael	Charles	88
<input type="checkbox"/>	Carraba	Caitlyn	19
<input type="checkbox"/>	Casella	Ruben	149

Baker, Stan [105] 156 Employees 1 filters applied  

Stan Baker  Sales Representative [105]
Employed since 2/5/2010 

Employment Pay Personal Time Off Benefits Career

Rates Checks Upcoming Check Tax Forms Direct Deposit Reminders Tax Setup Pay Setup Market Pay

 **No Current Bank Accounts**
You currently have no bank accounts on file and will receive a **paper check**. Add your existing bank account to setup your direct deposit.



Add any existing checking or savings account and get paid with direct deposit.

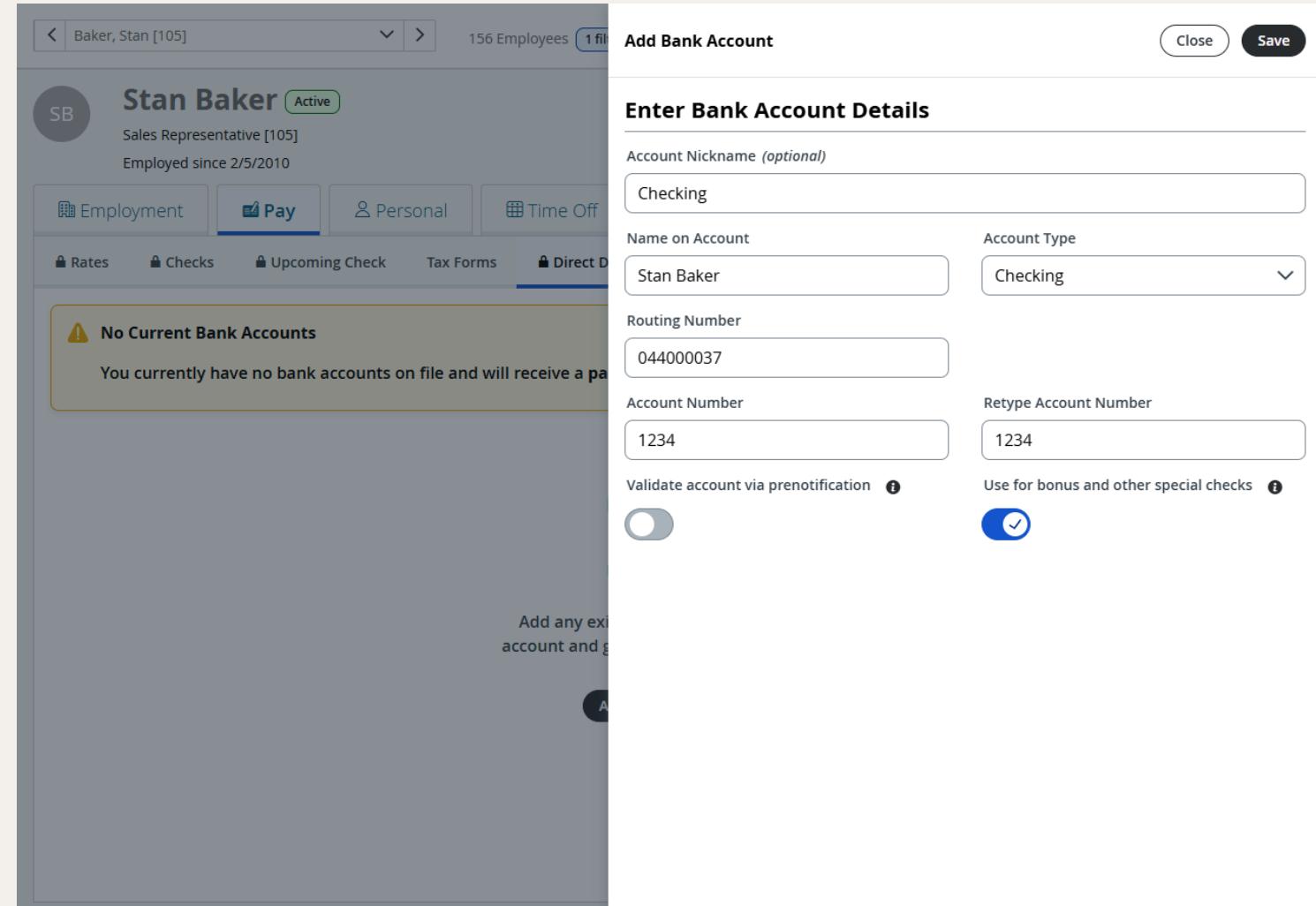
Add Bank Account

Direct Deposit cont.

- After selecting “Add Bank Account” you will see the window below. Please note the blurbs on the side relating to prenotification and special checks to determine whether or not they should be utilized. If an employee does not have special checks selected on at least one of their accounts, they will receive a live check for that payment.

Prenotification is used to validate a bank account. The Name on Account, Routing Number and Account Number are used for validation. When validation is enabled, it may take up to 14 business days from the Prenotification Validation Date before direct deposit accounts will receive funds.

Special checks are payments separate from your regular paycheck, such as bonuses. If this option is not selected for your Main Account, then all special checks will be issued as paper checks.



The screenshot shows a software interface for managing employee bank accounts. On the left, a grey sidebar displays an employee profile for 'Stan Baker [105]' (Active, Sales Representative, Employed since 2/5/2010). The main area is a modal window titled 'Add Bank Account' with a 'Save' button in the top right. The modal is titled 'Enter Bank Account Details' and contains fields for 'Account Nickname (optional)', 'Name on Account' (Stan Baker), 'Account Type' (Checking), 'Routing Number' (044000037), 'Account Number' (1234), 'Retype Account Number' (1234), 'Validate account via prenotification' (disabled), and 'Use for bonus and other special checks' (checked). A note in the modal states: 'You currently have no bank accounts on file and will receive a paper check for any special checks.' At the bottom of the modal, there is a link: 'Add any existing bank accounts and go to the next step'.

Direct Deposit cont.

- If an employee has multiple accounts and wants to split their net pay, then you are able to click “+ Add Account” and then edit the setup of the accounts to accommodate. In the example below the employee has a savings account setup to receive \$250 of their net pay first and the remaining will deposit into their checking account.

The screenshot displays the Paylocity software interface for managing employee direct deposit. It shows two main windows: a main employee profile page and a detailed 'Edit Direct Deposit Setup' dialog.

Main Employee Profile (Left):

- Header: Baker, Stan [105] (Active), 156 Employees, 1 filter applied.
- Employee Information: Stan Baker (Active), Sales Representative [105], Employed since 2/5/2010.
- Navigation: Employment, Pay, Personal, Time Off, Benefits, Career.
- Direct Deposit Tab: Selected, showing 'Setup'.
- Setup Details: 1. The entire paycheck will be deposited into Checking XXX1234 (includes special checks).
- Bank Accounts Table:

Name	Account Number	Routing Number	Pre-Note Date	Type	Action
Checking	XXX1234	XXX0037	N/A	Checking	Edit Delete

Edit Direct Deposit Setup (Right):

- Header: Edit Direct Deposit Setup, Stan Baker [105], 156 Employees.
- Section: Direct Deposit Setup. Deposits from your paycheck will be submitted in order until your Remaining Balance is reached.
- Setup: Add From Account List.
- Bank Accounts Table:

Account	Type	Amount	Special Checks	Remove
1. Savings	Jpmorgan Chase Bank, NA	XXX5678	Flat Amount	250
2. Checking	Jpmorgan Chase Bank, NA	XXX1234	Remaining Balance	<input checked="" type="checkbox"/>

Direct Deposit cont.

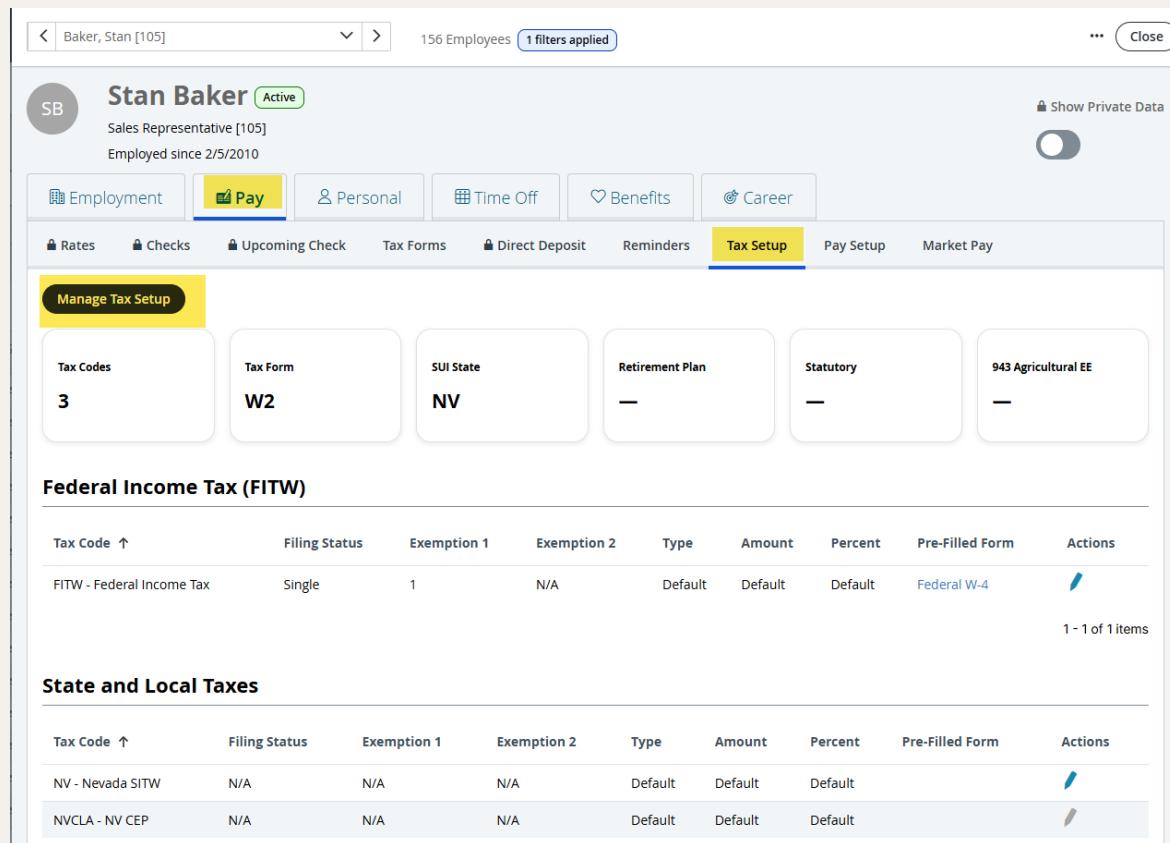
- The below is an example of how the direct deposit screen will look like if an employee has multiple accounts setup.
- Note in this scenario the employee elected for “special” checks to only deposit into their main account and not split to the savings account.

The screenshot shows the Paylocity HR & Payroll interface. On the left, a sidebar lists 'HR & Payroll', 'Employees', 'HR', 'Payroll', and 'User Access'. Below this is a search bar with 'Advanced' and 'Last Name, First Name, SSN, Employee Id' fields, and buttons for 'Save search as...' and 'Save'. A table lists employees with columns for 'Last Name', 'Preferred / First Name', and 'Emp Id'. The table includes rows for Baker (Chet, 72), Baker (Stan, 105), Barclay (Reginald, 39), Beasley (Pamela, 170), Beckman (Daniel, 97), Bell (Darius, 27), Bison (Dave, 69), Brownell (Buster, 164), Burgamy (Otelia, 124), Cal (Benjamin, 1), Captain (Stanton, 157), Carmichael (Charles, 88), Carraba (Caitlyn, 19), and Casella (Ruben, 149). At the bottom is a 'Delete Selected' button. On the right, the employee profile for Stan Baker is displayed. The profile shows 'Stan Baker [Active]', 'Sales Representative [105]', and 'Employed since 2/5/2010'. Below the profile are tabs for Employment, Pay (selected), Personal, Time Off, Benefits, and Career. Under the Pay tab, the 'Direct Deposit' tab is selected. The 'Direct Deposit' section contains a note: 'Deposits from your paycheck will be submitted in order until your Remaining Balance is reached.' It lists two options: '1. Up to \$250 will be deposited into Savings XXX5678 (does not include special checks)' and '2. The entire paycheck will be deposited into Checking XXX1234 (includes special checks)'. Below this is a 'Bank Accounts' section with a table. It shows a 'Checking' account at Jpmorgan Chase Bank, NA with account number XXX1234, routing number XXX0037, and type 'Checking'. It also shows a 'Savings' account at Jpmorgan Chase Bank, NA with account number XXX5678, routing number XXX0037, and type 'Savings'.

Name	Account Number	Routing Number	Pre-Note Date	Type	Action
Checking	XXX1234	XXX0037	N/A	Checking	
Jpmorgan Chase Bank, NA					
Savings	XXX5678	XXX0037	N/A	Savings	
Jpmorgan Chase Bank, NA					

Tax Verification

- To verify an employee's local tax setup please navigate to the employee record > Pay > Tax Setup > Manage Tax Setup.
- Once on the Manage Tax Setup page, click Verify Tax Setup.
- The verify tax setup tool will determine an employee has the correct tax code setup per their work and home address.



Baker, Stan [105] 156 Employees 1 filters applied

Stan Baker **Active**
Sales Representative [105]
Employed since 2/5/2010

Employment Pay Personal Time Off Benefits Career

Rates Checks Upcoming Check Tax Forms Direct Deposit Reminders **Tax Setup** Pay Setup Market Pay

Manage Tax Setup

Tax Codes 3	Tax Form W2	SUI State NV	Retirement Plan —	Statutory —	943 Agricultural EE —
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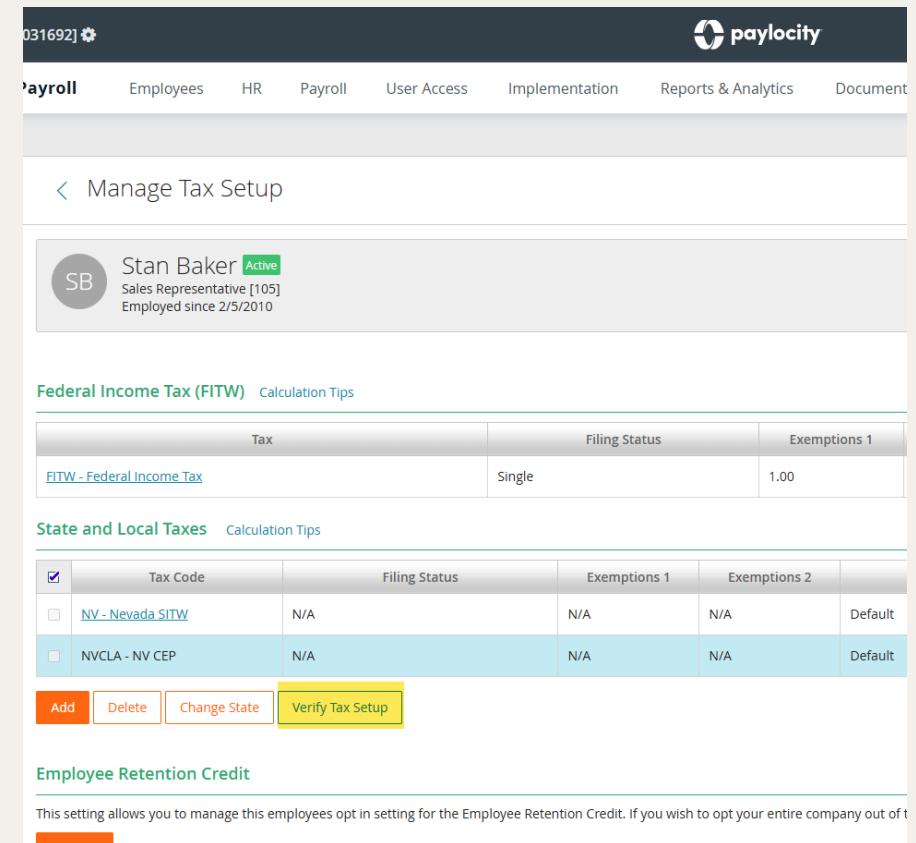
Federal Income Tax (FITW)

Tax Code ↑	Filing Status	Exemption 1	Exemption 2	Type	Amount	Percent	Pre-Filled Form	Actions
FITW - Federal Income Tax	Single	1	N/A	Default	Default	Default	Federal W-4	

1 - 1 of 1 items

State and Local Taxes

Tax Code ↑	Filing Status	Exemption 1	Exemption 2	Type	Amount	Percent	Pre-Filled Form	Actions
NV - Nevada SITW	N/A	N/A	N/A	Default	Default	Default		
NVCLA - NV CEP	N/A	N/A	N/A	Default	Default	Default		



031692]

Payroll Employees HR Payroll User Access Implementation Reports & Analytics Document

Manage Tax Setup

Stan Baker **Active**
Sales Representative [105]
Employed since 2/5/2010

Federal Income Tax (FITW) Calculation Tips

Tax	Filing Status	Exemptions 1
FITW - Federal Income Tax	Single	1.00

State and Local Taxes Calculation Tips

<input checked="" type="checkbox"/> Tax Code	Filing Status	Exemptions 1	Exemptions 2
<input type="checkbox"/> NV - Nevada SITW	N/A	N/A	N/A
<input type="checkbox"/> NVCLA - NV CEP	N/A	N/A	N/A

Verify Tax Setup

Employee Retention Credit

This setting allows you to manage this employee's opt-in setting for the Employee Retention Credit. If you wish to opt your entire company out of the credit, click [Opt Out](#).

Tax Verification cont.

- The Geolocation (Verify Tax Setup) feature recommends a residence (RES) tax code if the employee resides in the specific locality. If the employee does not reside, but works in the locality, the system recommends an employment (EMP) tax code. Ohio employers have the option to withhold an employee's RES tax as a courtesy in addition to any required workplace tax. Employers are not required to participate in Courtesy Withholding. If the client prefers to setup a residential employee with the EMP local tax code, the employer should ignore the recommendation to setup the residence local tax code.
- You can also confirm if an employee needs to be setup with a local by using the Ohio local tax finder linked here:
<https://thefinder.tax.ohio.gov/StreamlineSalesTaxWeb/AddressLookup/LookupByAddress.aspx?taxType=Municipal>

Verify Tax Setup

RC Ruben Casella Home Address 525 Vineward Way Doylestown, OH 44230 Work Address 525 Vineward Way Doylestown, OH 44230 Close

Recommended Changes		
Code	Description	Type
OH-BAR2	Barberton, OH (Emp) <i>Unneeded tax code</i>	LOCAL
OH-DOY2	Doylestown, OH (Res) <i>This code is not set up for your company. Please click here to download the "Request to Add or Remove Tax Codes form", and email the completed form here. Contact your account manager if you need assistance.</i>	LOCAL

Verified		
Code	Description	Type
OH	Ohio SITW	SITW
OH-CHI3	8501 Chippewa S.D.	LOCAL
OHSUI	Ohio SUI	SUI

Questions?

- Please contact your account manager via service@paylocity.com or (888)-873-8205.
- Paylocity is available from 8am – 8pm EST Monday – Friday. We are closed Saturday and Sunday and on Federal Holidays.

