



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

☐

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

- 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

^ Dept/Position

Current Effective Date

• Level 1

-- Select --

• Level 2

-- Select --

• Level 3

-- Select --

• Employment Type

-- Select --

• Supervisor

Reviewer

Is Supervisor / Reviewer?

☐

• Position

-- Select --

Job Title

EEO Class

-- Select --

Work Comp

-- Select --

Work Phone/Ext

Ext

• Work Email

OT Exempt

☐

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>401K Status</u>	<u>401K Loan</u>	<u>401K SH (I)</u>	<u>401K Deferral Eligibility</u>	<u>Employee Required to Use the Time & Labor Module in PCTY</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 <u>fifteen or more classroom hours per week</u> for <u>2 or more consecutive months</u>) 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	<u>Occasional Workers</u> 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	UNITED STATES ▼
• Address 1	
Address 2	
County	
• City	
• State	-- ▼
• Zip Code	
Home Phone	
Mobile Phone	
• Email Address	
Additional Address	
AdditionalAddress Type	-- Select -- ▼
Additional Country	-- 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
-------------------------------------	------------	-----------	---------	----------------	------	-------------	--------	--------------


Add Delete


- 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.

Benefits Setup


• Effective Date 2/17/2025 


• Benefit Class -- Select -- 

Benefit Location -- Select -- 

Benefit Division -- Select -- 

Part Time? ☐

Benefit Termination Date 

Benefit Salary Effective Date 

Benefit Salary \$0.00 ☐ Override?

Benefit Hours per Week 0.00

Current Rate Annual Salary \$0.00

Save Save & Return Cancel

Direct Deposit – Skip for Now

^ Direct Deposit

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

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.

Local Taxes

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

Add

Delete

Deductions

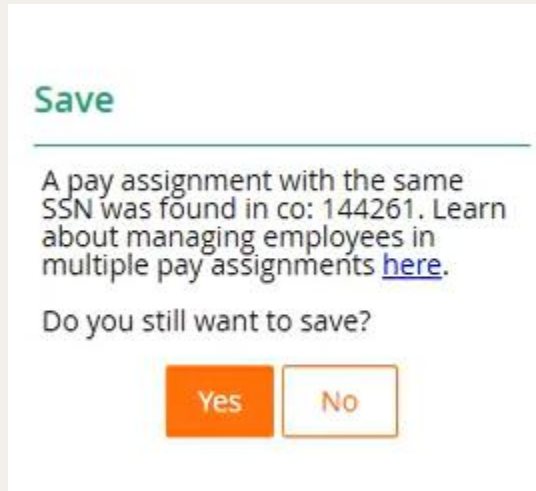
<input checked="" type="checkbox"/>	Priority ▲	Code	Type	Begin Check Date	End Check Date	Calc Code	Amount	Frequency	Goal	Paid
-------------------------------------	------------	------	------	------------------	----------------	-----------	--------	-----------	------	------

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

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

- 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

<input type="checkbox"/>	Last Name ▲	Preferred / First Name	Emp Id
<input type="checkbox"/>	Baker	Chet	72
<input type="checkbox"/>	Baker	Stan	105
<input type="checkbox"/>	Barclay	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	Otella	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

...

Close

SB

Stan Baker

Active

Sales Representative [105]

Employed since 2/5/2010

Show Private Data

☐

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 displays the 'Add Bank Account' interface for Stan Baker, a Sales Representative. The form is titled 'Enter Bank Account Details' and includes the following fields and options:

- Account Nickname (optional):** Checking
- Name on Account:** Stan Baker
- Account Type:** Checking (dropdown menu)
- Routing Number:** 044000037
- Account Number:** 1234
- Retype Account Number:** 1234
- Validate account via prenotification:** Toggle switch (currently off)
- Use for bonus and other special checks:** Toggle switch (currently on)

A warning message at the top of the form states: "No Current Bank Accounts. You currently have no bank accounts on file and will receive a paper check for this payment." The background shows the employee's profile with tabs for Employment, Pay, Personal, and Time Off, and a navigation bar with options like Rates, Checks, Upcoming Check, Tax Forms, and Direct Deposit.

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.

Baker, Stan [105]

156 Employees 1 filters applied

Close

SB Stan Baker Active

Sales Representative [105]

Employed since 2/5/2010

Show Private Data

Employment

Pay

Personal

Time Off

Benefits

Career

Rates

Checks

Upcoming Check

Tax Forms

Direct Deposit

Reminders

Tax Setup

Pay Setup

Market Pay

Direct Deposit

Edit Setup

Setup

1. The entire paycheck will be deposited into **Checking XXX1234** (includes special checks)

Bank Accounts

+ Add Account

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

Baker, Stan [105]

156 Employees 1 filters applied

Close

Save

SB Stan Baker Active

Sales Representative [105]

Employed since 2/5/2010

Show Private Data

Employment

Pay

Personal

Time Off

Rates

Checks

Upcoming Check

Tax Forms

Direct Deposit

Direct Deposit

Edit Direct Deposit Setup

Deposits from your paycheck will be submitted in order until your Remaining Balance is reached

Add From Account List

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

Bank Accounts

Name	Account Number	Routing Number
Checking	XXX1234	XXX0037
Jpmorgan Chase Bank, NA		
Savings	XXX5678	XXX0037
Jpmorgan Chase Bank, NA		

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.

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

<input type="checkbox"/>	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

Delete Selected

Baker, Stan [105]

156 Employees

1 filters applied

Close

SB

Stan Baker

Active

Sales Representative [105]

Employed since 2/5/2010

Show Private Data

Employment

Pay

Personal

Time Off

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Tax Setup

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Market Pay

Direct Deposit

Edit Setup

Deposits from your paycheck will be submitted in order until your Remaining Balance is reached.

Setup

1. Up to \$250 will be deposited into Savings XXX5678 (does not include special checks)

2. The entire paycheck will be deposited into Checking XXX1234 (includes special checks)

Bank Accounts

Add Account

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

SB 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: **—**

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] paylocity

Payroll Employees HR Payroll User Access Implementation Reports & Analytics Document

< Manage Tax Setup

SB 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	Default
<input type="checkbox"/>	NVCLA - NV CEP	N/A	N/A	N/A	Default

[Add](#) [Delete](#) [Change State](#) **Verify Tax Setup**

Employee Retention Credit

This setting allows you to manage this employees opt in setting for the Employee Retention Credit. If you wish to opt your entire company out of t


[Get 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

Close

 **Ruben Casella**

Home Address
525 Vineward Way
Doylestown, OH
44230

Work Address
525 Vineward Way
Doylestown, OH
44230

Recommended Changes

Code	Description	Type
⊗ OH-BAR2	Barberton, OH (Emp)	LOCAL
Unneeded tax code		
⊕ OH-DOY2	Doylestown, OH (Res)	LOCAL
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.		

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.

