

Updating Tax Tables in Payroll

In Auto/Mate's Payroll program, we maintain the tax tables for **all** predefined taxes. You will be able to tell if a tax is predefined when it is not bold. Custom taxes are listed in **bold**.

See the example of the customs tax below.

Tax Setup
 Company #01 - Auto/Mate GoTeam 1

User: automate
 Wed, Apr 8, 2020 12:59



Taxes set up in your system

State	Code	Type	Name (abbrev)	Effective Date	Rate	Liab GL	Exp GL
US	US	Federal	US Federal Tax (Federal)	Always		323A	
US	EEFICA	OASDI/EE	US FICA (FICA)	Always		323A	067D 01: 323A
US	EEMedicare	Medicare/EE	US Medicare (Medicare)	Always		323A	067D 01: 323A
US	EEMedicareHE	MedicareHE/EE	US Medicare HiEarn (MedicareHE)	Always		323E	
US	FUTA	FUTA	US FUTA (FUTA)	Always	0.6000%	323D	
CT	CT	CT w/h	CT State Tax (CT)	Always		323C	
CT	CTSUTA	CT SUTA (ER)	CT SUTA (CT SUTA)	Always	0.6000%	323C	323C
NY	NY	NY w/h	NY State Tax (NY)	Always		323A	
NY	123NY	TEST	Test (TEST)	Always	0.9999%	99999	
NY	NYSUTA	NY SUTA (ER)	NY SUTA (NY SUTA)	Always	1.6300%	323B	323B
NY	NYEESDI	NY SDI/EE	NY SDI (NY SDI)	Always		323A	

Effective Date Filter
☐ 2019 ☒ 2020 ☐ 2021 ☐ All

Custom taxes appear in BOLD

Another item you will need to update, if they change, will be your **SUTA and FUTA rate**. To update these rates, select your existing SUTA tax in **Option 29: Tax Definition**. When the screen opens select your **SUTA** tax and select **Edit**. Update the effective date with an end date of when your SUTA tax is changing (For example Most of the time, this will change at the end of the year so the date would be 12/31 of that year.) Click **OK** to save.

Add/Edit Tax Setup

State **NY** Code **NYSUTA** Name **NY SUTA** Abbrev **NY SUTA** Effective date: 03/09/2016 **12/31/2020**

Tax Definition

Rate **1.6300%** Tax ID W2 Name W2 Box **N/A** Liability GL # **323B**

GL Expense Distribution

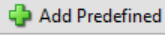
Default **323B** (used if no GL set for a dept.)

Dept	GL Account	GL Desc
01: SALES		
02: SERVICE		
03: PARTS		
04: OWNER		
05: CLERICAL		
06: MAINT		
07: BODY SHOP		
08: RENTAL DEPT		

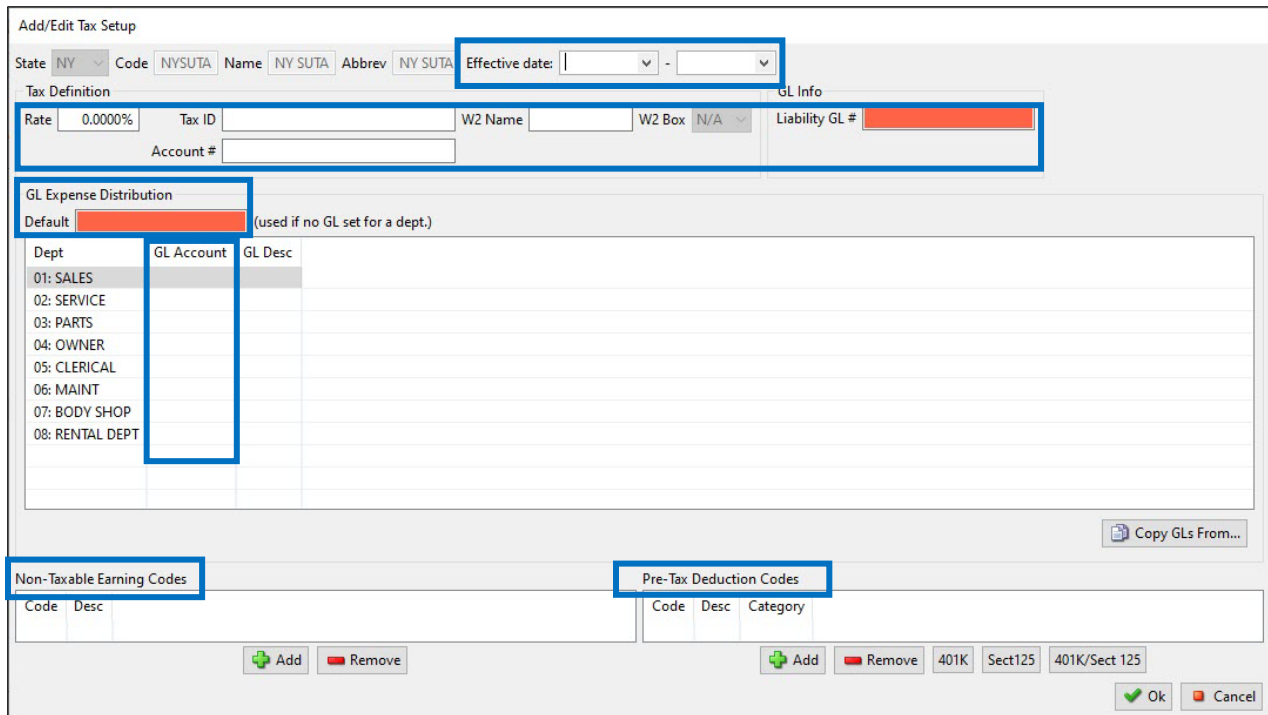
Non-Taxable Earning Codes

Pre-Tax Deduction Codes

401K Sect125 401K/Sect 125

After you have updated your effective date, you would then click  on the bottom right to add your state's respective SUTA tax. You can search on this screen by entering your state's abbreviation, a space, and then SUTA (Ex: NY SUTA) on the top in the **Name (partial)** box. You would then highlight your SUTA tax by clicking on it and then clicking on  to add the tax.

This will then bring you to the **SUTA tax setup screen**. Here, you will put in an effective date of when this tax is starting (*For example, this is normally at the beginning of the year, so it would be 1/1 of that year*). Then, you would add your new rate and then copy the **Tax ID, Account#, W2 Name, GLs, the Non-Taxable Earning Codes, and the Pre-Tax Deduction Codes** the same way it was set up in the tax rate for the prior year. Once this is all set up select .



The screenshot shows the 'Add/Edit Tax Setup' form with the following highlighted areas:

- Effective date:** A date range selector at the top.
- Tax Definition:** A section containing fields for Rate (0.0000%), Tax ID, W2 Name, W2 Box (N/A), and Liability GL #.
- GL Expense Distribution:** A section with a 'Default' dropdown and a table for departmental GL distribution.
- Non-Taxable Earning Codes:** A table with columns for Code and Desc.
- Pre-Tax Deduction Codes:** A table with columns for Code, Desc, and Category.

At the bottom of the form, there are 'Add' and 'Remove' buttons for each table, and a final 'Ok' button.

- You won't need to update the employee file at all for this because it will carry over from the SUTA that was set up in the prior year.
- If your FUTA rate changes at all due to your state being in a repayment period you would handle it the same way as the SUTA rate changes.