

Enterprise - How to Manage Employee Taxes

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Employee taxes can be managed under the employee record > pay setup > taxes. However, there a few steps we should be aware of prior to making adjustments to this area.

Adding Tax Information When Adding an Employee

You can setup tax information as soon as you [add a new employee](#) into the system.

Using HRCenter

If applicants are entering their information in HRCenter, their W-4 information will automatically populate in the pay setup section on the employee's record. A copy of the electronically created W-4 will be available in the documents sections.

The image shows a screenshot of the 2020 Form W-4, "Employee's Withholding Certificate". The form is titled "Form W-4 Employee's Withholding Certificate" and includes the OMB No. 1545-0074 and the year "2020". It is issued by the Department of the Treasury, Internal Revenue Service. The form is divided into several sections: "Step 1: Enter Personal Information", "Step 2: Multiple Jobs or Spouse Works", and "Step 3: State". The "Step 1" section includes fields for "First name and middle initial", "Last name", "Social security number", "Address", and "City or town, state, and ZIP code". The "Step 2" section includes checkboxes for "Single or Married filing separately", "Married filing jointly (or Qualifying widow(er))", and "Head of household". The "Step 3" section includes a dropdown menu for "State". The form also includes instructions and a "TIP" section. The screenshot shows the form is partially filled out, with some fields highlighted in red. The form is displayed on a web page with a "Previous" button, a "Page 2 of 4" indicator, and "Save and Continue" and "Get Started" buttons.

If later an employee needs to fill out a new copy of their W-4, you can assign them the W-4 page that they will complete in HRCenter. For more information, check out [Assigning HRCenter Workflows/pages from Enterprise](#).

When Manually Adding an Employee

Tax setup information can be entered when you select the + icon next to employee in the navigation tree:

? X
add new employee

<p>personal information</p> <p>SSN: _____</p> <p>First Name: zzNewFederalW4</p> <p>Last Name: zzNewFederalW4</p> <p>Initial: _____</p> <p>Phone: _____</p> <p>Cell: _____</p> <p>Email: _____</p>	<p>address information</p> <p>Street: _____</p> <p>Street 2: _____</p> <p>City: _____</p> <p>State: MN</p> <p>Zip Code: _____</p> <p>School District: _____</p> <p>Country: United States of America</p>
<p>tax setup/other</p> <p>Branch: High Tech NE</p> <p>Federal Ex: 0</p> <p>State Ex: 0</p> <p>Marital Status: Single</p> <p>Tax Higher Rate <input type="checkbox"/></p>	<p>avatar</p> <p>Upload a custom avatar by dragging it into this box.</p>

0
 Save

Note The "Tax at Higher Rate" option can be used for employees who...

- Work more than one job at a time and/or
- Are married-filing jointly and have a spouse who also works

It can be beneficial to tax at a higher rate to accommodate the multiple W-2s you may be filing at the end of the year. Always consult a tax professional if you are unsure about a tax setup.

Once the information is entered here, it will be saved on the employee record under employee > pay setup.

Editing or Reviewing Employee Tax Information

All employee tax information can be found under the Pay Setup section on the left.

Under Required Tax Information, W-4 information can be reviewed or edited including exemptions, withholding amounts, and marital tax status.

Note Always consult a tax professional if you are unsure about a tax setup

The screenshot shows the 'pay setup' page for employee Lorelai "Leah" Woodbury. The header displays the employee's name, address (123 Maple Lane, Saint Paul, MN 55123), ID (4295080432), SSN (xxx-xx-3753), and Branch (New Brighton). The left navigation menu includes options like visifile, details, documents, integrations, evaluations, messages, pay history, pay setup (selected), accruals, adjustments, arrears, electronic pay, rate sheet, taxes, tasks, and search. The main form area is divided into two sections: 'general information' and 'required tax information'. The 'general information' section includes a 'Pay Setup Complete' checkbox (checked), an 'Employee ID' field, and a 'W4 Year' dropdown set to 2020. The 'required tax information' section includes a 'Tax Higher Rate' checkbox (unchecked), a 'Marital Tax Status' dropdown set to Single, and several input fields for 'Dependent Allowance', 'Other Income', 'Extra Deductions', 'Extra Withholding', 'Federal Exemptions', 'Tax State' (set to MN), 'State Exemptions', and 'State Juris' (set to MNMAR).

Since employees are taxed based on where they live and work, Enterprise will take both the permanent address listed on the employee record as well as the address on the order worksite to calculate tax amounts.

The dependents field in this section is only for those in Louisiana to account for dependents separate from state exemptions.

Employee Permanent Address:

The employee's address is located on the details page of the employee's record.

Lorelai "Leah" Woodbury
 123 Maple Lane ID: 4295080432
 Saint Paul, MN 55123 SSN: xxx-xx-3753
 Branch: New Brighton

No tasks to display for your current filter settings
 Currently viewing 0 of 17573 tasks. View more...

tasks appointments social email

visifile
details
 aca
 activity tracker
 assignment restrictions
 contact methods
 candidacy
 direct hire
 education
 interpersonal
 interview questionnaire
 past jobs
 required docs
 test scores
 transportation
 unemployment
 work experience
 work interests

employee

personal information

Last Name: Woodbury Suffix:
 First Name: Lorelai Prefix:
 Middle Name: Nickname: Leah
 SSN:
 ID: 4295080432 Contact:
 Act. Date: 6/6/2018 Deact. Date:

addresses Permanent Use Temporary

Street: 123 Maple Lane
 Street 2:
 City: Saint Paul
 State: MN Zip Code: 55123-____
 County: Ramsey School:
 Country: United States of America

hiring information

Order Type: TE Branch: New Brighton
 Hire Status: Eligible and Active Staffing Specialist: amelia.stout
 Profession: All Interviewed By: amelia.stout 12/5/2019
 Washed Status: Familiar Entered By: amelia.stout 6/6/2018 1:57:00 PM
 I9 On File: I9 Expire Date: Vendor:
 Orientation Date: Anniversary Date: 7/7/2018 Job Title:
 Resume On File: Numeric Rating: 0 How Heard of:

When you enter a Zip Code here, you will see a drop down of local tax options. This determines what state and local taxes appear in the pay setup section. Always update the local taxes here on the employee's address.

addresses Permanent Use Temporary

Street: 123 Maple Lane
 Street 2:
 City: Saint Paul
 State: MN Zip Code: 55123-____

City	City Juris	School District Number	School District Name	School Juris	County	County Juris	State	SUTA
Eagan					Dakota		MN	MNSUTA
Saint Paul					Ramsey		MN	MNSUTA
St Paul					Ramsey		MN	MNSUTA

evaluations
 messages
 pay history
pay setup
 accruals
 adjustments
 arrears
 electronic pay
 imputed income
 rate sheet
 taxes
 tasks
 search

employee
 customer
 order
 assignment
 contact
 pay / bill

required tax information

W4 Year: 2020
 Tax Higher Rate:
 Marital Tax Status: Single
 Dependent Allowance: \$0.00
 Dependents: 0
 Other Income: \$0.00
 Extra Deductions: 0.00
 Extra Withholding: \$0.00
 Federal Exemptions: 0
 Tax State: MN
 State Exemptions: 0
 State Juris:
 Tax By Employee State:

Email Pay Stub:
 Paycard Requested:
 Paycheck Delivery Code:
 Default Pay Rate:
 Note to Payroll:

affordable care act **Details** Family + Comments

ACA Status: Hire date needed Admin Status:
 Hire Date: Set Hire Date Insurance Due:
 Last Eval: Next Eval:
 Insurance:

local taxes
 Local taxes are automatically determined by the employee's zip code. Manual changes should not be necessary.

	Exempt
County Tax	<input type="checkbox"/>
City Tax	<input type="checkbox"/>
School Tax	<input type="checkbox"/>

Note The following resources can be used to determine what local taxes are applicable to locations within Ohio and Pennsylvania:

Ohio

You can look up OH local information by address via this website: [The Finder - Lookup By Address \(ohio.gov\)](http://The Finder - Lookup By Address (ohio.gov))

Lookup By Address

Address:
 ?

Suite, Apt, Lot:
 ?

City:
 ?

State:

Zip Code: (Note: Zip + 4 is optional)
 - ?

denotes a required field.

This shows you that you should be looking for Columbus and Columbus CSD in the zip code drop down:

Lookup By Address

The system has successfully matched the address you entered:
The information displayed reflects rates effective for the current calendar date.

Input Address (Modify)		Found Address	
Address:	3095 N High St	Address:	3095 N HIGH ST
Suite, Apt, Lot:		Suite, Apt, Lot:	
City:	Columbus	City:	COLUMBUS
State:	Oh	State:	OH
Zip Code:	43202-	Zip Code:	43202-1109
		Physical City:	COLUMBUS

Date: 4/14/2022

Sales and Use Tax				
County	State Tax Rate	County Tax Rate	Transit Tax Rate	Total Tax Rate
Franklin with transit:	5.75%	1.25%	0.50%	7.50%
School District Income Tax				
COLUMBUS CSD (2503):	0.00%			
Municipal Income Tax				
COLUMBUS (18000):	2.50%			

Pennsylvania

Pennsylvania has a Municipal Statistics website that allows you to look up withholding information by address here: [Municipal Statistics](#)

If you want to find the local tax information for the employee and you don't yet know the work address, you can enter the same address for the Home Address and Work Address.

Find Your Withholding Rates by Address

HOME ADDRESS: [Copy From Work](#)

Street Address: ?

City:

State:

Zip: -

WORK ADDRESS: [Copy From Home](#)

Street Address:

City:

State:

Zip: -

The results show us a few things. It shows us that the user should look for a combination of Smithfield Twp and Huntingdon Area S D in the zip code drop down:

City	Huntingdon							
State	PA							
Zip Code	16652-							
City	City Juris	School District Number	School District Name	School Juris	County	County Juris	State	PSD Code
Huntingdon					Huntingdon		PA	
Huntingdon		31250	Huntingdon Asd	YPABR43125	Huntingdon		PA	310103
Smithfield Twp	XPAS714389				Huntingdon		PA	
Smithfield Twp	XPAS714389	31250	Huntingdon Asd	YPABR43125	Huntingdon		PA	310112
OneidaTwp	XPAO49413				Huntingdon		PA	
OneidaTwp	XPAO49413	31250	Huntingdon Asd	YPABR43125	Huntingdon		PA	310110

It also shows us that the PSD code on the employee should be 310112.

Your Local Withholding Tax Rates (as of 4/14/2022)					
HOME: HUNTINGDON		9564 William Penn Hwy, Huntingdon, Pennsylvania, 16652			
Location	PSD Code	Resident EIT			
SMITHFIELD TWP (Home)	310112	0.500 %			
HUNTINGDON AREA S D (Home)	310112	1.000 %			
WORK: HUNTINGDON		9564 William Penn Hwy, Huntingdon, Pennsylvania, 16652			
Location	PSD Code	Non Resident EIT	LST	LST Low Income Exemptions	
SMITHFIELD TWP (Work)	310112	0.500 %	\$47.00	\$12,000.00	
HUNTINGDON AREA S D (Work)	310112		\$5.00	\$0.00	

local taxes

Local taxes are automatically determined b

County Tax

City Tax

School Tax

PSD Code

You can also use the website to look up the withholding rates based on a home and work location:

HOME ADDRESS: [Copy From Work](#)

Street Address:
City:
State: PA
Zip: -

WORK ADDRESS: [Copy From Home](#)

Street Address:
City:
State: PA
Zip: -

If you believe that the municipality below is incorrect, please click the View All Results button below

Your Local Withholding Tax Rates (as of 4/14/2022)

This information should be used for Employee local tax setup

HOME: HUNTINGDON	9564 William Penn Hwy, Huntingdon, Pennsylvania, 16652				
Location	PSD Code	Resident EIT			
SMITHFIELD TWP (Home)	310112	0.500 %			
HUNTINGDON AREA S D (Home)	310112	1.000 %			

This information should be used for Worksite local tax setup

WORK: UNION	25 E Chestnut St, Mifflinburg, Pennsylvania, 17844				
Location	PSD Code		Non Resident EIT	LST	LST Low Income Exemptions
MIFFLINBURG BORO (Work)	600206		0.500 %	\$10.00	\$0.00
MIFFLINBURG AREA S D (Work)	600206			\$0.00	\$0.00

Shows what rates should be withheld on the check

Total Taxes to be Withheld	
EIT	1.500 %
LST	\$10.00

You can also use this website to look up local tax information for the worksite. If you do not have an employee address, you can enter the worksite address as the Home Address and Work Address.

The results show us what combination we should look for in the zip code drop down of the Worksite details. It will also show us what the worksite PSD code should be. If you do not see the desired combination in the zip code drop down, you can select the PSD code and it will populate the applicable city and school jurisdictions.

Note For employees with a Tax State of PA, a PSD Code will need to be selected within Employee > Pay Setup:

The screenshot shows the 'pay setup' page for an employee named Joe Alaska. The 'required tax information' section is expanded for the year 2019. The 'PSD Code' field is highlighted with a red box and contains the value '050505'. Other fields include Employee ID (4294973045), Marital Tax Status (Single), and Tax State (PA). The 'payment options' section is also visible, with 'Mail Check and/or Stub' checked. The 'affordable care act' section shows 'ACA Status' as 'Hire date needed' and 'Hire Date' as 'Set Hire Date'. The 'local taxes' section shows 'County Tax', 'City Tax', 'School Tax', and 'PSD Code' fields, with 'PSD Code' highlighted in red.

Once a Zip Code has been entered for the Employee within Details > Addresses or when the Zip Code is added when the Employee is created within Enterprise, the PSD Code will automatically populate within Employee > Pay Setup.

In the event a Zip Code is selected that does not have a PSD Code assigned to it, you will see the following warning and be prompted to add the PSD Code manually within Employee > Pay Setup:

The screenshot shows the 'Addresses' section in the HR system. The 'Zip Code' field is highlighted with a yellow box and contains the value '15003-____'. A warning message is displayed: 'PSD code will need to be entered under Pay Setup.'

Once a PSD Code is selected, the County Tax, City Tax, and School District Tax fields will not be able to be edited:

The screenshot displays the HR system interface for an employee named Joe Alaska. The interface is divided into several sections:

- Employee Information:** Name (Joe Alaska), Address (2217 N. 51st Street Apt. A-7, Philadelphia, PA 19131), ID (4294973045), SSN (xxx-xx-7304), and Branch (Minneapolis).
- Navigation:** A sidebar on the left contains various menu items such as 'visifile', 'details', 'documents', 'integrations', 'evaluations', 'messages', 'pay history', 'pay setup', 'accruals', 'adjustments', 'arrears', 'electronic pay', 'rate sheet', 'taxes', 'tasks', 'search', 'employee', 'customer', 'order', 'assignment', 'contact', 'pay / bill', 'calendar', 'reports', and 'all options'.
- General Information:** Includes 'Pay Setup Complete' (checked), 'Employee ID' (4294973045), and 'required tax information' for the year 2019, including Federal Exemptions (1), State Exemptions (1), Federal Add. Withholding (\$0.00), Dependents (0), Marital Tax Status (Single), Tax State (PA), and State Juris.
- Payment Options:** Includes 'Electronic Pay Setup Complete' (checked), 'Mail Check and/or Stub' (checked), 'Email Pay Stub', 'Paycard Requested', 'Paycheck Delivery Code', 'Default Pay Rate', and 'Note to Payroll'.
- Affordable Care Act:** Includes 'ACA Status', 'Hire date needed', 'Admin Status', 'Hire Date', 'Set Hire Date', 'Insurance Due', 'Last Eval', 'Next Eval', and 'Insurance'.
- Local Taxes:** This section is highlighted with a red box. It states: 'Local taxes are automatically determined by the employee's zip code. Manual changes should not be necessary.' It includes fields for 'County Tax', 'City Tax' (XPAB445027), 'School Tax' (YPABR25800), and 'PSD Code' (050505). There are also 'Exempt' checkboxes for each tax type.

If a PSD Code is not entered for an employee living and/or working in Pennsylvania, you will receive an assignment restriction warning when attempting to assign the employee:

i Employee with tax state PA is missing a PSD code. Please verify tax setup and update PSD code. [View Employee](#)

If a PSD Code is not entered for the worksite associated with the assignment in Pennsylvania, you will receive an assignment restriction warning when attempting to assign the employee:

i Worksite in PA is missing PSD Code. [View Employee](#)

Worksite Address

The Worksite address is located on the [order record](#) and is [setup on the customer record](#).

When setting up the worksite address, local taxes are picked in a drop down when typing in the zip code.

Note If the employee should only be taxed by the state in which they live, you can select the check box "Tax by Employee State" under the employee record > pay setup. Doing this will ignore the address on the order worksite. Since each state has a different reciprocity agreement, **please consult with a tax professional before selecting this option.**

Amy Adams
 123 Clover Ln
 Eagan, MN 55121
 ID: 4295098111
 SSN: xxx-xx-5823
 Branch: High Tech NE

visifile
 ▶ details
 documents
 ▶ integrations
 ▶ evaluations
 messages
 ▶ pay history
 ◀ **pay setup**
 accruals
 adjustments
 arrear
 electronic pay
 imputed income
 rate sheet
 taxes
 tasks
 search

employee
 customer
 order

general information
 Pay Setup Complete
 Employee ID

required tax information
 W4 Year
 Tax Higher Rate
Marital Tax Status
 Dependent Allowance
 Dependents
 Other Income
 Extra Deductions
 Extra Withholding
 Federal Exemptions
 Tax State
 State Exemptions
 State Juris
Tax By Employee State

There will not be any tax jurisdictions set up yet under employee > pay setup > taxes on an employee who has not been paid. Enterprise automatically populates these once the employee has received their first check. See screen shots below for before and after the employee has been paid.

Note if you do need to enter additional state withholding prior to cutting a check for the employee, you can select the "+" icon in the upper right hand corner of the employee taxes screen and select which jurisdiction the additional withholding amount should be for. See screen shots below for examples.

1. Employee has not received any checks

ERIKA.WINBERG: High Tech Staffing

Amanda Stone
 123 State St
 Minneapolis, MN 55416
 ID: 4295037500
 SSN:

tasks appointments social email

Employee Taxes - United States of America
 No Records Found

visifile
 details
 documents
 integrations
 evaluations
 messages
 pay history
 pay setup
 accruals
 adjustments
 arrears
 electronic pay
 rate sheet
taxes
 tasks
 search

employee
 customer
 order
 assignment
 contact
 pay / bill
 calendar
 reports
 all options

2. Employee has received at least one check

ERIKA.WINBERG: High Tech Staffing

Amanda Stone
 123 State St
 Minneapolis, MN 55416
 ID: 4295037500
 SSN:

tasks appointments social email

Employee Taxes - United States of America

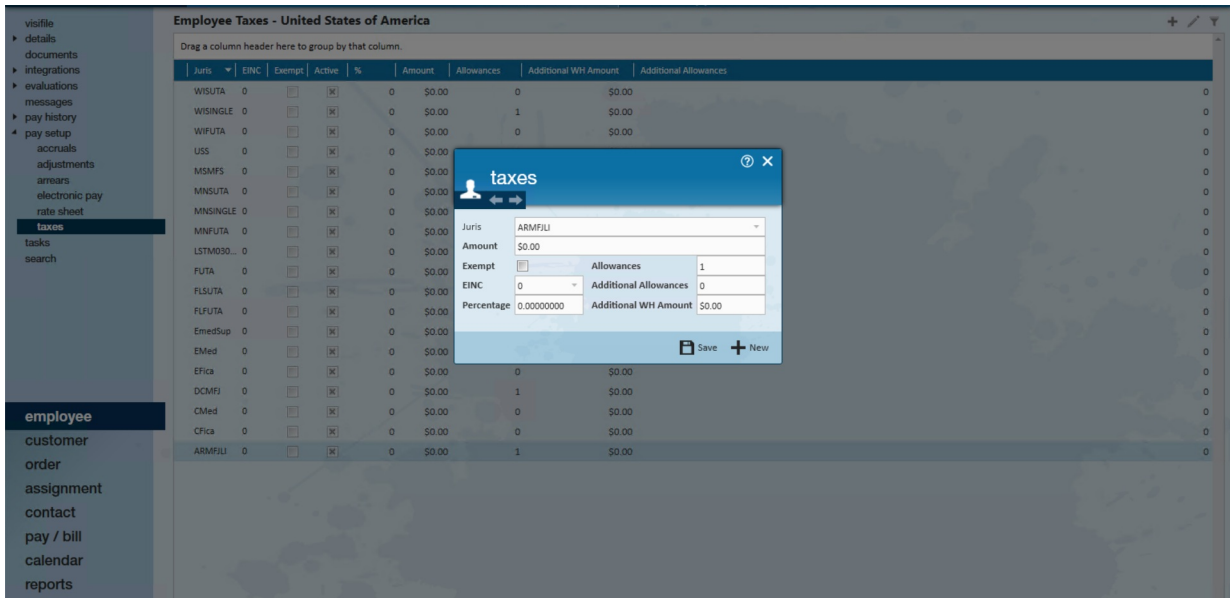
Drag a column header here to group by that column.

Juris	EINC	Exempt	Active	%	Amount	Allowances	Additional WH Amount	Additional Allowances
CFica	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	0	\$0.00	0
CMed	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	0	\$0.00	0
EFica	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	0	\$0.00	0
EMed	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	0	\$0.00	0
EmedSup	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	0	\$0.00	0
FUTA	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	0	\$0.00	0
MNSINGLE	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	2	\$0.00	0
USS	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	2	\$0.00	0
WIFUTA	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	0	\$0.00	0
WISINGLE	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	2	\$0.00	0
WISUTA	0	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	\$0.00	0	\$0.00	0

visifile
 details
 documents
 integrations
 evaluations
 messages
 pay history
 pay setup
 accruals
 adjustments
 arrears
 electronic pay
 rate sheet
taxes
 tasks
 search

employee
 customer
 order
 assignment
 contact
 pay / bill
 calendar
 reports
 all options

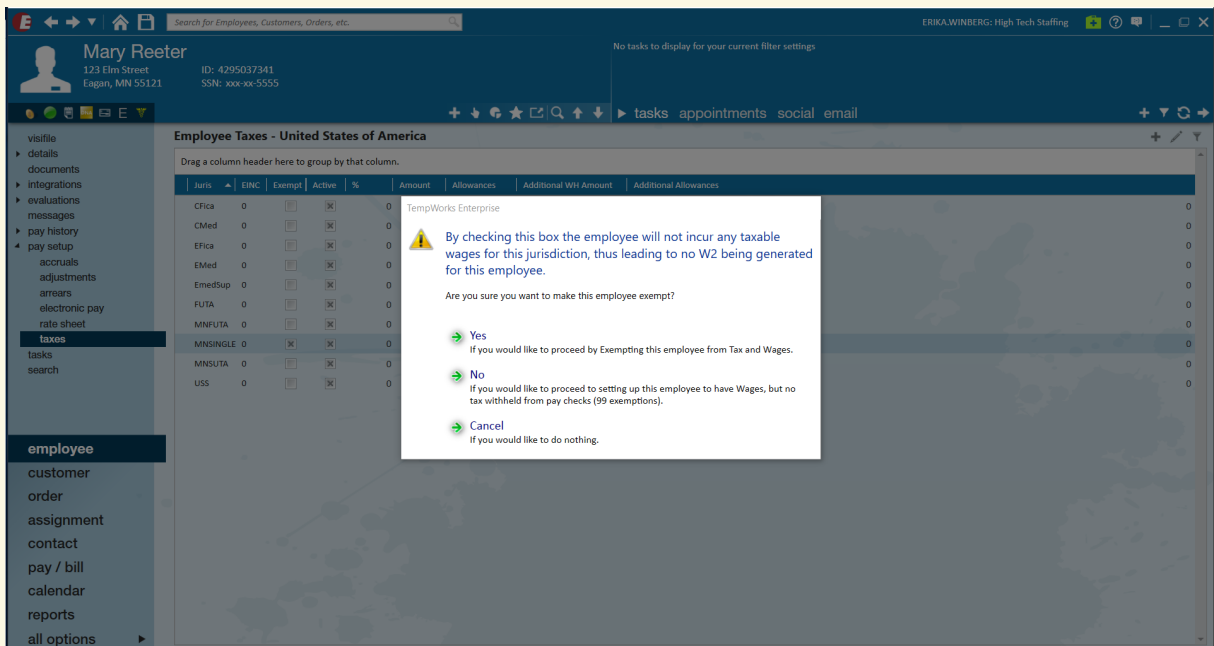
Once the taxes have populated based on the employee and worksite addresses, we can see those taxes appear under the pay setup area. To view the jurisdiction details, you can double click the juris to bring up additional tax information. If you'd like to add additional allowances or state withholding amounts, you may do so from this area.



Note You may also select the "exempt" box in this tax wizard area if the employee should be exempt from all [taxability](#). When selecting the exempt box, TempWorks will prompt you with a notification clarifying what this action will do. Please make sure you consult with a tax professional before selecting this option as it will lead to no W-2 being generated for this employee and could cause issues during year-end if set up incorrectly.

Entering 99 Federal or State Exemptions on the pay setup section will make you exempt from these taxes:

- Reports earnings as taxable
- W2 will be generated for this employee
- Federal/State tax will not be taken out



Related Articles

