Tax Processing Services Overview

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The Lone Oak Payroll Tax Team takes on the task of filing and paying your businesses payroll taxes. Tax filing requirements are constantly changing and new taxes are being rolled out every year. Filing and paying taxes inaccurately or late can lead to large tax penalties - an extra expense no one needs. Not to mention, verifying the accuracy and compliance of tax filings is a burdensome task, usually requiring an in-house expert or consultant. Lone Oak Payroll can be that in-house expert. Our team takes on the burden of filing accurately, making payments, verifying compliance, and corresponding with states as needed.

Services Provided

We'll complete the tax payments, returns, research, balancing, reconciliations, and maintenance for you.

Complete payments, returns, and reconciliations according to regulations. Including: • Payments based on state regulated due dates • Reconciliations annually • Weekly, monthly, quarterly filings and balancing
Balance allocation of tax withholding by jurisdiction via various daily, quarterly and annual processes
File amendments as needed (additional charges may apply)
Produce and file W2 data to local, state, and federal agencies annually
Produce and file annual 1099 returns
Maintain POA (Power of Attorney) where required/applicable
Maintain Third Party or Bulk access to employer tax accounts*
Maintain employer specific rates for taxes such as unemployment**
Maintain employer ID and frequency, typically updated annually**
Research and resolve tax letters from various agencies

Tax Types: What we cover and don't cover

We've got federal, state, local, unemployment, and sales tax under control

Tax Types We Cover	
Withholding - State and Federal	✔
Unemployment - State and Federal	✔
City Service Taxes and Fees	✔
Occupational Privilege Tax	✔
Paid Family Leave ***	✔
Workers Compensation ***	✔
For **Funding** clients: • Use or Sales tax when calculated on wages • Tax Levies***	✔
Tax Types We Don't Cover	
Annual EEO-1 Employee Information Reporting	✖
California Environmental Fee	✖
Corporation and Franchise Tax	
Delaware Paid Family Medical Leave	✖
General Excise Tax (GET)	✖
Hawaii Disability	✖
Multiple Worksite Reporting	
Nevada Modified Business Tax	✖
New York Disability	✖
New York Metropolitan Commuter Transportation Mobility Tax	✖
New York Paid Family Leave	✖
Texas Franchise Tax	✖
Washington Workers Comp (WA L&I)	✖
Wyoming Workers Comp	✖
For **Non-Funding** clients: • Sales tax • Tax Levies (NY IAS as an example)	✖
For **Funding** clients: • Floria Sales tax • Pennsylvania Sales with an Accelerated frequency • Washington Sales tax	✖

Clients Automatically Enrolled in our Tax Processing Services

You'll notice Software Only clients are not automatically enrolled in this service, if that's you, you can always sign up by speaking with your Account Manager.

Payroll Processing	✔
Funding	✔
TMS	✔
Software Only (Hosted)	✖
Software Only (Self-Hosted)	✖

Requirements to Utilize Tax Processing Service

We'll do the 90% if you can help with the 10%.

Close week according to standard payroll deadlines

Note Deadline is weekly, Thursday's at 11:00 AM.

Establish a wire draw.

- Tax liabilities are collected weekly via your payroll wire, funding wire, or a stand alone tax liability wire
- Tax liabilities are collected by 10:00 AM on Friday's (10:00am on Monday's for some holiday weeks)

Prior to payments or filings being completed, Lone Oak will require documentation by tax authority:

- Company ID (typically separate for Employer Withholding, Unemployment, and Locals by state)
- Authority for Lone Oak Payroll to be the filing agent per jurisdiction
- Payment frequency communicated by state collecting authority

Register for new accounts with taxation authorities as needed

Send new tax account information such as account ID, frequency, rate, etc., to the Tax Team (twtaxes@tempworks.com).

Inform the Tax Team (twtaxes@tempworks.com) if you are no longer doing business in a jurisdiction and ensure those accounts are closed with taxation authorities
Send the Tax Team (twtaxes@tempworks.com) all notices such as tax rates updates, frequency changes, account status changes, filing/payment issues, etc.
Maintain all employee tax setup, worksite and employee addresses to ensure tax liabilities calculate correctly

*Employer assistance required for certain jurisdictions dependent on TPA/bulk access requirements

**Employers are responsible for making Tax Team aware of employer specific rate, frequency and account changes

***Some exceptions apply and are outlined in the Tax Types Not Covered by Lone Oak Payroll's Tax Processing Services section below

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