

# *How to Create a Tax Category in Payroll Mate®*

Start by Opening your  
**Payroll Mate**  
Program



**1** Go to → File → Open Company

**2** Select a company to open

**3** Click → OK

2013

File Edit Tools Help Order Checks and Supplies

New Company  
Open Company  
Delete Company  
Exit

Print Selected Check Print Multiple Checks Direct Deposit

Check Preview [09/04/2013] - Check # [1]

Check Summary for "Leader Smith"

Pay Period: From: 09/01/2013 To: 09/03/2013

Net Pay: \$146.83

September

09  
Le

Open Company

Company Name:

Sample Company 2012  
Tutorial

OK Cancel

YTD:

\$14.00  
\$11.16  
\$2.61  
\$0.00  
\$0.00  
\$3.60  
\$11.16  
\$2.61  
\$1.08

Deduction Details

| Title:      | Amount: | YTD:   |
|-------------|---------|--------|
| Garnishment | \$1.80  | \$1.80 |

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File Edit Tools Help Order Checks and Supplies

### Company

| General Information | Federal Tax Information | State Tax Information |
|---------------------|-------------------------|-----------------------|
| Income Categories   | Tax Categories          | Deduction Categories  |
| Company Name:       | Tutorial                |                       |
| Address 1:          | 1234 S Collin Dr        |                       |
| Address 2:          |                         |                       |
| City:               | Tinley Hills            |                       |
| State:              | IL                      |                       |
| Zip Code:           | 60499                   |                       |
| Contact Name:       | John Doe                |                       |
| Telephone Number:   | (712) 786-6121          |                       |
| Fax Number:         | (712) 786-6123          |                       |
| E-mail Address:     | johndoe@tutorial.com    |                       |

Update

Go to → Company

2013

- Checks
- Employees
- Forms
- Reports
- Company**
- Vendor Center

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File Edit Tools Help Order Checks and Supplies

**Company**

General Information Federal Tax Information State Tax Information

Income Categories **Tax Categories** Deduction Categories

Click → Tax Categories 5

| Title                                 | Calc |
|---------------------------------------|------|
| ▶ Federal Income Tax                  |      |
| Social Security (Employee)            |      |
| Social Security (Employer)            |      |
| Medicare (Employee)                   |      |
| Medicare (Employer)                   |      |
| Fed Unemployment (Employer)           |      |
| State Income Tax                      |      |
| State Unemployment (Employer)         |      |
| Local Income Tax                      |      |
| State Disability Insurance (Employee) |      |
| State Disability Insurance (Employer) |      |
| New York City Tax                     |      |

Click → Add 6

Add Edit Delete

2013

Checks  
Employees  
Forms  
Reports  
Company  
Vendor Center

Tax Details box will appear

7

W-2 Options

W-2 Box 12 Code:

W-2 Box 14 Abbreviation:

Use on Box 19 (Local income tax)

Inactive

OK Cancel

Name the **Tax** that's being created

8

**Tax Details**

Title:

Abbreviation:

Calculation:

Quarterly Rates:

Wagebase:

Paid by:

W-2 Options

W-2 Box 12 Code:

W-2 Box 14 Abbreviation:

Use on Box 19 (Local income tax)

Inactive

Click → The down arrow to pick the **type of calculation**

9

**Tax Details** [X]

Title:

Abbreviation:

Calculation:

|                  |                                     |                                     |                                     |                                     |
|------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Quarterly Rates: | <input type="text" value="1.5000"/> | <input type="text" value="1.5000"/> | <input type="text" value="1.5000"/> | <input type="text" value="1.5000"/> |
|------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|

Wagebase:

Paid by:

W-2 Options

W-2 Box 12 Code:

W-2 Box 14 Abbreviation:

Use on Box 19 (Local income tax)

Inactive

Depending on the Calculation that was chosen enter in the Rates or the Amount. **10**

If there is a **Wage base**, enter it here. **11**

(Wage base is the maximum dollar amount that is subject to the tax)

Select if the Tax is paid by **Employee or Employer** **12**

Click → OK **13**

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File Edit Tools Help Order Checks and Supplies

New Edit Delete Pay Check History Pay Multiple Employees

**Employees**

- All Employees
- Active Employees
- Inactive Employees

| First Name | Middle | Last Name | SSNumber    | Phone Number   | Address 1       |
|------------|--------|-----------|-------------|----------------|-----------------|
| Dana       |        | Doe       | 363-21-5658 | (312) 566-4789 | 5252 s 76th St  |
| Sara       |        | Lee       | 252-62-1313 | (733) 566-8252 | 1234 S 82nd Ave |

2013

Checks

**Employees**

Forms

Reports

Company

Vendor Center

Click → Employees 14

Select an **Employee** to apply the **tax** to 15

Click → Edit 16

Modify Employee box will appear

Taxes will appear

17

Modify Employee

Welcome to the "Modify Employee" Wizard!

This wizard will guide you through the process of modifying an existing employee.

To continue, please

Click → **Next** until you get to **Taxes**

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Cancel

< Back

Next >

Finish

Modify Employee

Taxes

- Federal Income Tax
- Social Security (Employee)
- Social Security (Employer)
- Medicare (Employee)
- Medicare (Employer)
- Fed Unemployment (Employer)
- State Income Tax
- State Unemployment (Employer)
- Local Income Tax
- State Disability Insurance (Employee)
- State Disability Insurance (Employer)
- Trainer Tax [Percentage]

Cancel

< Back

Next >

Finish

Scroll down until the Tax created appears (Make sure to check the Tax that was created)

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Click → **Next** (until **Finish** appears)

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Tutorial - Payroll Mate (2013)

File Edit Tools Help Order Checks and Supplies

New Edit Delete Pay Check History Pay Multiple Employees

**Employees**

|   | First Name | Middle | Last Name | SSNumber    | Phone Number   | Address 1       |
|---|------------|--------|-----------|-------------|----------------|-----------------|
| ▶ | Dana       |        | Doe       | 363-21-5658 | (312) 566-4789 | 5252 s 76th St  |
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All Employees  
 Active Employees  
 Inactive Employees

**2013**

Checks  
**Employees**  
 Forms  
 Reports  
 Company  
 Vendor Center

**\*After checking the tax under one employee, do the same steps for every employee it pertains to.\***



***Congratulations. A tax category has been created!***

**www.PayrollMate.com**

**1-800-507-1992**