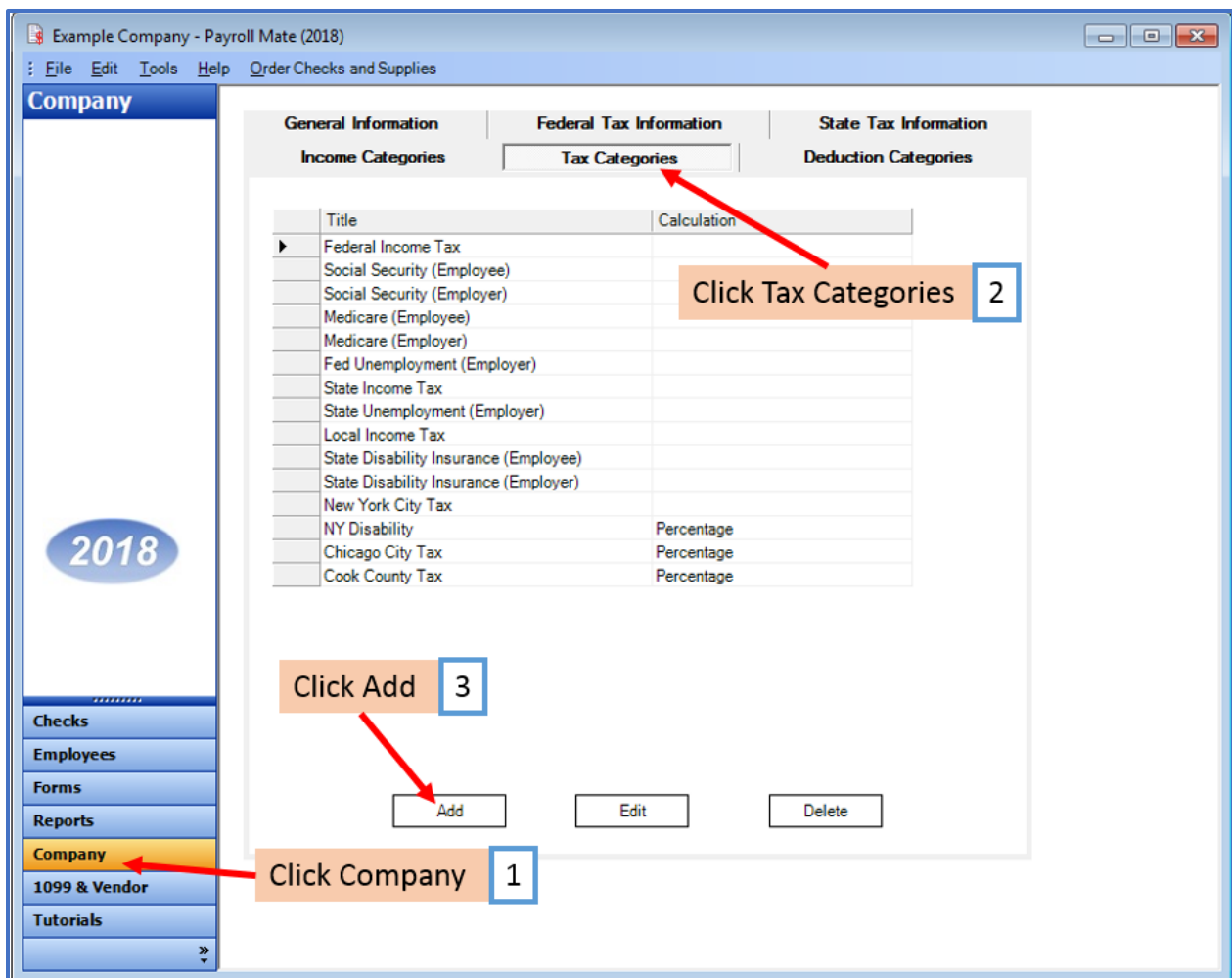


# How to Set Up New York Disability in Payroll Mate

This tutorial is for information purposes only. It is your responsibility to make sure the payroll setup is correct. Consult your accountant or tax advisor if you are unsure how a certain payroll item or your payroll in general should be set up.

1. Inside Payroll Mate Software, Click Company from Shortcuts
2. Click Tax Categories
3. Click Add



4. Complete the Tax information set up
  - 4a. Title the tax, Example: NY Disability
  - 4b. The abbreviation will automatically be filled in, you can make adjustments if you prefer
  - 4c. Choose Percentage from the drop-down menu
 

Fill in quarterly rate as the percentage rate may vary. As of this writing, the New York Workers' Compensation Board has set the rate for Disability at 0.50% of the employee's wages paid, not to exceed 60 cents per week. Employers should periodically check with the New York Workers' Compensation Board to confirm the correct rate.
  - 4d. Populate the "Max Amount per Check" field
 

As of this writing, the maximum is \$0.60 per week. Employers should periodically check with the New York Workers' Compensation Board to confirm the maximum dollar amount per week. For weekly paid employees, you enter .60 in the "Max Amount per Check" field. For monthly paid employee (12 pay periods), then you prorate ( $52 \times .60 / 12 = 2.60$ ) and enter the prorated amount.
  - 4e. Select Paid by option from drop-down menu
 

If you are not sure if the tax is paid by the employee or the employer, you can verify this with the New York Workers' Compensation Board.
  - 4f. Enter the W2 Options if applicable
  
5. Click OK to save the tax category and add it to the list of taxes available in the company

The screenshot shows the 'Complete Tax Details' dialog box with the following fields and annotations:

- Title:** NY Disability (Annotation: Title the new tax 4a)
- Abbreviation:** NY Disab (Annotation: Abbreviation 4b)
- Calculation:** Percentage (Annotation: Select Percentage 4c)
- Quarterly Rates:** 0.500000, 0.500000, 0.500000, 0.500000 (Annotation: Enter Quarterly Rates 4c)
- Wagebase:** (Empty field, with note: Leave Blank for No Wage Base)
- Max Amount per Check:** 0.60 (Annotation: Enter Max Amount per Check 4d)
- Paid by:** Employee (Annotation: Select Paid by option 4e)
- W-2 Options:**
  - W-2 Box 12 Code: (Empty field)
  - W-2 Box 14 Abbreviation: (Empty field)
 (Annotation: W2 Options 4f)
- Use on Box 19 (Local income tax)
- Inactive
- Buttons:** OK, Cancel (Annotation: Click OK 5)

5a. New York Disability tax is now added to the list of taxes available in the company

The screenshot shows the 'Example Company - Payroll Mate (2018)' interface. On the left, there is a 'Company' sidebar with a '2018' badge. The main area is divided into three tabs: 'General Information', 'Federal Tax Information', and 'State Tax Information'. Under 'State Tax Information', there are sub-tabs for 'Income Categories', 'Tax Categories', and 'Deduction Categories'. A table lists various taxes with columns for 'Title' and 'Calculation'. The 'NY Disability' row is highlighted with a red box, and a red arrow points to it from a callout box that says 'New Tax in list' with a '5a' in a blue box.

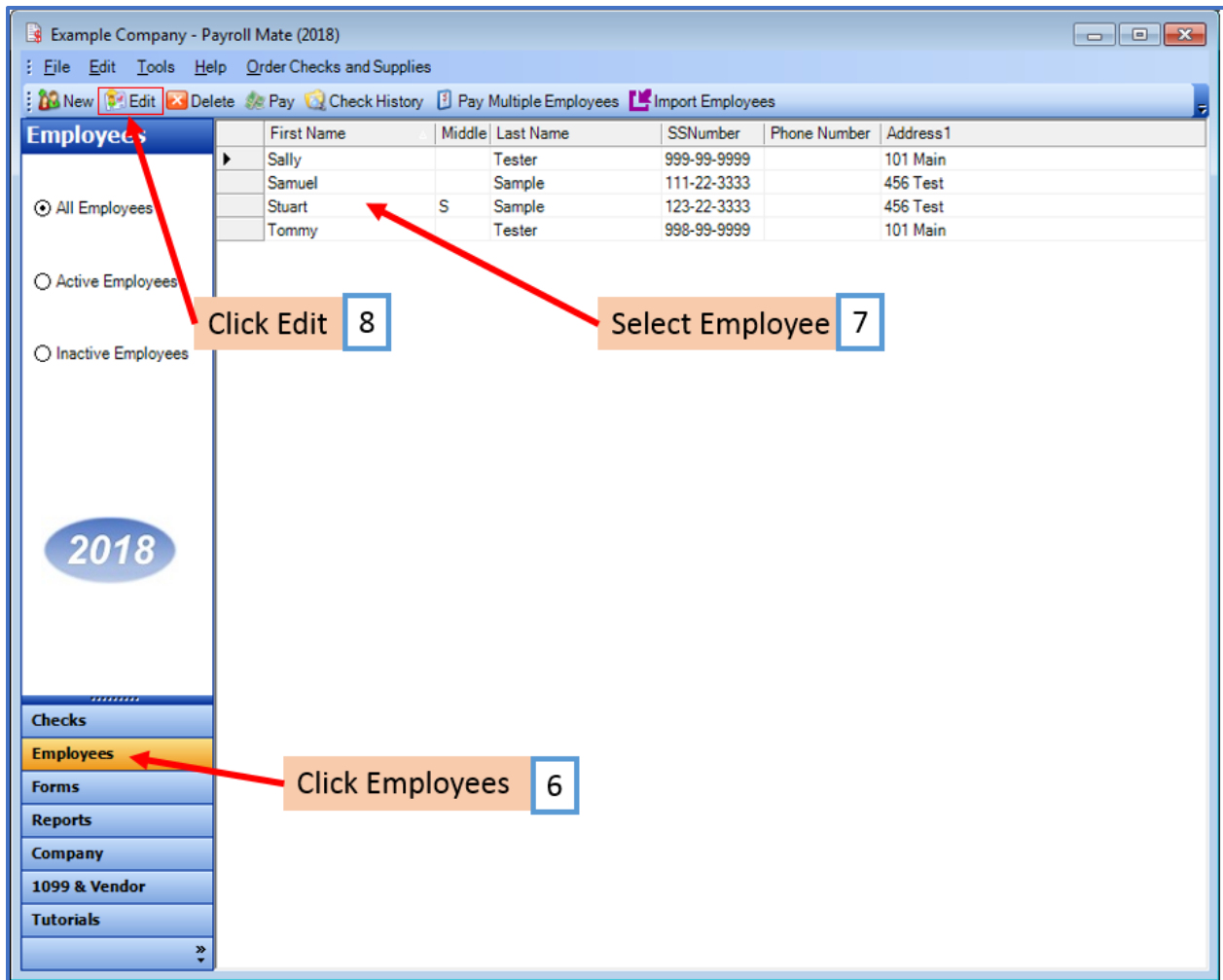
Title	Calculation
Federal Income Tax	
Social Security (Employee)	
Social Security (Employer)	
Medicare (Employee)	
Medicare (Employer)	
Fed Unemployment (Employer)	
State Income Tax	
State Unemployment (Employer)	
Local Income Tax	
State Disability Insurance (Employee)	
State Disability Insurance (Employer)	
New York City Tax	
NY Disability	Percentage
Chicago City Tax	Percentage

Now you will need to apply the tax to your applicable employees

6. Click Employees from Shortcuts

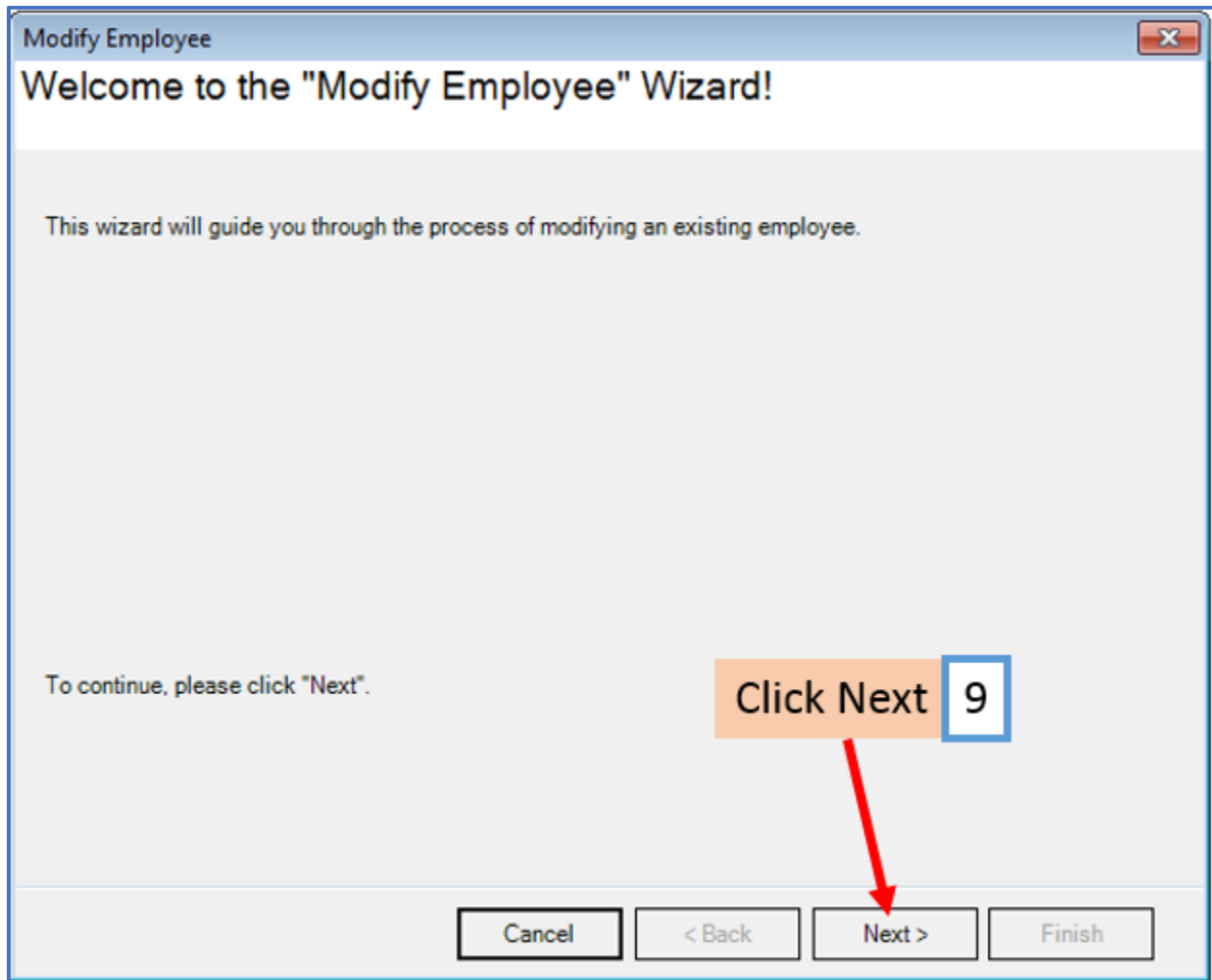
7. Select an employee from the list of employee's names

8. Click Edit



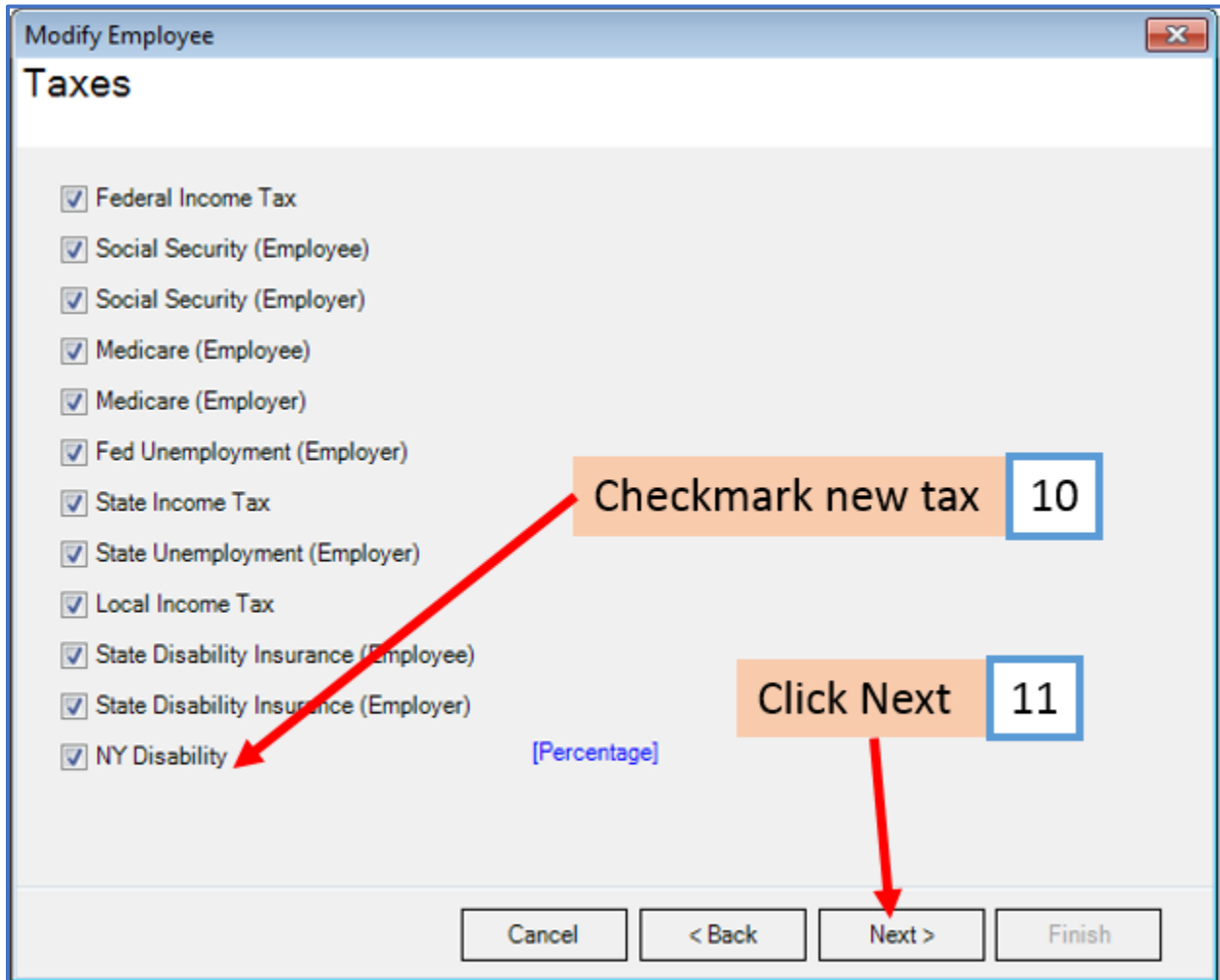
The Modify Employee Wizard will appear on the screen

9. Click Next through the wizard until you get to the Taxes screen



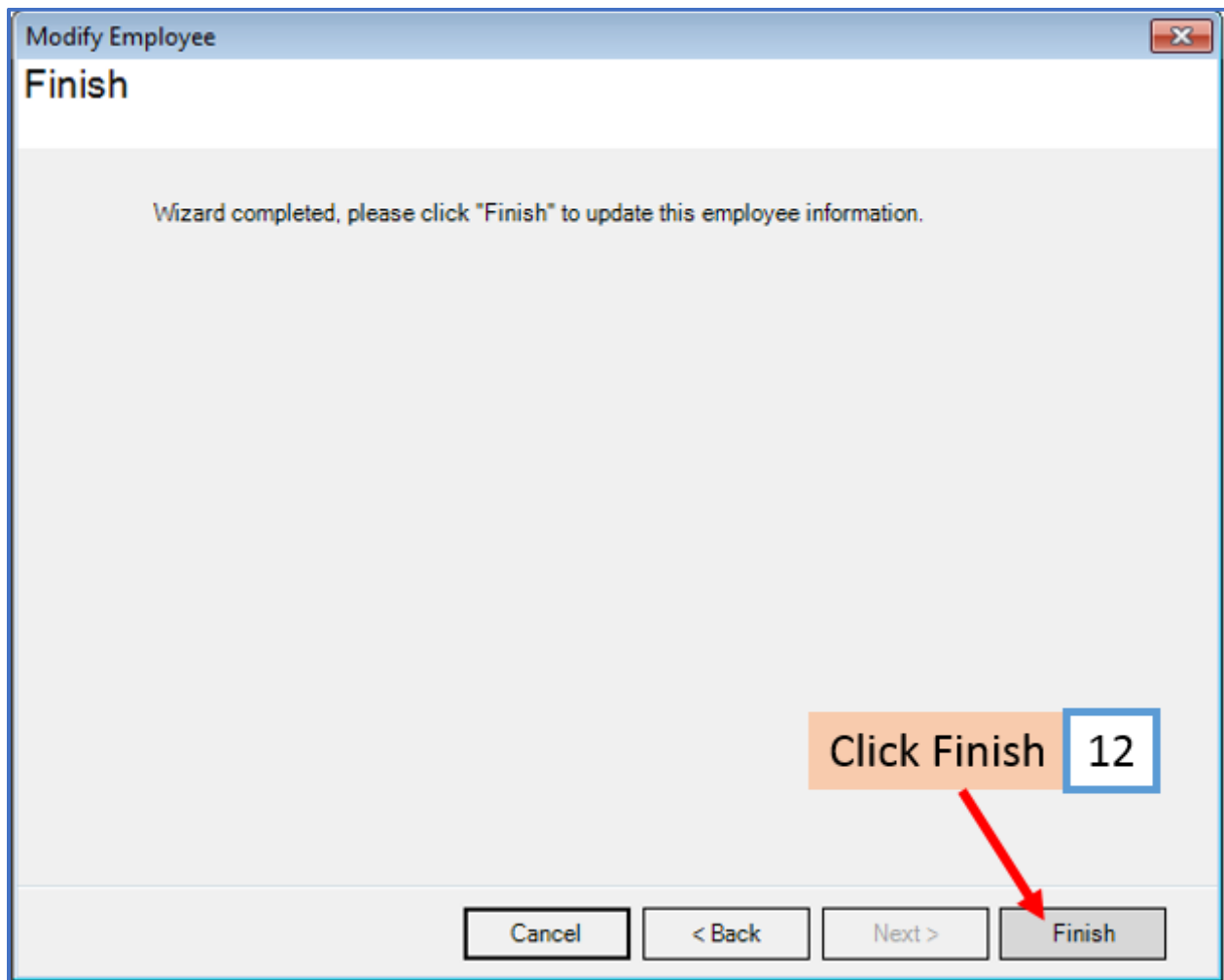
10. Select NY Disability from the list of taxes

11. Click Next until you finish the wizard



12. Make sure to press Finish

Note: Your information will not be saved if you do not click Finish



Repeat steps 6-12 for each applicable employee