

Template Set-up FORM

Client Number: _____ Client Name: _____

Company Number: _____ Company Name: _____

Template Name: _____

Tax Overrides:

Tax at Federal Supplemental Rate - Yes / No
 Federal Overrides – None / Regular Amount / Regular Percent / Additional Amount / Additional Percent
 Override Frequency – Weekly / Bi-Weekly / Monthly / Semi-Monthly / Quarterly / Annual
 Prorate Scheduled E/Ds – Yes / No

Scheduled Payroll Events:

Direct Deposit – Block All / Allow All / Block All except NET
 Block Labor Distribution – Yes / No
 Block Pensions – Yes / No
 Block Specific Scheduled E/Ds – Yes / No
 Specify _____

Federal Taxation:

Block Federal Taxes – Yes / No
 Block Additional Federal Taxes – Yes / No
 Block EIC – Yes / No

State Taxation: *

Block State Taxes – Yes / No
 Block Additional State Tax – Yes / No
 **Tax at Supplemental Rate – Yes / No

Local Taxation:

Block Local Taxes - Yes / No

**Reciprocal states are not recognized within templates. Adjustments to reciprocal states will need to be entered manually, during payroll entry*
***States of NH, FL, TN, TX, AK, NV, SD, WA, WY do not have withholdings.*

I agree to and authorize PAYDATA to make the above changes to our company set up.

Authorized client representative: _____ Title: _____

Signature: _____ Date: _____

<i>For PayData use only:</i>		Requestor: _____	CSR Rep: _____	Date Requested: _____
Route form to all Departments for Review				
TAX :	_____	Date Completed:	Priority: <input type="checkbox"/> High	<input type="checkbox"/> Medium
FINANCE:	_____	Date Completed:	<input type="checkbox"/> Low	
CONVERSION:	_____	Date Completed:		
CUST SVC:	_____	Date Completed:		
CSR MGR :	_____	Date Completed:		
ADMIN ASST :	_____	Date Completed:		