COATS

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**Visual Setting Up
CO Paid Leave**

Revised December 2022

Creating the Local Employee CO Paid Leave

SITUATION: You need to ensure that CO Paid Leave is withheld from employees' paychecks for 2023.

160,200 cap and based on 50% of .9% of the gross figures for Tax Year 2023.

STEPS:

1) Click on **Maintenance** / **Tax Tables** / **Local Tax**.

2) IF **COPL** appears on left then continue to step 3

    If not, perform below steps to create the code on the left grid.

    a) Click **Add Account**

    b) Type **COPL** in the Code box

3) Confirm the right grid holds the below

    a) In the **Name** field description can be updated to read: **CO Paid Leave**

    b) In the **Tax Max** field, **720.90**

    c) In the **Tax %** field, **0.50000**

    d) In the **Tax Res** field, **0.009**

4) IF need AP account, perform the below steps:

    a) Go to **AP / Payable Accounts**.

    b) Click **Add**.

    c) In the **Name** field, enter the Name that the WA Cares Fund to be paid to along with the address, city and state.

    d) Click **GL Info**.

    e) Attach your **Default Bank**, **Expense** and **Liability** accounts.

    f) **X** out of the **Payable account**.

5) Click on **Maintenance** / **Tax Tables** / **Local Tax**.

6) Click **Read Only** at the bottom to be able to assign the Employer ID and payable account into the *left grid*.

7) Once selected, **X** out of the Local Tax Information.

NOTE: As part of the steps provided for the 2023 Tax Update, this table has been updated. ***You are REQUIRED*** to update the **Employer ID** and attach the **AP Acct** before your first payroll of 2023. To work with COPL the user will put COPL under the assignment AND in the Local code grid field of the employee tax window. If COPL is setup as local code for employees then COPL should be attached to each client, order, assignment to have it come out as well.

If COPL is setup as Local Code

Add to COPL LOCAL W/H to Front Office / Employees, Assignments, Clients and Orders:
1) All employees will need to have Local COPL added to their tax screen.
2) Each employee assignment needs to have Local COPL added (Tax Code).
3) Each client needs to have Local COPL added (Tax Code).
4) Each job order needs to have Local COPL added (Tax Code).

If COPL is setup as resident code, to come out regardless of where they work:

Add to COPL as Local resident code:
1) All employees will need to have Local COPL added to their tax screen in the local tax grid and attached in the Local Resident Code.