

## COATS

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## Visual Setting Up OR Paid Leave

*Revised December 2023*

### Creating the Local Employee OR Paid Leave

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

This is based on a Taxable Wage Limit of \$128,400 and an employee rate of 0.6333 of 0.4% for 2019.

#### 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 **ORPL** in the Code box
- 3) In the **Code** field, **ORPL**
  - a) In the **Name** field, the description should read: **OR PAID LEAVE**
  - b) In the **Tax Max** field, **797.40**
  - c) In the **Tax %** field, **0.60000**
  - d) In the **Tax Res** field, **0.01000**

Currently Selected State: OR Code: ORPL

Code	Employer...	AP Acct
ORPL		
ORPL		OR PAID LEAVE

Options

Cafeteria Plan	401K	Not In List

Code	G...	Name	Tax Base	Tax Max	Constant	Tax %	Tax Res	STD D...	Option	...	NR
OR01			0.00	0.00	0.00	0.0500...		0.00	0.00		
OR02			0.00	0.00	0.00	0.0500...		0.00	0.00		
OR03			0.00	0.00	0.00	0.0500...		0.00	0.00		
ORPL		OR PAID L...	0.00	797.20	0.00	0.60	0.01000	0.00	0.00		

Add Account Delete Account Read Only Add Tax Item Delete Tax Item

- 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 Paid Family Leave is 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.

**Add to ORPL LOCAL W/H to Front Office / Employees, Assignments, Clients and Orders:**

- 1) All employees will need to have Local ORPL added to their tax screen.
- 2) Each employee assignment needs to have Local ORPL added (Tax Code).
- 3) Each client needs to have Local ORPL added (Tax Code).
- 4) Each job order needs to have Local ORPL added (Tax Code).

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

**Add to ORPL as Local resident code:**

- 1) All employees will need to have Local ORPL added to their tax screen in the local tax grid and attached in the Local Resident Code.