



**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		Priority:	<input type="checkbox"/> High <input type="checkbox"/> Medium <input type="checkbox"/> Low
TAX :	_____	Date Completed:	_____
FINANCE:	_____	Date Completed:	_____
CONVERSION:	_____	Date Completed:	_____
CUST SVC:	_____	Date Completed:	_____
CSR MGR :	_____	Date Completed:	_____
ADMIN ASST :	_____	Date Completed:	_____