



PA Locals on Greenshades

User Guide



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1 PA Locals Overview

1.1 The basics

Greenshades is here to help you handle PA local taxes. To do that, there are a few things you will need to know when getting started.

Worksite: A worksite is the location in which the employee is performing work. If they live in PA but work in, let's say NJ, then the employee's worksite would be the NJ office/location, and their home address would be in PA. The same would apply in the reverse, if an employee lives in NJ but works in PA, their worksite location would be the PA office/address. Another scenario you may encounter are employees who work from home. In that case, their home address and worksite would be the same address.

Political Subdivision (PSD) code: A PSD code is a six-digit number that uniquely identifies each municipality in PA. PSD codes are based on two pieces of information, the employee's home address and the employee's worksite address. Greenshades has great options and tools to help in determining the appropriate code to use for your employees, and the state has a website available to look up this [Local Tax](#) information (see figure 1) on a case by case basis as well.

PA pennsylvania DEPARTMENT OF COMMUNITY & ECONOMIC DEVELOPMENT

Municipal Statistics

Home DCED.PA.Gov

Taxes Financials Officials Fire Police Planning Other Municipal Authorities & NIDs

All data on these reports may be up to 24 hours old, data is refreshed nightly.

Find Your Withholding Rates by Address

HOME ADDRESS: [Copy From Work](#)

WORK ADDRESS: [Copy From Home](#)

Street Address:

City:

State: PA

Zip: -

Street Address:

City:

State: PA

Zip: -

VIEW INFORMATION

Figure 1 [PA – Find Local Tax rates]

Local Tax Code: Once you have determined which local taxes you will need to deduct from employees, you will need to set up a Local Tax Code in your ERP for each of these individual deductions. The codes will need to be on a 1:1 ratio, meaning 1 local tax code per local tax (*do not use one code for multiple taxes or use more than one code for the same local tax*).

1.2 ERP Set Up

Now that you know what details are needed to set up PA locals, let's take a look at proper set up starting with your ERP. Regardless of which ERP you are using (Greenshades Payroll, a Microsoft product, or something else) the basic steps will be the same. The difference in steps will come in with which Greenshades tax product you are using to generate your tax returns. This guide will walk you through both the Greenshades Online Tax Filing Center process as well as the Greenshades Payroll Tax Services process.

1.2.1 Employee Set up

First, determine an employee who lives and/or works in PA and ensure you have all required details for this employee in your ERP system (name, address, etc). If you do not already know the PSD code for this employee or tax rate you will need to withhold from this employee, go to the PA Find Local Tax site and enter the employee's home and work address.

Note: If you are using a Greenshades product, such as Dynamics Payroll Inspector, to determine this first step, skip to step two.

1.2.2 Worksite Set Up

Second, ensure you have all worksites set up in your ERP with the correct address. Each location that an employee would be assigned will need its own worksite entry in your ERP, this will include any "worksites" for employees who work from home. Assign each PA employee (whether living or working in PA) to a worksite.

1.2.3 Local Tax Code Set up

Lastly, based on the information provided by the state you will need to set up a local tax code(s) for each local tax deduction. The process of creating a local tax code will vary by ERP system, however the important details to note are: the tax type (school district tax, city, county, etc), the jurisdiction the code will be representing in your payroll system, and the amount or percentage of tax to withhold. Assign the local tax code to the appropriate employee(s).

Note: Dynamics Payroll Inspector users can also skip this step.

1.2.4 Send the information to Greenshades Online

Now that you have the information and details set up in your ERP, it is time to send these details to Greenshades through your syncing product (connector, Sync V2, etc).

Note: It is recommended that at least one payroll batch is run that includes the local tax codes created, so that you can easily review your set up in Greenshades for accuracy.

2 Set up of PA Locals on Greenshades Online

2.1 Settings

Log into GreenshadesOnline.com and navigate to the settings module. To follow the steps for using the Greenshades Online edition of the Tax Filing Center, continue to section 2.2 below. Skip to section 2.3, however, if you are a Payroll Tax Services user.

2.2 Greenshades Online Tax Filing Center (GO TFC) users

To get started, you should be on the Settings page of GreenshadesOnline.com. From the accordion menu on the left, expand the Tax Filing Center list and select Locals Mapping. (see figure 2a below)

2.2.1 Locals Mapping for GO TFC

When navigating to the Locals Mapping settings, you will see a list of the local codes you previously set up in your ERP. To the left of each code there is an edit or remove option. Use the remove option only for items you know will never need to be used or mapped as a local tax. To map a local tax code, select edit to the left of the code you want to assign, and select the state, tax type, and jurisdiction the code is intended to represent. (see figures 2a & 2b below)

PA Locals on Greenshades

Workspace Settings

Locals Mapping

Below is a listing of all the local tax codes found within your payroll system. Please choose a state, type, and name for each of them.

Your Local Code	State	Type	Name
CHARLB \$4.00	CO	City	Denver OPT (Semi-Monthly payroll)
COLMBU 2.500%	CO	City	Aurora OPT (Bi-Weekly payroll)
DENVRBW \$3.00	CO	City	Aurora OPT (Monthly payroll)
DETRO1 2.400%	DE	City	Wilmington Earned Income Tax
GRAP10 0.750%	OH	City	Bettsville City Tax (PSD 06194)
GRNDRA 1.500%	OH	City	Columbus City Tax (PSD 18000)
ICDELA 1.500%	IN	County	Clay County Total EIT Tax
ICHOWA 1.650%	AL	City	Auburn City Tax
IN-EL1 1.000%	DE	City	Wilmington Earned Income Tax
IN-EL2 1.000%	IN	County	Elkhart County Total EIT Tax
KSCITY 1.000%	KY	School District	Marshall County School Tax
LCHAH21 \$6.00	AL	City	Beaverton City Tax
LUSV1 2.200%	IN	County	Allen County Total EIT Tax
LUSVL 1.450%	AL	City	Attala City Tax
NYNVCM \$0.00	AL	City	Attala City Tax
OS43802 \$0.00	OH	School District	Columbia School District Tax (PSD 48140)
OS43844 \$0.00	OH	School District	Dayton School District Tax (PSD 43844)
PCDERTW 1.000%	CO	City	Denver OPT (Monthly payroll)
PCERICI 1.180%	CO	City	Giendle OPT (Monthly payroll)
PCPHIC1 3.900%	DE	City	Wilmington Earned Income Tax
PNHARDA 1.000%	OH	Municipal Resident Tax	Ohio Resident Tax
WILMING 1.250%	WV	City	Weirton City Tax (Bi-Weekly)

Figures 2a & 2b Locals Mapping

Edit Local Tax Mapping

Choose mapping for DENVRBW \$3.00:

State:

Type:

Name:

Note: It is our recommendation that if you may use them in the future to just leave them blank until that time. The process of mapping local taxes can only be used for local tax mapping. While some users set up other special taxes (such as CA SDI for example), special taxes are not considered a "local tax" in Greenshades and the mapping process for those happens in your syncing product. Reach out to Greenshades support for additional assistance on mapping special taxes you may need.

2.2.2 Create a Local Return

Now that you have set up your locals and completed the mapping, go to the Tax Filing Center home page and select Local Withholding from the drop-down menu and the period in which you need to file. Then, click build return next to the local return you would like to generate and review you totals. If no edits need to be made, click next and follow the instructions to submit your return.

2.3 Payroll Tax Services (PTS) users

To get started, you should be on the Settings page of GreenshadesOnline.com. From the accordion menu on the left, expand the Tax Services list and select Locals Mapping.

2.3.1 Locals Mapping for PTS

When navigating to the Locals Mapping settings, you will see a list of the local codes you previously set up in your ERP. To the left of each code there is an edit or remove option. Use the remove option only for items you know will never need to be used or mapped as a local tax. To map a local tax code, select edit to the left of the code you want to assign, and select the state, tax type, and jurisdiction the code is intended to represent. (see figure 3 below)

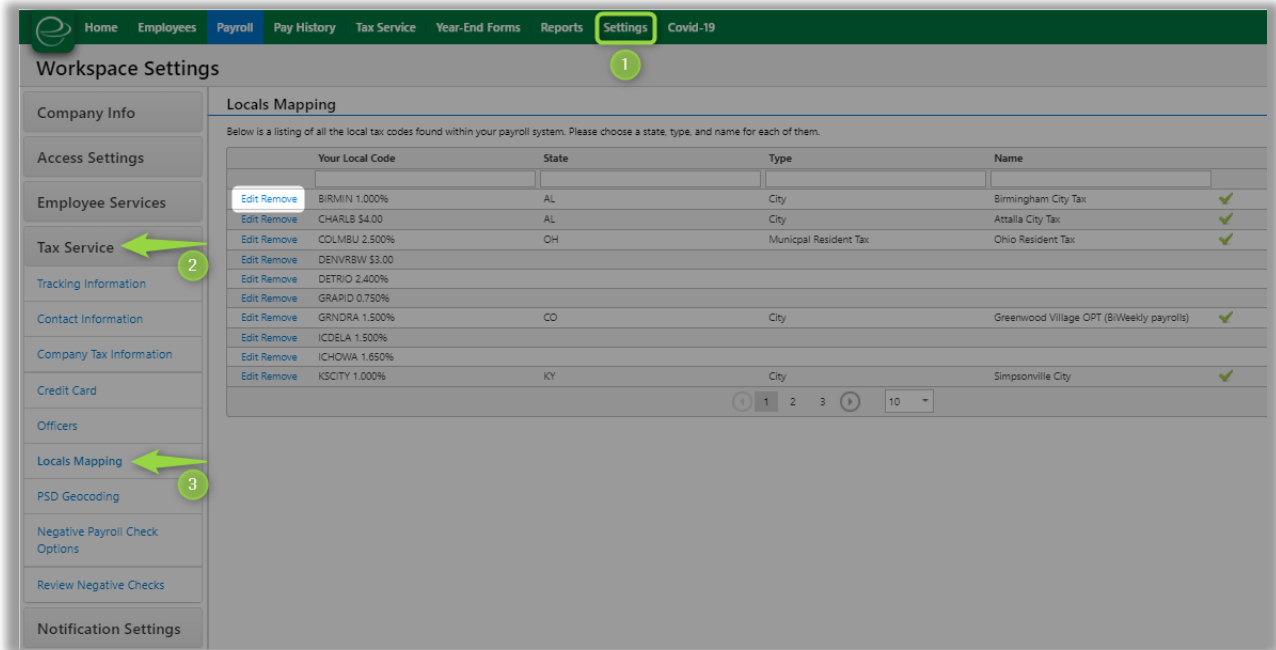


Figure 3 Locals Mapping & 3b Locals Mapping

Edit Local Tax Mapping

Choose mapping for DENVRBW \$3.00:

State:

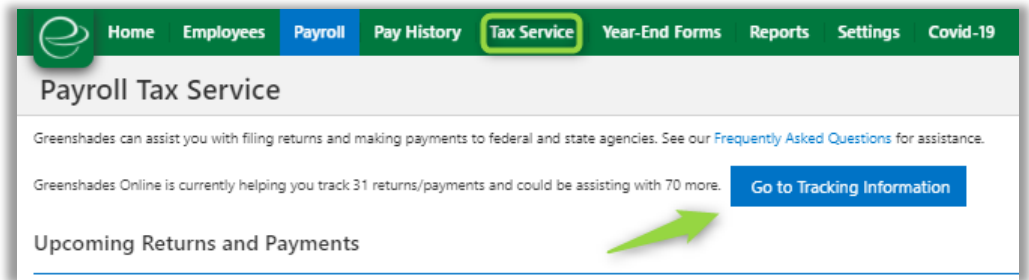
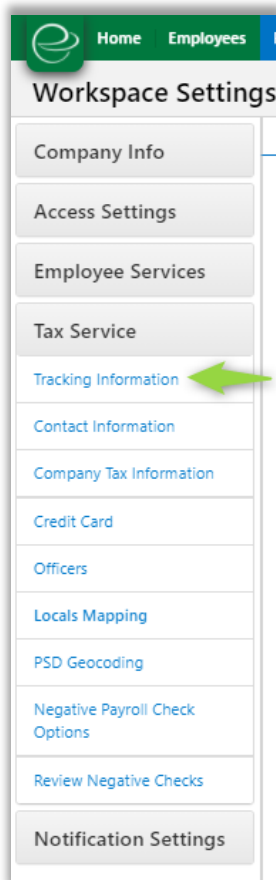
Type:

Name:

Note: It is our recommendation that if you may use them in the future to just leave them blank until that time. The process of mapping local taxes can only be used for local tax mapping. While some users set up other special taxes (such as CA SDI for example), special taxes are not considered a “local tax” in Greenshades and the mapping process for those happens in your syncing product. Reach out to Greenshades support for additional assistance on mapping special taxes you may need.

2.3.2 Locals Tracking

Once mapping setup is complete, you will need to tell Greenshades which locals you would like to track. You have two choices in navigating to the tracking page set up. You can choose from the same accordion menu on the left and choose “Tracking Information” or you can go to the Tax Services home page & click the “Go to Tracking Information” button. Here you will set up enable and set up your locals tracking page(s) like any other tracking page(s).



Figures 4a & 4b Navigate to Tracking Information

2.3.3 Create a Local Return

Now that you have set up your locals, completed the mapping, and set up the tracking page it is time to build a return. Navigate to the Tax Services home page. Once on the Tax Services home page, the Upcoming Returns and Payments section should display a “file now” option for the locals you are now tracking. Select “file now” to the left of the local you would like to build and review you totals. If no edits need to be made, click next and follow the instructions to submit your return. Be sure to submit any required payment as well.

3 Other things to know

3.1 Combined Monthly Filings

If you are a company that submits your PA local taxes on a combined, monthly frequency, we support that too. Once you have set up a local code with the appropriate PA type and jurisdiction name, the option will appear for you to generate these returns on a combined, monthly basis.

Locals Mapping

Below is a listing of all the local tax codes found within your payroll system. Please choose a state, type, and name for each of them.

Your Local Code	State	Type	Name
Edit Remove ATTA 5.000%	KY	City	Fulton City Tax
Edit Remove BIRMIN 1.000%	PA	Municipal NonResident EIT	Allegany Township in Coudersport SD (Potter County) NR EIT (PSD 530201)
Edit Remove BUTKY 1.000%	PA	Total Resident EIT (Muni and School)	Wilkinsburg Borough School District / Wilkinsburg Boro (Allegheny County) Total EIT (PSD 720901)
Edit Remove CASDI 0.900%			
Edit Remove CHARLB \$4.00			
Edit Remove CODEA 0.750%			
Edit Remove CODEB \$0.00			
Edit Remove COLMBU 2.500%	PA	Total Resident EIT (Muni and School)	Bryn Athyn School District / Bryn Athyn Boro (Montgomery County) Total EIT (PSD 460201)
Edit Remove DENVRBW \$3.00	PA	Municipal NonResident EIT	Abington Township (Montgomery County) NR EIT (PSD 460101)
Edit Remove DETRIO 2.400%	PA	Municipal NonResident EIT	Ambler Boro (Montgomery County) NR EIT (PSD 462201)

← 1 2 3 4 5 → 10 ▾

This company files local Pennsylvania taxes on a combined, monthly basis.

Figure 5 Combined PA Monthly option

3.2 PSD GeoCoder

The PSD GeoCoder is designed to assign a PSD code to any employee working or living in PA. You can set up PSD code assignment to be completed manually or run automatically when a new employee or new address is detected. (see figure 6 below)

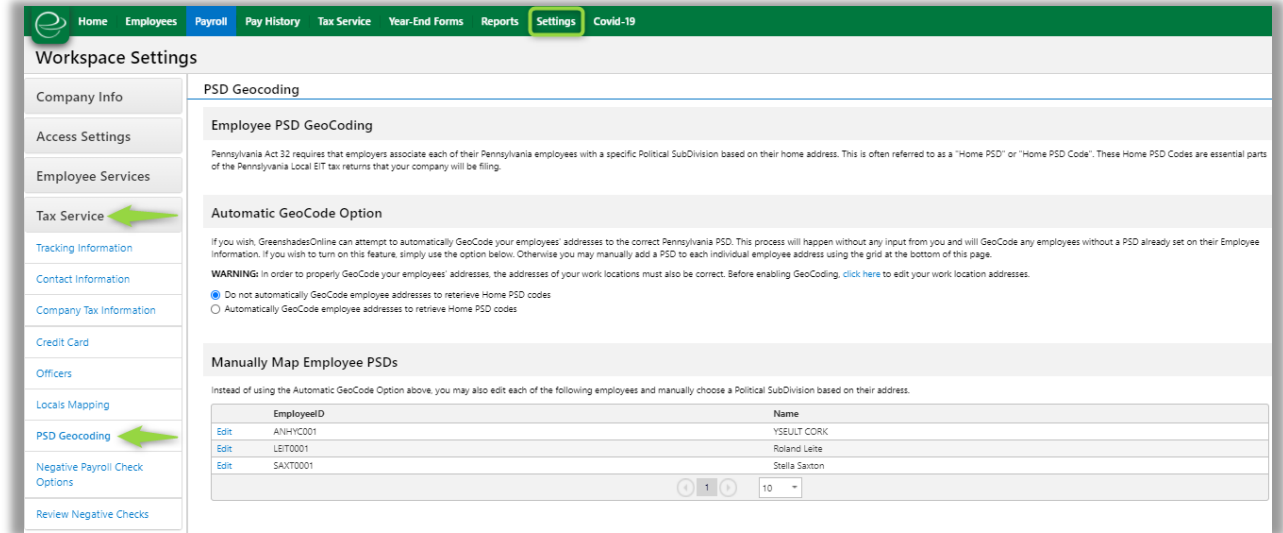


Figure 6 PSD Geocoding

3.3 Company Addresses

When you need to make a change to your company addresses, it is always recommended to make this change in your ERP and send the updated info to Greenshades. However, if you would like to review or edit the company address information in Greenshades, you may do so in the workspace Settings as well.

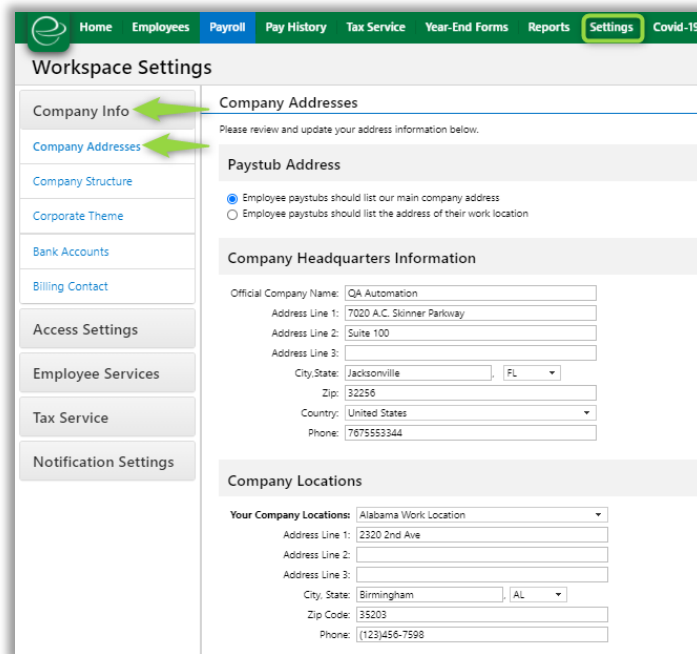


Figure 7 Company Addresses

3.4 Employees module

If the Employees Module is a part of your Greenshades offerings, you can review employee level information in Greenshades as well. You can see the worksite assigned to an employee and the PSD code assigned (if they live/work in PA).

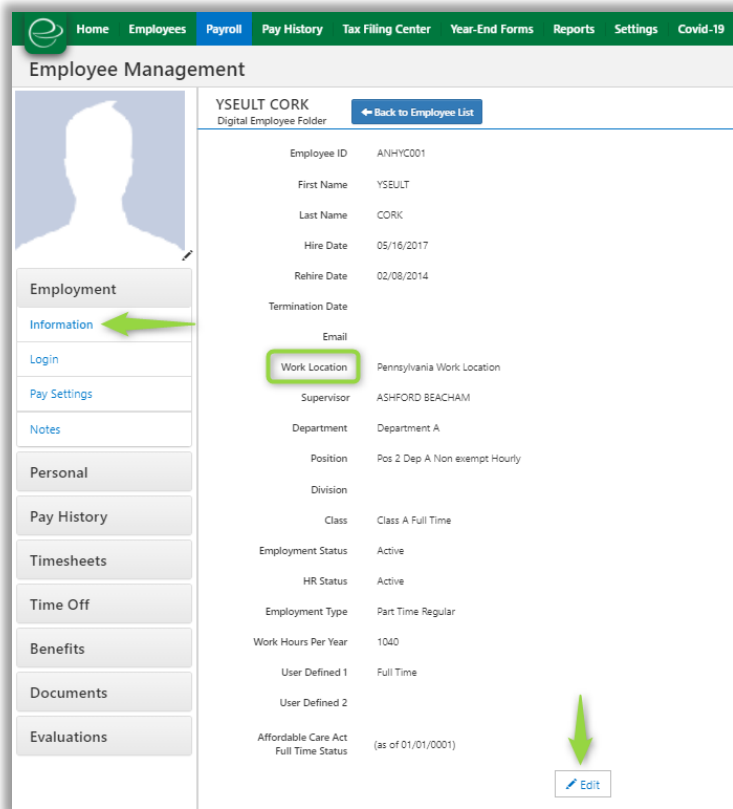


Figure 8a Work Location

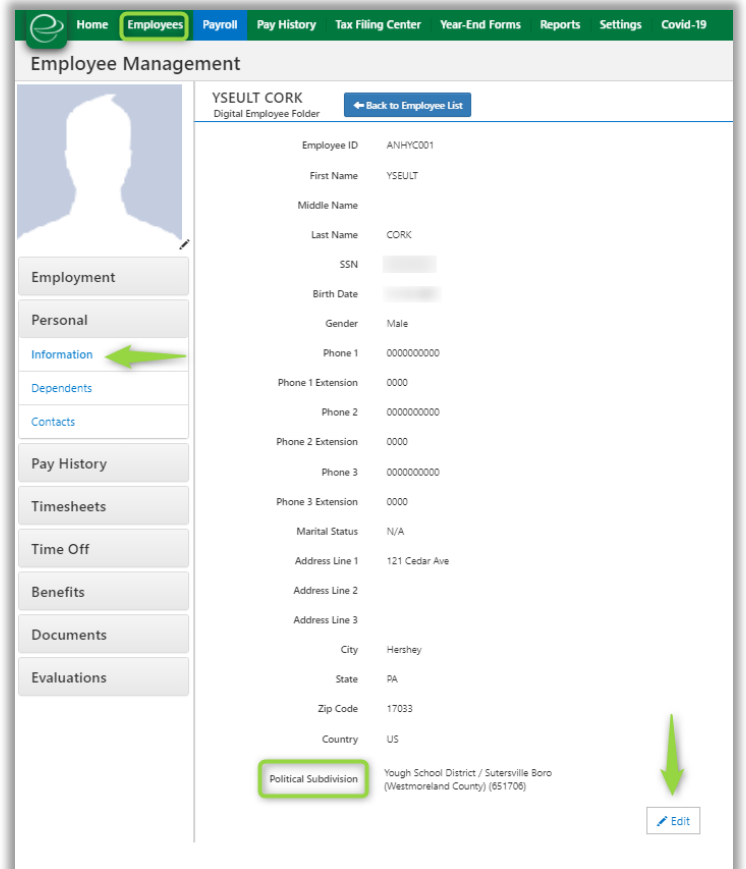


Figure 8b PSD Code assignment in Employee card

3.5 Common Questions

Q: Why is the local code I created in my ERP not showing on Greenshades in the Locals Mapping list?

A: There are a few common reasons you can double check before reaching out to Greenshades support.

- 1) Did you run a sync to get the new code/data online?*
- 2) Is the code active in your ERP?*
- 3) Did you use the correct code when running payroll?*
- 4) Did you assign the expected code to an employee?*

If all these check out, reach out to Greenshades Support for additional troubleshooting assistance.

Q: Why is the local jurisdiction not showing on my list of tracking pages? (For Payroll Tax Service clients only)

A: First, ensure the code has been properly mapped by navigating to Settings, then selecting the Locals Mapping option under the Tax Services accordion on the left. Keep in mind there is a small delay between the time a code is mapped and when a tracking page will appear for set up.

Alternatively, it is also possible there has not yet been payroll data uploaded to Greenshades Online that would include the new code for Greenshades to pick up.

A third possibility is that the local is included in or a part of another jurisdictions' return. You may also have checked the setting (on the Locals Mapping page) to file all PA locals to the same jurisdiction.

Q: I have a warning that an employee(s) has a PA address with an unknown Political SubDivision (PSD Code).

A: The system has detected you have an employee that requires PA Local assignment. Ensure you have followed the steps in this guide for the stated employee(s) to be properly included in the appropriate return. Section 3.4 of this document outlines how to assign a PSD on the Greenshades employee card. Keep in mind, it is always recommended to make changes in your ERP first and then sync your data changes to Greenshades.

Q: I have a warning that an employee(s) is missing the correct PA local income tax code or has income withheld using an incorrect PA local tax code.

A: Based on the employees address and worksite, Greenshades has detected that an employee(s) may not have the right local taxes being withheld. Be sure to confirm the right local taxes are being withheld and make any necessary changes as needed. See Section 1 of this document.

For additional support please contact us.

(888) 255-3815 ext.1

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