

# Accordant Technical Bulletin

July 9, 2009

## **Sage Timberline Office Metropolitan Commuter Transportation Mobility Tax ALERT**

New York has implemented a Metropolitan Commuter Transportation Mobility tax (MCTMT), effective March 1, 2009 for all employers other than school districts.

As this is a local tax that is specific to certain New York counties, it will not be provided by Sage Timberline Office. To ensure you comply to the MCTMT requirements, review the documentation provided by the state at <http://www.tax.state.ny.us/sbc/mta.htm> and [http://www.tax.state.ny.us/pdf/memos/mta\\_mobility/m09\\_1mctmt.pdf](http://www.tax.state.ny.us/pdf/memos/mta_mobility/m09_1mctmt.pdf).

If you determine that the MCTMT applies to you, use the following steps to set up a new tax:

### **Companies based in an applicable New York county:**

1. In **Setup > Taxes > Tax rates**, create the Tax ID **MCTMT** and provide a description.
2. Set the **Tax Level** to Local, the **Tax Type** to **Workplace** and the **Table Type** to **No Table**.
3. Check the **Employer tax** box.
4. Input account and Job cost information as required.
5. Enter the rate in the **Percent** box (currently .34), and the effective date.
6. Click [Save] and [Close].

If after reviewing the state documentation you determine that the tax applies to all your employees, add the tax to all local tax groups. In addition, if you have employees that do not work on jobs, create a MCTMT local tax group, and add the MCTMT tax to the group. Then in Setup > Employees, add the tax group to the Work Local on the Entry Info tab.

If you determine that you have employees in the same company that the tax does not apply to, contact your consultant for help implementing the tax for your particular setup.

### **Companies based in outside the applicable New York counties with employees residing within a county:**

1. In **Setup > Taxes > Tax rates**, create the Tax ID **MCTMTR** and provide a description.
2. Set the **Tax Level** to Local, the **Tax Type** to **Resident** and the **Table Type** to **No Table**.
3. Check the **Employer tax** box.
4. Input account and Job cost information as required.
5. Enter the rate in the **Percent** box (currently .34), and the effective date.

6. Click [Save] and [Close].

If after reviewing the state documentation you determine that the tax applies to an employee(s) residing in one of the applicable counties, create an **MCTMT-R** tax group and add the **MCTMTR** tax to the group. Then in **Setup > Employees**, add the tax group to the Work Local on the **Entry Info** tab.

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**Question:**

How do I exclude the Metropolitan Commuter Transportation Mobility Tax from my certified report?

**Solution:**

Modify the report design to exclude Metropolitan Commuter Transportation Mobility Tax .

Follow the steps below to modify the report design.

1. In Report Designer, from the **File** menu, select **Open Design**.
2. Select the **PR Certified Report.rpt** and then click [**Open**].
3. Click the **Formula 7** field. The field description may be truncated to "**Formul 7**".
4. From the **Tools** menu, select **Quick Formulas**.
5. Modify **Formula 7 (Quick formula)**:
  - Original formula: Misc Deductions (PR Check) + Local Totals (PR Check)
  - Modified formula: Misc Deductions (PR Check) + Local Totals (PR Check) - LOOKUP(Amount (PR Check Tax), Employee (PR Daily Dist), Period End Date (PR Daily Dist), Check Sequence (PR Daily Dist), 3, "MCTMT")

**Note:** MCTMT tax amount formula assumes the tax id for Metropolitan Commuter Transportation Mobility Tax is MCTMT.
6. Click [**OK**].
7. From the **File** menu, select **Save Design as**.
8. Type **PR Certified Report alt** and then click [**Save**].
9. From the **File** menu, select **Close Design**.
10. From the **File** menu, select **Exit**.
11. Replace the existing report design in Payroll with this modified design.

Please contact us if you need assistance.

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