VERTEX®

Vertex Payroll Tax Q Series

Automating Payroll Tax Calculations

When it comes to payroll tax calculations, your employees expect 100 percent thoroughness and accuracy. But the complexity of this critical business activity creates a difficult and demanding process for payroll tax professionals. Vertex® Payroll Tax Q Series® offers a powerful solution with comprehensive coverage of calculation methods and options for any IT operating environment.

Robust, Integrated Payroll Tax Data

Vertex Payroll Tax provides one of the most robust solutions for U.S. and Canada payroll tax calculation in the industry. The system is supported by accredited research professionals who provide monthly data updates for every jurisdiction. Continually updated content and integrated data from Vertex eliminates the need for in-house staff to research rate changes. With Vertex, you can have a high degree of confidence that your calculations are accurate.

Start at Employee Onboarding

Vertex automates tax jurisdiction assignment when it's needed most – at the employee onboarding stage. For each employee address, the system assigns a unique "Geocode" based on the city, state, and county of each address. This enables more accurate tax jurisdiction assignment than ZIP codes. The GeoCode identifies the taxing jurisdiction for the employee's residence and work locations for country, state, county, city, and township tax.

Address Cleansing Improves Accuracy

To ensure even more precise tax jurisdiction assignment, add Address Cleansing* to scrub every U.S. address, correcting inaccuracies in street, city, and ZIP code, and assigning:

- ZIP+4
- Political Subdivision code (PSD)
- Township
- School District code (for PA and OH)

These granular details enable tax jurisdiction to be assigned at the "side of street" level for even greater accuracy when calculating payroll withholdings.

Reliable Integration

Vertex Payroll Tax interfaces directly with your HR and payroll processing systems to calculate and return gross-to-net, gross up, and vacation pay calculations back to the payroll system. Vertex interfaces with industry-leading Human Capital Management (HCM) and staffing solution providers to embed our Payroll Tax engine into their service offerings. And with an enhanced integration XML architecture, building an integration into Vertex Payroll Tax Q Series has never been easier.

Powerful Calculation

Vertex's solution is uniquely able to recognize all formal reciprocal agreements among states, cities, and counties, and those that calculate state and local taxes accordingly. It provides one of the most comprehensive coverages of calculation methods, including preferred and alternate federal-, state-, and locally-approved methods.

U.S. Federal Taxes & Withholdings

- Federal Withholding Tax
- Federal Unemployment Insurance Premium (FUTA)
- Federal Insurance Contributions Act (FICA), including Social Security and Medicare
- Advanced Earned Income Credit
- Railroad Retirement Taxes

U.S. State Taxes & Withholdings

- State Withholding Tax incorporating approved marital status
- State Unemployment Insurance (SUI)
- State Disability Insurance (SDI)
- State Miscellaneous Taxes
- Built-in reciprocity handling where appropriate

U.S. Local Taxes & Withholdings

- County Withholding Tax
- City, Borough, and Township Taxes
- Occupational Privilege and Head Taxes
- School District Taxes
- Surtaxes

Canada Taxes & Withholdings

- Federal Withholding
- Employment Insurance
- Canadian Pension Plan and Quebec Pension Plan
- Provincial Withholdings

The tax engine also includes a Gross-to-Net calculation routine and assorted Compensation types for users. And one of the industry's most robust engines, Vertex Payroll Tax even covers Group Term Life over $50,000, Deduction Types, and 401k Withholding limits.

On-Premise and Hosted Deployment Options

Vertex Payroll Tax Q Series provides you with a powerful tax calculation engine that contains all the required logic and flexibility needed to integrate with your host HCM application or internal payroll processes. When deployed on premise, it resides behind your firewall for multiple platforms and environments, making it the industry's most accurate and secure payroll tax system. For companies who prefer a hosted solution, Vertex Payroll Tax On-Demand is a remotely hosted, Internet-delivered solution offering centralized access and eliminating your need for server and storage administration, complicated hardware and software upgrades, and daily system backups. Your need for IT support can also be reduced substantially with a hosted solution.

Tax Solutions from the Industry Leader

Payroll tax solutions from Vertex deliver confidence. We pioneered indirect tax calculation technology, and have spent 40+ years developing new solutions that integrate with a range of financial transaction systems to enable businesses to improve tax accuracy. Our research department maintains a proprietary content database including over 300 million data-driven effective tax rules supporting tax compliance in more than 19,000 jurisdictions worldwide. Headquartered in North America, and with offices in South America and Europe, Vertex employs over 1,100 professionals and serves companies around the world including 50%+ of the Fortune 500.

To learn more, contact a Vertex representative at **800-355-3500** or visit **vertexinc.com**.

*Address Cleansing is available with an additional license and fee for Vertex Payroll Tax Q Series On-Demand. It is not available for on-premise deployments.

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Latin America
São Paulo, BR

Europe
London, UK

Asia Pacific
Chennai, IN

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