

Payroll Tax Filings

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Purpose and when to use this record

Record employer payroll-tax wages, withholding, adjustments, amount due, and payment status for a filing period.

At a glance

- **Identify it by:** **Occupational License Number, Business Name, Date Paid,** and **Number Of Employees.**
- **Check its business context:** **Business.**
- **Why care:** Names, periods, classifications, due dates, status, charges, and payments form an official account history. Correct them from the supporting filing, application, receipt, or ordinance.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

Before you begin

You need the Brisk permission for the action you are taking on payroll tax filings. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Create a Payroll Tax Filing

The screenshot shows a web application interface for creating a new payroll tax filing. At the top, there's a navigation bar with a date 'Tue, Aug 11, 2026', a search bar, and a user profile icon. Below this, a breadcrumb trail reads 'My site > Municipal > Payroll Tax Filing List > New Payroll Tax Filing'. The main form is titled 'Payroll Tax Filing Entry - New Payroll Tax Filing'. It features a 'Save' button, a 'Cancel' button, and navigation links '< Previous' and 'Next >'. The form fields are organized into two columns. The left column includes: 'Business' (a dropdown menu), 'Business Name' (a text input), 'Year' (a text input), 'Date Paid' (a text input with a date mask 'MM/DD/YYYY'), 'Number of Employees' (a text input), and 'Notes' (a large text area). The right column includes: 'Occupational License Number' (a text input), 'Active' (a checked checkbox), 'Quarter' (a dropdown menu), 'Amount' (a text input with a value of '0'), and 'Postal Worker/Annual' (an unchecked checkbox).

The Payroll Tax Filings create screen in the Brisk documentation demo.

Create a Payroll Tax Filing only after confirming that the source document or operational event has not already been entered.

1. Select the business context first: **Business**.
2. Enter the identifying values shown on the form, especially **Business**, **Occupational License Number**, **Business Name**, **Active**, **Year**, and **Quarter**, plus the remaining screen fields.
3. Review **Active**, **Quarter**, and **Postal Worker/Annual** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Payroll Tax Filing, then confirm **Occupational License Number**, **Business Name**, **Date Paid**, and **Number Of Employees** on its detail page before continuing.

After saving: Reconcile reported wages and withholding to the employer's payment before the filing is treated as complete.

Delete a Payroll Tax Filing

Delete this Payroll Tax Filing only when it was entered by mistake and no downstream history depends on it. Use a reversal, void, credit, counter-adjustment, or status correction for a real event that later changed.

If the record is merely obsolete, use **Active** to remove it from future use while preserving existing references.

On the confirmation page, verify **Occupational License Number**, **Business Name**, **Date Paid**, and **Number Of Employees**. After confirmation, return to the Payroll Tax Filings list and make sure only the intended Payroll Tax Filing was removed.

Review Payroll Tax Filing details

Use the detail page as the shared record of what this Payroll Tax Filing currently means. Verify **Active**, **Quarter**, **Date Paid**, and **Amount** before relying on it for a decision.

Follow **Business** to determine whether the issue is on this Payroll Tax Filing or on one of those linked records.

Next check: Reconcile reported wages and withholding to the employer's payment before the filing is treated as complete.

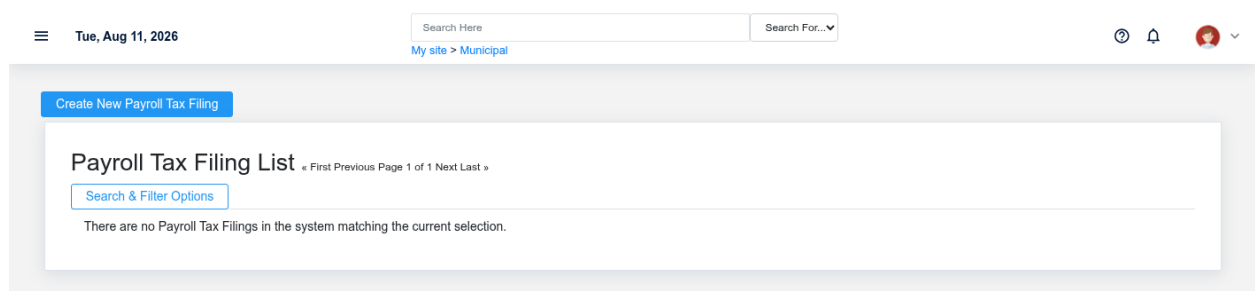
Edit an existing Payroll Tax Filing

Edit this Payroll Tax Filing to correct or complete the same source document or operational event; use the supported reversal or follow-up workflow when the business event itself changed.

1. Open the detail page. Compare **Business** with the supporting document or approved request.
2. Recheck **Active**, **Quarter**, **Date Paid**, and **Amount**. These values are most likely to change license, compliance, filing, charge, payment, and official account history.
3. Save the change, return to the list, and confirm that the Payroll Tax Filing now appears under the expected **Active**, **Quarter**, and **Date Paid**.

After the change: Reconcile reported wages and withholding to the employer's payment before the filing is treated as complete.

Find and review payroll tax filings



The Payroll Tax Filings list screen in the Brisk documentation demo.

Use the Payroll Tax Filings list to find the correct record before opening or changing it. Compare **Occupational License Number**, **Business Name**, **Date Paid**, and **Number Of Employees**. Records with similar names or numbers can still belong to different **Business**.

- Keyword search checks **Business Name**.

- The initial order emphasizes **Year**, **Quarter**, and **Business Name**. Select a column heading when you need a different comparison.

Open the Payroll Tax Filing whose **Occupational License Number**, **Business Name**, **Date Paid**, and **Number Of Employees** match the task. If it is missing, clear the list filters and recheck **Active**, **Quarter**, and **Date Paid** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 11 user-relevant fields for this Payroll Tax Filing, including 1 linked-record selection and 1 controlled-choice field. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Business	No	The business associated with this payroll tax filing.
Occupational License Number	No	The occupational license number value recorded for this payroll tax filing.
Business Name	No	The business name recorded for this payroll tax filing.
Active	No	Whether this payroll tax filing is active and available for use.
Year	No	The year value recorded for this payroll tax filing.
Quarter	No	The quarter recorded for this payroll tax filing. Available values: 1, 2, 3, 4.
Date Paid	No	Date recorded for date paid on this payroll tax filing.
Amount	No	The amount value recorded for this payroll tax filing.
Number Of Employees	No	The number of employees value recorded for this payroll tax filing.
Postal Worker/Annual	No	Whether the postal worker/annual option applies to this payroll tax filing.
Notes	No	Additional internal notes about this payroll tax filing.

What happens next

Reconcile reported wages and withholding to the employer's payment before the filing is treated as complete.

Common mistakes and troubleshooting

- **The record saved but is not available where expected:** Recheck **Active**, **Quarter**, and **Date Paid**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Business** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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