



Anthology Payroll

ANTHOLOGY PAYROLL – V112 STATUTORY DEDUCTION SPREADSHEET FOR UNITED STATES

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Introduction

This document contains a summary of changes and installation instructions for the Payroll Statutory

Deduction Spreadsheet Version 12 for the United States.

This spreadsheet is only compatible with:

- Anthology Payroll for Microsoft Dynamics 365 Finance

Installing the spreadsheet updates US statutory deductions in Anthology Payroll. This spreadsheet is intended for companies that process US statutory deductions in the specified jurisdictions.

The current baseline version for the Payroll Statutory Deduction Spreadsheet is Version 112. If you have installed Version 112, you can install any subsequent version.

To obtain the latest statutory deductions spreadsheets, contact our Client Support: | <https://support.campusmgmt.com>.

It is recommended that you install and test the spreadsheet in a test environment before installing it in production.

This document is divided into the following sections:

- Summary of Changes
- Installation

Summary of Changes

The following changes are made since the previous version.

US Federal Changes

This section describes federal changes for the United States. This version contains changes to the following federal taxes:

Tax	Changes
401k	The worker elective deferral amount is increased from \$20,500 to \$22,500. The additional tax-free worker contribution amount is increased from \$6,500 to \$7,500. The employer elective deferral amount is increased from \$61,000 to \$66,000. The annual compensation limit is increased from \$305,000 to \$330,000.
OASDI	Annual limit is increased from \$147,000 to \$160,200.

State Changes

This version contains the following state changes:

State	Changes
Arizona	Tax rates are changed. Unemployment taxable wage base is increased from \$7,000 to \$8,000.
Colorado	Unemployment taxable wage base is increased from \$17,000 to \$20,400.
Connecticut	Paid leave employee contribution calculation is updated to account for the change in OASDI wage base.
Iowa	Unemployment taxable wage base is increased from \$34,800 to \$36,100.
Missouri	Unemployment taxable wage base is reduced from \$11,000 to \$10,500.
Montana	Unemployment taxable wage base is increased from \$38,100 to \$40,500.
Nevada	Unemployment taxable wage base is increased from \$36,600 to \$40,100.
New Jersey	Unemployment taxable wage base is increased from \$39,800 to \$41,100.
New Mexico	Unemployment taxable wage base is increased from \$28,700 to \$30,100.
New York	Unemployment taxable wage base is increased from \$12,000 to \$12,300.

State	Changes
Oklahoma	Unemployment taxable wage base is increased from \$24,800 to \$25,700.
Vermont	Unemployment taxable wage base is reduced from \$15,500 to \$13,500.
Virginia	Standard deduction is increased from \$4,500 to \$8,000. This change is retroactive to October 1, 2022.
Washington	Unemployment taxable wage base is increased from \$62,500 to \$67,600.
Wyoming	Unemployment taxable wage base is increased from \$27,700 to \$29,100.

Installation

Installation procedures are divided into the following sections:

- Installation time
- Prerequisites
- Installation instructions

Installation Time

The time required for Anthology Payroll to complete the import process varies depending on the type of spreadsheet:

- This is a *baseline* version. The import process will take a significant amount of time because you are importing the entire statutory deduction spreadsheet.
- Other factors also affect the time required for installation:
 - The amount of pre-existing, custom statutory deduction records in your system. Anthology Payroll must check each of these against the imported records for conflicts.
 - The amount of statutory deduction changes included in the current version.

Prerequisites

The prerequisites for installing Version 112 for the United States are:

- Microsoft Excel installed on the Microsoft Dynamics AX client from which the statutory deduction spreadsheet is updated.
- Anthology Payroll version.
- Statutory deduction spreadsheet condition.

Anthology Payroll Version

You must be using Anthology Payroll US localization version 10.0 or later. Other versions are not compatible with this spreadsheet.

To verify your version, click **Anthology Payroll > Setup > Parameters**. The version number appears in the **General definitions** form title.

You can download the latest Anthology Payroll hotfix at the Client Support site:

<https://support.campusmgmt.com>

Statutory Deduction Spreadsheet Condition

Version 112 for the United States is a new baseline version of the Anthology Payroll Statutory Deduction Spreadsheet. You can install this version on any statutory spreadsheet condition. Please follow all installation steps.

The current baseline version for the Anthology Payroll Statutory Deduction Spreadsheet is Version 112. The spreadsheet versions released after each baseline are cumulative. If you have installed Version 112, you can install any subsequent version. However, if there are any spreadsheet versions between Version 112 and Version 112 that you have not installed, you must check for pre-installation and post-installation instructions applicable to these missed versions. For an overview of pre-installation steps since the last baseline, see **Pre-Installation Procedures** on page 8 and **Post-Installation Procedures** on page 12.

To determine your current spreadsheet version, click **Anthology Payroll > Setup > Calculations > Calculations** on the **Anthology Payroll** navigation pane. Click the **Version** column heading to sort the calculations by version number. The highest version number is your current spreadsheet version.

Contact Client Support for documentation for versions prior to Version 112:

<https://support.campusmgmt.com>

Note: it is recommended that you install and test the spreadsheet in a test environment before installing it in production.

Pre-Installation Procedures

Pre-installation procedures may be required to prepare Anthology Payroll for the installation of the spreadsheet. If you follow any of these procedures, ensure to perform the procedures in the same test environment as your initial installation, and to validate correct functionality before installation in your production environment.

This is a new baseline version. The following table describes the pre-installation procedures applicable to each cumulative version after the last baseline version up to the current version.

Note: If you have previously skipped the installation of any spreadsheet versions listed below and they contain pre-installation instructions, then you must contact Client Support for the release notes of those past versions: <https://support.campusmgmt.com>

Spreadsheet Version	Pre-installation procedures
97	None
98	None
99	None
100	None
101	None
102	None
103	None
104	None
105	None
106	None
107	None
108	None
110	None
111	None
112	None

Installation Instructions

You must complete the following steps in the proper sequence to install the spreadsheet. It is recommended that you first install and test the spreadsheet in a test environment before installing it in your production environment. It is also recommended to install the spreadsheet at the start of a new pay period before any transactions are made.

To install the Statutory Deductions Spreadsheet:

1. Backup your database prior to importing the spreadsheet.
2. Start the Microsoft Dynamics 365 Finance client. Ensure you are in the company (legal entity) that you want to update.
3. The next step depends on the highest version number that appears in the **Calculation** form's **Version** column:
 - If there are no version numbers, then either no statutory deductions spreadsheet has been installed or all versioned calculations have been removed. You must first install the current baseline—spreadsheet Version 112. After installing the baseline, proceed with installing Version 112 for the United States.
For information on where to download the baseline version, please see **Statutory Deduction Spreadsheet Condition** on page 6.
 - If the highest version number is lower than Version 112, then you must install the current baseline—spreadsheet Version 112. After installing the baseline, proceed with installing Version 112 for the United States.
For information on where to download the baseline version, please see **Statutory Deduction Spreadsheet Condition** on page 6.
 - If the highest version number is Version 112 or higher, then proceed to the next step.
5. Click **Anthology Payroll > System update utilities > Other > Import statutory deduction updates** to open the **Statutory deduction data import** dialog pane.
6. In the pane, browse to your statutory deduction spreadsheet and select it.
7. This is a baseline spreadsheet, and the import process can take a very long time. Expand the **Run in the background** section and set **Batch processing** to **Yes**. Set other options as desired.
8. Click **OK** to start the import.

4. The Update Statutory Reporting Accumulators form appears if:

- You are upgrading from a version of the spreadsheet that is earlier than version 17; and
- The setup forms for your statutory deduction reports refer to custom accumulators; and
- Any of these accumulators are based on date periods other than Tax Year, Tax Quarter, or Tax Week.

If the form appears, use it to perform date period changes to custom accumulators and their associated data.

To change pay year to tax year, calendar year to tax year, and calendar quarter to tax quarter, select the Process check box beside the custom accumulator. If your date period definitions are appropriate and do not require changing, then clear the check boxes.

Make sure that these check boxes are selected only for the accumulators that you want to convert to Tax Year, Tax Quarter, or Tax Week, then click OK.

9. When the import process is complete, an alert message appears. If there are errors reported, navigate to **Anthology Payroll > Inquiries > Run controls** to view the error messages. Take the recommended actions (see **Error Messages and Conditions** on page 10) and run the import process again.

10. You have completed the spreadsheet installation process. Remember to test the spreadsheet in a test environment before repeating these instructions in your production environment.

Error Messages and Conditions

The following table details some common error messages or conditions that you may encounter when importing a Statutory Deductions Spreadsheet and the recommendations on fixing the error:

Error Condition	Problem and Resolution
No statutory deduction updates are imported. The run controls do not display any messages about importing spreadsheet tables, only that the process has initialized. For reference, highlighted lines in the image below do <i>not</i> appear in the run controls.	<p>A synchronization error has occurred on the cloud-based environment resulting in the import process hanging.</p> <p>The Statutory Deductions Spreadsheet import process must be restarted. However, it is possible that a partial import has occurred and some records have been imported. These records must be deleted before the import process can be restarted.</p>

Error Condition	Problem and Resolution
<p>The screenshot shows a log of import operations. The 'Run category' column lists several 'Import statutory deductions' entries. The 'Run type' column shows 'V'. The log messages include: 'Table PHRCalc/Variables records: inserted: 0; updated: 0; skipped: 4.', 'Table PHRCalc/VariableItems records: inserted: 0; updated: 0; skipped: 4.', 'Table PHRCalc records: inserted: 1; updated: 0; skipped: 316.', 'Deleted statutory deduction records marked for removal: 0 succeeded; 0 failed...', 'Processed 6 tables: records imported 1, updated 0, skipped 350 records: previous...', and 'Initialized'.</p>	<p>If this scenario occurs, please contact Support for assistance https://support.campusmgmt.com.</p>
<p><i>Table <tableName> contains field 'Code' with key value <keyValue> which is a system record; it must be renamed or removed prior to import.</i></p>	<p>You have set up a record in the <tableName> that matches a versioned record in the spreadsheet.</p> <p>If your custom record serves a specific purpose, then it must be renamed. If you want to replace your record with the one in the spreadsheet, then simply delete your custom record.</p> <p>After taking one of these steps, run the import process again.</p>

Post-Installation Procedures

After you have installed the spreadsheet, post-installation procedures are sometimes required to properly configure new data elements. If you follow any of these procedures, ensure to perform the procedures in the same test environment as your initial installation, and to validate correct functionality before installation in your production environment.

This is a new baseline version. The following table describes the post-installation procedures applicable to each cumulative version after the last baseline version up to the current version.

Note: If you have previously skipped the installation of any spreadsheet versions listed below and they contain post-installation instructions, contact Client Support for the release notes of those past versions: <https://support.campusmgmt.com>

Spreadsheet Version	Post-installation procedures
97	None
98	None
99	Set up Connecticut Paid Leave
100	None
101	Check and Reassign GA SIT Calculation Variables
102	None
103	None
104	Set up Washington Cares Fund
105	Update Washington Family Leave Insurance Employer Rate
106	Update Washington Family Leave Insurance Employer Rate
107	Update Washington Family Leave Insurance Employer Rate
108	Update Washington Family Leave Insurance Employer Rate
110	None
111	None
112	None