



Anthology Payroll for Microsoft Dynamics 365 Finance

ANTHOLOGY PAYROLL - V118 STATUTORY DEDUCTION SPREADSHEET FOR UNITED STATES

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Introduction

This document contains a summary of changes and installation instructions for Statutory Deductions Spreadsheet Version 118 for the United States.

This spreadsheet updates US statutory deductions in Anthology Payroll according to the most recent legislation by governing authorities. It 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.

For more details about the objects and statutory deductions updated by this spreadsheet, contact our client: <https://support.campusmgmt.com>

It is recommended that this spreadsheet is installed in a test environment and validated against your test data 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:

State	Changes
401k	The worker elective deferral amount is increased from \$22,500 to \$23,000. The employer elective deferral amount is increased from \$66,000 to \$69,000. The annual compensation limit is increased from \$330,000 to \$345,000.
OASDI	Annual limit is increased from \$160,200 to \$168,600.

State Changes

This version contains the following state changes:

State	Changes
Arkansas	Tax rates are changed. Standard deduction amount is changed. High income annual wage base is increased from \$91,301 to \$100,001. Supplemental income tax rate is reduced from 4.7% to 4.4%.
California	The 940 credit reduction rate increased from 0.3% to 0.6%. This change takes effect December 31, 2023.
Colorado	Standard deduction amounts are changed. Unemployment taxable wage base is increased from \$20,400 to \$23,800.
Connecticut	The 940 credit reduction rate reduced from 0.3% to 0%. This change takes effect December 31, 2023. Unemployment taxable wage base is increased from \$15,000 to \$25,000.
Illinois	The 940 credit reduction rate reduced from 0.3% to 0%. This change takes effect December 31, 2023.
Iowa	Unemployment taxable wage base is increased from \$36,100 to \$38,200.
Kentucky	Standard deduction amount is increased from \$2,980 to \$3,160.

State	Changes
	State income tax is reduced from 4.5% to 4.0%. Unemployment taxable wage base is increased from \$11,100 to \$11,400.
Massachusetts	Family and Medical Leave Act overall rate is increased from 0.52% to 0.70%. Family Leave Insurance rate is increased from 0.11% to 0.18%.
Missouri	Unemployment taxable wage base is reduced from \$10,500, to \$10,000.
Montana	Unemployment taxable wage base is increased from \$40,500 to \$43,000.
Nevada	Unemployment taxable wage base is increased from \$40,100 to \$40,600.
New Jersey	The taxable wage limit for disability insurance is increased from \$151,900 to \$161,400. Family leave rate is increased from 0.06% to 0.09%. The annual maximum FLI wage base is increased from \$156,800 to \$161,400. Unemployment taxable wage base is increased from \$41,100 to \$42,300.
New York	Unemployment taxable wage base is increased from \$12,300 to \$12,500. Family leave rate is reduced from 0.455% to 0.373%. The statewide average weekly wage is increased from \$1688.19 to \$1718.15. The 940 credit reduction rate increased from 0.3% to 0.6%. This change takes effect December 31, 2023.
North Carolina	Unemployment taxable wage base is increased from \$29,600 to \$31,400.
Oklahoma	Unemployment taxable wage base is increased from \$25,700 to \$27,000.
Oregon	The Workers Compensation Fund rate calculation is updated to account for the employer-paid portion of the combined rate. Unemployment taxable wage base is increased from \$50,900 to \$52,800.
South Carolina	Exemption allowance amount is increased from \$4,310 to \$4,610. Standard deduction is increased from \$6,475 to \$6,925. Tax brackets and rates are changed. Supplemental income tax rate is reduced from 6.5% to 6.4%.
Utah	Unemployment taxable wage base is increased from \$44,800 to \$47,000.
Vermont	Unemployment taxable wage base is increased from \$13,500 to \$14,300.
Washington	Unemployment taxable wage base is increased from \$67,600 to \$68,500. Family leave contribution rate is reduced from 0.8% to 0.74%. Family leave standard employer share is increased from 27.24% to 28.57%. This change requires post-installation instructions.
Wyoming	Unemployment taxable wage base is increased from \$29,100 to \$30,900.

Installation

Installation procedures are divided into the following sections:

- Time to install.
- Prerequisites
- Installation instructions
- Post-installation

Time to Installation

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

- This is an update version. The import process time will be minimal because you are only importing records that have been updated since the last baseline version.

These other factors can also impact 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 118 for the United States are:

- Microsoft Excel installed on the Microsoft Dynamics AX client from which the statutory deduction spreadsheet is updated.
- Latest statutory deduction spreadsheet condition

Latest Statutory Deduction Spreadsheet Condition

Depending on the last Statutory Deductions Spreadsheet that you have imported into your environment, you may need to import a prerequisite spreadsheet before importing this one.

Version 118 for the United States is an update version of the Anthology Payroll Statutory Deductions Spreadsheet. This version is meant to be installed on top of the current baseline version, which is Version 112. Update versions released after each baseline are cumulative and are independent of each other. If you have installed Version 112, you can install any subsequent update version.

If there are any spreadsheet versions between Version 112 and Version 118 that you have not installed, please check for any pre- and post-installation instructions applicable to these missed versions that may apply to statutory deductions in jurisdictions where your company operates. For an overview of these steps since the last baseline, see Pre-Installation Procedures on page 8 and Post-Installation Procedures on page 10.

To determine your current spreadsheet version, click **Anthology Payroll** > Setup > Calculations > Calculations on the **Anthology Payroll** navigation pane. Sort the Version column heading in descending order. The highest version number is your current spreadsheet version.

For other versions of the Statutory Deductions Spreadsheet, please contact our client:

<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 performing the same steps in your production environment.

The following table describes the pre-installation procedures applicable to each version since the last baseline version (Version 112).

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

Spreadsheet Version	Pre-installation procedures
112	None
113	None
114	None
115	None
116	None
117	None
118	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. Log in to the Microsoft Dynamics 365 Finance. Ensure you are in the company (legal entity) that you want to update.
2. Click **Anthology Payroll** > System update utilities > Other > Import statutory deduction updates to open the Statutory deduction data import pane.

3. The next step depends on the latest version of the Statutory Deductions Spreadsheet that you have installed:


If the import pane shows are no version numbers or the latest version number is lower than Version 112, you must install the latest baseline version before proceeding to install this version. The latest baseline version is Version 112. After installing the baseline, proceed with installing Version 118 for the United States. For information on how to obtain the baseline version, please see Latest Statutory Deductions Spreadsheet Version on page 3.

If the latest version number is Version 112 or higher, then proceed to the next step.

4. In the pane, browse to your statutory deduction spreadsheet and select it.
5. Click OK to start the import.
6. 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 8) and run the import process again.
7. You have completed the spreadsheet installation process. Please check for any post-installation notes or instructions that may apply to you. 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
<p>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 not appear in the run controls.</p> 	<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> <p>If this scenario occurs, please contact Anthology Support for assistance</p>

Error Condition	Problem and Resolution
	(https://www.workforcelogiq.com/contact-us-payroll/).
Table <tableName> contains field 'Code' with key value <keyValue> which is a system record; it must be renamed or removed prior to import.	<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.

The following table describes the post-installation procedures applicable to each version since the last baseline version (Version 112).

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

Spreadsheet Version	Post-installation procedures
112	None
113	Revert OASDI Taxable Income Calculation Method
114	Set up Colorado Family and Medical Leave Insurance Set up Oregon Paid Leave Update Washington Family Leave Insurance Employer Rate
115	Set up Massachusetts Paid Family Medical Leave Accumulators Set up Massachusetts Paid Family Medical Leave Consideration for Small Employers
116	Set up Maryland Paid Family and Medical Leave Set up New Jersey Governmental Reimbursable Employer
117	Set up Arizona Taxable Fringe Benefits Accumulators
118	Update Washington Family Leave Insurance Employer Rate

Update Washington Family Leave Insurance Employer Rate

The percentage portion of WA FLI that is paid by employers is changing from 27.24% to 28.57% starting January 1, 2024. The corresponding calculation in the US Statutory Deductions Spreadsheet is updated with a new value; however, this calculation can be modified by implementations as the employer rate may differ from employer to employer. As a result, this change must be completed manually for those organizations affected, as the Statutory Deductions import process will not update this calculation for Dynamics companies that already have it.

If you have no workers or business in Washington state, or you continue to use a custom value for the employer-paid portion of WA FLI, you can skip these procedures.

To update the WA FLI employer rate:

1. In the navigation pane, click Setup > Tables > Calculations > Calculations to open the Calculations form.
2. On the Overview tab, locate and select the WA FLI ER Rate Calculation. Expand the Maintain effective date entries pane.
3. In the Maintain effective date entries pane, click New to create a new effective-dated record. Set the Active date to 1/1/2024 (January 1, 2024).
4. In the Maintain effective date entries pane, expand the Rule tab and click Edit to open the Calculation setup form.

5. On the Calculation setup form, change the value in the Calculation string to 0.2857. Click Validate and Save to save your changes and return to the Calculations form.
6. On the Calculations form, save your changes and close the form.

If you need assistance with configuring the above, please contact our client: <https://support.campusmgmt.com>