



Anthology Payroll for Microsoft Dynamics 365 Finance

ANTHOLOGY PAYROLL - V119 STATUTORY DEDUCTION SPREADSHEET FOR UNITED STATES

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Version 119 for the 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
Federal income tax	Tax brackets and rates are changed. Resident Alien adjustment amount has increased from \$9,550 to \$10,300 for workers filing their W-4 before 2020. The adjustment increased from \$13,850 to \$14,600 for workers filing W-4s on or after 2020.

State Changes

This version contains the following state changes:

State	Changes
Alaska	Unemployment taxable wage base is increased from \$47,100 to \$49,700. The worker rate for unemployment insurance is reduced from 0.51% to 0.5%.
Arizona	A correction is made to the year-to-date accumulator for taxable employee fringe benefit amounts. This change requires post-installation instructions.
California	Effective January 1, 2024, Senate Bill 951 removes the taxable wage limit and maximum withholding for disability insurance contributions. Low income exemption threshold amounts are changed. Tax brackets are changed. Standard deduction amounts are changed. W-4 allowance amount is increased from \$141.90 to \$158.40.
Georgia	Tax rates are changed.
Hawaii	The maximum weekly deduction for disability insurance is increased from \$6.59 to \$6.87.
Illinois	Personal allowance line 1 is increased from \$2,425 to \$2,625. Unemployment taxable wage base is increased from \$13,271 to \$13,590. The 940 credit reduction rate reduced from 0.3% to 0%. This change takes effect December 31, 2023.

State	Changes
Iowa	New filing statuses for Single and Married are introduced starting January 1, 2024. This change requires post-installation instructions. Standard deduction amounts are changed.
Maine	Standard deduction amounts are changed. Tax brackets are changed.
Minnesota	Exemption allowance amount is increased from \$4,800 to \$5,050.
Missouri	Standard deduction amounts are changed. Tax brackets and rates are changed. Supplemental income tax rate is reduced from 4.95% to 4.8%.
Montana	New objects are added as Senate Bill 399 introduces filing statuses in Montana tax withholding. This change requires post-installation instructions. Supplemental income tax rate is reduced from 0.06% to 0.05%.
Nebraska	Tax brackets and rates are changed. Exemption allowance amount is increased from \$2,140 to \$2,250.
New Mexico	Tax brackets are changed.
North Carolina	Tax rates is reduced from 4.85% to 4.6%. Supplemental income tax rate is reduced from 4.85% to 4.6%.
North Dakota	Unemployment taxable wage base is increased from \$40,800 to \$43,800.
Oklahoma	Tax brackets and tax rates are changed.
Oregon	Tax brackets and rates are changed. The maximum amount of Federal tax subtraction limit is increased from \$7,800 to \$8,250. Standard deduction amount for Single with 3 or more allowances, or Married filing status is increased from \$5,210 to \$5,495. Exemption allowance amount is increased from \$236 to \$249.
Rhode Island	The annual wage threshold amount for high income earnings is increased from \$260,550 to \$274,650. Tax brackets are changed.
Washington	An update is made to the WA Cares employee contribution rate calculation.

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 119 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 119 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 119 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.campusgmt.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
119	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
119	Set up Filing Statuses for Iowa State Income Tax Set up Filing Statuses for Montana State Income Tax Re-seed Arizona Taxable Fringe Benefits Accumulator

Set up Filing Statuses for Iowa State Income Tax

Iowa has introduced new filing statuses for single and married persons for Iowa state income tax starting 2024. The following objects are included with the Statutory Deductions Spreadsheet and require additional post-installation configuration:

- New calculations for IA SIT state income tax filing statuses, which require new benefit/deduction enrolments.
- An updated IA SIT benefit/deduction code that must also be updated on the **Worker** benefit/deductions form for workers in IA

If you have no workers or business in Iowa, you can skip these procedures.

To set up new benefit/deduction enrollments for IA state income tax filing statuses:

1. In the navigation pane, click Setup > Tables > Benefit/deductions > Benefit/deductions to open the Benefit/deductions form.
2. Select the Future Effective date filter to view future-dated records.
3. On the Overview tab, locate and select the IA SIT Benefit/deduction that has an Active date of 1/1/2024 and select it.

4. Expand the Maintain effective date entries pane and select the same benefit/deduction in the Effective dates tab.
5. On the Benefit/deduction enrollment selections tab in the Maintain effective date entries pane, select and move the Single and Married enrollment codes and associate them with the IA SIT benefit/deduction.
6. Save your changes and close the form.

To set up new benefit/deduction rule group calculations for the new IA SIT calculations:

1. In the navigation pane, click Setup > Tables > Benefit/deductions > Benefit/deduction rule group calculations to open the Benefit/deduction rule group calculations form.
2. Filter on the IA SIT Benefit/deduction to view all benefit/deduction rule group calculations associated with it.
3. Set the Expiry date for all benefit/deduction rule group calculations associated with the IA SIT Benefit/deduction to 12/31/2023.
4. On the Fast entry tab, select all your Benefit/deduction rule groups and the following objects and create the associated benefit/deduction rule group calculation records. You must repeat your selections for each calculation. Click Insert to create each set of rule group calculations:

Benefit/deduction	Benefit/deduction enrollment	Worker calculation	Active date
IA SIT	Single	IA SIT Final S	1/1/2024
	Married	IA SIT Final M	1/1/2024

5. Save your changes and close the form.

To update worker benefit/deductions for the new IA SIT benefit/deduction:

1. In the navigation pane, click Common > Anthology payroll workers to open the Anthology payroll workers list.
2. On the ribbon, click AdvPay Profile tab > Update Earnings and Benefit/deductions section > Benefit/deductions to open the Worker benefit/deductions form.
3. If the worker is a new hire in 2024, create a new record and select the IA SIT Benefit/deduction and their corresponding Benefit/deduction enrollment. Verify that the **Worker** calculation appears correctly from their rule group. Enter an Active date of the worker's hire date.
4. If the worker is an existing worker, locate and select their IA SIT Benefit/deduction and expand the Maintain effective date entries pane. Create a new effective-dated record for the IA SIT benefit/deduction and select the worker's new Benefit/deduction enrollment equivalent to their

filing status. Verify that the **Worker** calculation appears correctly from their rule group. Enter an Active date of 1/1/2024.

5. Repeat as required for other workers in Iowa.
6. Save and close the form.

Set up Filing Statuses for Montana State Income Tax

Senate Bill 399 introduces new filing statuses for single, married, and head of household for Montana state income tax starting 2024. The following objects are included with the Statutory Deductions Spreadsheet and require additional post-installation configuration:

- new calculations for MT SIT state income tax filing statuses, which require new benefit/deduction enrollments
- an updated MT SIT benefit/deduction code that must also be updated on the **Worker** benefit/deductions form for workers in MT

If you have no workers or business in Montana , you can skip these procedures.

To set up new benefit/deduction enrollments for MT state income tax filing statuses:

1. In the navigation pane, click Setup > Tables > Benefit/deductions > Benefit/deductions to open the Benefit/deductions form.
2. Select the Future Effective date filter to view future-dated records.
3. On the Overview tab, locate and select the MT SIT Benefit/deduction that has an Active date of 1/1/2024 and select it.
4. Expand the Maintain effective date entries pane and select the same benefit/deduction in the Effective dates tab.
5. On the Benefit/deduction enrollment selections tab in the Maintain effective date entries pane, select and move the Single, Married, and Head of household enrollment codes and associate them with the MT SIT benefit/deduction.
6. Save your changes and close the form.

To set up new benefit/deduction rule group calculations for the new MT SIT calculations:

1. In the navigation pane, click Setup > Tables > Benefit/deductions > Benefit/deduction rule group calculations to open the Benefit/deduction rule group calculations form.
2. Filter on the MT SIT Benefit/deduction to view all benefit/deduction rule group calculations associated with it.
3. Set the Expiry date for all benefit/deduction rule group calculations associated with the MT SIT Benefit/deduction to 12/31/2023.

- On the Fast entry tab, select all your Benefit/deduction rule groups and the following objects and create the associated benefit/deduction rule group calculation records. You must repeat your selections for each calculation. Click Insert to create each set of rule group calculations:

Benefit/deduction	Benefit/deduction enrollment	Worker calculation	Active date
MT SIT	Single	MT SIT Final S	1/1/2024
	Married	MT SIT Final M	1/1/2024
	Head of Household	MT SIT Final H	1/1/2024

- Save your changes and close the form.

To update worker benefit/deductions for the new MT SIT benefit/deduction:

- In the navigation pane, click Common > Anthology payroll workers to open the Anthology payroll workers list.
- On the ribbon, click AdvPay Profile tab > Update Earnings and Benefit/deductions section > Benefit/deductions to open the Worker benefit/deductions form.
- If the worker is a new hire in 2024, create a new record and select the MT SIT Benefit/deduction and their corresponding Benefit/deduction enrollment. Verify that the **Worker** calculation appears correctly from their rule group. Enter an Active date of the worker's hire date.
- If the worker is an existing worker, locate and select their MT SIT Benefit/deduction and expand the Maintain effective date entries pane. Create a new effective-dated record for the MT SIT benefit/deduction and select the worker's new Benefit/deduction enrollment equivalent to their filing status. Verify that the **Worker** calculation appears correctly from their rule group. Enter an Active date of 1/1/2024.
- Repeat as required for other workers in Montana.
- Save and close the form.

Re-seed Arizona Taxable Fringe Benefits Accumulator

A correction was made to the year-to-date accumulators that tracks taxable fringe benefits for statutory reporting in Arizona.

The accumulators has an active date of January 2, 2023. Since you have likely produced payments after this date, you must re-seed them with the appropriate deduction transactions. Before proceeding to re-seed these accumulators, it is recommended to back up the database as a precautionary measure. Re-seeding should only be attempted immediately before a new pay period, or after a pay period has been closed and all transactions are already processed.

To reseed the updated fringe benefit accumulator:

1. In the navigation pane, click Periodic > Other > Accumulators > Delete/set initial accumulator values based on period to open the Delete/set initial accumulator values based on period pane.
2. Select a Date period of Tax Year.
3. Specify the current Date period year and Date period number.
4. Specify a Date period type of Reporting date.
5. Select the following accumulator to reseed:
 - AZ FB EE YTD
6. Click OK to reseed the accumulator.