Anthology Payroll for Microsoft Dynamics 365 Finance

ANTHOLOGY PAYROLL - V126 STATUTORY DEDUCTION SPREADSHEET FOR UNITED STATES

Release Date:	April 2025
Version:	Version 126 for the United States

Contents

Introduction

This document contains a summary of changes and installation instructions for Statutory Deductions Spreadsheet Version 126 for the United States.

This spreadsheet is only compatible with Anthology Payroll for Microsoft Dynamics 365 Finance.

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 Support: https://support.anthology.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:

Deduction	Changes
Federal limits	The following federal limits are now being delivered in statutory deduction spreadsheets. Post-installation instructions below describe how to adopt them. • Health savings plan limits • Flexible spending account medical limit • Flexible spending account dependent care limits

State Changes

This version contains the following state changes:

State	Changes
Arizona	Additional calculation variable option to explicitly record workers claiming exempt status.
Delaware	Unemployment taxable wage base is increased from $10,500 to $12,500.
Hawaii	State tax brackets and withholding allowance are changed.
Louisiana	State tax brackets are changed to a rate of 3.09%. Personal allowances changed to $12,500.
Massachusetts	The threshold to begin calculating the 4% surtax increased.
Mississippi	Tax decreased from 4.7% to 4.4% for income over the first $10,000.
Montana	Unemployment taxable wage base is increased from $43,000 to $45,100.
New Mexico	Unemployment taxable wage base is increased from $31,700 to $33,200.
North Dakota	Exemptions are increased from $4,300 to $5,050 and tax brackets are changed.
Oklahoma	Unemployment taxable wage base is increased from $27,000 to $28,200.
Oregon	State tax brackets, standard deductions and allowances are changed.
Vermont	Unemployment taxable wage base is increased from $14,300 to $14,800.
Washington	Unemployment taxable wage base is increased from $68,500 to $72,800.
West Virginia	Unemployment taxable wage base is decreased from $9,521 to $9,500.

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 126 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 required.
- Latest statutory deduction spreadsheet condition.

Anthology Payroll Version Required

This version of the spreadsheet is intended for Anthology Payroll US localization version 10.0. 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.

For the latest software updates of Anthology Payroll, please contact Anthology Support: https://support.anthology.com

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 126 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 126 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 7 and Post-Installation Procedures on page 10.

To determine your current spreadsheet version, click **Anthology Payroll** > **System update utilities** > **Other**> **Import statutory deduction updates** to open the Import statutory deduction updates pane. Note the value of the Latest version installed.

For other versions of the Statutory Deductions Spreadsheet, please contact our Client Support: https://support.anthology.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 Client Support for the release notes of those past versions:

https://support.anthology.com

Spreadsheet Version	Pre-installation procedures
112	None
113	None
114	None
115	None
116	None
117	None
118	None
119	None
120	None
121	None
122	None
123	None
124	None
125	None
126	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 121 for the United States. For information on how to obtain the baseline version, please see Latest Statutory Deductions Spreadsheet Version on page 6.
   - 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
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. 	A synchronization error has occurred on the cloud-based environment resulting in the import process hanging. 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. If this scenario occurs, please contact our Client Support for assistance (https://support.anthology.com).
Table <tableName> contains field 'Code' with key value <keyValue> which is a system record; it must be renamed or removed prior to import.	You have set up a record in the <tableName> that matches a versioned record in the spreadsheet. 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. After taking one of these steps, run the import process again.

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 our Client Support for the release notes of those past versions:* https://support.anthology.com

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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 Montana State Income Tax Re-seed Arizona Taxable Fringe Benefits Accumulator
120	Set up Filing Statuses for Georgia State Income Tax Check and Assign Massachusetts State Income Tax Calculation Variables
121	Set up Accumulators for Alabama State Overtime Pay Exemption Set up Vermont Child Care Contribution Set up Maryland Local Tax Table Rate Calculations
122	Set up Filing Statuses for Kansas State Income Tax Set up DR 0004 Colorado Employee Withholding Certificate
123	Set up Delaware Paid Medical and Family Leave Update Washington Family Leave Insurance Employer Rate
124	Set up Delaware Paid Medical and Family Leave
125	Set up new Iowa income tax enrolments
126	Update federal limit calculations to enable future maintenance through statutory deduction updates.

Federal limit calculations

If you are using one of the following custom calculations to hold a federally defined value, you can reset its calculation string to use the following calculations, whose values Anthology will maintain each year through statutory deduction spreadsheets.

Your custom calculation	Current "Calculation result"	New "Calculation result"	Purpose
HSA Single Limit	4300	HSA Limit Single	Health savings plan limit, single
HSA Family Limit	8550	HSA Limit Single	Health savings plan limit, family
Flex MD Expense Max	3300	FSA Limit Medical	Flexible spending account medical limit
Flex DP Care Max	5000	FSA Limit DepCare	Flexible spending account, dependent care exclusion limit
new addition	2500	FSA Limit DepCar MFS	Flexible spending acct, dep care - married filing separately

1. Click Anthology Payroll > Calculations > Calculations.

2. In the Calculations list, look for a calculation with the name matching a value in "Your custom calculation." If you find one, verify that its Active date is Jan 1, 2025, and its current Calculation string matches what is shown in the table above.

3. If they maths, click the "Edit" button and replace the number with the corresponding "New calculation string."

If you need assistance with configuring the above, please contact Anthology Support:

https://support.anthology.com