Anthology Payroll for Anthology Finance & HCM

Anthology Payroll United States Localization Configuration Guide

Date: March 2025

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Introduction

This document describes setup and configuration procedures for the United States localization of Anthology Payroll for Anthology Finance & HCM. This document contains procedures for setting up:

- payroll objects (accumulators, benefit/deductions, etc.) specific to the United States localization
- W-2 reporting
- 940 and 941 reporting
- state unemployment reporting
- multi-state tax deductions

This document is intended to be used with the latest version of the United States Statutory Deduction Spreadsheet available from Anthology Inc..

The Statutory Deduction Spreadsheet does not include support for local taxes and this document does not discuss local tax configuration.

These instructions are intended to be followed by an implementer or super-user. If you have questions regarding these instructions, then contact:

- Your Anthology Payroll implementer; or
- Please contact Anthology Client Support

Prerequisites and Requirements

Before proceeding with these instructions, you must meet the following prerequisites:

- Anthology Payroll for Anthology Finance & HCM must be fully installed and configured according to the installation guide
- the United States localization (country extension) of Anthology Payroll must be fully installed and configured according to the installation guide
- the latest hotfixes for Anthology Payroll and the United States localization must be installed
- the latest United States Statutory Deduction Spreadsheet must be imported and any post-install instructions must be completed. To obtain the latest spreadsheet, please contact Anthology Client Support
- you must have administrative access to Microsoft Dynamics 365 Finance

Custom Calculations and Accumulators

If you have not yet gone live with Anthology Payroll or you do not use custom calculations and accumulators for statutory reporting, skip this section and proceed to the configuration procedures.

If you have already gone live with Anthology Payroll for Anthology Finance & HCM or you employ custom calculations and accumulators for the purposes of statutory reporting, you may have to make some decisions regarding how to set up the United States statutory reports to work in unison with your custom objects.

The Statutory Deduction Spreadsheet contains *versioned* calculations and accumulators that cannot be manually modified. These objects are maintained solely by Anthology Inc. and designed according to the most recent changes in United States federal and provincial/state taxation laws. If you have developed your own custom objects to model federal or provincial/state taxation laws, there may be some conflict in setting up the versioned objects. You must determine whether to retain your custom components or transition to the versioned objects.

If you choose to retain your custom setup, be aware that future Statutory Deduction Spreadsheets do not update your custom components. This means that to ensure accurate reporting, you must maintain your custom components according to United States taxation laws manually.

If you switch to the versioned calculations and accumulators part-way through a tax year, you must consider the following:

- After setting up the United States localization of Anthology Payroll, you must set initial values on the new accumulators to populate them with your year-to-date values. See **Appendix A: Set Initial Accumulator Values** on page 94 for more information.
- It is recommended to verify your accumulator setup to ensure the values match your prior setup.
- After verifying accumulator values, you should remove the accumulator eligibilities for your custom accumulators. This retains your data, but prevents Anthology Payroll from continuing to update the obsolete accumulators.

Non-Versioned Calculations

Non-versioned calculations are records in the Statutory Deduction Spreadsheet that contain no version number that, when imported, become editable records. The Statutory Deduction Spreadsheet contains non-versioned calculations that represent the following:

- State Unemployment Insurance (SUI) rates for each state
- United States Federal Unemployment Tax Act (FUTA) rate

These rates are non-versioned because they can differ from company to company. As a result, you must modify these calculations according to your SUI and FUTA rates after importing the spreadsheet. Imports of later Statutory Deduction Spreadsheets will not overwrite your rates.

Set up Anthology Payroll for Anthology Finance & HCM Objects

You can import the statutory deduction objects (accumulators, calculations, benefit/deductions, etc.) from the Statutory Deduction Spreadsheet for your jurisdiction. These objects require some setup after import. The spreadsheet must be installed before continuing with statutory deductions and reporting setup.

You can obtain the latest version of the Statutory Deduction Spreadsheet for your jurisdiction from the Anthology Inc. Client Support site:

Please contact Anthology Client Support

If you require federal reporting using more than one IRS Employer ID Number (EIN), then you must create a duplicate set of federal reporting accumulators and calculations. Please contact Anthology Inc. Client Support for further details.

Set up Position Filters

Position filters are an attribute of a worker's position record. In a typical implementation of Anthology Payroll, position filters are used to classify worker positions into various jurisdictions and localities, such as states, provinces and regions. If you process pay for workers in multiple jurisdictions with differing tax rules and rates per jurisdiction, it is highly recommended you set up position filters to segregate your workers according to their location of work.

Anthology Payroll uses position filters to determine worker eligibility for accumulators and for the application of the appropriate format fields for statutory reporting. For example, the reporting requirements for one state or province may be different from another. Statutory reporting fields can be defined for each position filter you have configured, allowing you to control the data exported for each jurisdiction you report for.

For the procedure to set up position filters, refer to the appropriate section in the Anthology Payroll Implementer Training Guide.

Set US Payroll General Definitions

Some general definitions must be set for your US company that dictate how Anthology Payroll processes worker pay and worker setup.

To set US Payroll general definitions:

1. In the **Anthology Payroll** navigation pane, click **Setup**> **Parameters** to open the **General definitions** form.
2. Set the **String values** for the following **General definition codes**:
    - *Employer identification number*: your company EIN
    - *Multiple jurisdiction workers*: *Yes* to enforce that **Position filters** are required when positions are created for workers, for companies that have workers that work in multiple positions in differing jurisdictions. *No*, otherwise.
    - *Multi-state tax processing*: *Yes* if multiple state tax rules apply for state tax calculations. *No*, otherwise.
3. Save your changes and close the form.

Note: *export format codes are defined on the* ***Formats*** *form, accessed from* ***Setup*** *>* ***Tables*** *>* ***Payroll*** *>* ***Forms*** *>* ***Formats****.*

Set up Date Period Dates

The Anthology Payroll United States Statutory Deduction Spreadsheet imports some basic date periods that are used in normal pay period processing. These date periods include:

- Calendar Month
- Calendar Quarter
- Calendar Week
- Calendar Year
- Pay Period
- Pay Year
- Tax Year
- Tax Week

These periods do not include the individual dates such as your pay period end dates. These must be set up as part of your implementation.

To set up date period dates:

1. In the navigation pane, click **Setup** > **Tables** > **Dates** > **Date period dates** to open the **Date period dates** form.
2. On the **Fast entry** tab, specify the *Pay Period* **Date period**. Leave the **Pay group** blank.
3. Enter the **Date period year** equivalent to your current tax year.
4. Enter the **Date period number** of the first pay period to create. All dates are generated in succession from this number. For example, if this is the first pay period of the year and your tax year begins in January, you may enter *1*. If you are entering dates in the middle of the tax year, you may choose a later number.
5. Specify the **Start date** of the specified pay period number.
6. Specify the **Statement date** of the first date period date. This date is propagated forward to each generated date according to the increment cycle.
7. Specify the number of **Work days** to include in the pay period. Payroll processing does not use this information, but it can be included in reports.
8. Select the **Increment cycle**, which determines the unit of time between each successive pay period (i.e.: the unit of your pay period).
9. Enter a **Cycle length**, which acts as a multiplier for the **Increment cycle**. The product of the increment cycle and cycle length determines the overall length of each pay period. For example, an **Increment cycle** of *Weeks* and a **Cycle length** of *2* produces a biweekly pay period.
10. Specify a **Cycle number**, which is the number of dates to generate. For example, to generate a biweekly pay period cycle for one year, specify *26*.
11. Click **Generate** to generate the dates for the *Pay Period* **Date period**.
12. Repeat this process as required for additional **Date periods**, such as *Tax Year*. The **Increment**

cycle for tax year is *Years* and the **Cycle length** is *1*.

13. Save your changes and close the form.

If you have *Weekly* and *Bi-weekly* pay periods, It is recommended to create 53 *Weekly* periods and 27 *Bi-weekly* periods. Then check the **Statement date** of the last pay period created. If the date is in the next tax year, then delete the last period.

To check a date period for any gaps between its dates:

1. On the **Fast entry** tab of the **Date period dates** form, specify the **Date period** to check in the **Check for gaps** section.
2. Click **Check** to check for gaps:
   - If there are no gaps, a message popup displays a message stating so.
   - If there are gaps, a warning popup displays. You can create the necessary dates to fill in the gaps manually or with **Fast entry**.

Set up Unemployment Insurance Rates

Each state and company may have their own custom State Unemployment Insurance (SUI) rate. You must manually set this rate for each state in which you have workers to process pay for. These rates are flat amounts entered in the **Calculations** form. This also applies to the Federal Unemployment Tax Act (FUTA) rate.

To set up SUI rates:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Calculations** > **Calculations** to open the **Calculations** form.
2. On the **Overview** tab, filter by *XX SUI RATE* in the **Calculation** filter field, where *XX* is the 2-character state identifier for your desired state.
3. On the **Rule** tab, click **Edit** to open the **Calculation setup** form for the rate calculation.
4. Enter your SUI rate into the **Calculation string** (e.g.: if your rate is 2.5%, enter *0.025*).
5. Click **Save** and close the **Calculation setup** form.
6. Repeat as desired for additional state SUI rates.
7. Repeat for the *USA FUTA RATE* calculation.

Set up Earning Groups

Earnings need to be added to the appropriate earning groups as they are used by calculations and report generation. Your implementation may require these earnings to be added to other earning groups.

The United Stated Statutory Deduction Spreadsheet does not provide any statutory earning codes, nor earning groups and it is up to your implementation design to identify which groups are required. This procedure suggests earning groups that would be useful for defining accumulator values.

To configure earning groups:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Earnings** > **Earning groups** to open the **Earning groups** form.
2. On the **Overview** tab, create a new record.
3. Create the following **Earning groups** as needed. On the **Earning group earnings** tab, move earnings into the groups accordingly. Repeat for each earning group (*XX* represents the 2-character state identifier):

Earning Group	Usage
Federal Tax Exempt	Earnings exempt from federal income tax
Taxable Earnings	Federally taxable earnings
FUTA Exempt	Earnings exempt from federal unemployment insurance
Medicare Exempt	Earnings exempt from Medicare
OASDI Exempt	Earnings exempt from social security
Tax at Marginal Rate	Earnings subject to supplemental tax rates
Tax at Regular Rate	Earnings subject to normal tax rates
Tip Income	Tip income subject to OASDI
NV CS Garn Inc	Earnings subject to garnishment in NV
WY CS Garn Inc	Earnings subject to garnishment in WY
XX State Insur Earns	Earnings subject to unemployment insurance in XX state
XX State Insur Hours	Time-based earnings subject to unemployment insurance in XX state
XX State Suppl Earns	Supplementary earnings subject to tax in XX state
XX State Tax Earns	Earnings subject to XX state income tax

4. Associate earnings with any custom earning groups as applicable.
5. Save your changes and close the form.

Set up Benefit/deductions

Setting up benefit/deductions involves the following:

- set up benefit/deduction codes
- adding benefit/deduction enrolments
- adding benefit/deduction rule groups and calculations
- set up benefit/deduction groups
- add benefit/deductions to payment types

Ensure that you associate benefit/deductions with the appropriate payment types and schedules as part of your implementation. Your payment types and schedules are specific to your implementation. The procedures to set these up are detailed in the Anthology Payroll implementation guide.

Also, ensure that the tax benefit/deductions a higher calculation sequence number than taxable benefit benefit/deductions or pre-tax deductions that reduce taxable income.

Set up Benefit/deduction Sequences

Benefit/deduction sequences are a mechanism by which you can associate certain benefit/deduction codes to a single calculation sequence number and depletion sequence number in a grouping. Benefit/deductions associated in such a way can have their calculation and depletion sequences controlled at a more granular level to determine their order relative to one another for different workers. This allows you to group together certain benefit/deductions such that they are processed together respective to other benefit/deductions and, if needed, you can override the order of their calculation and depletion for different workers depending on your business needs.

Benefit/deduction sequences are optional. Their intended use is for added control in the order of benefit/deduction calculation and depletion in cases where workers have many deductions that can compete for withholding depending on order of arrival and each worker can have a different order. One such case is with US garnishments and child support orders.

For example, you can set up one benefit/deduction sequence for child support order deductions and one for creditor garnishments. All child support orders deductions can be associated with the sequence for child support orders which can be set as higher priority than all the creditor garnishments. Then, if a worker were to have multiple child support orders, their order of deduction can be set individually for that worker while ensuring that they all still have higher priority than creditor garnishments.

To set up benefit/deduction sequences:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Benefit/deductions** > **Benefit/deduction sequences** to open the **Benefit deduction sequences** form.
2. On the **Overview** tab, create a new record.
3. On the **General** tab, enter the **Benefit/deduction sequence** name and **Benefit/deduction sequence description**. The **Short code** defaults to the first five characters of the name.
4. Enter the **Calculation sequence**. All benefit/deduction codes associated with this benefit/deduction sequence will have this calculation sequence. Lower numbers are higher priority.
5. Enter the **Depletion sequence**. All benefit/deduction codes associated with this benefit/deduction sequence will have this depletion sequence. Lower numbers are higher priority.
6. Enter an **Active date** and **Expiry date** as applicable.
7. Repeat as required for additional benefit/deduction sequences.
8. Save your changes and close the form.

After configuring benefit/deduction sequences, they must be associated with individual benefit/deduction codes before they are applied (see **Set up Benefit/deduction Codes** on page 11).

Set up Benefit/deduction Codes

It is recommended as part of your normal implementation that accounting information be entered for all statutory benefit and deduction codes. This can be done directly on the benefit/deduction code. Additionally, the calculation sequence for federal and state level taxes must be set to calculate in the correct order. It is up to your implementation standard to determine the exact values of your calculation sequence numbers. Lower sequence numbers have priority.

You may also set up additional benefit/deduction codes for the purposes of wage garnishments. The United States Statutory Deductions Spreadsheet includes a basic set of garnishment types and garnishment sub-types (see **Set up Garnishments** on page 83), but no benefit/deduction codes. It is up to each implementation to determine which benefit/deduction codes they need for different types of garnishments and how many of each code to maintain.

To set up benefit/deduction codes:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Benefit/deductions** > **Benefit/deductions** to open the **Benefit deductions** form.
2. Locate the following **Benefit/deductions** and set their **Calculation sequence numbers**. The following table lists the types of statutory deductions that should be calculated in order (*XX* represents the 2-character state identifier):

Order	Type	Benefit/deduction
1	401k	401K
2	Federal	USA FIT
		USA FIT Suppl Tax
		FUTA
		Medicare
		Medicare Addl
		OASDI
		OASDI on Tips
3	State	XX SIT
		XX SIT Suppl Tax
		XX SUI
		etc.
4	Garnishments	Child Support #
		Creditor Garn #
		etc.
5	Custom	Charity
		Dental Plan
		etc.

3. If you have configured benefit/deduction sequences (see **Set up Benefit/deduction Sequences** on page 11), you can set the **Benefit/deduction sequence** field as applicable. Benefit/deductions associated with sequences can have their calculation and depletion sequence overridden at the worker level.
4. Enter accounting information for each statutory benefit or deduction code as needed.
5. To create new benefit/deduction codes, refer to the *Implementer Training Guide* for details. For garnishment benefit/deduction codes, set the **Garnishment** option to *Yes*.
6. Save your changes and close the form.

If you have created new benefit/deduction codes, it is recommended to configure other supporting benefit/deduction objects such as groups, benefit/deduction schedules and payment type benefit/deductions. Please refer to the *Implementer Training Guide* for detailed procedures on configuring these objects for your implementation.

Add Benefit/deduction Enrollments

The US Statutory Deduction Spreadsheet does not import any default benefit/deduction enrollments, so it is up to you to create your own enrollments as part of your implementation. It is recommended to have at least the following enrollments for statutory tax deductions:

- head of household
- married
- single
- single non-resident alien

You may need additional enrollments depending on the states in which you process payroll. If you do not process payroll for a particular state, you may skip setting up the enrollments for that state. To create benefit/deduction enrollments, please refer to the Anthology Payroll Implementer Training Guide.

To add benefit/deduction enrollments:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Benefit/deductions** > **Benefit/deductions** to open the **Benefit deductions** form.
2. On the **Overview** tab, select the following benefit/deductions and click the **Benefit/deduction enrollment selections** tab. Move the specified enrollments to the **Benefit/deduction enrollments selected** pane:

Benefit/deduction	Benefit/deduction enrollments
USA FIT	Head of Household
	Married
	Single Alien
	Single
Federal levy Bef CS	Head of Household
Federal levy Aft CS	Married filing jointly
	Married filing separately
	Single
Court Order Garn 1	Fair Lbr Stds Act 1
	Court Order Fin CA 1
Court Order Garn 2	Fair Lbr Stds Act 2
	Court Order Fin CA 2
Court Order Garn 3	Fair Lbr Stds Act 3
	Court Order Fin CA 3
Court Order Garn 4	Fair Lbr Stds Act 4
	Court Order Fin CA 4
Court Order Garn 5	Fair Lbr Stds Act 5
	Court Order Fin CA 5

Benefit/deduction	Benefit/deduction enrollments
AL SIT	Head of Household
	Married filing jointly
	Married filing separately
	Single
CA SIT	Head of Household
	Married, 0-1 exemptions
	Married, 2 or more exemptions
	Single
CO SIT	Married
	Single
CT SIT	Code A
	Code B
	Code C
	Code D
	Code F
GA SIT	Head of Household
	Married filing jointly, one spouse with income
	Married filing jointly, both spouses with income
	Married filing separately
	Single
HI SIT	Head of Household
	Married
	Single
ID SIT	Married
	Single
IL SIT	Married filing jointly
	Single
KS SIT	Married
	Single
LA SIT	0-1 personal exemptions
	2 or more personal exemptions
MA SIT	0 personal exemptions
	1 personal exemption
	2 or more personal exemptions
MD SIT	Head of Household
	Dependent
	Married filing jointly
	Married filing separately
	Working in Delaware
	Single

Benefit/deduction	Benefit/deduction enrollments
ME SIT	Married
	Single
MN SIT	Married
	Single
MO SIT	Head of Household
	Married, spouse not working
	Married, spouse working
	Single
NC SIT	Head of Household
	Married
	Single
ND SIT	Head of Household
	Married
	Single
NE SIT	Married
	Single
NJ SIT	Rate A
	Rate B
	Rate C
	Rate D
	Rate E
NM SIT	Head of Household
	Married
	Single
NY SIT	Married
	Single
OK SIT	Married
	Single
OR SIT	Married
	Single
RI SIT	Head of Household
	Married
	Single
UT SIT	Married
	Single
VT SIT	Married
	Single
WA IIP	Hourly
	Salaried
WI SIT	Married
	Single
WV SIT	1 earner
	2 earners

***Note**: you do not need to set up every state, only the states you process payroll for.*

3. Save your changes and close the form.

Add Benefit/deduction Rule Group Calculations

Each statutory benefit/deduction (and enrolment) must be associated with a calculation for each rule group you have implemented. Benefit/deduction codes may have worker or employer calculations, or both.

Some benefit/deductions are segregated by state. You do not need to set up state benefit/deductions for states in which you have no workers to process pay for.

To associate calculations with benefit/deductions:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Benefit/deductions** > **Benefit/deduction rule group calculations** to open the **Benefit/deduction rule group calculations** form.
2. On the **Fast entry** tab, select the applicable **Benefit/deduction rule groups**.
3. Select the following **Benefit deductions**, **Benefit/deduction enrollments** and their associated **Employer calculation** and/or **Worker calculation**. Verify the **Active date**. Click **Insert** to create a benefit/deduction rule group calculation. Repeat for each benefit/deduction (*XX* represents the 2-character state identifier):

Benefit/deduction	Benefit/deduction Enrollment	Employer calculation	Worker calculation
401K			401K
401K on Suppl Earns			401K on Suppl Earns
CA SUT		CA SUT ETT	
DC FLI			DC FLI Cont
FUTA		USA FUTA Final	
MA FLI		MA FLI ER Cont	MA FLI EE Cont
MA FMLA		MA FMLA ER Cont	MA FMLA EE Cont
ME SUI CSSF Tax		ME SUI CSSF Final	
Medicare		USA Medicare ER	USA Medicare EE
Medicare Addl			USA Med Add
NJ FLI			NJ FLI Cont
NJ SDI		NJ SDI ER	NJ SDI EE
NY FLI			NY FLI Cont
NM WCPA		NM WCPA ER	NM WCPA EE
OASDI		USA OASDI ER	USA OASDI EE
OASDI on Tips		USA OASDI on Tip ER	USA OASDI on Tip EE
OR Trans Tax			OR Trans Tax
OR WCF		OR WCF	OR WCF

Benefit/deduction	Benefit/deduction Enrollment	Employer calculation	Worker calculation
USA FIT	Head of Household		USA Fed Tax H 2020
	Married		USA Fed Tax M 2020
	Single Alien		USA Fed Tax SA 2020
	Single		USA Fed Tax S 2020
USA FIT Suppl Tax			USA Fed Tax Suppl
WA CARES			WA CARES EE
WA IIP	Hourly	WA IIP ER	WA IIP EE
	Salaried	WA IIP Salary ER	WA IIP Salary EE
WA FLI		WA FLI ER Cont	WA FLI EE Cont
XX SDI			XX SDI
XX SIT	Head of Household		XX SIT Final Head (or HoH)
	Married		XX SIT Final Married (or M)
	Single		XX SIT Final Single (or S)
	<no enrollment>		XX SIT Final
XX SIT SUPPL			XX SIT SUPPL
XX SUI		XX SUI Final	
Child Supp #			ChldSupp Fin #
Child Supp Arr #			ChildSuppArr Fin #
Federal levy Aft CS	Head of Household		FedLev Final AftHOH
	Married filing jointly		FedLev Final AftMJt
	Married filing separately		FedLev Final AftMSp
	Single		FedLev Final AftSgl
Federal levy Bef CS	Head of Household		FedLev Final BefHOH
	Married filing jointly		FedLev Final BefMJt
	Married filing separately		FedLev Final BefMSp
	Single		FedLev Final BefSgl
USA Fed SL garn			USA Fed SL Fin
State Levy #			State Levy Fin #
Court Order Garn #	Fair Lbr Stds Act #		Court Order Fin #
	Court Order Fin CA #		Court Order Fin CA #
Other Garnishments			US CCPA Garnishment

***Note**: some state income taxes (SIT) have additional calculations to represent specific enrollments. Use the calculation descriptions to help you determine the correct usage.*

4. Save your changes and close the form.

Add Benefit/deduction Groups

Grouping benefit/deductions together allows for ease of maintenance when scheduling benefit/deductions and associating benefit/deductions with accumulator values.

The United States Statutory Deductions Spreadsheet does not provide any statutory benefit/deduction groups and it is up to your implementation design to identify which groups are required. This guide suggests some basic groups that may be that would be useful for defining accumulator values.

For US garnishments, at least one group must exist to hold garnishment benefit/deduction codes as users may only select from the benefit/deductions in the associated group on the garnishment type when assigning garnishments to workers.

To configure benefit/deduction groups:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Benefit/deductions** > **Benefit/deduction groups** to open the **Benefit/deduction groups** form.
2. On the **Overview** tab, create a new record.
3. Create the following **Benefit deduction groups** as needed. On the **Benefit deduction group benefit deductions** tab, move benefit/deductions into the groups accordingly. Repeat for each benefit/deduction group (*XX* represents the 2-character state identifier):

Benefit deduction group	Suggested deductions
FBen subj to FUTA	Fringe benefits subject to FUTA
FBen subj to Medic	Fringe benefits subject to Medicare
FBen subj to OASDI	Fringe benefits subject to OASDI
FBen subj to OASDI T	Fringe benefits subject to OASDI on Tips
FBen subj to FIT	Fringe benefits subject to federal income tax
Federal Levy Deds	Mandatory deductions that determine disposable income for federal levies
MA Ded from Inc	Massachusetts worker deductions, not including state income tax
Not subj to FIT	Pre-tax deductions that reduce taxable income for federal income tax
Not subj to FUTA	Pre-tax deductions that reduce taxable income for federal unemployment insurance
Not subj to Medic	Pre-tax deductions that reduce taxable income for Medicare
Not subj to OASDI	Pre-tax deductions that reduce taxable income for OASDI
USA CS mandat deds	Mandatory deductions that determine disposable income for child support deductions
US Garnishments	Child support and garnishment deductions (suggested)
XX FBen subj to SIT	XX state fringe benefits subject to state income tax
XX FBen subj to SUTA	XX state fringe benefits subject to state unemployment insurance
XX Not subj to SIT	Pre-tax deductions that reduce taxable income for state income tax
XX Not subj to SUTA	Pre-tax deductions that reduce taxable income for state unemployment insurance

4. Save your changes and close the form.

Add Benefit/deductions to Payment Types

Benefit/deductions must be associated with payment types to be processed for payments of those types. If all your payment types are associated with benefit/deduction groups and you have already added all the benefit/deductions below to relevant benefit/deduction groups, you do not need to update your payment types.

Alternatively, you may create additional benefit/deduction groups and associate them with payment types instead of associating the benefit/deduction codes individually. Your payment types are specific to your implementation. This procedure suggests typical payment types.

To add benefit/deductions to payment types:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payments** > **Payment type benefit deduction selections** to open the **Payment type benefit deduction selections** form.
2. Click the **Fast entry** tab.
3. For each of the following **Benefit deductions** or **Benefit/deduction groups**, add them to the appropriate **Payment types**. Click **Insert** to add all selected **Benefit deductions** or groups to all selected **Payment types** (*XX* represents the 2-character state identifier):

Benefit/deductions	Suggested Payment Types
USA FIT 401K FUTA Medicare Medicare Addl OASDI OASDI on Tips US Local Taxes XX SIT XX SUI other state-level taxes	regular payments manual/off-cycle payments
Child Supp Admin # Court Order Adm #	regular payments
USA FIT Add Tax USA FIT Suppl Tax XX SIT Add Tax XX SIT SUPPL	manual/off-cycle payments bonus/supplemental payments
Federal levy Bef CS Federal levy Aft CS Child Supp # Child Supp Arr # Court Order Garn # State Levy # USA Fed SL garn US Local Taxes	all payment types

4. Save your changes and close the form.

Set up Accumulators

Accumulator eligibility and values must be set up in order for Anthology Payroll calculations to function properly. Also, some accumulators store year-to-date values used in statutory reporting.

Some accumulators are segregated by state. You do not need to set up state accumulators for states in which you have no workers to process pay for.

To set up accumulator eligibilities:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Eligibilities** > **Accumulators** to open the **Accumulator eligibility** form.
2. On the **Fast entry** tab, set the following eligibilities according to your implementation of **Pay groups**, **Position types**, **Position assignment types** , **Position filters** or **Eligibility groups**. The following table describes the accumulators in the United States Statutory Deduction Spreadsheet and the suggested eligibility of each (*XX* represents the 2-character state identifier):

Accumulator	Description	Eligibility
401K ER YTD	401K-eligible employer-paid contributions year-to-date	All workers
401K Gross	401K-eligible earnings	All workers
401K Gross YTD	401K-eligible earnings year-to-date	All workers
401K on Suppl Gross	401K-eligible supplemental earnings	All workers
401K YTD	401K deductions year-to-date	All workers
940 FBen ER Partial	940 Fringe Benefits Partial Employer Contribution	All workers
940 FUTA EE Ded Ex	Federal Unemployment Tax Act (FUTA) Employee Deduction Exemptions	All workers
940 FUTA EE Earn Ex	FUTA Employee Earning Exemptions	All workers
940 FUTA ER Ded Ex	FUTA Employer Deduction Exemptions	All workers
941 COBRA ER QTD	Employer paid COBRA premium assistance	All workers
941 Empl Ret Cr Inc	Qualified wages for employee retention credit	All workers
941 FBen EE QTD	941 Fringe Benefits quarterly-to-date	All workers
941 FBen ER QTD	941 Fringe Benefits Employer Contribution quarterly-to-date	All workers
941 Fed Ded Inc QTD	941 US Federal Deductions From Income quarterly-to-date	All workers
941 HP exp on EmRtCr	Qualified health plan expenses allocable to employee retention credit wages	All workers

Accumulator	Description	Eligibility
941 HP exp on FamLv	Qualified health plan expenses allocable to qualified family leave wages	All workers
941 HP exp on SickLv	Qualified health plan expenses allocable to qualified sick leave wages	All workers
941 Med FBen EE QTD	941 Fringe Benefits liable for Medicare quarterly-to-date	All workers
941 Med FBen ER QTD	941 Fringe Benefits Employer liable for Medicare quarterly-to-date	All workers
941 Medicare Add QTD	941 Medicare Deduction from Med Income quarterly-to-date	All workers
941 Medicare Ded QTD	941 Medicare Deduction from Med Income quarterly-to-date	All workers
941 OASDI EE QTD	Employee contributions to OASDI quarterly-to-date	All workers
941 OASDI on Tips	OASDI on tips quarterly-to-date for 941 report	All workers
941 USA Fed Supp QTD	941 US Federal Supplemental Wages quarterly-to-date	All workers
CA SIT Bn OR Stk Inc	CA income tax on bonus or stock income	All workers in CA
CA SUT ETT QTD	CA Sales & Use Tax on employment training quarterly-to-date	All workers in CA
CA SUT ETT YTD	CA Sales & Use Tax on employment training year-to-date	All workers in CA
ChldSupp garns PP	Child support deductions, pay period amount	All workers
ChldSuppAdm garns PP	Administration fee for child support deductions, pay period amount	All workers
ChldSuppArr garns PP	Child support deductions in arrears, pay period amount	All workers
Court Ord Garn Ong 1	Ongoing amount of court order garnishments withheld court order 1	All workers
Court Ord Garn Ong 2	Ongoing amount of court order garnishments withheld court order 2	All workers
Court Ord Garn Ong 3	Ongoing amount of court order garnishments withheld court order 3	All workers
Court Ord Garn Ong 4	Ongoing amount of court order garnishments withheld court order 4	All workers
Court Ord Garn Ong 5	Ongoing amount of court order garnishments withheld court order 5	All workers
Court Order Adm PP	Pay period amount of court order garnishments administrative fees	All workers
Court Order Garn PP	Total amount of court order garnishments withheld in the pay period	All workers

Accumulator	Description	Eligibility
CSAr withheld 1	Ongoing amount of child support arrears withheld for child support garnishment 1	All workers
CSAr withheld 2	Ongoing amount of child support arrears withheld for child support garnishment 2	All workers
CSAr withheld 3	Ongoing amount of child support arrears withheld for child support garnishment 3	All workers
CSAr withheld 4	Ongoing amount of child support arrears withheld for child support garnishment 4	All workers
CSAr withheld 5	Ongoing amount of child support arrears withheld for child support garnishment 5	All workers
DC FLI Inc	DC Paid Family Leave Plan insurable income	All workers in DC
DC FLI Inc YTD	DC Paid Family Leave Plan insurable income year-to-date	All workers in DC
DE Ded frm Inc 2	DE deductions from income per pay period	All workers in DE
DE FB 2	DE Fringe Benefits (liable for SIT) full amount	All workers in DE
DE FB ER 2	DE Fringe Benefits employer portion (liable for SIT) full amount	All workers in DE
DE Taxable Inc 2	DE Taxable Income per pay period full amount	All workers in DE
FBen EE QTD	Fringe Benefits quarterly-to-date	All workers
FBen EE YTD	Fringe Benefits year-to-date	All workers
FBen ER QTD	Fringe Benefits Employer Contribution quarterly-to-date	All workers
FBen ER YTD	Fringe Benefits Employer Contribution year-to-date	All workers
Fed Ded frm Inc QTD	US Federal Deductions from Income quarterly-to-date	All workers
Fed Ded frm Inc YTD	US Federal Deductions from Income year-to-date	All workers
Fed Ded frm Inc	US Federal Deductions from Income	All workers
Fed Ded frm SpIn YTD	US Federal Deductions from Supplementary Income year-to-date	All workers
Fed Ded frm Sup Inc	US Federal Deductions from Income per pay period	All workers
Fed Tax Inc QTD	Federal Taxable Income quarterly-to-date	All workers
Fed Tax Inc YTD	Federal Taxable Income year-to-date	All workers
Fed Tax Inc	Federal Taxable Income per pay period	All workers
Federal LevyEarns PP	Earnings per pay period subject to federal levies	All workers
Federal Mand Deds PP	Mandatory deductions from garnishable earnings	All workers

Accumulator	Description	Eligibility
FedLev Dns AftCS Ong	Year-to-date federal levy garnishments after child support	All workers
FedLev Dns BefCS Ong	Year-to-date federal levy garnishments before child support	All workers
FedLevy garns PP	US Federal levy deductions from Income per pay period	All workers
Fringe Benefits ER	Fringe Benefits ER	All workers
Fringe Benefits	Fringe Benefits	All workers
FUTA Ded YTD	FUTA Deduction from FUTA Income year-to-date	All workers
FUTA Ded	Federal Unemployment Tax Act deductions from FUTA-eligible income	All workers
FUTA Exemptions	FUTA Exempt Earnings	All workers
FUTA FBen EE YTD	Fringe Benefits liable for FUTA year-to-date	All workers
FUTA FBen ER YTD	Fringe Benefits ER Contributions liable for FUTA year-to-date	All workers
FUTA Fringe Ben ER	Fringe Benefits ER contributions liable for FUTA	All workers
FUTA Fringe Benefits	Fringe Benefits liable for FUTA	All workers
FUTA Inc QTD	FUTA Eligible Income quarterly-to-date	All workers
FUTA Inc YTD	FUTA Eligible Income year-to-date	All workers
FUTA Inc	FUTA Eligible Income per pay period	All workers
FUTA Payments	FUTA Employee Payments	All workers
FUTA QTD	FUTA employer deductions quarterly-to-date	All workers
FUTA YTD	FUTA year-to-date	All workers
GA Ded frm Sp In YTD	GA worker deductions from supplemental income year-to-date	All workers in GA
IL SUI Ded MTD	IL Deductions from State Unemployment Insurance (SUI) taxable income month-to-date	All workers in IL
IL SUI FB EE MTD	IL SUI Taxable Employee Fringe Benefits month-to-date	All workers in IL
IL SUI FB ER MTD	IL SUI Taxable Employer Fringe Benefits month-to-date	All workers in IL
IL SUI Inc MTD	IL Unemployment Insurance Eligible Income month-to-date	All workers in IL
MA DED PP	MA worker deductions per pay period	All workers in MA
MA DED YTD	MA worker deductions year-to-date	All workers in MA
MA FLI Inc	MA Paid Family Leave Plan insurable income per pay period	All workers

Accumulator	Description	Eligibility
MA FLI Inc YTD	MA Paid Family Leave Plan insurable income year-to-date	All workers
MA FMLA Inc	MA Paid Family Medical Leave Plan insurable income per pay period	All workers
MA FMLA Inc YTD	MA Paid Family Medical Leave Plan insurable income year-to-date	All workers
MA FMLA YTD	MA Paid Family Medical Leave Plan deduction year-to-date	All workers
MD DED YTD	MD worker deductions year-to-date	All workers in MD
ME SUI CSSF YTD	ME Unemployment CSSF Tax year-to-date	All workers in ME
Medicare Ded QTD	Medicare Deduction from Med Income quarterly-to-date	All workers
Medicare Ded YTD	Medicare Deduction from Med Income year-to-date	All workers
Medicare Ded	Medicare Deduction from Med Income	All workers
Medicare FBen EE QTD	Fringe Benefits liable for Medicare quarterly-to-date	All workers
Medicare FBen EE YTD	Fringe Benefits liable for Medicare year-to-date	All workers
Medicare FBen ER QTD	Fringe Benefits Employer liable for Medicare quarterly-to-date	All workers
Medicare FBen ER YTD	Fringe Benefits Employer liable for Medicare year-to-date	All workers
Medicare Fringe Ben	Fringe Benefits liable for Medicare	All workers
Medicare Fringe ER	Fringe Benefits Employer contributions liable for Medicare	All workers
Medicare Inc QTD	Medicare Income quarterly-to-date	All workers
Medicare Inc YTD	Medicare Income year-to-date	All workers
Medicare Inc	Medicare Income	All workers
Medicare	Medicare employee amount per pay period	All workers
MS Ded frm Sp In YTD	MS worker deductions from supplemental income year-to-date	All workers in MS
NJ FLI Inc YTD	NJ Paid Family Leave Plan insurable income year-to-date	*NJ FLI Group* **Eligibility group**
NJ FLI YTD	NJ Paid Family Leave Plan year-to-date	*NJ FLI Group* **Eligibility group**
NJ SDI YTD EE	NJ State Disability year-to-date Employee	All workers in NJ
NJ SDI YTD ER	NJ State Disability year-to-date Employer	All workers in NJ
NJ SUI Inc ER	NJ Unemployment Insurance Eligible Income ER	All workers in NJ

Accumulator	Description	Eligibility
NJ SUI YTD ER	NJ Unemployment Tax year-to-date employer	All workers in NJ
NY FLI Inc YTD	NY Paid Family Leave Plan insurable income year-to-date	*NY FLI Group* **Eligibility group**
NY FLI YTD	NY Paid Family Leave Plan year-to-date	*NY FLI Group* **Eligibility group**
OASDI Ded	OASDI deductions from OASDI-eligible income	All workers eligible for OASDI
OASDI ER YTD	OASDI employer contributions year-to-date	All workers eligible for OASDI
OASDI Fringe Ben ER	Fringe benefit employer contributions liable for OASDI	All workers eligible for OASDI
OASDI Fringe Benefit	Fringe benefit contributions liable for OASDI	All workers eligible for OASDI
OASDI Inc QTD	OASDI-eligible income quarterly-to-date	All workers eligible for OASDI
OASDI Inc YTD	OASDI-eligible income year-to-date	All workers eligible for OASDI
OASDI Inc	OASDI-eligible income	All workers eligible for OASDI
OASDI on Tips EE	OASDI contributions on OASDI tip income	All workers eligible for OASDI
OASDI QTD	OASDI contributions quarterly-to-date	All workers eligible for OASDI
OASDI Tip Inc Earns	OASDI tip income from earnings	All workers eligible for OASDI
OASDI Tip Inc ER	OASDI tip income from employer contributions	All workers eligible for OASDI
OASDI Tips QTD	OASDI tip income quarterly-to-date	All workers eligible for OASDI
OASDI YTD	OASDI contributions year-to-date	All workers eligible for OASDI
OASDI	OASDI employee contributions per pay period	All workers eligible for OASDI
OR TT QTD	OR Workers transit tax withheld quarter-to-date	All workers in OR
OR TT YTD	OR Workers transit tax withheld year-to-date	All workers in OR
OR Workers Comp Hrs	OR Workers Compensation Hours	All workers in OR
Qual Famly Lv Wg PPD	Qualified family leave wages, pay period amount	All workers
Qual Famly Lv Wg QTD	Qualified family leave wages quarterly-to-date	All workers
Qual Famly Lv Wg YTD	Qualified family leave wages year-to-date	All workers

Accumulator	Description	Eligibility
Qual Sick Lv Wg PPd	Qualified sick leave wages, pay period amount	All workers
Qual Sick Lv Wg QTD	Qualified sick leave wages quarterly-to-date	All workers
Qual Sick Lv Wg YTD	Qualified sick leave wages year-to-date	All workers
StaLev garns PP	Total state levies withheld in the pay period	All workers
State Lev deds Ong 1	Ongoing amount of state levy deductions for state levy 1	All workers
State Lev deds Ong 2	Ongoing amount of state levy deductions for state levy 2	All workers
State Lev deds Ong 3	Ongoing amount of state levy deductions for state levy 3	All workers
State Lev deds Ong 4	Ongoing amount of state levy deductions for state levy 4	All workers
State Lev deds Ong 5	Ongoing amount of state levy deductions for state levy 5	All workers
USA CS LS deds	Lump sum child support mandatory deductions	All workers
USA CS Lump Sum	Pay period lump sum earnings subject to child support	All workers
USA CS mandat deds	Pay period deductions that apply before child support	All workers
USA CS Taxable Inc	Pay period earnings subject to child support garnishments	All workers
USA Fed SL garns Ong	Ongoing amount of federal student loan garnishments withheld	All workers
USA Fed SL garns PP	Pay period amount of federal student loan garnishments withheld	All workers
USA Fed Suppl QTD	Federal Supplemental Wages quarterly-to-date	All workers
USA Fed Suppl YTD	Federal Supplemental Wages year-to-date	All workers
USA Fed Suppl	Federal Supplemental Wages per pay period	All workers
USA FIT QTD	Federal tax deductions quarterly-to-date	All workers
USA FIT SUPPL	Federal tax on supplemental income per pay period	All workers
USA FIT SUPPL YTD	Federal tax on supplemental income year-to-date	All workers
USA FIT YTD	Federal tax deductions year-to-date	All workers
USA FIT	Federal tax deductions per pay period	All workers
USA Garn El Dns PP	Federal and garnishment deductions that reduce garnishable income per pay period	All workers
USA Garn El Inc PP	Income eligible for garnishment per pay period	All workers

Accumulator	Description	Eligibility
W2 Allc Tips ER YTD	W-2 Allocated Tips Employer Deductions year-to-date	All workers
W2 Allc Tips Inc YTD	W-2 Allocated Tips Wages year-to-date	All workers
W2 Dep Care ER YTD	W-2 Dependent Care Employer Deductions year-to-date	All workers
W2 Dep Care Inc YTD	W-2 Dependent Care Wages year-to-date	All workers
W2 Medicare Ded YTD	W-2 Medicare Deduction From Income year-to-date	All workers
W2 NQ Plan Inc YTD	W-2 Non Qualified Plan Wages year-to-date	All workers
W2 OASDI on Tips YTD	OASDI on tips year-to-date for W-2 reporting	All workers
W2 SS Tips ER YTD	W-2 Social Security Tips Employer Deductions year-to-date	All workers
W2 SS Tips Inc YTD	W-2 Social Security Tips Wages year-to-date	All workers
W2 USA Fed Suppl YTD	US Federal Supplemental Wages year-to-date	All workers
WA Cares Inc	Eligible income for deducting Washington Cares Fund	All workers in WA
WA Cares Inc YTD	Year-to-date eligible income for deducting Washing Cares Fund	All workers in WA
WA FLI Inc	WA Paid Family Leave Plan insurable income per pay period	All workers in WA
WA FLI Inc YTD	WA Paid Family Leave Plan insurable income year-to-date	All workers in WA
WA IIP Hours	WA Industrial Insurance Premium Hours	All workers in WA
WI Ded frm Sp In YTD	WI worker deductions from supplemental income year-to-date	All workers in WI
WV Ded frm Sp In YTD	WV worker deductions from supplemental income year-to-date	All workers in WV
XX Ded frm Inc QTD	XX Deductions from Income quarterly-to-date	All workers in XX state
XX Ded frm Inc YTD	XX Deductions from Income year-to-date	All workers in XX state
XX Ded frm Inc	XX Deductions from Income per pay period	All workers in XX state
XX Ded frm Supp Inc	XX Deductions from Supplemental Income year-to-date	All workers in XX state
XX FB EE QTD	XX Taxable Employee Fringe Benefits quarterly-to-date	All workers in XX state
XX FB EE YTD	XX Taxable Employee Fringe Benefits year-to-date	All workers in XX state

Accumulator	Description	Eligibility
XX FB ER QTD	XX Taxable Employer Fringe Benefits quarterly-to-date	All workers in XX state
XX FB ER YTD	XX Taxable Employer Fringe Benefits year-to-date	All workers in XX state
XX Fringe Benefit ER	XX Fringe Benefits ER portion (liable for SIT)	All workers in XX state
XX Fringe Benefits	XX Fringe Benefits (liable for SIT)	All workers in XX state
XX Local SUI YTD W2D	XX Unemployment Insurance Local Annual W-2 Tax	All workers in XX state
XX Local SUI YTD W2I	XX Unemployment Insurance Local Annual W-2 Income	All workers in XX state
XX SDI YTD	XX SDI year-to-date	All workers in XX state
XX SIT PP	XX SIT per pay period	All workers
XX SIT QTD	XX SIT quarterly-to-date	All workers
XX SIT Suppl Inc YTD	XX SIT Supplemental Income year-to-date	All workers with earnings in XX state
XX SIT Suppl Inc	XX SIT Supplemental Income	All workers with earnings in XX state
XX SIT YTD	XX SIT year-to-date	All workers
XX SUI Ded QTD	XX Deductions from State Unemployment Insurance (SUI) taxable income quarterly-to-date	All workers in XX state
XX SUI Ded YTD	XX Deductions from SUI Taxable Income year-to-date	All workers in XX state
XX SUI Ded	XX Unemployment Insurance Deduction from UI Income	All workers in XX state
XX SUI FB EE QTD	XX SUI Taxable Employee Fringe Benefits quarterly-to-date	All workers in XX state
XX SUI FB EE YTD	XX SUI Taxable Employee Fringe Benefits year-to-date	All workers in XX state
XX SUI FB ER QTD	XX SUI Taxable Employer Fringe Benefits quarterly-to-date	All workers in XX state
XX SUI FB ER YTD	XX SUI Taxable Employer Fringe Benefits year-to-date	All workers in XX state
XX SUI Fringe Ben ER	XX Fringe Benefits ER portion (liable for SUTA)	All workers in XX state
XX SUI Fringe Ben	XX Fringe Benefits (liable for SUTA)	All workers in XX state
XX SUI Hours	XX Unemployment Insurance Weekly Hours	All workers in XX state
XX SUI Inc QTD	XX Unemployment Insurance Eligible Income quarterly-to-date	All workers in XX state

Accumulator	Description	Eligibility
XX SUI Inc YTD	XX Unemployment Insurance Eligible Income year-to-date	All workers in XX state
XX SUI Inc	XX Unemployment Insurance Eligible Income	All workers in XX state
XX SUI QTD EE	XX Unemployment Insurance quarterly-to-date Employee	All workers
XX SUI QTD W2	XX Unemployment Insurance Quarterly W-2 Tax	All workers in XX state
XX SUI QTD W2 Inc	XX Unemployment Insurance Quarterly W-2 Income	All workers in XX state
XX SUI QTD	XX Unemployment Insurance quarterly-to-date	All workers
XX SUI YTD EE	XX Unemployment Insurance year-to-date Employee	All workers
XX SUI YTD W2	XX Unemployment Insurance Annual W-2 Tax	All workers in XX state
XX SUI YTD W2 Inc	XX Unemployment Insurance Annual W-2 Income	All workers in XX state
XX SUI YTD	XX Unemployment Insurance year-to-date	All workers
XX Taxable Inc QTD	XX Taxable Income quarterly-to-date	All workers in XX state
XX Taxable Inc YTD	XX Taxable Income year-to-date	All workers in XX state
XX Taxable Inc	XX Taxable Income per pay period	All workers in XX state

3. Click **Insert** to create the accumulator eligibilities.
4. Save your changes and close the form.

To set up accumulator values:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Accumulators** > **Accumulator values** to open the **Accumulator values** form.
2. On the **Fast entry** tab, specify the **Accumulator**.
3. Select the following **Earnings** or **Benefit deductions**. Click **Insert** to create the accumulator values. Repeat for each accumulator (*XX* represents the 2-character state identifier):

Note*: you may opt for an* ***Earning group*** *or* ***Benefit/deduction group*** *that contains all the suggested earnings or benefit/deductions in place of the individual objects*

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
941 Empl Ret Cr Inc	earnings qualifying for employee retention credit		
941 HP exp on EmRtCr			qualified health plan benefit/deduction code

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
941 HP exp on FamLv			qualified health plan benefit/deduction code
941 HP exp on SickLv			qualified health plan benefit/deduction code
941 OASDI EE QTD			*OASDI*
Qual Famly Lv Wg PPD	Qualified family leave earning code		
Qual Famly Lv Wg QTD	Qualified family leave earning code		
Qual Famly Lv Wg YTD	Qualified family leave earning code		
Qual Sick Lv Wg PPd	Qualified sick leave earning code		
Qual Sick Lv Wg QTD	Qualified sick leave earning code		
Qual Sick Lv Wg YTD	Qualified sick leave earning code		
401K ER YTD			*401k* *401k on Suppl Earns*
401K Gross	Earnings eligible for 401k deductions		
401K Gross YTD	Earnings (regular and supplemental) eligible for 401k deductions		
401K on Suppl Gross	Supplemental earnings eligible for 401k deductions		
401K YTD			*401k*
940 FBen ER Partial		benefit/deductions that increase worker's taxable income partially subject to FUTA tax	
940 FUTA EE Ded Ex		pre-tax benefit/deductions that reduce the worker’s taxable income subject to FUTA tax	
940 FUTA EE Earn Ex	Earnings exempt from FUTA tax		

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
940 FUTA ER Ded Ex		pre-tax benefit/deductions that reduce the worker’s taxable income subject to FUTA tax	
941 COBRA ER QTD		worker contributions to COBRA	
941 FBen EE QTD		benefit/deductions that increase worker's taxable income subject to federal income tax	
941 FBen ER QTD		benefit/deductions that increase worker's taxable income subject to federal income tax	
941 Fed Ded Inc QTD		pre-tax benefit/deductions that reduce the worker’s taxable income subject to federal income tax	
941 Med FBen EE QTD		benefit/deductions that increase worker's taxable income subject to Medicare tax	
941 Med FBen ER QTD		benefit/deductions that increase worker's taxable income subject to Medicare tax	
941 Medicare Add QTD			*Medicare Addl*
941 Medicare Ded QTD		pre-tax benefit/deductions that reduce the worker’s taxable income subject to Medicare tax	
941 OASDI on Tips			*OASDI on Tips*
941 USA Fed Supp QTD	Earning subject to federal supplemental income tax		
CA SDI YTD			*CS SDI*
CA SIT Bn OR Stk Inc	Earnings subject to CA SIT on bonus or stock income		
CA SUT ETT QTD			*CA SUT*
CA SUT ETT YTD			*CA SUT*

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
ChldSupp garns PP			*Child Supp 1* *Child Supp 2* *Child Supp 3* *Child Supp 4* *Child Supp 5*
ChldSuppAdm garns PP			*Child Supp Admin 1* *Child Supp Admin 2* *Child Supp Admin 3* *Child Supp Admin 4* *Child Supp Admin 5*
ChldSuppArr garns PP			*Child Supp Arr 1* *Child Supp Arr 2* *Child Supp Arr 3* *Child Supp Arr 4* *Child Supp Arr 5*
Court Ord Garn Ong 1			*Court Order Garn 1*
Court Ord Garn Ong 2			*Court Order Garn 2*
Court Ord Garn Ong 3			*Court Order Garn 3*
Court Ord Garn Ong 4			*Court Order Garn 4*
Court Ord Garn Ong 5			*Court Order Garn 5*
Court Order Adm PP			*Court Order Adm 1* *Court Order Adm 2* *Court Order Adm 3* *Court Order Adm 4* *Court Order Adm 5*
Court Order Garn PP			*Court Order Garn 1* *Court Order Garn 2* *Court Order Garn 3* *Court Order Garn 4* *Court Order Garn 5*
CSAr withheld 1			*Child Supp Arr 1*
CSAr withheld 2			*Child Supp Arr 2*
CSAr withheld 3			*Child Supp Arr 3*

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
CSAr withheld 4			*Child Supp Arr 4*
CSAr withheld 5			*Child Supp Arr 5*
DC FLI Inc	Earnings subject to DC State Unemployment Insurance tax		
DC FLI Inc YTD	Earnings subject to DC State Unemployment Insurance tax		
DE Ded frm Inc 2		pre-tax benefit/deductions that reduce the worker’s taxable income subject to Delaware supplemental income tax	
DE FB 2		benefit/deductions that reduce the worker’s taxable income subject to Delaware supplemental income tax	
DE FB ER 2		benefit/deductions that reduce the worker’s taxable income subject to Delaware supplemental income tax	
DE Taxable Inc 2	Earnings subject to Delaware state income tax		
FBen EE QTD		benefit/deductions that increase worker's taxable income subject to federal income tax	
FBen EE YTD		benefit/deductions that increase worker's taxable income subject to federal income tax	
FBen ER QTD		benefit/deductions that increase worker's taxable income subject to federal income tax	
FBen ER YTD		benefit/deductions that increase worker's taxable income subject to federal income tax	

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
Fed Ded frm Inc QTD		pre-tax benefit/deductions that reduce the worker's taxable income subject to federal income tax	
Fed Ded frm Inc YTD		pre-tax benefit/deductions that reduce the worker's taxable income subject to federal income tax	
Fed Ded frm Inc		pre-tax benefit/deductions that reduce the worker's taxable income subject to federal income tax	
Fed Ded frm SpIn YTD			*401K on Suppl Earns*
Fed Ded frm Sup Inc			*401K on Suppl Earns*
Fed Tax Inc QTD	Earnings subject to federal income tax		
Fed Tax Inc YTD	Earnings subject to federal income tax		
Fed Tax Inc	Earnings subject to federal income tax		
Federal Mand Deds PP		*Federal Levy Deds*	
Federal LevyEarns PP	Earnings subject to federal income tax		
FedLev Dns AftCS Ong			*Federal levy Aft CS*
FedLev Dns BefCS Ong			*Federal levy Bef CS*
FedLevy garns PP			*Federal levy Bef CS* *Federal levy Aft CS*
Fringe Benefits ER		benefit/deductions that increase worker's taxable income subject to federal income tax	
Fringe Benefits		benefit/deductions that increase worker's taxable income subject to federal income tax	
FUTA Ded YTD		pre-tax benefit/deductions that reduce the worker's taxable income subject to and exempt from FUTA tax	

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
FUTA Ded		pre-tax benefit/deductions that reduce the worker's taxable income subject to FUTA tax	
FUTA Exemptions	Earnings exempt from FUTA tax		
FUTA FBen EE YTD		benefit/deductions that increase worker's taxable income subject to FUTA tax	
FUTA FBen ER YTD		benefit/deductions that increase worker's taxable income subject to, partially subject to, and exempt from FUTA tax	
FUTA Fringe Ben ER		benefit/deductions that increase worker's taxable income subject and partially subject to FUTA tax	
FUTA Fringe Benefits		benefit/deductions that increase worker's taxable income subject to FUTA tax	
FUTA Inc QTD	Earnings subject to FUTA tax		
FUTA Inc YTD	Earnings subject to FUTA tax		
FUTA Inc	Earnings subject to FUTA tax		
FUTA Payments	Earnings subject to FUTA tax		
FUTA QTD			*FUTA*
FUTA YTD			*FUTA*
GA Ded frm Sp In YTD			*401K on Suppl Earns*
IL SUI Ded MTD		*IL Not subj to SUTA*	
IL SUI FB EE MTD		*IL FBen subj to SUTA*	
IL SUI FB ER MTD		*IL FBen subj to SUTA*	
IL SUI Inc MTD	*IL State Insur Earns*		
MA DED PP		All deductions in Massachusetts not including income tax	

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
MA DED YTD		All deductions in Massachusetts not including income tax	
MA FLI Inc	Earnings subject to MA State Unemployment Insurance tax		
MA FLI Inc YTD	Earnings subject to MA State Unemployment Insurance tax		
MA FMLA Inc	Earnings subject to MA State Unemployment Insurance tax		
MA FMLA Inc YTD	Earnings subject to MA State Unemployment Insurance tax		
MA FMLA YTD			*MA FMLA*
ME SUI CSSF YTD			*ME SUI CSSF Tax*
Medicare Ded QTD		pre-tax benefit/deductions that reduce the worker’s taxable income subject to *Medicare*	
Medicare Ded YTD		pre-tax benefit/deductions that reduce the worker’s taxable income subject to *Medicare*	
Medicare Ded		pre-tax benefit/deductions that reduce the worker’s taxable income subject to *Medicare*	
Medicare FBen EE QTD		benefit/deductions that increase worker's taxable income subject to *Medicare*	
Medicare FBen EE YTD		benefit/deductions that increase worker's taxable income subject to *Medicare*	
Medicare FBen ER QTD		benefit/deductions that increase worker's taxable income subject to *Medicare*	
Medicare FBen ER YTD		benefit/deductions that increase worker's taxable income subject to *Medicare*	

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
Medicare Fringe Ben		benefit/deductions that increase worker's taxable income subject to *Medicare*	
Medicare Fringe ER		benefit/deductions that increase worker's taxable income subject to *Medicare*	
Medicare Inc QTD	Earnings subject to *Medicare*		
Medicare Inc YTD	Earnings subject to *Medicare*		
Medicare Inc	Earnings subject to *Medicare*		
Medicare			*Medicare*
MS Ded frm Sp In YTD			*401K on Suppl Earns*
NJ FLI Inc YTD	Earnings subject to state FLI		
NJ FLI YTD			*NJ FLI*
NJ SDI YTD EE			*NJ SDI*
NJ SDI YTD ER			*NJ SDI*
NJ SUI Inc ER	Insurable earnings in NJ		
NJ SUI YTD ER			*NJ SUI*
NY FLI Inc YTD	Earnings subject to state FLI		
NY FLI YTD			*NY FLI*
OASDI Ded		pre-tax benefit/deductions that reduce the worker's taxable income subject to *OASDI*	
OASDI ER YTD			*OASDI*
OASDI Fringe Ben ER		benefit/deductions that increase worker's taxable income subject to *OASDI*	
OASDI Fringe Benefit		benefit/deductions that increase worker's taxable income subject to *OASDI*	
OASDI Inc QTD	Earnings subject to *OASDI*		
OASDI Inc YTD	Earnings subject to *OASDI*		
OASDI Inc	Earnings subject to *OASDI*		
OASDI on Tips EE			*OASDI on tips*

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
OASDI QTD			*OASDI*
OASDI Tip Inc Earns	Earnings subject to *OASDI on tips*		
OASDI Tip Inc ER		benefit/deductions that increase worker's taxable income subject to *OASDI on tips*	
OASDI Tips QTD			*OASDI on tips*
OASDI YTD			*OASDI*
OASDI			*OASDI*
OR TT QTD			*OR Trans Tax*
OR TT YTD			*OR Trans Tax*
OR Workers Comp Hrs	Earnings that contribute to OR Workers Compensation hours		
RI SDI YTD			*RI SDI*
StaLev garns PP			*State Levy 1* *State Levy 2* *State Levy 3* *State Levy 4* *State Levy 5*
State Lev deds Ong 1			*State Levy 1*
State Lev deds Ong 2			*State Levy 2*
State Lev deds Ong 3			*State Levy 3*
State Lev deds Ong 4			*State Levy 4*
State Lev deds Ong 5			*State Levy 5*
USA CS LS deds			*AZ SIT* *UT SIT* *USA FIT Suppl Tax*
USA CS Lump Sum	Earning subject to federal supplemental income tax		
USA CS mandat deds		*USA CS mandat deds*	
USA CS Taxable Inc	All taxable income regular and supplemental		

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
USA Fed SL garns Ong			*USA Fed SL garn*
USA Fed SL garns PP			*USA Fed SL garn*
USA Fed Suppl QTD	Earnings subject to federal supplemental income tax		
USA Fed Suppl YTD	Earnings subject to federal supplemental income tax		
USA Fed Suppl	Earnings subject to federal supplemental income tax		
USA FIT QTD			*USA FIT* *USA FIT Add Tax* *USA Fit Suppl Tax*
USA FIT SUPPL			*USA FIT Suppl Tax*
USA FIT SUPPL YTD			*USA FIT Suppl Tax*
USA FIT YTD			*USA FIT* *USA FIT Add Tax* *USA Fit Suppl Tax*
USA FIT			*USA FIT* *USA FIT Add Tax*
USA Garn El Dns PP		benefit/deductions that reduce worker garnishable income	
USA Garn El Inc PP	Earnings subject to garnishment at federal and state levels		
W2 Allc Tips ER YTD		benefit/deductions that increase worker's taxable income subject to reporting Allocated Tips on W-2	
W2 Allc Tips Inc YTD	Earnings that contribute to reporting Allocated Tips on W-2		
W2 Dep Care ER YTD		benefit/deductions that increase worker's taxable income subject to reporting Dependent Care on W-2	
W2 Dep Care Inc YTD	Earnings that contribute to reporting Dependent Care on W-2		

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
W2 Medicare Ded YTD			*Medicare* *Medicare Addl*
W2 NQ Plan Inc YTD	Earnings that contribute to reporting Nonqualified plan 457 on W-2		
W2 OASDI on Tips YTD			*OASDI on Tips*
W2 SS Tips ER YTD			*OASDI on Tips*
W2 SS Tips Inc YTD	Earnings subject to *OASDI*		
W2 USA Fed Suppl YTD	Earnings that are processed as supplemental earnings		
WA Cares Inc	earnings eligible for state unemployment insurance, or same values as the *WA SUI Inc* accumulator		
WA Cares Inc YTD	earnings eligible for state unemployment insurance, or same values as the *WA SUI Inc* accumulator		
WA FLI Inc	Earnings subject to WA State Unemployment Insurance tax		
WA FLI Inc YTD	Earnings subject to WA State Unemployment Insurance tax		
WA IIP Hours	Earnings that contribute to WA IIP hours		
WI Ded frm Sp In YTD			*401K on Suppl Earns*
WV Ded frm Sp In YTD			*401K on Suppl Earns*
XX Ded frm Inc QTD		pre-tax benefit/deductions that reduce the worker's taxable income subject to *XX SIT*	

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
XX Ded frm Inc YTD		pre-tax benefit/deductions that reduce the worker’s taxable income subject to *XX SIT*	
XX Ded frm Inc		pre-tax benefit/deductions that reduce the worker’s taxable income subject to *XX SIT*	
XX Ded frm Supp Inc			*401K on Suppl Earns*
XX FB EE QTD		benefit/deductions that increase worker's taxable income subject to *XX SIT*	
XX Local SUI YTD W2D			*XX SUI*
XX Local SUI YTD W2I	Earnings subject to XX State Unemployment Insurance tax		
XX SIT PP			*XX SIT*
XX SIT Suppl Inc	Earnings subject to XX State Income Supplemental Tax		
XX SIT Suppl Inc YTD	Earnings subject to XX State Income Supplemental Tax		
XX SUI FB EE QTD		benefit/deductions that increase worker's taxable income subject to *XX SUI*	
XX SUI FB EE YTD		benefit/deductions that increase worker's taxable income subject to *XX SUI*	
XX SUI Fringe Ben		benefit/deductions that increase worker's taxable income subject to *XX SUI*	
XX Taxable Inc	Earnings subject to *XX SIT*		
XX FB EE YTD		benefit/deductions that increase worker's taxable income subject to *XX SIT*	
XX FB ER QTD		benefit/deductions that increase worker's taxable income subject to *XX SIT*	

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
XX FB ER YTD		benefit/deductions that increase worker's taxable income subject to *XX SIT*	
XX Fringe Benefit ER		benefit/deductions that increase worker's taxable income subject to *XX SIT*	
XX Fringe Benefits		benefit/deductions that increase worker's taxable income subject to *XX SIT*	
XX SIT QTD			*XX SIT* *XX SIT Add Tax* *XX SIT SUPPL*
XX SIT Suppl Inc	Earnings subject to XX State Income Supplemental Tax		
XX SIT YTD			*XX SIT* *XX SIT Add Tax* *XX SIT SUPPL*
XX SUI Ded QTD		pre-tax benefit/deductions that reduce the worker's taxable income subject to *XX SUI*	
XX SUI Ded YTD		pre-tax benefit/deductions that reduce the worker's taxable income subject to *XX SUI*	
XX SUI Ded		pre-tax benefit/deductions that reduce the worker's taxable income subject to *XX SUI*	
XX SUI FB ER QTD		benefit/deductions that increase worker's taxable income subject to *XX SUI*	
XX SUI FB ER YTD		benefit/deductions that increase worker's taxable income subject to *XX SUI*	
XX SUI Fringe Ben ER		benefit/deductions that increase worker's taxable income subject to *XX SUI*	
XX SUI Hours	Earnings that contribute to XX State Unemployment Insurance hours		

Accumulator	Earnings	Benefit/deduction Groups	Benefit/deductions
XX SUI Inc QTD	Earnings subject to XX State Unemployment Insurance tax		
XX SUI Inc YTD	Earnings subject to XX State Unemployment Insurance tax		
XX SUI Inc	Earnings subject to XX State Unemployment Insurance tax		
XX SUI QTD EE			*XX SUI*
XX SUI QTD W2 Inc	Earnings subject to SUI for W-2 reporting		
XX SUI QTD W2			*XX SUI*
XX SUI QTD			*XX SUI*
XX SUI YTD EE			*XX SUI*
XX SUI YTD W2 Inc	Earnings subject to SUI for W-2 reporting		
XX SUI YTD W2			*XX SUI*
XX SUI YTD			*XX SUI*
XX Taxable Inc QTD	Earnings subject to *XX SIT* and XX state supplemental income tax		
XX Taxable Inc YTD	Earnings subject to *XX SIT* and XX state supplemental income tax		

4. Save your changes and close the form.

Set up Occupations

In addition to standard occupation setup, you can include the Standard Occupational Classification (SOC) code as a field on an occupation code. This field is reported in SUTA reports for the state of Louisiana. If you do not file in Louisiana, you can ignore this setup.

To set an SOC code on an occupation code:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Occupations** > **Occupations** to open the **Occupations** form.
2. On the **Overview** tab, locate and select the **Occupation** code to associate with an SOC.
3. Enter a **Standard occupation classification code** on the occupation.
4. Repeat as required for other occupation codes.
5. Close the form to save your changes.

Set up 940 Employers Annual Federal Unemployment (FUTA) Tax Return

940 reporting must be set up before the 940 Annual Federal Unemployment report can generate the correct information. This section contains procedures for:

- setting up 940 format fields
- setting up 940 format parameters

The 940 report gathers worker information from accumulators (see **Set up Accumulators** on page 20). Export format fields then determine the contents that are exported to XML format, which is then processed by third-party software (Greenshades).

If you withhold FUTA in a state subject to FUTA credit reduction, you must create custom accumulators and calculations to calculate the FUTA taxable wages in each of those states.

Set up 940 Format Fields

Format fields for the 940 report must be manually configured. Format fields determine the payroll data used to populate the defined fields of the XML export file.

Schedule A (Form 940) is automatically generated when more than one *SUTA State X* field is created in the form, meaning you are a multi-state employer. If you create more than one *SUTA State X* field, you must create the following corresponding fields for each value of *X*, where *X* is an integer starting from *1*:

- SUTA State FUTA Taxable Wages X
- SUTA State ID X
- SUTA State Reduction Rate X
- SUTA State Tax Rate X

This part of the document is updated to 2024.

To set up the 940 format fields:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *940* **Export format**.
3. Click **Setup** > **Format fields** to open the **Format fields** form.
4. Create or modify the following export format fields. Enter the **Export format field** name, **Field source type**, and **Field source** as listed in the table below, if it does not already exist (where *XX* is the 2-character state identifier applicable to the state indicated):

Export Format Field	Description	Field Source Type	Field Source	940 Box
Amended Indicator	Indications that this is an amended return	Boolean	Yes/No	Type of Return, Box a

Export Format Field	Description	Field Source Type	Field Source	940 Box
Apply to Next Return	Indicates that overpayment is to be applied to the next return	Boolean	Yes/No	Part 4, Line 15
Company specific statutory reporting	Indicates that you report 940 for multiple Dynamics companies (legal entities) and wish to upload them separately to Greenshades	Boolean	Yes/No	
Contact Email	Email address for company contact person	Fixed	custom text	
Contact Fax	Fax number for company contact	Fixed	custom text	
Contact Name	Company contact person name	Fixed	custom text	
Contact Phone	Telephone number for company contact	Fixed	custom text	
Contact Phone Ext	Telephone extension number for company contact, if applicable	Fixed	custom text	
Contact Title	Title of company contact person	Fixed	custom text	
Creation Date	Submission date for the 940. The default value is the current system date (Systemdateget() function), but you may enter an explicit date as desired (MM/DD/YYYY format).	Expression or Fixed, if desired	Systemdateget()	Part 7
Dependent Care Indicator	Indicates if payments were exempt from unemployment tax due to dependent care	Boolean	Yes/No	Part 2, Line 4, Box 4d
Designee Indicator	Indicates if another employee, paid tax preparer, or person can discuss this return with the IRS	Boolean	Yes/No	Part 6
Designee Name	Name of third-party designee	Fixed	custom text	Part 6
Designee PIN	5-digit Personal Identification Number to use when talking to IRS	Fixed	custom text	Part 6
Employer's Preparer Code	Preparer’s social security number (SSN) or their preparer tax identification number (PTIN)	Fixed	custom text	Part 7

Export Format Field	Description	Field Source Type	Field Source	940 Box
Fringe Benefits Indicator	Indicates if payments were exempt from unemployment tax due to them being fringe benefits	Boolean	Yes/No	Part 2, Line 4, Box 4a
FUTA Exemptions	Total of all FUTA exemptions, including GTL, 401K contributions, as well as dependent care payments, etc.	Calculation code	*940 FUTA Exemp*	Part 2, Line 4
FUTA Taxable Amount	Maximum taxable income limit	Calculation code	*FUTA Max Taxable Inc*	
Group Term Life Insurance Indicator	Indicates if payments were exempt from unemployment tax due to them being for group life insurance	Boolean	Yes/No	Part 2, Line 4, Box 4b
No Payments Indicator	Indicates that no payments were made to any employees in the reporting year	Boolean	Yes/No	Type of Return, Box c
Other Indicator	Indicates if payments were exempt from unemployment tax due to other reasons	Boolean	Yes/No	Part 2, Line 4, Box 4e
Preferred Notification	Enter *1* for the email address or *2* for the U.S. postal service.	Fixed	custom text	
Quarterly FUTA Tax Liability	FUTA tax liability by quarter	Accumulator	*FUTA QTD*	Part 5, Line 16
Read only forms Indicator	Indicates that the form is "read only" and cannot be modified. Used by Greenshades only.	Boolean	Yes/No	
Retirement Indicator	Indicates if payments were exempt from unemployment tax due to them being for retirement or pension	Boolean	Yes/No	Part 2, Line 4, Box 4c
Send a Refund	Indicates if overpayment is to be refunded back to the company	Boolean	Yes/No	Part 4, Line 15
Successor Employer Indicator	Indicates that this form is produced for a successor employer	Boolean	Yes/No	Type of Return, Box b

Export Format Field	Description	Field Source Type	Field Source	940 Box
SUTA State X	2-character state identifier for the state in which the company paid state unemployment tax, where *X* is an integer starting with *1*. You can create additional rows for multiple states as required. Each additional state must be associated with corresponding Schedule A fields (see above).	Fixed	custom text	Part 1, Line 1a
SUTA State FUTA Taxable Wages X	Wages from State X that are subject to FUTA not including wages excluded from state unemployment tax, where *X* is an integer corresponding to the *SUTA State X* field. Leave blank if the state is not subject to credit reduction.	Calculation code	*940 XX FUTA Wages* or custom calc	Schedule A, FUTA Taxable Wages
SUTA State ID X	Your SUTA reporting ID for State X, where *X* is an integer corresponding to the *SUTA State X* field. Leave blank if the state is not subject to credit reduction.	Fixed	custom text	
SUTA State Reduction Rate X	Reduction rate of State X on Schedule A (Form 940), where *X* is an integer corresponding to the *SUTA State X* field. Leave blank if the reduction rate is zero.	Calculation code	*940 XX Credit Reduct*	Schedule A, Reduction Rate
SUTA State Tax Rate X	State Unemployment Insurance rate for State X, where *X* is an integer corresponding to the *SUTA State X* field.	Calculation code	*XX SUI RATE*	
Terminating Business Indicator	Indicates that this form is produced for an employer who is closing their business	Boolean	Yes/No	Type of Return. Box d
Total Payments	Total amount of FUTA income and FUTA Fringe benefits less Deductions for FUTA income	Calculation code	*940 FUTA Inc*	Part 2. Line 3

***Note**: the calculation code for **SUTA State FUTA Taxable Wages X** may require a custom calculation if you withhold FUTA in a state subject to FUTA credit reduction.*

5. Select *Yes* for **Display in report?** to allow the field to appear when generated.

6. Select *Yes* for **Exclude if zero?** to prevent the field from appearing when its value is zero.
7. Save your changes and close the form.

Set up 940 Format Parameters

You can customize the file name and the location of where the 940 XML file is generated.

To set up 940 format parameters:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *940* **Export format**.
3. Click **Setup** > **Format parameters** to open the **Format parameters** form.
4. Change any of the following parameters as desired:
   - *ZipCode*: enter the ZIP code of the person(s) responsible for filing the 940 report. This code is used by Greenshades to tailor other information to the location of the reporter.
   - *XMLFileName*: enter/modify the file name of the XML file that 940 report data is exported to. File name must have the *.xml* extension.
   - *XMLDirectory*: enter/modify the directory path location where the XML file is saved to. In a Dynamics 365 cloud environment, this parameter is not used. You use the **Download files to local network** function to retrieve the file instead.

   Do not alter any other parameters unless instructed by Anthology Inc. client support.
5. Save your changes and close the form.

Set up 941 Employer's Quarterly Federal Tax Return

941 reporting must be set up before the 941 Employer's Quarterly Federal Tax Return report can generate the correct information. This section contains procedures for:

- setting up 941 format fields
- setting up 941 format parameters

The 941 report gathers worker information from accumulators (see **Set up Accumulators** on page 20). Export format fields then determine the contents that are exported to XML format, which is then processed by third-party software (Greenshades).

Set up 941 Format Fields

Format fields for the 941 report must be manually configured. Format fields determine the payroll data used to populate the defined fields of the XML export file.

***Note**: During implementation, validate both the contents of the accumulators and the results of the calculations that are used in creating this report. During the parallel run, compare the results you get in producing the report with Payroll/Greenshades against the results you obtain with your legacy system.*

This part of the document is updated to 2024.

To set up 941 format fields:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *941* **Export format**.
3. Click **Setup** > **Format fields** to open the **Format fields** form.
4. Create or modify the following export format fields. Enter the **Export format field** name, **Field source type**, and **Field source** as listed in the table below, if it does not already exist:

Export Format Field	Description	Field Source Type	Field Source	941 Box
Accumulated OASDI QTD	OASDI withheld quarter-to-date	Accumulator	*OASDI QTD*	
Advanced EIC Payments	Quarterly Advanced EIC payments	Calculation code	*941 Advance EIC*	No longer reported
Apply To Next Return	Indicates that overpayment is to be applied to the next return	Boolean	Yes/No	Part 1, Line 13
Company specific statutory reporting	Indicates that you report 941 for multiple Dynamics companies (legal entities) and wish to upload them separately to Greenshades	Boolean	Yes/No	
Contact Email	Email address for company contact person	Fixed	custom text	
Contact Fax	Fax number for company contact	Fixed	custom text	
Contact Name	Company contact person name	Fixed	custom text	
Contact Phone	Telephone number for company contact	Fixed	custom text	
Contact Phone Ext	Telephone extension number for company contact, if applicable	Fixed	custom text	
Contact Title	Title of company contact person	Fixed	custom text	
Creation Date	Submission date for the 941. The default value is the current system date (Systemdateget() function), but you may enter an explicit date as desired (MM/DD/YYYY format).	Expression or Fixed, if desired	Systemdateget()	Part 5

Export Format Field	Description	Field Source Type	Field Source	941 Box
Deduction 1	Deduction code for federal income tax	Benefit / Deduction	*USA FIT*	Part 2
Deduction 2	Deduction code for additional federal income tax	Benefit / Deduction	*USA FIT Add Tax*	Part 2
Deduction 3	Deduction code for supplemental federal income tax	Benefit / Deduction	*USA FIT Suppl Tax*	Part 2
Deduction 5a	Deduction code for social security on wages	Benefit / Deduction	*OASDI*	Part 2
Deduction 5b	Deduction code for social security on tips	Benefit / Deduction	*OASDI on Tips*	Part 2
Deduction 5c	Deduction code for Medicare	Benefit / Deduction	*Medicare*	Part 2
Deduction 5d	Deduction code for Additional Medicare	Benefit / Deduction	*Medicare Addl*	Part 2
Deposit State Code	2-character state identifier for the state in which you paid unemployment tax. Specify *MU* for multiple states.	Fixed	custom text	
Designee Indicator	Indicates if another employee, paid tax preparer, or person can discuss this return with the IRS	Boolean	Yes/No	Part 4
Designee Name	Name of third-party designee	Fixed	custom text	Part 4
Designee Phone Extension	Phone number extension for third-party designee	Fixed	custom text	Part 4
Designee Phone Number	Phone number for third-party designee	Fixed	custom text	Part 4
Designee PIN	5-digit Personal Identification Number to use when talking to IRS	Fixed	custom text	Part 4
Employee retention credit wages	qualified wages for the employee retention credit	Accumulator	*941 Empl Ret Cr Inc*	21, Worksheet 1 Line 3a

Export Format Field	Description	Field Source Type	Field Source	941 Box
Employer's Preparer Code	Preparer's social security number (SSN) or their preparer tax identification number (PTIN)	Fixed	custom text	Part 5
Final 941 Return Indicator	Indicates that your business has closed or you stopped paying wages	Boolean	Yes/No	Part 3
Final Wages Paid Date	Final date you paid wages. MM/DD/YYYY format. Leave blank if not applicable.	Fixed	custom text	Part 3
Health plan on family leave	qualified health plan expenses allocable to qualified family leave wages	Accumulator	*941 HP exp on FamLv*	20, Worksheet 1 Line 2f
Health plan on retention credit wages	qualified health plan expenses allocable to employee retention credit wages (wages reported on line 21)	Accumulator	*941 HP exp on EmRtCr*	22, Worksheet 1 Line 3b
Health plan on sick leave	qualified health plan expenses allocable to qualified sick leave wages	Accumulator	*941 HP exp on SickLv*	19, Worksheet 1 Line 2b
Monthly Schedule Depositor	Indicates that you were a monthly schedule depositor for the entire quarter	Boolean	Yes/ No	Part 2, Line 14
Not Subject To Tax	Indicates that you are not subject to federal taxation for the quarter	Boolean	Yes/No	Used by Greenshades only
Preferred Notification	Enter *1* for the email address or *2* for the U.S. postal service.	Fixed	custom text	
Qualified Family Leave 1	qualified family leave earning code	Earning	qualified family leave earning code	5a(ii), Worksheet 1 Line 2e
Qualified Family Leave QTD	qualified family leave wages quarter-to-date accumulator	Accumulator	*Qual Famly Lv Wg QTD*	Worksheet 1 Line 2e(i)
Qualified Sick Leave 1	qualified sick leave earning code	Earning	qualified sick leave earning code	5a(i), Worksheet 1 Line 2a

Export Format Field	Description	Field Source Type	Field Source	941 Box
Qualified Sick Leave QTD	qualified sick leave wages quarter-to-date accumulator	Accumulator	*Qual Sick Lv Wg QTD*	Worksheet 1 Line 2a(i)
Read only forms Indicator	Indicates that the form is "read only" and cannot be modified.	Boolean	Yes/No	Used by Greenshades only
Seasonal Employer Indicator	Indicates that you are a seasonal employer and do not have to file a return for every quarter of the year	Boolean	Yes/No	Part 3, Line 16
Semiweekly Schedule Depositor	Indicates that you were a semi-weekly schedule depositor for any part of the quarter	Boolean	Yes/No	Part 2, Line 14
Send a Refund	Indicates if overpayment is to be refunded back to the company	Boolean	Yes/No	Part 1, Line 13
Taxable Additional Medicare Rate	Current Additional Medicare Tax rate as defined on Form 941	Calculation code	*USA Med Add Rate*	Part 1, Line 5d
Taxable Additional Medicare Wages Tips	Taxable wages & tips subject to Additional Medicare Tax withholding	Accumulator	*941 Medicare Add QTD*	Part 1, Line 5d
Taxable Medicare Rate	Current Medicare Tax rate as defined on Form 941 (employer and employee rates combined)	Calculation code	*USA Comb Medicare Rt*	Part 1, Line 5c
Taxable Medicare Wages Tips	Taxable Medicare wages & tips	Calculation code	*941 Medicare Inc*	Part 1, Line 5c
Taxable Social Security Rate	Current social security tax rate as defined on Form 941	Calculation code	*USA Comb OASDI Rate*	Part 1, Line 5a, 5b
Taxable Social Security Tips	Taxable social security tips	Calculation code	*941 OASDI Tip Inc*	Part 1, Line 5b
Taxable Social Security Wages	Taxable social security wages	Calculation code	*941 OASDI Inc*	Part 1, Line 5a
Terminating Business Indicator	Indicates that this form is produced for an employer who is closing their business	Boolean	Yes/No	Part 3

Export Format Field	Description	Field Source Type	Field Source	941 Box
Total 941 Income Tax Withheld	Federal income tax withheld from wages, tips, and other compensation	Accumulator	*USA FIT QTD*	Part 1, Line 3
Total 941 Wages	Wages, tips, and other compensation	Calculation code	*941 Fed Tax Inc*	Part 1, Line 2

5. Select *Yes* for **Display in report?** to allow the field to appear when generated.
6. Select *Yes* for **Exclude if zero?** to prevent the field from appearing when its value is zero.
7. Save your changes and close the form.

Set up 941 Format Parameters

You can customize the file name and the location of where the 941 XML file is generated.

To set up 941 export format parameters:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *941* **Export format**.
3. Click **Setup** > **Format parameters** to open the **Format parameters** form.
4. Change any of the following parameters as desired:
    - *ZipCode*: enter the ZIP code of the person(s) responsible for filing the 941 report. This code is used by Greenshades to tailor other information to the location of the reporter.
    - *XMLFileName*: enter/modify the file name of the XML file that 941 report data is exported to. File name must have the *.xml* extension.
    - *XMLDirectory*: enter/modify the directory path location where the XML file is saved to. In a Dynamics 365 cloud environment, this parameter is not used. You use the **Download files to local network** function to retrieve the file instead.

    Do not alter any other parameters unless instructed by Anthology Inc. client support.
5. Save your changes and close the form.

Set up State Unemployment Reporting

State Unemployment reporting must be set up before the SUTA Quarterly State Unemployment report can generate the correct information. This section contains procedures for:

- setting up SUTA format fields
- setting up SUTA format parameters

The SUTA report gathers worker information from accumulators (see **Set up Accumulators** on page 20). Export format fields then determine the contents that are exported to XML format, which is then processed by third-party software (Greenshades). If you report SUTA in multiple states, you may need to duplicate the export format fields for each state. This document assumes that you have configured the necessary position filters for each state you report accordingly.

Set up SUTA Format Fields

It is strongly recommended that you begin by setting up SUTA reporting for one state only and then thoroughly test the SUTA reporting functions for that state. After verifying the setup, you can use a copy of it as the starting point for the remaining states you will be reporting in.

If you are also using Anthology Payroll to maintain local taxes, you must set up export format fields for each local tax you report. For example: *XX-local1*, *XX-local2*, etc. where *XX* is the 2-character state identifier, as well as another *Employers Assessment Rate* export format field for each instance of local taxes.

To set up SUTA format fields:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *SUTA* **Export format**.
3. Click **Setup** > **Format fields** to open the **Format fields** form.
4. Create or modify the following export format fields. Enter the **Export format field** name, **Field source type**, and **Field source** as listed in the table below, if it does not already exist (*XX* denotes the 2-character state identifier):

Export Format Field	Description	Field Source Type	Field Source
Annual W2 Local Taxes Withheld	Unemployment insurance local quarterly W-2 taxes withheld. Required only if your state requires quarterly reporting of W-2 wages.	Accumulator	custom
Annual W2 Local Wages	Unemployment insurance quarterly eligible wages. Required only if your state requires quarterly reporting of W-2 wages.	Accumulator	custom
Annual Wage Base	Annual maximum wage base for the state. This field cannot be blank.	Fixed	*XX SUI Wage Base*
Company specific statutory reporting	Indicates that you report SUTA for multiple Dynamics companies (legal entities) and wish to upload them separately to Greenshades	Boolean	Yes/No
Contact Email	Email address for company contact person	Fixed	custom text
Contact Fax	Fax number for company contact	Fixed	custom text
Contact Name	Company contact person name	Fixed	custom text
Contact Phone	Telephone number for company contact	Fixed	custom text
Contact Phone Ext	Telephone extension number for company contact, if applicable	Fixed	custom text
Contact Title	Title of company contact person	Fixed	custom text

Export Format Field	Description	Field Source Type	Field Source
Creation Date	Submission date for the SUTA. The default value is the current system date (Systemdateget() function), but you may enter an explicit date as desired (MM/DD/YYYY format).	Expression or Fixed, if desired	Systemdateget()
Default Coverage Type	Type of unemployment coverage in the state (e.g.: *U* for unemployment insurance, *W* for worker's compensation.)	Fixed	custom text
Employer's Home Country	Home country code for the company that has paid the state unemployment taxes.	Fixed	USA
Employer's Preparer Code	Preparer's social security number (SSN) or their preparer tax identification number (PTIN). Only required if a third-party is preparing the SUTA report.	Fixed	custom text
Employer's State ID Number	State-assigned employer identification.	Fixed	custom text
Employer Assessment Rate	State-assessed unemployment tax rate for the company, one for each instance of local tax.	Fixed or Calculation code	custom
Federal W2 Wages	Federal W2-taxable wages. Used to report the annual federally taxable wages. Must be specified together with a **Position filter**.	Calculation code	*W2 Fed Tax Inc*
Hourly Salary Earn Code	Earning code used to determine the worker's basic hourly wage. Must not be specified with a **Position filter**.	Earning code	*Regular* or code used for regular hourly pay
Hours Worked Accumulator	Earning hours eligible for the state unemployment tax. Required only if your state reports hours worked.	Accumulator	*XX SUI Hours*
Male Gender	Gender code used in Microsoft Dynamics AX to identify male employees	Fixed	MALE
Married Marital Status	Marital status code used in Microsoft Dynamics AX to identify married employees	Fixed	Married
Monthly SUTA Wages	Monthly SUTA wages. Used to report the monthly insurable wages for those states that require it monthly. Must be specified together with a **Position filter**.	Calculation code	*XX SUI Rpt SUI MTD*
Preferred Notification	Enter *1* for the email address or *2* for the U.S. postal service.	Fixed	custom text
Provider ID	Company provider identification assigned by the state. Required only for certain states.	Fixed	custom text

Export Format Field	Description	Field Source Type	Field Source
Quarterly SUTA Wages	Total of SUTA income and SUTA fringe benefits, less Deductions for SUTA income	Calculation code	*XX SUI RPT SUI QTD*
Quarterly Tip Income	State-specific quarterly tip income. Required only for certain states. The accumulator must be manually created.	Accumulator	custom accumulator
Quarterly W2 State Taxes Withheld	Quarterly state taxes withheld	Accumulator	*XX SIT QTD*
Quarterly W2 State Wages	Total of quarterly state income and fringe benefits, less deductions from quarterly state income. Leave this field blank for states that do not assess state tax.	Calculation code	*XX SUI RPT Tax QTD*
Quarterly Wage Base	Quarterly wage base for the state. If there is no quarterly wage base, enter the annual wage base. This field cannot be blank.	Fixed	custom numeric value
Read only forms Indicator	Indicates that the form is "read only" and cannot be modified. Used by Greenshades only.	Boolean	Yes/No
SDI Annual Wage Base	State disability insurance annual wage base. California only.	Calculation code	*CA SDI Wage Base*
SDI Tax Rate	State disability insurance tax rate. California only.	Calculation code	*CA SDI Rate*
Terminating Business Indicator	Indicates that this form is produced for an employer who is closing their business	Boolean	Yes/No
Unemployment Account Number	Company identification number assigned by the state for reporting unemployment insurance.	Fixed	custom text
Unemployment Tax Rate	State-assessed unemployment tax rate assigned to your company	Fixed or Calculation code	*XX SUI Rate*
Worker's Filing State	Two-character code for the state in which the company paid unemployment tax.	Fixed	*XX*

5. Select *Yes* for **Display in report?** to allow the field to appear when generated.
6. Select *Yes* for **Exclude if zero?** to prevent the field from appearing when its value is zero.
7. After creating/modifying the set of format fields, expand the **Fast entry** tab.
8. Select the *SUTA* **Format** and each **Position filter** corresponding to the jurisdiction you process SUTA for. Click **Insert** to duplicate the format fields for each of your jurisdictions. A message popup details the results of the operation.

9. Change any fields as required for your jurisdictions according to your configuration, such as tax rates.
10. Save your changes and close the form.

Set up SUTA Format Parameters

You can customize the file name and the location of where the SUTA XML file is generated.

To set up export format parameters:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *SUTA* **Export format**.
3. Click **Setup** > **Format parameters** to open the **Format parameters** form.
4. Change any of the following parameters as desired:
   - *ZipCode*: enter the ZIP code of the person(s) responsible for filing the SUTA report. This code is used by Greenshades to tailor other information to the location of the reporter.
   - *XMLFileName*: enter/modify the file name of the XML file that SUTA report data is exported to. File name must have the *.xml* extension. If not specified, a file name is automatically generated in the following format: *[Report name]-[Date Period Code]-[Date Period Year]-[Date Period Number]-[Date]-[Time].xml*.
   - *XMLDirectory*: enter/modify the directory path location where the XML file is saved to. In a Dynamics 365 cloud environment, this parameter is not used. You use the **Download files to local network** function to retrieve the file instead.

   Do not alter any other parameters unless instructed by Anthology Inc. client support.
5. Close the form to save your changes.

Set up W-2 Wage and Tax Statement

W-2 reporting must be set up before the W-2 Wage and Tax Statement report can generate the correct information. This section contains procedures for:

- setting up W-2 format fields
- setting up W-2 format parameters
- setting up W-2 general definitions

The W-2 report gathers worker information from accumulators (see **Set up Accumulators** on page 20). Export format fields then determine the contents that are exported to XML format, which is then processed by third-party software (Greenshades).

Set up W-2 Format Fields

Format fields for the W-2 report must be manually configured. Format fields determine the payroll data used to populate the defined fields of the XML export file. If you withhold tax in multiple jurisdictions, you must create W-2 format fields for each one, but Anthology Payroll provides a quick method to duplicate format fields.

This form is updated to the 2024 W-2 Wage and Tax Statement.

To set up export format fields:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *W-2* **Export format**.
3. Click **Setup** > **Format fields** to open the **Format fields** form.
4. Create or modify the following export format fields. Enter the **Export format field** name, **Field source type**, and **Field source** as listed in the table below, if it does not already exist (*XX* denotes the 2-character state identifier):

Export Format Field	Description	Field Source Type	Field Source	W-2 Box
Allocated Tips	Year-to-date tip income allocated to the worker	Calculation code	*W2 Allocated Tips*	Box 8
Annual FLI Wages	Annual wages for family insurance leave. Used for reporting FLI-insurable wages year-to-date. Must be specified together with a **Position filter**.	Accumulator	*XX FLI Inc YTD* or *XX FMLA Inc YTD* where *XX* is the state ID	
Annual FLI withheld	Annual family insurance leave withheld. Used for reporting FLI tax withheld year-to-date. Must be specified together with a **Position filter**.	Accumulator	*XX FLI YTD* or *XX FMLA YTD* where *XX* is the state ID	
Annual Local Tax Withheld	Year-to-date employee withholdings of local taxes. This field is not used when local tax assessments are performed by third-party provider, Symmetry Software. The **Locality name** in box 20 comes from the worker's **Worker W2 localities** form.	Accumulator or Calculation code	blank or custom	Box 19
Annual Local Wages	Year-to-date income subject to local taxes. This field is not used when local tax assessments are performed by third-party provider, Symmetry Software.	Calculation code	blank or custom	Box 18
Annual State Tax Withheld	Year-to-date employee withholdings of state taxes	Accumulator	*XX SIT YTD*	Box 17
Annual State Wages	Year-to-date income subject to state income tax	Calculation code	*XX SUI RPT TAX YTD*	Box 16

Export Format Field	Description	Field Source Type	Field Source	W-2 Box
Box12 Code	See below for information on including Box 12 and Box 14 fields.	Fixed	custom text	
Box12 Value	See below for information on including Box 12 and Box 14 fields.	Accumulator or Calculation code	custom	
Box14 Code	See below for information on including Box 12 and Box 14 fields.	Fixed	custom text	
Box14 Value	See below for information on including Box 12 and Box 14 fields.	Accumulator or Calculation code	custom	
Company specific statutory reporting	Indicates that you report W-2 for multiple Dynamics companies (legal entities) and wish to upload them separately to Greenshades	Boolean	Yes/No	
Creation Date	Submission date for the W-2. The default value is the current system date (Systemdateget() function), but you may enter an explicit date as desired (MM/DD/YYYY format).	Expression or Fixed, if desired	Systemdateget()	
Dependent Care Benefits	Year-to-date dependent care benefits that you paid to the worker or incurred on the worker's behalf	Calculation code	*W2 Dependent Care*	Box 10
Employer's Agent For EIN	Agent EIN, if employer's agent indicator code is specified	Fixed	custom text or blank	
Employer's Agent Indicator Code	Agent Indicator code, if applicable. *1* is 2678 agent approved (by IRS). *2* is Common Paymaster. If this field is specified, *Employer's Agent for EIN* must also be specified.	Fixed	custom text or blank	
Employer's Company Third Party Sick Pay Indicator	Indicates that the company is a Sick Pay employer	Boolean	Yes/No	

Export Format Field	Description	Field Source Type	Field Source	W-2 Box
Employer's Establishment Number	Used if there are multiple companies in the same file that have the same EIN. In this situation, select a 4 character code to designate between them. Enter the 4 digit code here. The default is Blank.	Fixed	custom text	
Employer's Other EIN	Indicate if another EIN has been used this year	Fixed	custom text or blank	
Employer's Preparer Code	Used when a third-party is preparing the W2's. The default is "O", which represents OTHER.	Fixed	O	
Employer's Software Vendor ID		Fixed	custom text	
Employer's State ID Number	Employer's ID number as assigned by the state. This can be various lengths depending on the state. The default is Blank.	Fixed	custom text	
Employer's W2 Home Country	Employer's country of operation	Fixed	US	
Federal Tax Withheld	Year-to-date federal tax withheld from the worker	Accumulator	*USA FIT YTD*	Box 2
Federal Wages	Year-to-date income subject to federal income tax	Calculation code	*W2 Fed Tax Inc*	Box 1
Medicare Tax Withheld	Year-to-date Medicare tax withheld from the worker	Accumulator	*W2 Medicare Ded YTD*	Box 6
Medicare Wages	Year-to-date income subject to Medicare tax	Calculation code	*W2 Medicare Inc*	Box 5
NonQualified Plan457	Annual non-qualified deferred compensation	Accumulator	*W2 NQ Plan Inc YTD*	Box 11
Read only forms Indicator	Indicates that the form is "read only" and cannot be modified. Used by Greenshades only.	Boolean	Yes/No	
Social Security Tax Withheld	Year-to-date OASDI tax withheld from the worker	Calculation code	*W2 OASDI Tax withheld*	Box 4
Social Security Tips	Year-to-date tip income subject to OASDI tax	Calculation code	*W2 Soc Sec Tips*	Box 7
Social Security Wages	Year-to-date wage income subject to OASDI tax	Calculation code	*W2 OASDI Inc*	Box 3
Terminating Business Indicator	Indicates that this form is produced for an employer who is closing their business	Boolean	Yes/No	

Export Format Field	Description	Field Source Type	Field Source	W-2 Box
Worker's Filing State	Two-letter state identifier for the worker's filing state	Fixed	custom text	Box 15

5. Select *Yes* for **Display in report?** to allow the field to appear when generated.
6. Select *Yes* for **Exclude if zero?** to prevent the field from appearing when its value is zero.
7. After creating/modifying the set of format fields, expand the **Fast entry** tab.
8. Select the *W-2* **Format** and each **Position filter** corresponding to the jurisdiction you process W-2 for. Click **Insert** to duplicate the format fields for each of your jurisdictions. A message popup details the results of the operation.
9. Change any fields as required for your jurisdictions according to your configuration, such as state identifiers.
10. Save your changes and close the form.

Box 12 and 14 Export Format Fields

Boxes 12 and 14 on the W-2 form can include multiple entries to cover a range of purposes. The values you can include in Box 12 are controlled by IRS, who specify the codes you must use to represent these values.

There are no IRS-controlled codes to assign to Box 14 (Other) items. Examples of items reported in Box 14 can include:

- state disability insurance taxes withheld
- union dues
- health insurance premiums deducted, etc.
- paid family leave premium contributions

See IRS publications on W-2 forms for more information on values to include in Box 14.

Boxes 12 and 14 require setup actions that are slightly different than other W-2 boxes. For any one value to report on the W-2, you must create two export format fields in the **Format fields** form:

- a *code* format field: indicates the label that appears in Box 12 or Box 14. Syntax is *Box 12 Code X*, where *X* is the label to print in the appropriate W-2 box. **Field source** is *X*.
- a *value* format field: indicates the actual value of the code item printed in the W-2 box. Syntax is *Box 12 Value X*, where *X* is equal to the *X* of the code format field. **Field source** is a custom accumulator or calculation that provides the value.

The following table illustrates an example of each box: IRS-controlled *Box 12 Code Z*, income under a nonqualified deferred compensation plan that fails to satisfy section 409A. and *Box 14 Union Dues*:

Format Field	Field Source type	Field Source
Box12 Code Z	Fixed	Z

Format Field	Field Source type	Field Source
Box12 Value Z	Accumulator or Calculation code	An accumulator or a calculation set up to provide the value for income under a nonqualified deferred compensation plan that fails to satisfy section 409A
Box14 Code Union Dues	Fixed	Union Dues
Box14 Value Union Dues	Accumulator or Calculation code	An accumulator or a calculation set up to provide the value for union dues paid by the worker

The following table is a reference of all current Box 12 codes current to 2024:

Code	Description
Box12 Code A	Uncollected social security or RRTA tax on tips
Box12 Code B	Uncollected Medicare tax on tips
Box12 Code C	Taxable cost of group-term life insurance over $50,000
Box12 Code D	Elective deferrals to a section 401(k) cash or deferred arrangement (plan)
Box12 Code E	Elective deferrals under a section 403(b) salary reduction agreement
Box12 Code F	Elective deferrals under a section 408(k)(6) salary reduction SEP
Box12 Code G	Elective deferrals and employer contributions (including nonelective deferrals) to any governmental or nongovernmental section 457(b) deferred compensation plan
Box12 Code H	Elective deferrals under section 501(c)(18)(D) tax-exempt organization plan
Box12 Code J	Nontaxable sick pay
Box12 Code K	20% excise tax on excess golden parachute payments (not applicable to Forms W-2AS, W-2CM, W-2GU, or W-2VI)
Box12 Code L	Substantiated employee business expense reimbursements
Box12 Code M	Uncollected social security or RRTA tax on taxable cost of group-term life insurance over $50,000 (for former employees)
Box12 Code N	Uncollected Medicare tax on taxable cost of group-term life insurance over $50,000 (for employees)
Box12 Code P	Excludable moving expense reimbursements paid directly to a member of the U.S. Armed Forces
Bo 12 Code Q	Nontaxable combat pay
Box12 Code R	Employer contributions to your Archer MSA
Box12 Code S	Employee salary reduction contributions under a section 408(p) SIMPLE plan
Box12 Code T	Adoption benefits
Box12 Code V	Income from exercise of nonstatutory stock option(s)
Box12 Code W	Employer contributions to a health savings account (HSA)
Box12 Code Y	Deferrals under a section 409A nonqualified deferred compensation plan
Box12 Code Z	Income under a nonqualified deferred compensation plan that fails to satisfy section 409A
Box12 Code AA	Designated Roth contributions under a section 401(k) plan
Box12 Code BB	Designated Roth contributions under a section 403(b) plan
Box12 Code DD	Cost of employer-sponsored health coverage
Box12 Code EE	Designated Roth contributions under a governmental section 457(b) plan
Box12 Code FF	Permitted benefits under a qualified small employer health reimbursement arrangement
Box12 Code GG	Income from qualified equity grants under section 83(i)
Box12 Code HH	Aggregate deferrals under section 83(i) elections as of the close of the calendar year

Box 14 Guidance for State Disability Insurance and Paid Family Leave

The following table contains some additional guidance on Box 14 items related to various state reporting on the W-2:

Position Filter	Format Field	Field Source type	Field Source
MA	Box14 Code MAPFML	Fixed	MA PFML
MA	Box14 Value MAPFML	Accumulator	MA FMLA YTD
NJ	Box14 Code NJSDI	Fixed	DI
NJ	Box14 Value NJSDI	Accumulator	NJ SDI YTD EE
NJ	Box14 Code NJFLI	Fixed	FLI
NJ	Box14 Value NJFLI	Accumulator	NJ FLI YTD
NY	Box14 Code NYSDI	Fixed	NY Nonoccupational Disability Fund
NY	Box14 Value NYSDI	Accumulator	NY FLI YTD

Set up W-2 Format Parameters

You can customize the file name and the location of where the W-2 XML file is generated.

To set up export format parameters:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *W-2* **Export format**.
3. Click **Setup** > **Format parameters** to open the **Format parameters** form.
4. Change any of the following parameters as desired:
   - *ZipCode*: enter the ZIP code of the person(s) responsible for filing the W-2 report. This code is used by Greenshades to tailor other information to the location of the reporter.
   - *XMLFileName*: enter/modify the file name of the XML file that W-2 report data is exported to. File name must have the *.xml* extension. If not specified, a file name is automatically generated in the following format: *[Report name]-[Date Period Code]-[Date Period Year]-[Date Period Number]-[Date]-[Time].xml*.
   - *XMLDirectory*: enter/modify the directory path location where the XML file is saved to. In a Dynamics 365 cloud environment, this parameter is not used. You use the **Download files to local network** function to retrieve the file instead.

   Do not alter any other parameters unless instructed by Anthology Inc. client support.
5. Save your changes and close the form.

Set up W-2 General Definitions

The W-2 Wage and Tax Statement report requires some additional setup for general definitions.

To set up W-2 general definitions:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Parameters** to open the **General definitions** form.
2. Enter the appropriate **String value** for the following parameters:
   - *Latest reportable W2 tax year*: latest tax year that employees can access their W-2 forms for, in the **Employee self service** workspace. Default is *2019*. To disable access, set to *0*.
3. Save your changes and close the form.

Set up Certified Payroll Projects Report

Th Certified Payroll Projects report displays information similar to that of the WH-347 payroll report for the Department of Labor, Wage and Hour Division. The purpose of this report is to allow companies to certify that they are paying workers prevailing wage rates (through cash and/or benefits) on federally funded construction projects in accordance with the Davis-Bacon Act. Some states have similar state-level legislation.

This section contains procedures for:

- setting up certified payroll projects format fields
- setting up certified payroll projects format parameters
- setting up certified payroll projects

The 941 report gathers worker information from benefit/deduction and earning groups. Export format fields then determine the contents that are exported to XML format.

If your implementation does not use projects or require this report, you can skip this section.

Set up Certified Payroll Projects Format Fields

Format fields for the Certified Payroll Projects report must be manually configured. Format fields determine the payroll data used to populate the defined fields of the XML export file.

Many of the fields derive values from custom benefit/deduction and earning groups. These groups must be set up beforehand and are specific to your implementation.

To set up WH347 format fields:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the *WH347* **Export format**.
3. Click **Setup** > **Format fields** to open the **Format fields** form.

4. Set the following export format fields. Enter the **Field source** as listed in the table below:

Export Format Field	Description	Field Source Type	Field Source
Caption Deduction Codes Part 3	Caption for deductions in column 3 (*Deduction Codes Part 3*)	Fixed	custom text
Caption Deduction Codes Part 4	Caption for deductions in column 4 (*Deduction Codes Part 4*)	Fixed	custom text
Creation Date	Date stamp on the report	Expression	Systemdateget()
Deduction Codes Part 3	Group of deductions to be included in column 3 of deductions section	Benefit/deduction group	custom ben/ded group code
Deduction Codes Part 4	Group of deductions to be included in column 4 of deductions section	Benefit/deduction group	custom ben/ded group code
FICA Deduction Codes	Group of deductions included in FICA	Benefit/deduction group	custom ben/ded group code
Overtime Hours Earn Codes	Group of earnings counted as overtime hours	Earning group	custom earning group code
Standard Hours Earn Codes	Group of earnings counted as standard hours	Earning group	custom earning group code
Withholding Tax Deduction Codes	Group of deductions included in Withholding Tax	Benefit/deduction group	custom ben/ded group code

5. Save your changes and close the form.

Set up Certified Payroll Projects Format Parameters

You can customize the file name and the location of where the Certified Payroll Projects XML file is generated.

To set up export format parameters:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *WH347* **Export format**.
3. Click **Setup** > **Format parameters** to open the **Format parameters** form.
4. Change any of the following parameters as desired:
   - *XMLFilename*: enter/modify the file name of the XML file that the WH-347 report data is exported to. File name must have the *.xml* extension.
   - *XMLDirectory*: enter/modify the directory path location where the XML file is saved to. In a Dynamics 365 cloud environment, this parameter is not used. You use the **Download files to local network** function to retrieve the file instead.
   - *Include subprojects*: set *Y* or *N* depending on whether the **Certified Payroll Projects** report summarizes results from all projects associated with each certified project ID. If set to *N*, a separate report is generated for each subproject using the same ID.

Do not alter any other parameters unless instructed by Anthology Inc. client support.

5. Save your changes and close the form.

Set up Certified Payroll Projects

To allow Anthology Payroll to identify which projects are considered certified, they must be set up in the **Project management and accounting** module. You can set up any number of certified projects.

If the selected project is a subproject, the fields on this form are ignored as this information is taken from the parent project.

To set up certified payroll projects:

1. In the navigation pane, click **Project management and accounting** module > **Projects** > **All projects** to open the **All projects** list. Select a project to certify.
2. In the ribbon, click **Anthology Payroll Profile** > **Certified Payroll Projects** to open the **Certified payroll projects** form.
3. On the **Overview** tab, create a new record.
4. On the **General** tab, enter the following fields. These fields are optional:
   - **Description**: description of the project
   - **Contract Id**: contract ID that appears on the report. If not entered, the **Project contract ID** from the project record is used. If no contract ID can be determined, the report uses the project ID instead.
   - **Address**: location information for the project that appears on the report
   - **Project role**: project role that appears on the report
   - **Active date** and **Expiry date**
5. Repeat as required for additional certified projects.
6. Save your changes and close the form.

Set up Multi-state Tax Withholdings

Provided the state withholds income tax, workers must pay tax on all earnings regardless of where they were earned. How much tax the worker pays and to which jurisdiction the payments are made depends on several factors. Someone who lives in one state and works in another may or may not be required to pay income tax to both those states, and may or may not be required to include that income in reports made to both those states. You can set up multi-state tax deductions and enable Anthology Payroll to automatically calculate them during a normal pay process.

This section contains procedures for setting up multi-state tax deductions and the workers that work in multiple states. You must set up both the multi-state scenarios you anticipate and each individual worker that operates under such tax scenarios. When multi-state taxes are set up, Anthology Payroll identifies situations where workers reside in one state and work in another. In these situations, Anthology Payroll determines whether taxes must be withheld for more than one state. Provided the state tax benefit/deduction codes are set up, all the appropriate state reporting accumulators are recalculated and the appropriate tax deductions are made for every required state.

Anthology Payroll also supports workers enrolled in reciprocal agreements between specific states.

To understand multi-state tax deductions and setting them up, this section references the following terms:

Term	Definition
Resident worker	An employee working in the state in which he or she resides.
Non-resident worker	An employee working in a state outside of the one in which he or she resides.
Business presence	A company has business presence in a state if the company provides services there. Another term for this is *nexus*. If the company chooses to withhold income taxes for employees who reside in a state in which the company provides no services, then this creates business presence and implies legal liabilities. If the company has business presence in a state, then it must withhold income tax for employees who reside there. If the company has no business presence in a state, it is not required to withhold income taxes for employees who reside there.
Reciprocal agreements	An agreement between states such that when an employee lives in one state and works in the other, taxes are withheld only in the state of residence. In these cases, taxes are not withheld and statutory reports are not filed for the state in which the work was performed. The terms of the reciprocity agreement usually require the employees to file a state form with the employer claiming their eligibility under the agreement. If the employer does not have business presence in the employee's state of residence, payroll taxes are not withheld and the employee must remit taxes directly.
Out-of-state SIT withholding credit	Some states credit their residents for state income taxes paid on out-of-state work. For example, a resident may find that income taxes are higher in the resident state than where out-of-state work was performed. In this scenario, the resident may pay the non-resident state's taxes on their out-of-state work, and then pay the difference back to their resident state.
Out-of-state SIT withholding deferral	Some states do not withhold income taxes on wages that were earned out-of-state if income tax was withheld by that other state. Some states may want these out-of-state wages included in statutory reporting whereas other states may not.

Your multi-state tax setup may require maintenance when any of the following occur:

- tax law changes
- employees change residence
- your company develops or rescinds business presence

The general process for setting up multi-state tax deductions is as follows:

1. determine requirements for multi-state tax deductions and which workers are affected
2. set up state tax options
3. set the worker's state of residence
4. assign state tax benefit/deductions and calculation variables to affected workers
5. enroll workers in reciprocal agreements, if applicable

Note*: it is recommended to test your multi-state tax deduction setup in a test environment before introducing it into your production environment.*

Determine Requirements

Before proceeding further with multi-state tax deduction setup, ensure that the following requirements are met:

- the latest Statutory Deduction Spreadsheet for United States is imported
- benefit/deduction setup is complete (see **Set up Benefit/deductions** on page 10)
- position filters are set up for each state you have business presence in (see **Set up Position Filters** on page 7)
- the general definitions for multi-state workers and tax processing are set (see **Set US Payroll General Definitions** on page 7)
- you have identified the workers that have multi-state tax requirements

Set up State Tax Options

State tax options allow you to identify the states in which you have business presence and, ultimately, the states where you withhold state income tax.

To set up state tax options:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **States** > **State tax options** to open the **State tax options** form.
2. On the **Overview** tab, set the **Business presence** option to *Yes* for every state in which you have a business presence.
3. Set the **Position filter** associated with the state for each state in which you have a business presence. This is required if you want to enable apportioning by state for accumulator values (see **Set up State Tax Benefit/deductions** on page 71).
4. If the state withholds local taxes, the **Local taxes** option is set to *Yes* automatically. Change the **Local taxes reporting period** as needed to determine how often you report local taxes to the state authority and which reporting process creates the XML file for submission to Greenshades.
5. Repeat as required for other states.
6. Save your changes and close the form.

Set Worker State of Residence

For each worker that works outside their state of residence and in a state where you have a business presence, you must set their state of residence on their worker or position record, according to your implementation. You can also take this moment to set the worker's position filter to match their state of residence.

This procedure assumes that the worker or position record has already been created (i.e. worker has already been hired).

> ***Note**: remember that settings made at the position level override those on the worker level.*

To set the worker's state of residence:

1. In the **Anthology Payroll** navigation pane, click **Common**> **Anthology Payroll workers** to open the **Anthology Payroll workers** list. Select the worker.
2. To set options on the position level, click **Anthology Payroll Profile** tab > **Positions** to open the **Worker positions** form. To set options on the worker level, click **Anthology Payroll Profile** tab > **Payroll worker** to open the **Workers** form.
3. Select the appropriate position or worker record and expand the **Maintain effective date entries** pane.
4. In the **Maintain effective date entries** pane, create a new effective-dated record of the worker or position record.
5. On the **General** tab in the **Maintain effective date entries** pane, specify the worker's **Country/region** and **State of residence**.
6. Specify the appropriate **Position filter** for the worker if necessary.
7. Specify an appropriate **Active date** for the change.
8. Save your changes and close the form.
9. Repeat for each worker with multi-state tax requirements.

> ***Note**: when you have employees working outside their state of residence , particularly if they are mobile employees, you will probably need to use a field other than **Position filter** for state unemployment accumulator eligibility. You can use **Position type** or **Position assignment type**. Typically, the employee pays state unemployment based on their usual place of work, even on wages worked elsewhere.*

Assign State Tax Benefit/deductions and Calculation Variables

For each worker who may work in a multi-state tax scenario, you must:

- ensure that the worker's benefit/deductions includes every state tax benefit deduction required for this employee’s potential multi-state tax deductions; and
- ensure that the worker’s individual state-specific calculation variables are set up to indicate the number of exemptions or allowances they are claiming for each state they have the potential to work in.

To assign state tax benefit/deductions and calculation variables, refer to your Anthology Payroll end-user manual. Benefit/deductions and calculation variables can be assigned at the worker or position level with position-level taking priority.

Enroll Workers in Reciprocal Agreements

For workers with reciprocal agreements, you must set up additional state tax options for them. This procedure assumes that you have verified the worker's application of the appropriate state form to qualify for reciprocal agreements.

To enroll a worker in a reciprocal agreement:

1. In the **Anthology Payroll** navigation pane, click **Common**> **Anthology Payroll workers** to open the **Anthology Payroll workers** list. Select the worker.
2. On the **Anthology Payroll Profile** tab, click **Payroll worker** to open the **Workers** form.
3. Click **Setup** > **State tax options** to open the **Worker state tax options** form.
4. On the **Overview** tab, create a new record.
5. On the **General** tab, specify the worker's **Country/region** and **State worked**
6. Select *Yes* in the **Reciprocity filed** field.
7. Enter the **Active date** and **Expiry date**.
8. Save your changes and close the form.
9. Repeat as required for additional workers with reciprocal agreements.

Workers with reciprocal agreements must have the state tax benefit/deductions for both of the applicable states assigned to them in the **Worker benefit deductions** form. Please refer to the *Anthology Payroll User Guide for US Localization* for procedures on assigning benefit/deductions.

Set up Multi-State Tax Apportioning

Benefit/deduction codes can be configured to update accumulator values according to an apportioned amount of the benefit or deduction based on the worker's position filter. This allows accumulators to only store the apportioned amount of deductions that reduce taxable income and taxable benefits paid by employers attributed to the state the worker worked in, if the worker worked in multiple states within a given pay period. To facilitate this, the following items must be configured or enabled:

- state tax types
- state tax benefit/deductions
- **Position filter** fields on state tax options (see **Set up State Tax Options** on page 68)
- the **Apportion by state** flag on accumulator codes
- the **Apportion by state** flag on benefit/deduction codes

Set up State Tax Types

The Statutory Deductions Spreadsheet provides two default state tax types. You can create more as needed, but at minimum, there must be at least one tax type that is associated to state income taxes and one other type that can represent other deductions that impact taxable income and are also subject to apportioning, but are not state income taxes.

To set up state tax types:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **States** > **State tax types** to open the **State tax types** form.
2. Select the **State tax type** corresponding to state taxes that are affected by multi-state tax configuration and are to be apportioned by state (i.e.: *State Tax*)
3. Set the **State tax** field to *Yes*.
4. Select the other **State tax type** corresponding to other deductions that impact taxable income and are also subject to apportioning (i.e.: *Additional Tax*). Alternatively, you can create another state tax type as desired.
5. Set the **State tax** field to *No*.
6. Save your changes and close the form.

Set up State Tax Benefit/deductions

State tax benefit/deductions allow you to identify which benefit/deduction codes correspond to the state income tax deduction for a particular state. Generally, these codes are defined by the software provider and delivered via the Statutory Deductions Spreadsheet, so do not require additional configuration. However, if you have other benefits that contribute to taxable income or fringe benefits that are subject to apportioning by state, they must be associated to the state with a record on this form. This must be done for each state with these additional benefit/deduction codes.

To set up state tax benefit/deductions:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **States** > **State tax benefit/deductions** to open the **State tax benefit/deductions** form.
2. Ensure that the state income taxes for states in which you have a business presence are configured with a corresponding entry on this form associated to the state income tax **Benefit/deduction** code and corresponding **State**.
3. If you have other benefits that contribute to taxable income or are subject to apportioning by state, create a new record on this form. Set the **State** applicable and select the **Benefit/deduction** code.
4. Set the **State tax type** field to the tax type that is not a state tax configured in the previous section (see **Set up State Tax Types** on page 70).
5. Save your changes and close the form.

Set up Accumulators and Benefit/deductions for Apportioning

All accumulator codes and benefit/deduction codes applicable to the taxable income and fringe benefits for the states in which you have a business presence must have the **Apportion by state** flag enabled on them in order for apportioning to be turned on when the accumulators store their values.

To set up accumulators and benefit/deductions for apportioning:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Accumulators** > **Accumulators** to open the **Accumulators** form.
2. For each **Accumulator** applicable to taxable income and fringe benefits for states in which you have a business presence, set the **Apportion by state** field to *Yes*.
3. Save your changes and close the form.
4. Click **Setup** > **Tables** > **Benefit/deductions** > **Benefit/deductions** to open the **Benefit/deductions** form.
5. For each **Benefit/deduction** deducting for the states in you have a business presence and are subject to apportioning by state, set the **Apportion by state** field to *Yes*.
6. Save your changes and close the form.

Set up Local Taxes

Anthology Payroll supports automatic calculation of local taxes in any given state where there are local taxes. Local taxes for each individual worker are determined by the worker's residence address and work address.

Anthology Inc. has partnered with a tax calculation engine to obtain the correct local taxes for a given locality. This service is provided by Symmetry Software. The general process for calculating local taxes is:

1. Anthology Payroll contacts the tax calculation web service with the worker's addresses.
2. The web service responds with the local taxes applicable to that worker.
3. Anthology Payroll automatically creates and schedules the tax deduction for the current pay period.

The above process is completed once per pay period through the **Local taxes assessment** procedure. Please refer to the *Anthology Payroll User Guide for US Localization QuickStart* for detailed steps on assessing local taxes each pay period. The local tax assessment procedure automatically creates the following objects when local taxes are detected as applicable for workers:

- benefit/deduction codes for the local taxes applicable
- benefit/deduction group benefit/deduction associations for the *US Local Taxes* benefit/deduction group
- earning groups for the local taxable earnings for each state assessed. The earning group names are *XX Local Taxable Inc*, where *XX* is the 2-character state identifier.
- earning group earnings associations for the local taxable earnings groups. Eligible earnings are based on the state's taxable earnings accumulator.
- local tax type rule group records
- local tax codes
- worker benefit/deduction schedules for each local tax and each worker in the current pay period
- worker benefit/deduction schedule local tax records

Much of the local tax configuration is automated; however, some initial setup and maintenance is still required. The following procedures detail the initial setup for Anthology Payroll to automatically contact the tax calculation engine to obtain the latest local tax rates on each assessment. Alternatively, these rates may be maintained manually.

Set Local Tax General Definitions

Some general definitions must be set to control how Anthology Payroll updates and processes US local taxes for workers.

To set local tax general definitions:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Parameters** to open the **General definitions** form.
2. Set the **String values** for the following **General definition codes**:
    - *Local taxes benefit/deduction group*: name of benefit/deduction group containing all automatically generated local tax benefit/deduction codes. The default group is *US Local Taxes* and is automatically created during installation of the US localization.
    - *Tax lookup engine name*: service provider for local tax rates lookup. Do not change.
    - *Tax lookup engine option*: select *Yes* to enable automatic lookup of local tax rates when local taxes are calculated. Select *No* to enable manual maintenance of local tax rates.
    - *Tax lookup engine web service URL address*: service provider URL for local tax rates lookup. Do not change.
    - *Work location address type*: corresponding **Address type** field on the **Location addresses** form that identifies the worker's workplace address. Default is *Work*.
    - *Local taxes taxable income*: name of earning group containing all earnings that are taxable by local taxes. If no group is set or earning group is invalid, all earnings are considered taxable.
    - *Local taxes additions to income amount used*: select *Full amount* to apply the full amount of additions to income for calculating taxable income for local taxes. Select *Apportion* to apply an apportioned amount of additions to income for calculating taxable income for local taxes due to different amounts of income applicable to different local taxes. Default is *Full amount*. Can be overridden at the benefit/deduction group level.
    - *Local taxes deductions from income amount used*: select *Full amount* to apply the full amount of deductions from income for calculating taxable income for local taxes. Select *Apportion* to apply an apportioned amount of deductions from income for calculating taxable income for local taxes due to different amounts of income applicable to different local taxes. Default is *Full amount*. Can be overridden at the benefit/deduction group level.
    - *Local taxes exemption amount used*: select *Full amount* to apply the full amount of exemptions when calculating taxable income for local taxes. Select *Apportion* to apply an apportioned amount of exemptions for calculating taxable income for local taxes due to different amounts of income applicable to different local taxes. Default is *Full amount*. Can be overridden at the benefit/deduction group level.
3. Save your changes and close the form.

Set Apportioning for Benefit/deductions

Benefit/deduction transactions that reduce or increase taxable income can be configured for apportioning when calculating local taxes. This is to accommodate the scenario where a worker may have earnings that are partially subject to one local tax and partially subject to another in the same pay period. If that worker's payment includes a deduction that reduces their taxable income, that reduction should be apportioned according to the amount of earnings subject to each local tax when calculating the amount of local taxes to be withheld.

For example, a worker has $1000 of regular wages on the payment, but only $200 are subject to Township A's local tax (20% of the earnings) and $800 to Township B's local tax (80% of the earnings), while all $1000 are subject to School district C's local tax. If those earnings are paid in a payment that includes a $200 pension contribution that reduces taxable income, two options are available to calculate the taxable income for local taxes.

Use the full amount of the benefit/deduction (default behavior):

- Township A: $200 - $200 = no taxable income
- Township B: $800 - $200 = $600 taxable income
- School District C: 1000 - $200 = $800 taxable income

Use an apportioned amount of the benefit/deduction:

- Township A: $200 - ($200 * 20%) = $160 taxable income
- Township B: $800 - ($200 * 80%) = $640 taxable income
- School District C: $1000 - ($200 * 100%) = $800 taxable income

The option for apportioning can be set in the **General definitions** form for the whole Dynamics company or can be set at the benefit/deduction group level. The option set at the benefit/deduction group level overrides the setting at the general definitions level. Apportioning can only be set on benefit/deductions that are used in calculating local taxes.

To set apportioning for benefit/deductions:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Benefit/deductions** > **Benefit/deduction group benefit/deductions** to open the **Benefit/deduction group benefit/deductions** form.
2. On the **Overview** tab, locate the **Benefit/deduction** to apportion and the **Benefit/deduction group** used in local tax calculations.
3. Specify the *Apportion* option for **Amount used** to set apportioning on the benefit/deduction code.
4. Repeat as required for additional benefit/deductions.
5. Save your changes and close the form.

Set up Location Addresses

If your implementation of Anthology Payroll uses locations (e.g.: physical office locations), the addresses for these locations must be correctly entered to enable accurate retrieval of the local taxes applicable.

Locations are specified on the worker's position and the addresses are used to obtain the local taxes applicable to the worker who works in that location.

If your implementation does not use locations (i.e.: using tasks, projects, etc.) or you have already set up locations and their addresses as part of your implementation, you can skip this section.

To set up location addresses:

- In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Organization** > **Locations** to open the **Locations** form.
- On the **Overview** tab, create a new record. Enter the **Location** name and **Location description**. The **Short code** defaults to the first five characters of the name. If locations have already been created, select the location to update.
- With the location selected, click **Setup** > **Addresses** to open the **Location addresses** form.
- On the **Overview** tab, create a new record.
- Specify the **Address type**. This type must correspond to the *Work location address type* **General definition** set in the previous section (see **Set Local Tax General Definitions** on page 73). Default is *Work*.
- Enter the address for this location in the fields in the **Location address** section. Ensure that the address is accurate and all fields are specified (**Street**, **County**, **ZIP**, etc.).
- Save your changes and close the form.
- Repeat for additional locations.

Set up Project Addresses

If your implementation of Anthology Payroll uses projects that are tied to physical locations, you may set addresses for individual projects to enable accurate retrieval of the local taxes applicable to them when workers work a project. Addresses can be associated to a project group or an individual project. If addresses are set on both, the address at the project level overrides the project group.

If your implementation does not use projects (i.e.: using tasks, locations, etc.) or you have already set up projects and their addresses as part of your implementation, you can skip this section.

To set up project addresses:

1. In the navigation pane, click **Project management and accounting** > **Projects** > **All projects** to open the **All projects** list. Double-click a project to open the **Projects** form.
2. On the **Projects** form, click **Edit** to enable editing.
3. Enter the address for this project in the fields in the **United States work address** section. Ensure that the address is accurate and all fields are specified (**Street**, **City**, **ZIP**, etc.).
4. Save your changes and close the form.
5. Repeat for additional projects.

To set up addresses at the project group level:

1. In the **Project management and accounting** navigation pane, click **Setup** > **Posting** > **Project groups** to open the **Project groups** form.
2. On the **Project groups** form, select the project group to add an address to.
3. Enter the address for this project in the fields in the **United States work address** section. Ensure that the address is accurate and all fields are specified (**Street**, **City**, **ZIP**, etc.).
4. Save your changes and close the form.
5. Repeat for additional projects.

Set up Task Addresses

If your implementation of Anthology Payroll uses tasks that are tied to physical locations, you may set addresses for individual tasks to enable accurate retrieval of the local taxes applicable to them when workers work a task. Addresses at the task level override all other work addresses at other levels (projects, project groups, locations, etc.).

If your implementation does not use tasks (i.e.: using locations, projects, etc.) or you have already set up tasks and their addresses as part of your implementation, you can skip this section.

To set up task addresses:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Organization** > **Tasks** to open the **Tasks** form.
2. On the **Overview** tab, create a new record. Enter the **Task** name and **Task description**. The **Short code** defaults to the first five characters of the name. If tasks have already been created, select the task to update.
3. Enter the address for this task in the **United States work address** section. Ensure that the address is accurate and all fields are specified (**Street**, **City**, **ZIP**, etc.).
4. Save your changes and close the form.
5. Repeat for additional locations.

Configure Pennsylvania Worksites

Worksites

Worksites are a list of unique work addresses. Pennsylvania local tax reporting requires worksite-related information for PA worksites and any non-PA worksites of PA residents. Worksite records are created automatically by local tax assessments and the creation of local tax adjustment records. If your work addresses are derived from, for example, locations on worker position records, you may have a very limited and static list of worksites. If you have employees working from home or working at a dynamic list of project addresses, you will have a larger list and potentially more new entries each month.

The Local tax listing reports and local tax filing process for Pennsylvania generates exceptions if a new work address has been used that has not been configured in the Worksite setup table. You must do this setup before filing your PA local tax report.

Set up a default EEO Unit number for new worksites

If all or most of the worksites that you report share and EEO Unit Number, record the default value, so that any new worksites that get created receive that value by default. That value can be changed if it does not apply.

1. Click Anthology Payroll for Anthology Finance & HCM > Setup > Tables > Payroll > Forms > Formats
2. In the Formats form, select “Local Taxes,” and, from the Setup menu above the list, select Format fields.
3. Find the “EEO Unit Number” for and enter the default value. Close the form.

Manage worksites

To access your list of worksites, click Anthology Payroll for Anthology Finance & HCM > Periodic > Other > Worksites

If you have run a local tax assessment for Pennsylvania workers and/or worksites, a list of addresses appears.

For each worksite address that you report, provide

- Worksite (must be unique)
- EEO Unit number
- PSD Code (PA addresses only)
- County (optional)
- Telephone number (optional)

If addresses that you must report are missing from the list, you can add them manually by selecting New on this form or importing them with the AthPay Worksite data entity.

If you have multiple variations of address that describe a single worksite, find the one that uses the standard version of the address that you want to report and give it a Worksite identifier. For all the rows with non-standard versions of that address, fill in the “Override Worksite” field with that Worksite identifier. This Override instructs the report to redirect transactions associated with the non-standard address to instead be reported under the Worksite that uses the standard version of the address.

Worksites field	Description	Instructions
Worksite	Unique identifier for each address.	Editable, must be unique when not blank. Ensure that each worksite in Pennsylvania and each worksite outside Pennsylvania that residents of Pennsylvania work at have a worksite row with a value in this field. If you change an existing value that has already been used in filings, you may need to contact the jurisdiction to correct previous filings"
Street Address	Concatenation of street address fields, excluding city, county, state and zip fields	Not editable
City name		Not editable
State name		Not editable
Zip		Not editable
County name	As reported in Local Tax Request Response	
PSD code	As reported in Local Tax Request Response	6 digits, if populated
Telephone number		Optional
EEO unit number		
Creation Date	The date that this worksite record was created.	Not editable, but sorting or filtering by this value will help you find newly-created records.
Override Worksite	Another worksite that will be used to report transactions at this address. This is our mechanism to reroute addresses that mean the same thing but have cosmetic differences. For example, these two addresses refer to the same place. The client should be able to configure the system so that instead of having 2 worksites reported, or needing clients to override a pile of addresses that didn't follow the standard address format, the client can redirect worksites that crop up from non-standard variations on the correct address to get reported as the standard worksite. 123 Main St., Suite 200 #200 123 Main St.	It must be another Worksite If this record has a Worksite ID, and a user adds an Override worksite, pop up a message warning. "If Worksite ID [this Worksite] has already been used in filings, you may need to contact the jurisdiction to correct previous filings."

When you generate local tax listing reports as described in the user guide, the work addresses associated with the transactions that are included in the report will be listed at the end of the report, with their worksite identifier. Exceptions will be listed for any addresses that have neither a Worksite identifier nor an Override worksite.
Similarly, when you generate local tax XML filings, exceptions will be generated for any addresses that have neither a Worksite identifier nor an Override worksite.

Handling Exceptions

When running a local tax listing report or generating a filing for Pennsylvania, if a transaction involves a work address that lacks a worksite or is not configured, an exception message will indicate the need for a worksite record. Ensure that the address cited in any exception has a row in the Worksites list, and that that row either has an Override Worksite to refer to the standard form of the address that should be reported, or has the full worksite information required for a filing to that Pennsylvania jurisdiction.

Import and Export data entity for Worksite records

The AthPay Worksite data entity will export and import Worksite records.

> ***Note**: Pennsylvania local tax filings summarize transactions by worksite. Exceptions will be listed for any addresses that have neither a Worksite identifier nor an Override worksite. Use the Worksites form (Anthology Payroll > Periodic > Other > Worksites) to manage your worksite reporting.*

Set up Local Tax Type Rule Groups

Local tax type rule groups control how the different types of local tax are calculated from applicable earnings. On this form, you may define the earning groups containing the earning codes that are taxable by local taxes for that county, municipality, or school district. Anthology Payroll sets up these rule groups with a default earning group, but you can control various options with how the local taxes are to be calculated.

You may also set up accounting information for local taxes that your organization withholds. These are default accounts that can be overridden at a lower level.

To set up local tax type rule groups:

1. In the **Anthology Payroll** navigation pane, click **Setup**> **Tables** > **Local taxes** > **Local tax type rule groups** to open the **Local tax type rule groups** form.
2. On the **Overview** tab, select the **Local tax type rule group** that is applicable to your implementation.
3. On the **General** tab, verify that the **Income earnings** field contains the earning group containing the earnings that are taxable by the selected local tax.

4. Set any of the following as desired for **Benefit/deduction defaults**:
   - **DR employer ledger account**: debit account for employer-paid amount for the deduction
   - **CR employer ledger account**: credit account for employer-paid amount for the deduction
   - **Employer AP vendor**: account payable vendor account for employer-paid amount for the deduction.
   - **Employer apportioning basis:** The dimensions of postings to the General ledger are derived from:
     - **All earnings**: Apportion this benefit/deduction's employer postings according to the dimension sets of all the earning transactions associated with the same payment as this transaction
     - **Selected earning:** Apportion this benefit/deduction's employer postings according to the dimension sets on the earning transactions in the selected earning group that are associated with the same payment as this transaction.
     - **Related Position:** Assign this benefit/deduction's employer postings the dimension set associated with either:
       - if the benefit/deduction is assigned at the worker position level, then that position
       - if the benefit/deduction is assigned at the worker level, then the worker's primary position as of the pay period end date for this transaction
     - **All positions:** Apportion this benefit/deduction's employer postings according to the dimension sets of all positions assigned to the worker during the pay period of this transaction.
   - **Earnings for employer apportioning**

     Note: This field is active only when 'Employer apportioning basis' is set to 'Selected earnings.' In this case, the user must choose one earning group. If the user attempts to save the record without selecting an earning group, a warning message is displayed stating, 'When the 'Employer apportioning basis' is 'Selected earnings,' 'Earnings for employer apportioning' cannot be empty' and prevents user from saving the record.
   - **DR worker ledger account**: debit account for worker-paid amount for the deduction
   - **CR worker ledger account:** credit account for worker-paid amount for the deduction
   - **Worker AP vendor**: accounts payable vendor account for worker-paid amount for the deduction
   - **Worker apportioning basis** the dimensions of postings to the General ledger are derived from:
     - **All earnings**: Apportion this benefit/deduction's worker postings according to the dimension sets of all the earning transactions associated with the same payment as this transaction
     - **Selected earning:** Apportion this benefit/deduction's worker postings according to the dimension sets on the earning transactions in the selected earning group that are associated with the same payment as this transaction

- **Related Position:** Assign this benefit/deduction's worker postings the dimension set associated with either:
    - if the benefit/deduction is assigned at the worker position level, then that position
    - if the benefit/deduction is assigned at the worker level, then the worker's primary position as of the pay period end date for this transaction
- **All positions:** Apportion this benefit/deduction's worker postings according to the dimension sets of all positions assigned to the worker during the pay period of this transaction.

- **Earnings for worker apportioning**

  Note: This field is active only when 'Employer apportioning basis' is set to 'Selected earnings.' In this case, the user must choose one earning group. If the user attempts to save the record without selecting an earning group, a warning message is displayed stating, 'When the 'Employer apportioning basis' is 'Selected earnings,' 'Earnings for employer apportioning' cannot be empty' and prevents user from saving the record.
- **Effective Date**
    - **Active Date**
    - **Expiry Date**

5. Repeat as required for additional local tax type rule groups.
6. Save your changes and close the form.

Set up Local Tax Earning Groups

The local tax assessment process relies on various earning groups for each state that has local taxes to determine the taxable income. These earning groups are created automatically during the assessment process, but you still need to add earnings to the groups to define taxable income; otherwise, the local taxes assessed will always be zero.

These earning groups are referenced by the **Local tax type rule groups** form (see **Set up Local Tax Type Rule Groups** on page 79) on the **Income earnings** field.

To add earnings to local tax earning groups:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Earnings** > **Earning groups** to open the **Earning groups** form.
2. On the **Overview** tab, select the *XX Local Taxable Inc* **Earning group** where *XX* is the 2-character state identifier of the state where you are withholding local taxes. If this earning group does not exist, it must be created.
3. On the **Earning group earnings** tab, add earnings to the group that represent taxable income for withholding local taxes in *XX* state.
4. Save your changes and close the form.

Set up Local Taxes Reporting

Local tax reporting must be set up before the monthly, quarterly, or year-end local taxes report can generate the correct information. This section contains procedures for:

- setting up local tax format fields
- setting up local tax parameters
- setting local tax reporting options
- setting local tax reporting period

The local tax report gathers worker information from accumulators (see **Set up Accumulators** on page 20). Export format fields then determine the contents that are exported to XML format, which is then processed by third-party software (Greenshades). If you report local taxes in multiple states, you may need to duplicate the export format fields for each state. This document assumes that you have configured the necessary position filters for each state you report accordingly.

Set up Local Taxes Format Fields

Format fields for the local taxes report must be manually configured. Format fields determine the payroll data used to populate the defined fields of the XML export file.

It is strongly recommended that you begin by setting up local tax reporting for one state only and then thoroughly test the local tax reporting functions for that state. After verifying the setup, you can use a copy of it as the starting point for the remaining states you will be reporting in.

To set up local tax report format fields:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the *Local Taxes* **Export format**.
3. Click **Setup** > **Format fields** to open the **Format fields** form.
4. Create or modify the following export format fields. Enter the **Export format field** name, **Field source type**, and **Field source** as listed in the table below, if it does not already exist (*XX* denotes the 2-character state identifier):

5.

Export Format Field	Description	Field Source Type	Field Source
Contact Email	Email address for company contact person	Fixed	custom text
Contact Fax	Fax number for company contact	Fixed	custom text
Contact Name	Company contact person name	Fixed	custom text
Contact Phone	Telephone number for company contact	Fixed	custom text
Contact Phone Ext	Telephone extension number for company contact, if applicable	Fixed	custom text
Contact Title	Title of company contact person	Fixed	custom text
Creation Date	Submission date for the local tax report. The default value is the current system date (Systemdateget() function), but you may enter an explicit date as desired (MM/DD/YYYY format).	Expression or Fixed, if desired	Systemdateget()
Employer PSD Code	Political sub-division code (6-digit number). Can be overridden at local tax level.	Fixed	custom text
Employer's Preparer Code	Preparer's social security number (SSN) or their preparer tax identification number (PTIN)	Fixed	custom text
Local Tax Employer ID Number	Employer's ID number for reporting local taxes	Fixed	custom text
Preferred Notification	Enter *1* for the email address or *2* for the U.S. postal service.	Fixed	custom text

6. After creating/modifying the set of format fields, expand the **Fast entry** tab.
7. Select the *Local Taxes* **Format** and each **Position filter** corresponding to the jurisdiction you process local taxes for. Click **Insert** to duplicate the format fields for each of your jurisdictions. A message popup details the results of the operation.
8. Change any fields as required for your jurisdictions according to your configuration.
9. Save your changes and close the form.

Set up Local Taxes Format Parameters

You can customize the file name and the location of where the local taxes XML file is generated.

To set up export format parameters:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *Local Taxes* **Export format**.
3. Click **Setup** > **Format parameters** to open the **Format parameters** form.

4. Change any of the following parameters as desired:
   - *XMLFilename*: enter/modify the file name of the XML file that local taxes report data is exported to. File name must have the *.xml* extension. If not specified, a file name is automatically generated in the following format: *[Report name]-[Date Period Code]-[Date Period Year]-[Date Period Number]-[Date]-[Time].xml*.
   - *XMLDirectory*: enter/modify the directory path location where the XML file is saved to. In a Dynamics 365 cloud environment, this parameter is not used. You use the **Download files to local network** function to retrieve the file instead.
5. Save your changes and close the form.

Set Local Tax Reporting Options

You can set your organization's employer ID number and PSD code for each local tax you report. If these options are not set, the local taxes report uses the value set in the *Local Taxes* export format fields form (see **Set up Local Taxes Format Fields** on page 81). These are optional.

If the PSD code is entered, it is always used when local tax reports are run. If the PSD is not entered (and is not entered in the export format fields), it must be set in your locality settings in Greenshades.

To set local taxes reporting options:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Local taxes** > **Local taxes** to open the **Local taxes** form.
2. On the **Overview** tab, locate and select the **Local tax** to set options for.
3. On the **General** tab, enter a **Local tax employer ID number** and/or **Local tax PSD code**, as applicable.
4. Repeat as required for other local tax codes.
5. Save your changes and close the form.

Set Local Taxes Reporting Period

You can configure the reporting period for each state to determine which local tax reporting process (i.e.: monthly, quarterly, yearly) will process the state's local taxes for submission to Greenshades. By default, the reporting period is *Quarterly*.

State tax options setup is covered in **Set up State Tax Options** on page 68.

Set up Garnishments

Certain benefit/deduction codes can be configured as garnishment deductions and have properties set for how they are calculated according to federal or state legislation. This requires the additional setup of garnishment types and sub-types, which are a classification of deductions that provide additional calculation processing information for those benefit/deduction codes that are identified as garnishments.

The United States Statutory Deductions Spreadsheet contains a set of garnishment types and sub-types that are pre-configured to withhold federal and state tax levies, child support, and creditor garnishments according to CCPa limits.

If your implementation does not include US garnishment withholding, you can skip this section.

Garnishment setup involves the following:

- set up garnishment sub-types
- set up garnishment types

Set up Benefit/deduction Groups for Garnishments

Benefit/deduction groups can be associated with garnishment types so that when assigning a garnishment type to workers, only those benefit/deduction codes that belong to the group associated with the garnishment type can be selected. All benefit/deduction codes added to a benefit/deduction group for the purposes of garnishment should be marked as garnishment benefit/deductions (see **Set Benefit/deduction Code as a Garnishment** on page 1).

It is up to the implementation requirements to determine how many groups are needed and which benefit/deduction codes are added to which groups. Benefit/deductions may belong to multiple groups that are associated with garnishment types.

For the procedure to setting up new benefit/deduction groups, see **Add Benefit/deduction Groups** on page 18. You can set up groups for specific garnishment types (e.g.: *Child Support*) or more generically for multiple garnishment types (e.g.: *US Garnishments*).

Set up Garnishment Sub-types

Garnishment sub-types refer to specific garnishment codes that have individual characteristics on how much of the worker's disposable earnings can be garnished, minimum protected income amount and so on. Sub-types must be associated with a garnishment type (e.g.: child support, state or federal levy, student loan repayment), but can have different parameters depending on certain factors, such as a normal child support garnishment versus a child support garnishment in arrears.

Garnishment sub-types must be set up before garnishment types as sub-types are associated with garnishment types on the **Garnishment types** form.

To set up garnishment sub-types:

1. In the navigation pane, click **Setup** > **Tables** > **Garnishments** > **Garnishment sub-types** to open the **Garnishment sub-types** form.
2. On the **Overview** tab, create a new record.
3. On the **General** tab, enter the **Garnishment sub-type** name and **Description**. The **Short code** defaults to the first five characters of the type name.
4. Set any of the following attributes as applicable to garnishments of this sub-type. These attributes override those at the garnishment type level:
    - **Min income type**: select whether the worker's weekly protected disposable income is based on the *Federal hourly rate* or a manually entered flat *Amount*. If *Federal hourly rate*, Anthology Payroll uses the *USA Fed Min Hrly Rte* calculation rate provided in the US Statutory Deductions Spreadsheet. Some states have a flat rate or a different state minimum wage for calculating the worker's weekly protected earnings.
    - **Min federal hourly rate factor**: the multiplication factor used to determine the worker's weekly protected net income. This factor is multiplied against the **Min income type rate** to obtain the amount of weekly protected net income. All income above this amount is subject to garnishment. This rate factor is typically *30*.
    - **Min weekly income amount**: if **Min income type** is *Amount*, specify a flat amount for the worker's weekly protected net income.
    - **Max %**: the maximum percentage of disposable income that can be garnished per payment. This is typically *50* for federal levies and child support, and 25 for state-level garnishments.
5. Enter an **Active date** and **Expiry date** as applicable. These dates are not the active and end dates for the worker's garnishment, but of the garnishment sub-type code.
6. Save your changes and close the form.

Set up Garnishment Types

Garnishment types are blanket garnishment codes that can be linked to a benefit/deduction code, such as *Child Support* or *Federal Tax Levy*. Workers may have multiple garnishments against a particular garnishment type, such as multiple child support orders. Garnishment types can be configured with the following attributes:

- the minimum wage rate used to determine the worker's weekly protected disposable income
- the multiplication factor used to determine the worker's weekly protected disposable income
- a flat amount for the worker's weekly protected disposable income
- a maximum percentage of disposable income that can be garnished per payment

The United States Statutory Deductions Spreadsheet contains a set of garnishment types pre-configured to withhold federal and state tax levies, child support, and creditor garnishments according to CCPa limits. You only need to set up garnishment types for new garnishments that do not already exist and you require to withhold for workers in your jurisdiction. If you have set up a new garnishment sub-type, you must associate it with an existing or new garnishment type.

To set up garnishment types:

1. In the navigation pane, click **Setup** > **Tables** > **Garnishments** > **Garnishment types** to open the **Garnishment types** form.
2. On the **Overview** tab, create a new record.
3. On the **General** tab, enter the **Garnishment type** name and **Description**. The **Short code** defaults to the first five characters of the type name.
4. Set any of the following attributes as applicable to garnishments of this type. These attributes can be overridden at the sub-type level:
    - **Min income type**: select whether the worker's weekly protected disposable income is based on the *Federal hourly rate* or a manually entered flat *Amount*. If *Federal hourly rate*, Anthology Payroll uses the *USA Fed Min Hrly Rte* calculation rate provided in the US Statutory Deductions Spreadsheet. Some states have a flat rate or a different state minimum wage for calculating the worker's weekly protected earnings.
    - **Min federal hourly rate factor**: the multiplication factor used to determine the worker's weekly protected net income. This factor is multiplied against the **Min income type rate** to obtain the amount of weekly protected net income. All income above this amount is subject to garnishment. This rate factor is typically *30*.
    - **Min weekly income amount**: if **Min income type** is *Amount*, specify a flat amount for the worker's weekly protected net income.
    - **Max %**: the maximum percentage of disposable income that can be garnished per payment. This is typically *50* for federal levies and child support, and 25 for state-level garnishments.
5. Specify a **Benefit/deduction group** to associate this garnishment type with. When this garnishment type is assigned to workers, only benefit/deductions that are part of this group can be selected as the code that appears on the worker's pay statement.
6. Enter an **Active date** and **Expiry date** as applicable. These dates are not the active and end dates for the worker's garnishment, but of the garnishment type code.
7. Save your changes and close the form.

To add garnishment sub-types to a garnishment type:

1. In the navigation pane, click **Setup** > **Tables** > **Garnishments** > **Garnishment types** to open the **Garnishment types** form.
2. On the **Overview** tab, select the **Garnishment type** to add sub-types to.
3. On the **Garnishment sub-type selections** tab, add any garnishment sub-types to this garnishment type as applicable. Garnishment sub-types indicate specific garnishments that are assigned to workers.
4. Save your changes and close the form.

Set up HR Employee Self-Service

Anthology Payroll allows workers to view their own pay statement information from their Human Resources Employee Self-Service workspace. This requires the employee to have their Office 365 user account associated to a worker in Dynamics 365 and the appropriate security role for viewing pay statements.

This procedure assumes that the worker is already configured with an Office 365 account that is synchronized with Dynamics 365.

To set up employee self-service for viewing pay statements:

1. In the **System Administration** navigation pane, click **Users** > **Users** to open the **Users** list.
2. Click the **User ID** of the user to configure for self-service pay statements to open their **Users** form.
3. In the **Person** field in the **User details** section, locate and assign the worker record that corresponds to the user account if it is not already set.
4. In the **User's roles** section, click **Assign roles** to open the **Assign roles to user** pane.
5. Select the *Anthology Payroll employee self service* role. Click **OK** to assign it to the user.
6. Save your changes and close the form.

Set up Pay Statement Exporting

Worker pay statements in the US localization of Anthology Payroll can be viewed online at Greenshades Online (GSO). The pay statements are exported as an XML file and imported to GSO using the Greenshades Sync Server. Workers can then log in to greenshadesonline.com with their company-provided credentials and view their own pay statements.

The pay statement XML export file is created from Anthology Payroll in the same way as other XML export files for reporting, such as the W-2 and SUTA reports. As such, it has its own export format and some options that can be configured for it. These include:

- setting up pay statement format fields
- setting up pay statement format parameters

Set up Pay Statement Format Fields

Format fields for the pay statement export can manually configured to determine which benefit/deduction codes appear in the **Tax Codes** section of the pay statement when viewed in GSO.

While a default number of two of each type of tax code (Federal, Local, State) are created at implementation time, additional fields can be created if you wish to display more tax codes. Additional fields must follow the same consistent formatting and naming convention of the existing fields.

To set up the pay statement format fields:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.
2. On the **Overview** tab, select the appropriate *PayStmts* **Export format**.

3. Click **Setup** > **Format fields** to open the **Format fields** form.
4. Create or modify the following export format fields. Enter the **Export format field** name, **Field source type**, and **Field source** as listed in the table below, if it does not already exist:

Export Format Field	Description	Field Source Type	Field Source
Creation Date	File creation date for the export. The default value is the current system date.	Expression	systemdateget()
Federal Payroll Tax Codes 1	Federal deductions to be included in the tax codes list section in the pay statement. To add more to the list, create additional rows where X is the next consecutive integer.	Benefit/ deduction group	benefit/ deduction code
Federal Payroll Tax Codes 2		Benefit/ deduction group	benefit/ deduction code
Federal Payroll Tax Codes X		Benefit/ deduction group	benefit/ deduction code
Local Payroll Tax Codes 1	Local deductions to be included in the tax codes list section in the pay statement. To add more to the list, create additional rows where X is the next consecutive integer.	Benefit/ deduction group	benefit/ deduction code
Local Payroll Tax Codes 2		Benefit/ deduction group	benefit/ deduction code
Local Payroll Tax Codes X		Benefit/ deduction group	benefit/ deduction code
State Payroll Tax Codes 1	State deductions to be included in the tax codes list section in the pay statement. To add more to the list, create additional rows where X is the next consecutive integer.	Benefit/ deduction group	benefit/ deduction code
State Payroll Tax Codes 3		Benefit/ deduction group	benefit/ deduction code
State Payroll Tax Codes X		Benefit/ deduction group	benefit/ deduction code

5. Select *Yes* for **Display in report?** to allow the field to appear when generated.
6. Select *Yes* for **Exclude if zero?** to prevent the field from appearing when its value is zero.
7. Save your changes and close the form.

Set up Pay Statement Format Parameters

You can customize the file name and the location of where the pay statement XML file is generated.

To set up pay statement format parameters:

1. In the **Anthology Payroll** navigation pane, click **Setup** > **Tables** > **Payroll** > **Forms** > **Formats** to open the **Formats** form.

2. On the **Overview** tab, select the appropriate *PayStmts* **Export format**.
3. Click **Setup** > **Format parameters** to open the **Format parameters** form.
4. Change any of the following parameters as desired:
   - *XMLFileName*: enter/modify the file name of the XML file that pay statement data is exported to. File name must have the *.xml* extension.
   - *XMLDirectory*: enter/modify the directory path location where the XML file is saved to. In a Dynamics 365 cloud environment, this parameter is not used. You use the **Download files to local network** function to retrieve the file instead.

   Do not alter any other parameters unless instructed by Anthology Inc. client support.
5. Save your changes and close the form.

Set up Other General Definitions

Your implementation of Anthology Payroll may elect to configure additional options that control how Anthology Payroll operates and how it interacts with other modules. These options are in the **General definitions** table and they are configured for the entire Dynamics company (legal entity).

This section contains a reference of other general definition parameters that you may set for your implementation and how the parameter affects Anthology Payroll and associated modules.

To set general definitions:

1. In the **Anthology Payroll** navigation pane, click **Setup**> **Parameters** to open the **General definitions** form.
2. Locate the **General definition code** and change the appropriate field to change the option.
3. The following table describes commonly used general definition parameters:

General Definition Code	Description	Parameter Values	Default Value
Allow backdated late changes	Allow backdated changes to worker position assignments when pay processing has already produced transactions for the pay period. Enabling this function allows users to potentially *orphan* paid time or earning transactions and track those changes for manual reconciliation. Please refer to appropriate user documentation for further details on managing these types of transactions.	*Yes* / *No*	*No*
Allow employment factor total to exceed 1.00	Indicate that workers in the current company are permitted to exceed an employment factor (the **Full-time equivalent** field on their **Worker positions** form) of *1.00*. Once enabled, the restriction is lifted from all workers in the Dynamics company. By default, this option is not enabled.	*Yes* / *No*	*No*

General Definition Code	Description	Parameter Values	Default Value
Allow intercompany project postings	Allow project postings to be posted to projects in other Dynamics companies from the current Dynamics company. Requires project records on the **Project intercompany postings** form to be configured, as well as expense and hours journals in the destination companies to be set.	*Yes* / *No*	*No*
AP postings separate invoice/voucher	Indicate that transactions posted to Accounts Payable require separate invoice and voucher numbers for each worker and deduction.	*Yes* / *No*	*No*
Check accumulators against enrollments	Enforce the checking of whether workers have been assigned the proper benefit/deduction codes and enrolled in the proper generated earnings by looking at accumulator amounts they have accumulated in the pay period and verifying those against setup tables that associate accumulators to benefit/deduction codes and generated earning codes. If this option is set to *Yes*, this step becomes mandatory during the normal pay process.	*Yes* / *No*	*No*
Date to be used for AP postings	Indicate which date of the transaction is to be used for postings to **Accounts Payable**.	*Pay period end date* / *Statement date*	*Pay period end date*
Date to be used for GL postings	Indicate which date of the transaction is to be used for postings to **General Ledger**.	*Pay period end date* / *Statement date*	*Pay period end date*
Date to be used for Project postings	Indicate which date of the transaction is to be used for postings to **Project Management and Accounting**.	*Pay period end date* / *Statement date*	*Pay period end date*
Default active date for new code entries	A default **Active date** to set on all new earnings, benefit/deductions, entitlements, and other setup records.	date	
Default AP worker vendor text type	Controls the amount of the worker's identification to be included on transactions posted to Accounts Payable. This option only applies to benefit and deduction transactions that are attributed to a worker. Options include: • *Worker name*: display the worker's name • *Personnel number*: display the worker's personnel number • *<blank>*: show no worker information, only the pay group and pay period timestamp	*Worker name* / *Personnel number* / blank	*Worker name*

General Definition Code	Description	Parameter Values	Default Value
Export postings CSV files location	A folder location of where posting export files are saved, used when the **Export postings to the Accounts Payable module** and/or **Export postings to the General Ledger module** parameters are set to export to CSV file. Can be a UNC network path or local server directory. Ensure the AOS has access rights to write to this location.	UNC path or local server directory	
Export postings to the Accounts Payable module	Indicates how Anthology Payroll handles transaction postings to the Accounts Payable module. Transactions can be exported through Dynamics directly (default behaviour), to an external CSV file, or disabled.	*Yes* / *No* / *Create CSV file*	*Yes*
Export postings to the General Ledger module	Indicates how Anthology Payroll handles transaction postings to the General Ledger module. Transactions can be exported through Dynamics directly (default behaviour), to an external CSV file, or disabled.	*Yes* / *No* / *Create CSV file*	*Yes*
Include blank projects and categories cost	Indicate whether to include costs from blank projects and categories in postings to the expense journal. Used for **Project Management and Accounting** integration.	*Yes* / *No*	*No*
Include occupation code on journal transactions	Indicate whether to include occupation summary on posted transactions to the hours and expense journals. Used for **Project Management and Accounting** integration.	*Yes* / *No*	*No*
Include shift code on journal transactions	Indicate whether to include shift summary on posted transactions to the hours and expense journals. Used for **Project Management and Accounting** integration.	*Yes* / *No*	*No*
Large currency amounts	Allow the **Payroll register** report in Anthology Payroll to display large number amounts in the standard spacing of the report. When enabled, the report supports numerical values up to *9,999,999.99* and total fields up to *99,999,999.99*.	*Yes* / *No*	*No*
Late first payments option	Indicate that Anthology Payroll will check for possibility of late first payments for new workers when processing pay.	*Yes* / *No*	*No*
Locations mandatory on positions	Indicates whether location information is mandatory when worker positions are created.	*Yes* / *No*	*No*
Multiple jurisdiction workers	Indicates whether a position filter is mandatory when worker positions are created. Position filters help identify the jurisdiction (state) a worker's position is in, for workers with multiple positions in multiple jurisdictions.	*Yes* / *No*	*No*

General Definition Code	Description	Parameter Values	Default Value
Payslip address format	Indicate which worker's address format to use on pay statements generated from Anthology Payroll. Address formats are defined in the **Organization administration** module (**Organization administration** > **Global address book** > **Addresses** > **Address setup** > **Address format**). If this parameter is not set, the current default address format is used.	address format	
Post benefit/deductions based on department	Indicates if the benefit/deduction postings are prorated by payments' earnings' departments.	*Yes* / *No*	*No*
Post benefit/deductions based on financial dims	Indicates if the benefit/deduction postings are prorated by payments' earnings' financial dimensions.	*Yes* / *No*	*No*
Post benefit/deductions based on occupation	Indicates if the benefit/deduction postings are prorated by payments' earnings' occupations.	*Yes* / *No*	*No*
Post benefit/deductions based on relief reason	Indicates if the benefit/deduction postings are prorated by payments' earnings' relief reasons.	*Yes* / *No*	*No*
Post benefit/deductions based on task	Indicates if the benefit/deduction postings are prorated by payments' earnings' tasks.	*Yes* / *No*	*No*
Post benefit/deductions based on work reason	Indicates if the benefit/deduction postings are prorated by payments' earnings' work reasons.	*Yes* / *No*	*No*
Prior period time can trigger pay period salary	Indicates how time records detected in a prior pay period impact salary calculation in the current pay period when there was no salary generated in the prior period. Default behaviour (*Yes*) will generate pay period salary for each date that salary was not generated in the prior period if any unprocessed, prior period time records are detected in the current pay period. If set to *No*, the **Time to earnings** pay process will only generate salary for each day that contains an unprocessed time record in the prior period where no other salary was generated, instead of generating the full prior pay period's worth of salary.	*Yes* / *No*	*Yes*
Project earning reversal expense journal name	Name of the project journal that records expenses, such as unit-based earnings and amount-based earnings, to be used for posting earning reversals. Used for **Project Management and Accounting** integration.	journal name	

General Definition Code	Description	Parameter Values	Default Value
Project expense journal name	Name of the project journal that records expenses, such as unit-based earnings and amount-based earnings. Used for **Project Management and Accounting** integration.	journal name	
Project hours earning group	Name of the earning group that contains hours-based earning codes that should be posted to **Project Management and Accounting**. If this earning group does not exist, it must be set up.	earning group	
Project hours journal name	Name of the project journal that records hours worked in projects. Used for **Project Management and Accounting** integration.	journal name	
Project hours postings include zero-cost records	Indicate whether zero-value (or zero-cost) earning transactions are to be posted to a project hours journal for the purposes of tracking time and shift information.	*Yes* / *No*	*No*
Project reversal hours journal name	Name of the project journal to be used for posting hours reversals from StaffRight Scheduling. Used for **Project Management and Accounting** integration.	journal name	
Project time reversal expense journal name	Name of the project journal that records expenses, such as unit-based earnings and amount-based earnings, to be used for posting time reversals. Used for **Project Management and Accounting** integration.	journal name	
Salary rotation shift filter	Identifies a set of shift codes (in a shift group) that represent zero-hour shifts to be used on non-work days during a rotation. This allows workers who are on an absence rotation to not generate salary on non-work days.	shift group code	
Salary use FTE	When enabled, set the **Apply FTE to Salary** field on all new workers and worker positions to *Yes* by default. Once the parameter is set, all new workers and worker positions created henceforth have the field set to *Yes*.	*Yes* / *No*	*No*
Separate deposits from pay statements	Indicates whether direct deposit EFT file generation is run in a separate process from pay statement creation, on subsequent runs of the payment approval process.	*Yes* / *No*	*No*
Use bank's financial dimensions on payments debits	Indicates that debit postings to the *Payroll clearing* account in Accounts Payable will use the same financial dimensions entered on the bank account setup in the **Cash and bank management** module, when no financial dimensions are detected on the transaction.	*Yes* / *No*	*No*
Use debit financial dimensions	Indicate that credit postings to Accounts Payable will use the same financial dimensions as their debit posting counterparts when no financial dimensions are detected for those credit postings. By default, this functionality is not enabled and any credit postings not configured with financial dimensions are posted as-is.	*Yes* / *No*	*No*

General Definition Code	Description	Parameter Values	Default Value
Use HR Compensation Module option	Indicates that all salary and hourly wage information (and some generated earnings, depending on configuration) are obtained from the Human Resources module as fixed compensation plans. When enabled, wage information in Anthology Payroll is disabled on the **Workers** and **Worker positions** forms.	*Yes* / *No*	*No*
Use HR position's full-time equivalent factor	Indicate that when Anthology Payroll calculates worker pay, it uses the **Full-time equivalent** field on the worker's position record in the **Human resources** module instead of the **Employment factor (FTE)** field on the **Worker positions** form in Anthology Payroll.	*Yes* / *No*	*No*
Use HR worker's financial dimensions	Allow Anthology Payroll to check financial dimension information on the **Worker** form in the Human resources module when generating earnings and posting transactions to HR and AP. When enabled, Anthology Payroll checks the HR module when no financial dimension information is found on account exceptions, organization splits, the earning code, the project task, or the worker's position record.	*Yes* / *No*	*No*
Use project address for local taxes	Indicate that address lookups to assess local taxes should use the project's address instead of the worker's residential address. Used only for the US localization of Anthology Payroll.	*Yes* / *No*	*No*
Use Talent	Indicate that your implementation of Dynamics 365 uses Talent instead of Finance and Operations. This parameter, when set, disables some of the human resource functions that are normally accessible from Anthology Payroll, so as to prevent possible de-synchronization of information that is now managed in Talent.	*Yes* / *No*	*No*
Working set option	Indicates whether user-initiated pay processes that are run in batch utilize multi-threaded processing for improved performance. If set to *Yes*, the **Working set size** parameter must also be set.	*Yes* / *No*	*No*
Working set size	The working set size for processing multiple workers at a time for pay processes run in batch mode. Requires the **Working set option** parameter to be set to *Yes*.	integer	*500*
Working set size batch accumulators	The working set size for processing multiple accumulators at a time for the **Delete/set initial accumulator values based on period** function running as a batch process.	integer	*10*

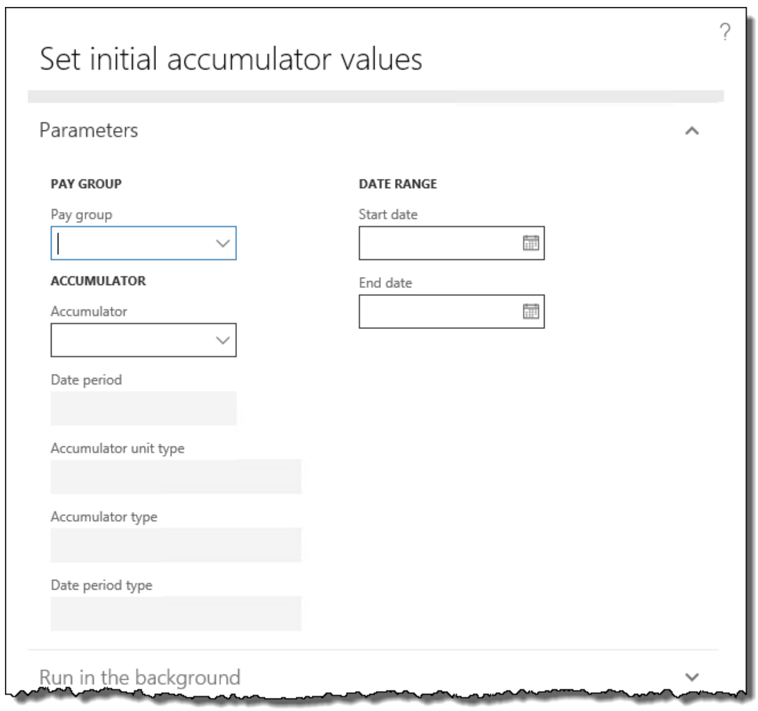
Appendix A: Set Initial Accumulator Values

After creating new accumulators in a live environment, you may need to populate them with existing transactional data. It is recommended to complete and close the current pay period before running this procedure. You should also run this procedure before creating any new transactions in the new pay period.

In order to run this procedure on an accumulator, the accumulator must be fully set up with eligibilities and values.

To set initial accumulator values:

1. In the **Anthology Payroll** navigation pane, click **Periodic** > **Other** > **Accumulators** > **Set initial accumulator values** to open the **Set initial accumulator values** pane.



2. Specify the **Pay group** to set the initial values of the accumulator for.
3. Specify the **Accumulator** to set values for.
4. Specify the **Start date** of the date range containing the transactional data to accumulate in the accumulator.
5. Click **OK** to create the accumulator and set its initial values.
6. To review the amounts that are accumulated, navigate to **Inquiries** > **Accumulators** > **<your accumulator level>**. Filter by **Accumulator** name and locate the accumulator you just set.