



Anthology Payroll

ANTHOLOGY PAYROLL – V114 STATUTORY DEDUCTION SPREADSHEET FOR UNITED STATES

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Contents

Introduction	3
Summary of Changes	4
State Changes	4
Installation	7
Time to Installation	7
Prerequisites	7
Pre-Installation Procedures.....	9
Installation Instructions.....	10
Post-Installation Procedures.....	12

Introduction

This document contains a summary of changes and installation instructions for the Payroll Statutory Deduction Spreadsheet Version 114 for the United States.

This spreadsheet is only compatible with the following version of Advanced Payroll:

- Advanced Payroll for Microsoft Dynamics 365 Finance

This spreadsheet updates US statutory deductions in Advanced Payroll according to the most recent legislation by governing authorities. It is intended for companies that process US statutory deductions in the specified jurisdictions.

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

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

It is recommended that this spreadsheet is installed in a test environment and validated against your test data before installing it in production.

This document is divided into the following sections:

- Summary of Changes
- Installation

Summary of Changes

The following changes are made since the previous version.

State Changes

This version contains the following state changes:

State	Changes
Alaska	Unemployment taxable wage base is increased from \$45,200 to \$47,100. The worker rate for unemployment insurance is reduced from 0.56% to 0.51%.
Arkansas	Unemployment taxable wage base is reduced from \$10,000 to \$7,000.
California	The taxable wage limit for disability insurance is increased from \$145,600 to \$153,164. The employee rate is reduced from 1.1% to 0.9%.
Colorado	Standard deduction amounts are changed. Income tax rate is reduced from 4.55% to 4.4%. Supplemental income tax rate is reduced from 4.55% to 4.4%. New payroll objects are added for family and medical leave insurance deductions starting January 1, 2023. This change requires post-installation instructions.
Illinois	Personal allowance line 1 is increased from \$2,425 to \$2,625.
Iowa	Tax brackets are changed. Standard deduction amounts are changed. Income tax calculations are updated to account for federal income tax withholding no longer reducing taxable wages starting January 1, 2023.
Indiana	Income tax rate is decreased from 3.23% to 3.15%. Income tax calculations are updated to account for adoption dependent allowance. A new calculation variable is added for number of adopted child dependents in Indiana starting October 1, 2022. The adoption allowance rate is set at \$3,000.
Kentucky	Standard deduction amount is increased from \$2,770 to \$2,980. State income tax is reduced from 5% to 4.5%.
Michigan	Exemption allowance amount is increased from \$5,000 to \$5,400.
Minnesota	Exemption allowance amount is increased from \$4,450 to \$4,800. Tax brackets are changed.

State	Changes
Mississippi	Tax brackets are changed. Supplemental income tax brackets are changed.
Missouri	Standard deduction amounts are changed. Tax brackets and rates are changed. Supplemental income tax rate is reduced from 5.3% to 4.95%.
New Jersey	The taxable wage limit for disability insurance remains at \$151,900. The employee rate is reduced from 0.14% to zero.
New Mexico	Tax brackets are changed.
New York	Tax brackets and rates are changed.
North Carolina	Tax rates is reduced from 5.09% to 4.85%. Supplemental income tax rate is reduced from 5.09% to 4.85%.
North Dakota	Tax brackets are changed. Unemployment taxable wage base is increased from \$38,400 to \$40,800.
Oregon	Tax brackets and rates are changed. The maximum amount of Federal tax subtraction limit is increased from \$7,250 to \$7,800. Standard deduction amount for <i>Single with less than 3 allowances</i> filing status is increased from \$2,420 to \$2,605. Standard deduction amount for <i>Single with 3 or more allowances, or Married</i> filing status is increased from \$4,840 to \$5,210. Exemption allowance amount is increased from \$219 to \$236. New payroll objects are added for paid leave starting January 1, 2023. This change requires post-installation instructions. Unemployment taxable wage base is increased from \$47,700 to \$50,900.
Rhode Island	The annual wage threshold amount for high income earnings is increased from \$241,850 to \$260,550. Tax brackets are changed. The taxable wage limit for disability insurance is increased from \$81,500 to \$84,000. Unemployment taxable wage base is increased from \$24,600 to \$28,200. The

State	Changes
	wage base for high income earnings is increased from \$26,100 to \$29,700.
South Carolina	<p>Exemption allowance amount is increased from \$2,750 to \$4,310. Standard deduction is increased from \$4,580 to \$6,475.</p> <p>Tax brackets and rates are changed.</p> <p>Supplemental income tax rate is reduced from 7% to 6.5%.</p>
Vermont	<p>Tax brackets are changed.</p> <p>Exemption allowance is increased from \$4,500 to \$4,850.</p>
Washington	<p>Family leave contribution rate is increased from 0.6% to 0.8%.</p> <p>Family leave standard employer share is increased from 26.78% to 27.24%. This change requires post-installation instructions.</p>

Installation

Installation procedures are divided into the following sections:

- Time to Install
- Prerequisites
- Installation instructions
- Post Installation

Time to Installation

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

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

These other factors can also impact the time required for installation:

- The amount of pre-existing, custom statutory deduction records in your system. Advanced Payroll must check each of these against the imported records for conflicts.
- The amount of statutory deduction changes included in the current version.

Prerequisites

The prerequisites for installing Version 114 for the United States are:

- Microsoft Excel installed on the Microsoft Dynamics client from which the statutory deduction spreadsheet is updated
- Advanced Payroll version required
- Latest statutory deductions spreadsheet version

Advanced Payroll Version

This version of the spreadsheet is intended for Advanced Payroll US localization version 10.0. Other versions are not compatible with this spreadsheet.

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

For the latest software updates of Advanced Payroll, please contact our client support at:

<https://support.campusmgmt.com>

Latest Statutory Deductions Spreadsheet Version

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

Version 114 for the United States is an update version of the Advanced Payroll Statutory Deductions Spreadsheet. This version is meant to be installed on top of the current baseline version, which is Version 112. Update versions released after each baseline are cumulative and are independent of each other. If you have installed Version 112, you can install any subsequent update version.

If there are any spreadsheet versions between Version 112 and Version 114 that you have not installed, please check for any pre- and post-installation instructions applicable to these missed versions that may apply to statutory deductions in jurisdictions where your company operates. For an overview of these steps since the last baseline, see **Pre-Installation Procedures** on page 9 and **Post-Installation Procedures** on page 13.

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

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

<https://support.campusmgmt.com>

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

Pre-Installation Procedures

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

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

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

Spreadsheet Version	Pre-installation procedures
112	None
113	None
114	None

Installation Instructions

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


To install the Statutory Deductions Spreadsheet:

1. It is recommended to take a backup of your database prior to importing the spreadsheet.
2. Log in to the Microsoft Dynamics 365 Finance. Ensure you are in the company (legal entity) that you want to update.
3. Click **Advanced Payroll > Setup > Calculations > Calculations**. Click the Version column heading to sort the calculations by version number. This is the latest version of the Statutory Deductions Spreadsheet that you have installed.
4. The next step depends on the latest version of the Statutory Deductions Spreadsheet that you have installed:
 - If there are no version numbers or the latest version number is lower than Version 112, you must install the latest baseline version before proceeding to install this version. The latest baseline version is Version 112. After installing the baseline, proceed with installing Version 113 for the United States.
For information on how to obtain the baseline version, please see Latest Statutory Deductions Spreadsheet Version on page 8.
 - If the latest version number is Version 112 or higher, then proceed to the next step.
5. Click **Advanced Payroll > System update utilities > Other > Import statutory deduction updates** to open the Statutory deduction data import pane.
6. In the pane, browse to your statutory deduction spreadsheet and select it.
7. Click **OK** to start the import.
8. When the import process is complete, an alert message appears. If there are errors reported, navigate to **Advanced Payroll > Inquiries > Run controls** to view the error messages. Take the recommended actions (see Error Messages and Conditions on page 11) and run the import process again.

- You have completed the spreadsheet installation process. Please check for any post-installation notes or instructions that may apply to you. Remember to test the spreadsheet in a test environment before repeating these instructions in your production environment.

Error Messages and Conditions

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

Error Condition	Problem and Resolution
<p>No statutory deduction updates are imported. The run controls do not display any messages about importing spreadsheet tables, only that the process has initialized. For reference, highlighted lines in the image below do <i>not</i> appear in the run controls.</p> 	<p>A synchronization error has occurred on the cloud-based environment resulting in the import process hanging.</p> <p>The Statutory Deductions Spreadsheet import process must be restarted. However, it is possible that a partial import has occurred and some records have been imported. These records must be deleted before the import process can be restarted.</p> <p>If this scenario occurs, please contact Support for assistance (https://support.campusmgmt.com).</p>
<p><i>Table <tableName> contains field 'Code' with key value <keyValue> which is a system record; it must be renamed or removed prior to import.</i></p>	<p>You have set up a record in the <tableName> that matches a versioned record in the spreadsheet.</p> <p>If your custom record serves a specific purpose, then it must be renamed. If you want to replace your record with the one in the spreadsheet, then simply delete your custom record.</p> <p>After taking one of these steps, run the import process again.</p>

Post-Installation Procedures

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

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

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

Spreadsheet Version	Post-installation procedures
112	None
113	Revert OASDI Taxable Income Calculation Method
114	Set up Colorado Family and Medical Leave Insurance Set up Oregon Paid Leave Update Washington Family Leave Insurance Employer Rate

Set up Colorado Family and Medical Leave Insurance

New payroll objects have been added for family medical leave insurance in Colorado state starting January 1, 2023. These objects require some additional configuration after importing the spreadsheet.

If you do not have workers in CO, you may skip this procedure.

To set up a new eligibility group for CO FLI:

1. In the navigation pane, click **Setup > Tables > Eligibilities > Eligibility groups** to open the Eligibility groups form.
2. Click **New** to create a new record.
3. On the **General** tab, enter *CO FLI Group* as the Eligibility group name and Description.
4. Set the Active date to *01/01/2023* (January 1, 2023).

- On the **Calculation** variable items tab, click Edit to open the **Calculation variable items setup** form. Define the **Expression string** as the following:

CO FLI Flag#CO FLI EE = 1.00

- Click **Validate** to check the syntax on the expression string. Click **Save** to save the expression string and **Close** the close the form.
- Save and close the Eligibility groups form.

To add accumulator eligibility and values for the new accumulators:

- Change your current context date to *January 1, 2023* for ease of setting up the following objects.
- In the navigation pane, click **Setup > Tables > Accumulators > Accumulator values** to open the **Accumulator values** form.
- Create new accumulator values for the following accumulators and set their values accordingly:

Accumulator	Earnings	Benefit/Deductions
CO FLI Inc	same values as <i>CO SUI Inc</i> accumulator	
CO FLI Inc YTD	same values as <i>CO SUI Inc</i> YTD accumulator	
CO FLI YTD		<i>CO FLI</i>

- Save and close the **Accumulator Values** form.
- In the navigation pane, click **Setup > Tables > Eligibilities > Accumulators** to open the Accumulator eligibility form.
- Create new accumulator eligibility records for the following accumulators:

Accumulator	Eligibility
CO FLI Inc	CO FLI Group eligibility group or same eligibility as CO SUI Inc accumulator
CO FLI Inc YTD	CO FLI Group eligibility group or same eligibility as CO SUI Inc YTD accumulator
CO FLI YTD	blank row (all workers eligible)

- Save and close the **Accumulator eligibility** form.

Workers who are eligible for CO Family and Medical Leave Insurance must be assigned a new calculation variable called *CO FLI Flag* with the **Item amount** set to *1*. Please refer to your end-user manual or implementer's guide for the relevant documentation.

If you as an employer wish to contribute more than the default 50% of family and medical leave insurance contribution to workers in Colorado, you may change this fraction. To change your default employer contribution percentage:

1. In the navigation pane, click **Setup > Tables > Calculations > Calculations** to open the
2. **Calculations** form.
3. On the **Overview** tab, locate and select the *CO FLI ER Fraction Calculation* code.
4. On the **Rule** tab, click **Edit** to open the **Calculation setup** form.
5. Change the calculation string to a percentage value representing the portion of insurance contribution your organization is paying on behalf of your workers. For example, to indicate 60%, set the value to *0.6*.
6. Click **Validate** and **Save** to save your changes and return to the **Calculations** form.
7. Save your changes and close the form.

To set up the CO FLI benefit/deduction:

1. In the navigation pane, click **Setup > Tables > Benefit/deductions > Benefit/deductions** to open the **Benefit/deductions** form.
2. On the **Overview** tab, locate and select the *CO FLI Benefit/deduction*.
3. On the **General** tab, enter accounting information for the deduction as needed. Set the DR employer ledger account and CR employer ledger account to either the same clearing account or a pair of clearing accounts that offset each other.
4. Set the calculation and depletion sequence numbers to values such that this deduction calculates and depletes similarly to other CO state deductions.
5. Set the Use by worker field to **Yes** and the User by worker position field to **No** to indicate that this deduction is only intended to be assigned at the worker level.
6. Save your changes and close the form.
7. In the navigation pane, click **Setup > Tables > Benefit/deductions > Benefit/deduction groups** to open the Benefit/deduction groups form.
8. Add the *CO FLI* benefit/deduction to groups as required for your implementation. This deduction is applicable to all CO workers and deducted every pay period. Some suggested benefit/deduction groups are:
 - *All benefit/deductions*
 - *Payment all types*
 - *Sched every pay pd*
9. Save your changes and close the form.

10. In the navigation pane, click **Setup > Tables > Benefit/deductions > Benefit/deduction** rule group calculations to open the Benefit/deduction rule group calculations form.
11. On the **Fast entry** tab, select all your **Benefit/deduction** rule groups that deduct family leave insurance for CO. Select the *CO FLI* benefit/deduction in the Benefit deductions pane.
12. Select the *CO FLI EE Cont* calculation in the Worker calculation field.
13. Select the *CO FLI ER Cont* calculation in the Employer calculation field. Alternatively, you may set the Employer calculation to *Zero* if you are a small employer who is not obligated to contribute.
14. Set an Active date of *01/01/2023* (January 1, 2023). Click Insert to create the rule group calculation for each selected benefit/deduction rule group.
15. Save your changes and close the form.
16. Reset your context date back to the current date if you changed it earlier.

After creating the benefit/deduction rule group calculation record(s), you may assign the *CO FLI* benefit/deduction for all affected workers. Please refer to your end-user manual or implementer's guide for the relevant documentation.

To insert the deduction for multiple workers at a time:

1. In the navigation pane, click **Periodic > Other > Mass worker changes > Mass benefit/deductions** insert to open the **Worker benefit/deductions** form with the Fast entry tab expanded.
2. On the **Fast entry** tab, select the *CO FLI Benefit deduction*.
3. Select from **Pay groups, Departments, Occupations**, etc. to filter the workers that you wish to assign the deduction to. Click Build workers list to populate the list of workers according to your selection.
4. In the workers list, select one or more workers to assign the deduction to.
5. Click Insert to add the benefit/deduction to all selected workers.
6. Save and close the form.

The *CO FLI* benefit/deduction must also be associated with payment types. Payment types are specific to your implementation. If you added the *CO FLI* benefit/deduction to groups that are already configured for payment types (e.g: *Payment all types*), you can skip this procedure. It is highly recommended to add the benefit/deduction to a benefit/deduction group associated with payment types instead of associating it individually. To associate the *CO FLI* benefit/deduction to payment types individually:

1. In the navigation pane, click **Setup > Tables > Payments > Payment type benefit deduction** selections to open the Payment type benefit deduction selections form.
2. On the **Fast entry** tab, select the *CO FLI* Benefit deduction and the following suggested Paymenttypes:
 - regular payments
 - manual/off-cycle payments
 - bonus/supplemental payments
 - adjustment/correction payments
 - gross up payments
 - advances
3. Click **Insert** to add the *CO FLI* benefit/deduction to all selected Payment types.
4. Save and close the form.

The *CO FLI* benefit/deduction must also be scheduled to deduct every pay period. Schedules are specific to your implementation. If you added the *CO FLI* benefit/deduction to groups that are already scheduled to deduct every pay period (e.g: *Sched every pay pd*), you can skip this procedure. It is highly recommended to add the benefit/deduction to a benefit/deduction group that is scheduled every pay period instead of scheduling it individually. To schedule the *CO FLI* benefit/deduction individually:

1. In the navigation pane, click **Setup > Tables > Schedules > Pay period benefit/deductions** to open the Pay period benefit/deduction schedules form.
2. On the **Fast entry** tab, select the *CO FLI* Benefit deduction and Pay group as desired.
3. Select all Pay period end dates.
4. Click **Insert** to schedule the *CO FLI* benefit/deduction for all pay periods.
Note: This procedure must be repeated as new date periods are added.
5. Save and close the form.

The new accumulators become active January 1, 2023. If you have already produced payments after this date and before configuring the accumulators, you may need to re-seed the year-to-date accumulators with the appropriate earning transactions. Before proceeding to re-seed these accumulators, it is recommended to back up the database as a precautionary measure. Re-seeding should only be attempted immediately before a new pay period, or after a pay period has been closed and all transactions are already processed.

To reseed the FLI accumulators:

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

Family and Medical Leave Insurance must be reported as a Box 14 item on your W-2. To set up W-2 export format fields for the purpose of reporting *CO FLI*:

1. In the navigation pane, click **Setup > Tables > Payroll > Forms > Formats** to open the **Formats** form.
2. On the **Overview** tab, select your *W-2 Export format*.
3. Click **Setup > Format fields** to open the **Format fields** form.
4. Create the following export format fields. Enter the **Position filter**, **Export format field name**, **Field source type**, and **Field source** as listed in the table below:

Position Filter	Export Format Field	Field Source Type	Field Source
CO	Box14 Code COFLI	Fixed	CO FAMLI
CO	Box14 Value COFLI	Accumulator	CO FLI YTD
CO	Box14 Code COFLInc	Fixed	CO FAMLI Inc
CO	Box14 Value COFLInc	Accumulator	CO FLI Inc YTD

5. Select Yes for **Display in report?** and Yes for **Exclude if zero?**.
6. Save your changes and close the form.

Set up Oregon Paid Leave

New payroll objects have been added for paid leave in Oregon state starting January 1, 2023. These objects require some additional configuration after importing the spreadsheet. If you do not have workers in OR, you may skip this procedure. To set up a new eligibility group for OR PLO:

1. In the navigation pane, click **Setup > Tables > Eligibilities > Eligibility groups** to open the **Eligibility groups** form.
2. Click **New** to create a new record.
3. On the **General** tab, enter *OR FLI Group* as the **Eligibility group** name and **Description**.
4. Set the **Active date** to *01/01/2023* (January 1, 2023).
5. On the **Calculation variable items** tab, click **Edit** to open the **Calculation variable items setup** form. Define the **Expression string** as the following:
Oregon FLI Flag#Oregon FLI EE = 1.00
6. Click **Validate** to check the syntax on the expression string. Click **Save** to save the expression string and **Close** to close the form.
7. Save and close the **Eligibility groups** form.

To add accumulator eligibility and values for the new accumulators:

1. Change your current context date to *January 1, 2023* for ease of setting up the following objects.
2. In the navigation pane, click **Setup > Tables > Accumulators > Accumulator values** to open the **Accumulator values** form.
3. Create new accumulator values for the following accumulators and set their values accordingly:

Accumulator	Earnings	Benefit/Deductions
OR FLI Inc	same values as <i>OR SUI Inc</i> accumulator	Fixed
OR FLI Inc YTD	same values as <i>OR SUI Inc YTD</i> accumulator	Accumulator
OR FLI YTD		<i>OR FLI</i>

4. Save and close the **Accumulator values** form.
5. In the navigation pane, click **Setup > Tables > Eligibilities > Accumulators** to open the Accumulator eligibility form.

7. Create new accumulator eligibility records for the following accumulators:

Accumulator	Earnings
OR FLI Inc	<i>OR FLI Group</i> eligibility group or same eligibility as <i>OR SUI Inc</i> accumulator
OR FLI Inc YTD	<i>OR FLI Group</i> eligibility group or same eligibility as <i>OR SUI Inc</i> YTD accumulator
OR FLI YTD	blank row (all workers eligible)

8. Save and close the **Accumulator eligibility** form.

Workers who are eligible for OR Paid Leave must be assigned a new calculation variable called *Oregon FLI Flag* with the **Item amount** set to 1. Please refer to your end-user manual or implementer's guide for the relevant documentation.

To set up the OR PLO benefit/deduction:

1. In the navigation pane, click **Setup > Tables > Benefit/deductions > Benefit/deductions** to open the **Benefit/deductions** form.
2. On the **Overview** tab, locate and select the *OR FLI Benefit/deduction*.
3. On the **General** tab, enter accounting information for the deduction as needed. Set the **DR employer ledger account** and **CR employer ledger account** to either the same clearing account or a pair of clearing accounts that offset each other.
4. Set the calculation and depletion sequence numbers to values such that this deduction calculates and depletes similarly to other OR state deductions.
5. Set the **Use by worker** field to *Yes* and the **User by worker position** field to *No* to indicate that this deduction is only intended to be assigned at the worker level.
6. Save your changes and close the form.
7. In the navigation pane, click **Setup > Tables > Benefit/deductions > Benefit/deduction groups** to open the **Benefit/deduction groups** form.
8. Add the *OR FLI* benefit/deduction to groups as required for your implementation. This deduction is applicable to all OR workers and deducted every pay period. Some suggested benefit/deduction groups are:
 - *All benefit/deductions*
 - *Payment all types*
 - *Sched every pay pd*
9. Save your changes and close the form.
10. In the navigation pane, click **Setup > Tables > Benefit/deductions >**

Benefit/deduction rulegroup calculations to open the **Benefit/deduction rule group calculations** form.

11. On the **Fast entry** tab, select all your **Benefit/deduction rule groups** that deduct family leave insurance for OR. Select the *OR FLI* benefit/deduction in the **Benefit deductions** pane.
12. Select the *OR FLI EE Cont* calculation in the **Worker calculation** field.
13. Select the *OR FLI ER Cont* calculation in the **Employer calculation** field. Alternatively, you may set the **Employer calculation** to *Zero* if you are a small employer who is not obligated to contribute.
14. Set an **Active date** of *01/01/2023* (January 1, 2023). Click **Insert** to create the rule group calculation for each selected benefit/deduction rule group.
15. Save your changes and close the form.
16. Reset your context date back to the current date if you changed it earlier.

After creating the benefit/deduction rule group calculation record(s), you may assign the *OR FLI* benefit/deduction for all affected workers. Please refer to your end-user manual or implementer's guide for the relevant documentation.

To insert the deduction for multiple workers at a time:

1. In the navigation pane, click **Periodic > Other > Mass worker changes > Mass benefit/deductions insert** to open the **Worker benefit/deductions** form with the **Fast entry** tab expanded.
2. On the **Fast entry** tab, select the *OR FLI Benefit deduction*.
3. Select from **Pay groups, Departments, Occupations**, etc. to filter the workers that you wish to assign the deduction to. Click **Build workers list** to populate the list of workers according to your selection.
4. In the workers list, select one or more workers to assign the deduction to.
5. Click **Insert** to add the benefit/deduction to all selected workers.
6. Save and close the form.

The *OR FLI* benefit/deduction must also be associated with payment types. Payment types are specific to your implementation. If you added the *OR FLI* benefit/deduction to groups that are already configured for payment types (e.g. *Payment all types*), you can skip this procedure. It is highly recommended to add the benefit/deduction to a benefit/deduction group associated with payment types instead of associating it individually. To associate the *OR FLI* benefit/deduction to payment types individually:

1. In the navigation pane, click **Setup > Tables > Payments > Payment type benefit deduction selections** to open the **Payment type benefit deduction selections** form.

2. On the **Fast entry** tab, select the *OR FLI Benefit deduction* and the following suggested **Paymenttypes**:
 - regular payments
 - manual/off-cycle payments
 - bonus/supplemental payments
 - adjustment/correction payments
 - gross up payments
 - advances
3. Click **Insert** to add the *OR FLI* benefit/deduction to all selected **Payment types**.
4. Save and close the form.

The *OR FLI* benefit/deduction must also be scheduled to deduct every pay period. Schedules are specific to your implementation. If you added the *OR FLI* benefit/deduction to groups that are already scheduled to deduct every pay period (e.g: *Sched every pay pd*), you can skip this procedure. It is highly recommended to add the benefit/deduction to a benefit/deduction group that is scheduled every pay period instead of scheduling it individually. To schedule the *OR FLI* benefit/deduction individually:

1. In the navigation pane, click **Setup > Tables > Schedules > Pay period benefit/deductions** to open the **Pay period benefit/deduction schedules** form.
2. On the **Fast entry** tab, select the *OR FLI Benefit deduction* and **Pay group** as desired.
3. Select all **Pay period end dates**.
4. Click **Insert** to schedule the *OR FLI* benefit/deduction for all pay periods.
Note: This procedure must be repeated as a new date period are added.
5. Save and close the form.

The new accumulators become active January 1, 2023. If you have already produced payments after this date and before configuring the accumulators, you may need to re-seed the year-to-date accumulators with the appropriate earning transactions. Before proceeding to re-seed these accumulators, it is recommended to back up the database as a precautionary measure. Re-seeding should only be attempted immediately before a new pay period, or after a pay period has been closed and all transactions are already processed.

To reseed the PLO accumulators:

1. In the navigation pane, click **Periodic > Other > Accumulators > Delete/set initial accumulator values based on period** to open the **Delete/set initial accumulator values based on period** dialog.

2. Select a **Date period** of *Tax Year*.
3. Specify the current **Date period year** and **Date period number**.
4. Specify a **Date period type** of *Reporting date*.
5. Select the following accumulator(s) to reseed:
 - *OR FLI Inc YTD*
6. Click **OK** to reseed the accumulator(s).

Oregon Paid Leave must be reported as a Box 14 item on your W-2. To set up W-2 export format fields for the purpose of reporting *OR FLI*:

1. In the navigation pane, click **Setup > Tables > Payroll > Forms > Formats** to open the **Formats** form.
2. On the **Overview** tab, select your *W-2 Export format*.
3. Click **Setup > Format fields** to open the **Format fields** form.
4. Create the following export format fields. Enter the **Position filter**, **Export format field name**, **Field source type**, and **Field source** as listed in the table below:

Position Filter	Export Format Field	Field Source Type	Field Source
OR	Box14 Code ORPLO	Fixed	OR PLO
OR	Box14 Value ORPLO	Accumulator	OR FLI YTD
OR	Box14 Code ORPLOInc	Fixed	OR PLO Inc
OR	Box14 Value ORPLOInc	Accumulator	OR FLI Inc YTD

5. Select Yes for **Display in report?** and Yes

Update Washington Family Leave Insurance Employer Rate

The percentage portion of WA FLI that is paid by employers is changing from 26.78% to 27.24% starting January 1, 2023. The corresponding calculation in the US Statutory Deductions Spreadsheet is updated

with a new value; however, this calculation can be modified by implementations as the employer rate may differ from employer to employer. As a result, this change must be completed manually for those organizations affected, as the Statutory Deductions import process will not update this calculation for Dynamics companies that already have it.

If you have no workers or business in Washington state, or you continue to use a custom value for the

employer-paid portion of WA FLI, you can skip these procedures.

To update the WA FLI employer rate:

1. In the navigation pane, click **Setup > Tables > Calculations > Calculations** to open the **Calculations** form.
2. On the **Overview** tab, locate and select the *WA FLI ER Rate Calculation*. Expand the **Maintain effective date entries** pane.
3. In the **Maintain effective date entries** pane, click **New** to create a new effective-dated record. Set the **Active date** to *1/1/2023* (January 1, 2023).
4. In the **Maintain effective date entries** pane, expand the **Rule** tab and click **Edit** to open the **Calculation setup** form.
5. On the **Calculation setup** form, change the value in the **Calculation string** to *0.2724*. Click **Validate** and **Save** to save your changes and return to the **Calculations** form.
6. On the **Calculations** form, save your changes and close the form.

If you need assistance with configuring the above, please contact Client Services:

<https://support.campusmgmt.com>.