



Anthology Payroll for Microsoft Dynamics 365 Finance

ANTHOLOGY PAYROLL - V123 STATUTORY DEDUCTION SPREADSHEET FOR UNITED STATES

Release Date: December 2024
Version: Version 123 for the United States

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Introduction

This document contains a summary of changes and installation instructions for Statutory Deductions Spreadsheet Version 123 for the United States.

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

- Anthology Payroll for Microsoft Dynamics 365 Finance

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

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

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

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

This document is divided into the following sections:

- Summary of Changes
- Installation

Summary of Changes

The following changes are made since the previous version.

US Federal Changes

This section describes federal changes for the United States. This version contains changes to the following federal taxes:

State	Changes
401k	The worker elective deferral amount is increased from \$23,000 to \$23,500. The employer elective deferral amount is increased from \$69,000 to \$70,000. The annual compensation limit is increased from \$345,000 to \$350,000.
OASDI	Annual limit is increased from \$168,600 to \$176,100.

State Changes

This version contains the following state changes:

State	Changes
California	The employee contribution rate to state disability insurance is increased from to 1.1% to 1.2%. The 940-credit reduction rate increased from 0.6% to 0.9%.
Colorado	Unemployment taxable wage base is increased from \$23,800 to \$27,200.
Connecticut	Unemployment taxable wage base is increased from \$25,000 to \$26,100.
Iowa	Unemployment taxable wage base is increased from \$38,200 to \$39,500.
Maine	Competitive Skills Scholarship Fund rate is increased from 0.13% to 0.14%. Standard deduction amounts are changed. Tax brackets are changed. Exemption allowance is increased from \$5,000 to \$5,150. New payroll objects are added for Maine Paid Family Leave. This change requires post-installation instructions.

State	Changes
Minnesota	Unemployment taxable wage base is increased from \$42,000, to \$43,000.
Missouri	Unemployment taxable wage base is reduced from \$10,000, to \$9,500.
Nevada	Unemployment taxable wage base is increased from \$40,600 to \$41,800.
New Jersey	The taxable wage limit for disability insurance is increased from \$161,400 to \$165,400. The employee rate is increased from zero to 0.23%. Family leave rate is increased from 0.09% to 0.33%. The annual maximum FLI wage base is increased from \$161,400 to \$165,400. Unemployment taxable wage base is increased from \$42,300 to \$43,300.
New York	Unemployment taxable wage base is increased from \$12,500 to \$12,800. Family leave rate is increased from 0.373% to 0.388%. The statewide average weekly wage is increased from \$1718.15 to \$1,757.19. The 940-credit reduction rate increased from 0.6% to 0.9%.
Oregon	Unemployment taxable wage base is increased from \$52,800 to \$54,300.
Utah	Unemployment taxable wage base is increased from \$47,000 to \$48,900.
Washington	Family leave contribution rate is increased from 0.74% to 0.92%. Family leave standard employer share is reduced from 28.57% to 28.48%. This change requires post-installation instructions.
Wyoming	Unemployment taxable wage base is increased from \$30,900 to \$32,400.

Installation

Installation procedures are divided into the following sections:

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

Time to Installation

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

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

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

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

Prerequisites

The prerequisites for installing Version 123 for the United States are:

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

Anthology Payroll Version Required

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

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

For the latest software updates of Anthology Payroll, please contact Anthology Support:

<https://support.anthology.com>

Latest Statutory Deduction Spreadsheet Condition

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

Version 123 for the United States is an update version of the Anthology Payroll Statutory Deductions Spreadsheet. This version is meant to be installed on top of the current baseline version, which is Version 112. Update versions released after each baseline are cumulative and are independent of each other. If you have installed Version 112, you can install any subsequent update version.

If there are any spreadsheet versions between Version 112 and Version 121 that you have not installed, please check for any pre- and post-installation instructions applicable to these missed versions that may apply to statutory deductions in jurisdictions where your company operates. For an overview of these steps since the last baseline, see Pre-Installation Procedures on page 8 and Post-Installation Procedures on page 11.

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

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

<https://support.anthology.com>

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

Pre-Installation Procedures

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

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

Note: *If you have previously skipped the installation of any spreadsheet versions listed below and they contain pre-installation instructions, then you must contact Client Support for the release notes of those past versions:*

<https://support.anthology.com>

Spreadsheet Version	Pre-installation procedures
112	None
113	None
114	None
115	None
116	None
117	None
118	None
119	None
120	None
121	None
122	None
123	None

Installation Instructions


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

To install the Statutory Deductions Spreadsheet:

1. Log in to the Microsoft Dynamics 365 Finance. Ensure you are in the company (legal entity) that you want to update.
2. Click Anthology Payroll > System update utilities > Other > Import statutory deduction updates to open the Statutory deduction data import pane.
3. The next step depends on the latest version of the Statutory Deductions Spreadsheet that you have installed:
 - If the import pane shows are no version numbers OR the latest version number is lower than Version 112, you must install the latest baseline version before proceeding to install this version. The latest baseline version is Version 112. After installing the baseline, proceed with installing Version 121 for the United States. For information on how to obtain the baseline version, please see Latest Statutory Deductions Spreadsheet Version on page 6.
 - If the latest version number is Version 112 or higher, then proceed to the next step.
4. In the pane, browse to your statutory deduction spreadsheet and select it.
5. Click OK to start the import.
6. When the import process is complete, an alert message appears. If there are errors reported, navigate to Anthology Payroll > Inquiries > Run controls to view the error messages. Take the recommended actions (see Error Messages and Conditions on page 9) and run the import process again.
7. You have completed the spreadsheet installation process. Please check for any post-installation notes or instructions that may apply to you. Remember to test the spreadsheet in a test environment before repeating these instructions in your production environment.

Error Messages and Conditions

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

Error Condition	Problem and Resolution
<p>No statutory deduction updates are imported. The run controls do not display any messages about importing spreadsheet tables, only that the process has initialized. For reference, highlighted lines in the image below do not appear in the run controls.</p> 	<p>A synchronization error has occurred on the cloud-based environment resulting in the import process hanging.</p> <p>The Statutory Deductions Spreadsheet import process must be restarted. However, it is possible that a partial import has occurred and some records have been imported. These records must be deleted before the import process can be restarted.</p> <p>If this scenario occurs, please contact our Client Support for assistance (https://support.anthology.com).</p>
<p>Table <tableName> contains field 'Code' with key value <keyValue> which is a system record; it must be renamed or removed prior to import.</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 our Client Support for the release notes of those past versions: <https://support.anthology.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
115	Set up Massachusetts Paid Family Medical Leave Accumulators Set up Massachusetts Paid Family Medical Leave Consideration for Small Employers
116	Set up Maryland Paid Family and Medical Leave Set up New Jersey Governmental Reimbursable Employer
117	Set up Arizona Taxable Fringe Benefits Accumulators
118	Update Washington Family Leave Insurance Employer Rate
119	Set up Filing Statuses for Montana State Income Tax Re-seed Arizona Taxable Fringe Benefits Accumulator
120	Set up Filing Statuses for Georgia State Income Tax Check and Assign Massachusetts State Income Tax Calculation Variables
121	Set up Accumulators for Alabama State Overtime Pay Exemption Set up Vermont Child Care Contribution Set up Maryland Local Tax Table Rate Calculations
122	Set up Filing Statuses for Kansas State Income Tax Set up DR 0004 Colorado Employee Withholding Certificate
123	Set up Maine Paid Medical and Family Leave Update Washington Family Leave Insurance Employer Rate

Set up Maine Paid Medical and Family Leave

New payroll objects have been added for paid family and medical leave (Family and Medical Leave Act, FMLA) insurance in Maine starting January 1, 2025. These objects require some additional configuration after importing the spreadsheet.

Please note that even after configuration is complete, ME FMLA will not be deducted from workers in Maine until January 1, 2025.

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

To add accumulator eligibility and values for the new accumulators:

1. Change your current context date to *January 1, 2025*, 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
ME FMLA Inc	Same values as <i>ME SUI Inc</i> accumulator	
ME FMLA Inc YTD	Same values as <i>ME SUI Inc YTD</i> accumulator	
ME FMLA FBen	Same values as <i>ME SUI Fringe Ben</i> accumulator	
ME FMLA FBen YTD	Same values as <i>ME SUI Fringe Ben</i> accumulator	
ME FMLA YTD		<i>ME FMLA</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.
6. Create new accumulator eligibility records for the following accumulators:

Accumulator	Eligibility
ME FMLA Inc	Same eligibility as <i>ME SUI Inc</i> accumulator
ME FMLA Inc YTD	Same eligibility as <i>ME SUI Inc YTD</i> accumulator

Accumulator	Eligibility
ME FMLA FBen	Same eligibility as <i>ME SUI Fringe Ben</i> accumulator
ME FMLA FBen YTD	Same eligibility as <i>ME SUI Fringe Ben</i> accumulator
ME FMLA YTD	Blank row (all workers eligible)

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

To indicate that you are a small employer in Maine and eligible for a reduced employer rate of contribution to family and medical leave insurance:

1. In the navigation pane, click **Setup > Tables > Calculations > Calculations** to open the **Calculations** form.
2. On the **Overview** tab, locate and select the *ME FMLA small empr* **Calculation** code.
3. On the **Rule** tab, click **Edit** to open the **Calculation setup** form.
4. Change the calculation string to 0 (zero).
5. Click **Validate** and **Save** to save your changes and return to the **Calculations** form.
6. Save your changes and close the form.

If you as an employer wish to contribute more than the default 50% of family and medical leave insurance contribution to workers in Maine, 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 **Calculations** form.
2. On the **Overview** tab, locate and select the *ME FMLA ER Rate* **Calculation** code.
3. On the **Rule** tab, click **Edit** to open the **Calculation setup** form.
4. 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.
5. Click **Validate** and **Save** to save your changes and return to the **Calculations** form.
6. Save your changes and close the form.

To set up the ME FMLA 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 *ME FMLA 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 ME 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 *ME FMLA* benefit/deduction to groups as required for your implementation. This deduction is applicable to all ME 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 and medical leave insurance for ME. Select the *ME FMLA* benefit/deduction in the **Benefit deductions** pane.
12. Select the *ME FMLA EE Cont* calculation in the **Worker calculation** field.
13. Select the *ME FMLA ER Cont* calculation in the **Employer calculation** field.
14. Set an **Active date** of *01/1/2025* (January 1, 2025). 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 *ME FMLA* benefit/deduction for all affected workers starting January 1, 2025. 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 *ME FMLA 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 *ME FMLA* benefit/deduction must also be associated with payment types. Payment types are specific to your implementation. If you added the *ME FMLA* 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 *ME FMLA* 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 *ME FMLA Benefit deduction* and the following suggested **Payment types**:
 - regular payments
 - manual/off-cycle payments
 - bonus/supplemental payments
 - adjustment/correction payments
 - gross up payments
 - advances
3. Click **Insert** to add the *ME FMLA* benefit/deduction to all selected **Payment types**.
4. Save and close the form.

The *ME FMLA* benefit/deduction must also be scheduled to deduct every pay period. Schedules are specific to your implementation. If you added the *ME FMLA* 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 *ME FMLA* 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 *ME FMLA Benefit deduction* and **Pay group** as desired.
3. Select all **Pay period end dates**.
4. Click **Insert** to schedule the *ME FMLA* benefit/deduction for all pay periods.

Note: *this procedure must be repeated as new date periods are added.*

5. Save and close the form.

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 *ME FMLA*:

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
ME	Box14 Code MEFMLA	Fixed	ME FMLA
ME	Box14 Value MEFMLA	Accumulator	ME FMLA YTD
ME	Box14 Code MEFMLAInc	Fixed	ME FMLA Inc
ME	Box14 Value MEFMLAInc	Accumulator	ME FMLA Inc YTD

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

Update Washington Family Leave Insurance Employer Rate

The percentage portion of WA FLI that is paid by employers is changing from 28.57% to 28.48% starting January 1, 2025. 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 *1/1/2025* (January 1, 2025).
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 *0.2848*. 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 Anthology Support:

<https://support.anthology.com>