



Sage 300 U.S. Payroll

Q4 SR1 2018 Release Notes

January 2019

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Contents

- Product Update Release Notes 3**
 - Product Update Information 3
 - Software Requirements 3
 - Support and Resources 3

- Payroll Tax Updates 5**
 - Federal Legislative Updates 5
 - State and Local Legislative Updates 5
 - Hawaii 5
 - Idaho 6
 - Illinois 6
 - Indiana 6
 - Maryland 7
 - Massachusetts 7
 - Michigan 7
 - Minnesota 7
 - Mississippi 7
 - Missouri 7
 - North Dakota 7
 - Ohio 8
 - Oregon 8
 - Pennsylvania 8
 - Rhode Island 10
 - South Carolina 10
 - Vermont 10

- Product Updates 11**
 - Payroll Product Updates 11

Contents

My Workforce Forms Updates11

Sage Payroll Tax Forms and eFiling by Aatrix 12

 Supported W-2 Forms 12

Quarterly Wage on Disk(ette)13

Preparing for Year-End Processing14

Product Update Installation Instructions 15

 Installing the Product Update 15

 Activating the Tax Update15

 Verifying the Product Update 16

 Updating the Local Tax Repository and Rates 16

Product Update Release Notes

Important! All customers who update, maintain, and use Sage 300 U.S. Payroll should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

Product Update Information

Product: Sage 300 U.S. Payroll

Version: Product Update Q4 SR1 2018

If we receive additional payroll tax changes for this period and/or this year, a new update will be made available.

Software Requirements

To use this update for Sage 300 U.S. Payroll, you must have the correct version of Sage 300 U.S. Payroll for your version of Sage 300:

- Sage 300 U.S. Payroll 7.3 is supported in Sage 300 2019, 2018, and 2017.
- Sage 300 U.S. Payroll 7.2 is supported in Sage 300 2016.

Support and Resources

Sage strives to provide you with the best help and support in the industry. If you have a question, we're here to help!

- **Help and documentation:** Many answers to common questions can be found in the help and documentation included with Sage 300.
- **Sage University:** Learn pro tips for year-end processing in online or classroom courses. Visit <http://SageU.com> and log on or create an account to register for training.
- **Sage City Year-End Center:** Visit <http://sagecity.na.sage.com/p/yearend> for help, guidance, documents, and downloads specific to Sage 300 Payroll and Year End 2018.

- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at <https://support.na.sage.com> or contact Customer Support at 800-253-1372 (U.S. and Canada). Please have your Sage Customer Number handy when contacting Support.
- **Tax forms:** Because all printed forms have variations, Sage 300 Payroll only supports forms printed by Sage Checks and Forms. Call Sage Checks and Forms at 800-617-3224 or order online at www.SageChecks.com.

Tip: For information about ordering W-2 forms, see Knowledgebase article 40172: [Which forms should I order for year-end?](#)

Payroll Tax Updates

The following federal, state, and local tax changes are included in this update.

Federal Legislative Updates

There are no federal legislative updates with this release.

State and Local Legislative Updates

This section lists state and local legislative updates available with this release. If a state or locality is not listed in this section, there are currently no tax updates or product modifications for that state or locality.

Note: Sage 300 U.S. Payroll includes some system-supported State Disability Insurance (SDI) codes, which are updated automatically (for example, with rate changes) when you install product updates. To use these codes, your SDI codes must match the system-supported codes.

If you use custom tax codes to capture SDI taxes, note the following:

- If your codes match the system-supported tax codes, you should review the tax code setup before processing payroll.
- If your codes do not match the system-supported tax codes, you can switch to using the system-supported codes. To do this, you must deactivate your custom tax codes, and then set up the system-supported tax codes.
- Regardless of whether or not your codes match the system-supported tax codes, you must follow your existing procedures for reporting and filing SDI taxes as custom taxes.

Information about changes to specific system-supported SDI codes is included in the sections for the related states.

Hawaii

The Unemployment Insurance wage base limit changes to \$46,800 for 2019. (This has been updated from the amount in the Q4 2018 product update.)

Idaho

The Unemployment Insurance wage base limit changes to \$40,000 for 2019.

Illinois

Illinois withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Indiana

The following local taxes have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
IN0003	White 91 CO Regular (NR) IT	2.32%	1/1/2019
IN0053	Jennings 40 CO Regular (NR) IT	3.15%	1/1/2019
IN0058	Huntington 35 CO Regular (NR) IT	1.95%	1/1/2019
IN0063	Hancock 30 CO Regular (NR) IT	1.74%	1/1/2019
IN0066	Grant 27 CO Regular (NR) IT	2.55%	1/1/2019
IN0078	Dearborn 15 CO Regular (NR) IT	1.2%	1/1/2019
IN0084	Cass 09 CO Regular (NR) IT	2.6%	1/1/2019
IN0085	Carroll 08 CO Regular (NR) IT	2.2733%	1/1/2019
IN0094	White 91 CO Regular IT	2.32%	1/1/2019
IN0145	Jennings 40 CO Regular IT	3.15%	1/1/2019
IN0150	Huntington 35 CO Regular IT	1.95%	1/1/2019
IN0155	Hancock 30 CO Regular IT	1.74%	1/1/2019
IN0158	Grant 27 CO Regular IT	2.55%	1/1/2019
IN0170	Dearborn 15 CO Regular IT	1.2%	1/1/2019
IN0176	Cass 09 CO Regular IT	2.6%	1/1/2019
IN0177	Carroll 08 CO Regular IT	2.2733%	1/1/2019

Maryland

The following local tax has an updated rate in the supported tax tables:

Code	Description	Rate	Effective Date
MD3192	Caroline, Maryland Regular IT	3.2%	1/1/2019

Massachusetts

Massachusetts withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Michigan

Michigan withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Minnesota

Minnesota withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Mississippi

Mississippi withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Missouri

Missouri withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

North Dakota

- The Unemployment Insurance wage base limit changes to \$36,400 for 2019.

- North Dakota withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Ohio

- Ohio withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.
- The following local taxes have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
OH0031	Brimfield Tallmadge JEDD CT Regular IT	1.5%	1/1/2019
OH0796	Brimfield-Kent JEDD CT Regular IT	1.5%	1/1/2019
OH0887	Patterson VI Regular IT	0.5%	1/1/2019
OH0906	Conesville VI Regular IT	0.5%	1/1/2019

- Effective January 1, 2019, the following local tax has been expired:

Code	Description
OH0926	Bethel VI Regular IT

Oregon

Oregon withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Pennsylvania

The following local taxes have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
PA0115	Twilight BO, Charleroi SD (NR) LST	\$52	1/1/2019
PA0407	Heidelberg TP, Eastern Lebanon SD (NR) LST	\$52	1/1/2019
PA0414	Vandling BO, Forest City SD (NR) LST	\$52	1/1/2019
PA0536	Todd TP, Central Fulton SD (NR) LST	\$52	1/1/2019

Code	Description	Rate	Effective Date
PA0776	West Mead TP, Crawford Ctrl SD (NR) LST	\$52	1/1/2019
PA0912	Potter TP, Penns Valley SD (NR) LST	\$52	1/1/2019
PA0914	Penn TP, Penns Valley SD (NR) LST	\$52	1/1/2019
PA0915	Millheim BO, Penns Valley SD (NR) LST	\$52	1/1/2019
PA0926	Gregg TP, Penns Valley SD (NR) LST	\$52	1/1/2019
PA0928	Centre Hall BO, Penns Valley SD (NR) LST	\$10	1/1/2019
PA0978	Franklin BO, Conemaugh Valley SD (NR) LST	\$52	1/1/2019
PA0997	Wysox TP, Towanda SD (NR) LST	\$52	1/1/2019
PA1040	Athens TP, Athens SD (NR) LST	\$52	1/1/2019
PA1051	Martinsburg BO, Spring Cove SD (NR) LST	\$52	1/1/2019
PA1075	Perry TP, Hamburg SD (NR) LST	\$26	1/1/2019
PA1085	Laureldale BO, Muhlenberg SD (NR) LST	\$52	1/1/2019
PA1097	Bethel TP, Tulpehocken SD (NR) LST	\$52	1/1/2019
PA1180	Manor TP, Armstrong SD (NR) LST	\$52	1/1/2019
PA1209	Springfield TP, Springfield Twp SD (NR) LST	\$52	1/1/2019
PA1485	Upper Milford TP, East Penn SD (NR) LST	\$52	1/1/2019
PA1525	New Garden TP, Kennett SD (NR) LST	\$52	1/1/2019
PA2949	Somerset TP, Bentworth SD (NR) Regular IT	1%	1/1/2019
PA3599	Glendon BO, Wilson SD (NR) Regular IT	1%	1/1/2019
PA6319	Saville TP, West Perry SD (NR) Regular IT	1%	1/1/2019
PA6886	West Chester BO, W Chester SD Regular IT	1.25%	1/1/2019
PA7053	Rankin BO, Woodland Hills SD (NR) Regular IT	1.05%	1/1/2019
PA7054	Rankin BO, Woodland Hills SD Regular IT	1.1%	1/1/2019
PA7334	Hazleton CT, Hazleton SD Regular IT	2.75%	1/1/2019

Code	Description	Rate	Effective Date
PA7453	East Whiteland TP, Great Valley SD (NR) Regular IT	0.75%	1/1/2019
PA7454	East Whiteland TP, Great Valley SD Regular IT	0.75%	1/1/2019
PA7827	Lansdowne BO, William Penn SD (NR) LST	\$52	1/1/2019
PA7828	Lansdowne BO, William Penn SD (NR) Regular IT	0.5%	1/1/2019
PA7829	Lansdowne BO, William Penn SD Regular IT	0.5%	1/1/2019

Rhode Island

- The Unemployment Insurance wage base limit changes to \$23,600 for 2019.
- Rhode Island withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.
- State disability insurance tax (RISDI) information is updated for 2019. Effective for wages paid on or after January 1, 2019:
 - The withholding rate is 1.1%.
 - The taxable wage limit is \$71,000 for each employee per calendar year.

South Carolina

South Carolina withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Vermont

Vermont withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Product Updates

The following product updates are included with this release.

Payroll Product Updates

The following new features and improvements to payroll are included with this update.

Fix for Reported Tips

We have fixed a problem that could cause Reported Tips earned by an employee to be included in the employee's Current Earnings and YTD Earnings after calculating and printing payroll checks. This problem occurred if the **Tip Disbursement** option is not selected for the earning type you use for Reported Tips.

Fix for Sage 300 Direct Deposit

We have fixed a problem on the Reconcile Statements window that prevented you from clearing reconciled Sage Direct Deposit Fees.

My Workforce Forms Updates

The following new features and improvements are included with this update to My Workforce Forms.

Updates to Form 1095-C for 2019

Part III, column (a) now includes three separate fields for entering a covered individual's first name, middle initial, and last name.

Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage 300. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Payroll > Government Reports > Federal Tax Filing** or **State Tax Filing**. You will be prompted to register your organization with Sage Payroll Tax Forms and eFiling by Aatrix. After registering, you have the option to enroll your company (or companies) in the eFiling service.

For a detailed overview and a price structure of the Sage Payroll Tax Forms and eFiling by Aatrix options, visit our website here:

<https://partner.aatrix.com/partners/sage300>

Supported W-2 Forms

For information about ordering W-2 forms, see the article [Which forms should I order for year-end?](#) on the Sage Support website.

Quarterly Wage on Disk(ette)

If you use Sage 300 U.S. Payroll, note that tax filing for Puerto Rico is not currently supported by Sage Payroll Tax Forms and eFiling by Aatrix. To produce State Unemployment Tax (SUTA) quarterly wage reports for Puerto Rico, use the Quarterly Wage on Disk(ette) feature.

For more information, see the following Knowledgebase articles at <https://support.na.sage.com>:

- [Knowledgebase article 32877](#) - Producing Quarterly Wage Reports on Disk(ette) or Hard Disk
- [Knowledgebase article 32876](#) - State-Specific Information for Quarterly Wage on Disk(ette)
- [Knowledgebase article 32880](#) - Entering Employee Supplemental Information

Preparing for Year-End Processing

Before you start processing your 2019 payroll, visit the Sage City Year-End Center, where you can get fast answers from Sage support, peers, and product experts at the busiest time of year. You'll find helpful articles, discussion forums, and other links and resources to help your year-end processing go smoothly.

To get started, visit <http://sagecity.na.sage.com/p/yearend> and select Sage 300.

The Year-End Center provides you with information on the following topics:

- Printing and filing W-2s
- Entering employee supplemental information
- Frequently asked questions for year-end processes
- Information about processing year-end 2018 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- Preparing for your first payroll of 2019

Product Update Installation Instructions

Follow the instructions in this section to install, apply, and verify this Product Update.

Before you start:

- Back up your data.
- Make sure all users have exited the program.
- Verify your service pack or product update level. To verify what service pack or product update you have installed, click the **System Information** option on the **Help** menu in Sage 300.

Installing the Product Update

To install the Product Update:

1. Right-click the Product Update file to Run as Administrator (or make sure you have administrator rights to run the installation) and launch the installation program.
2. On the Welcome window, click **Next** to continue to the Software License Agreement window.
3. Select the features to install. Click **Next**, then **Install**.
4. On the Setup Complete window, click **Finish** to finish the installation.

Activating the Tax Update

To activate the Tax Update:

1. Start Sage 300.
2. In the **Administrative Services** folder, select **Data Activation**.
3. Select the current tax update, and then click **Activate**.
4. If you are prompted to convert a previous payroll tax update to the current version, click **Proceed**.

After you complete installation and activation, and after you have made any adjustments described in this document, you can resume processing payroll.

Verifying the Product Update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help > System Information**. The tax update version will be listed with a product update number.

Updating the Local Tax Repository and Rates

This section applies only if you use local tax codes in U.S. Payroll.

To update the local tax repository and rates:

1. After the Product Update is complete, log in to Sage 300.
2. On the Local and Other Custom Taxes window, click the **Install Repository** button to update all of the local tax rates in the system.
3. When you receive the prompt "Install Repository completed. Do you want to continue updating company level local tax records with information from the local repository?":
 - Click **Yes** to automatically update the company rates for all local taxes, or
 - Click **No** if you prefer to select each local tax individually and click the Update button for each one in order to apply the rate changes. This gives you the opportunity to validate rates before and after the changes.

Note: If you click **No**, you will be required to manually update each employee-level tax. This can be done for all employees at once by tax from **U.S. Payroll > Update Taxes**, or by individual employee from **Employee Payroll > Taxes**.

4. If you click **Yes**, after the process completes a message displays: "Updating company level local tax records completed. Do you want to continue updating employee local tax records from the local tax repository?".
 - Click **Yes** to automatically update the employee-level rates for all local taxes, or
 - Click **No** if you want to select each employee or use the Update Taxes tax, then update each tax or employee individually.

Important! This process requires security permissions in Sage 300 to access all employees. Otherwise you may not receive the prompts as described above and employee rates will not be updated.