



# Sage 300 U.S. Payroll

## Q4 SR1 2019 Release Notes

January 2020

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# 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 2019

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 product update, you must have Sage 300 U.S. Payroll 7.3, which is supported in Sage 300 2020, 2019, 2018, and 2017.

**Note:** Effective February 28, 2020, Sage 300 U.S. Payroll 7.3 will no longer be supported for Sage 300 2017.

## 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 2019.

- **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](http://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.

## Colorado

Colorado withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Hawaii

The Unemployment Insurance wage base limit changes to \$48,100 for 2020.

## Idaho

The Unemployment Insurance wage base limit changes to \$41,600 for 2020.

## Illinois

Illinois withholding tables and instructions have been updated for 2020. 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
IN0015	Tippecanoe 79 CO Regular (NR) IT	1.28%	1/1/2020
IN0051	Knox 42 CO Regular (NR) IT	1.2%	1/1/2020
IN0053	Jennings 40 CO Regular (NR) IT	2.5%	1/1/2020
IN0054	Jefferson 39 CO Regular (NR) IT	0.9%	1/1/2020
IN0060	Henry 33 CO Regular (NR) IT	1.7%	1/1/2020
IN0064	Hamilton 29 CO Regular (NR) IT	1.1%	1/1/2020
IN0067	Gibson 26 CO Regular (NR) IT	0.9%	1/1/2020
IN0068	Fulton 25 CO Regular (NR) IT	2.68%	1/1/2020
IN0077	Decatur 16 CO Regular (NR) IT	2.5%	1/1/2020
IN0084	Cass 09 CO Regular (NR) IT	2.7%	1/1/2020
IN0106	Tippecanoe 79 CO Regular IT	1.28%	1/1/2020
IN0143	Knox 42 CO Regular IT	1.2%	1/1/2020
IN0145	Jennings 40 CO Regular IT	2.5%	1/1/2020



Code	Description	Rate	Effective Date
IN0146	Jefferson 39 CO Regular IT	0.9%	1/1/2020
IN0152	Henry 33 CO Regular IT	1.7%	1/1/2020
IN0156	Hamilton 29 CO Regular IT	1.1%	1/1/2020
IN0159	Gibson 26 CO Regular IT	0.9%	1/1/2020
IN0160	Fulton 25 CO Regular IT	2.68%	1/1/2020
IN0169	Decatur 16 CO Regular IT	2.5%	1/1/2020
IN0176	Cass 09 CO Regular IT	2.7%	1/1/2020

## Kentucky

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

Code	Description	Rate	Effective Date
KY0040	Tompkinsville CT Regular IT	1.5%	1/1/2020
KY0205	Boyle CO Regular IT	1.25%	1/1/2020
KY0246	Nortonville CT Regular IT	1.5%	7/1/2019

## Maine

Maine withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Maryland

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

Code	Description	Rate	Effective Date
MD3189	Anne Arundel, Maryland Regular IT	2.85%	1/1/2020
MD3190	Baltimore, Maryland Regular IT	3.2%	1/1/2020
MD3196	Dorchester, Maryland Regular IT	3.2%	1/1/2020

Code	Description	Rate	Effective Date
MD3201	Kent, Maryland Regular IT	3.2%	1/1/2020
MD3205	St Mary's, Maryland Regular IT	3.2%	1/1/2020
MD3208	Washington, Maryland Regular IT	3.2%	1/1/2020
MD3210	Worcester, Maryland Regular IT	2.25%	1/1/2020

## Massachusetts

Massachusetts withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Michigan

Michigan withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Minnesota

Minnesota withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Mississippi

Mississippi withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Missouri

Missouri withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## New Jersey

The Unemployment Insurance wage base limit changes to \$35,300 for 2020.

## New Mexico

New Mexico withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## North Carolina

North Carolina withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## North Dakota

- The Unemployment Insurance wage base limit changes to \$37,900 for 2020.
- North Dakota withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Ohio

The following local taxes have been added in the supported tax tables:

Code	Description	Rate	Effective Date
OH1012	Dorr Street JEDD CT Regular IT	2%	1/1/2020
OH1013	Fulton VI Regular IT	1%	1/1/2020

## Oregon

- The Unemployment Insurance wage base limit changes to \$42,100 for 2020.
- Oregon withholding tables and instructions have been updated for 2020. 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
PA0469	Walker TP, Huntingdon SD (NR) LST	\$52	1/1/2020

Code	Description	Rate	Effective Date
PA0485	Morris TP, Juniata Valley SD (NR) LST	0	1/1/2020
PA0532	Aleppo TP, West Greene SD (NR) LST	\$52	1/1/2020
PA0893	Licking TP, Keystone SD (NR) LST	\$52	1/1/2020
PA1068	Tulpehocken TP, Tulpehocken SD (NR) LST	\$52	1/1/2020
PA1204	Upper Moreland TP, Upper Moreland SD (NR) LST	\$52	1/1/2020
PA1293	Mt Carmel BO, Mount Carmel SD (NR) LST	\$52	1/1/2020
PA1469	West Fallowfield TP, Octorara SD (NR) LST	\$52	1/1/2020
PA1890	Point TP, Shikellamy SD (NR) LST	\$52	1/1/2020
PA3560	Upper Nazareth TP, Nazareth SD Regular IT	1.45%	1/1/2020
PA3588	Lower Nazareth TP, Nazareth SD Regular IT	1.45%	1/1/2020
PA7160	Nanticoke CT, Greater Nanticoke SD Regular IT	2.25%	1/1/2020
PA7496	Duquesne CT, Duquesne SD Regular IT	1.8%	1/1/2020
PA7828	Lansdowne BO, William Penn SD (NR) Regular IT	0.5%	1/1/2020
PA7829	Lansdowne BO, William Penn SD Regular IT	0.5%	1/1/2020

## Rhode Island

Rhode Island withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## South Carolina

South Carolina withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Vermont

Vermont withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

# Product updates

This update does not include any new features or improvements for payroll or My Workforce Forms.

## Payroll product updates

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

### Form W-4 Filing Statuses for Colorado, New Mexico, and North Dakota

In the Filing Status field on the Payroll Employees Tax Info window, new filing statuses are available for the following state income taxes:

- Colorado Income Tax (COSIT)
- New Mexico Income Tax (NMSIT)
- North Dakota Income Tax (NDSIT)

## My Workforce Forms updates

This update does not include any new features or improvements to My Workforce Forms.

# 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 2020 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 2019 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- Preparing for your first payroll of 2020



# 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.