



Sage 300 U.S. Payroll

Q2 2022 Release Notes

June 2022

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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 Q2 2022

Software requirements

To use this product update, you must have Sage 300 U.S. Payroll 7.3, which is supported in Sage 300 2022, 2021, 2020, and 2019.

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. Visit the [Sage 300 Product Documents website](#) for access to more documents.
- **Sage City:** Visit <https://sagecity.na.sage.com> for blogs, tips, and guidance specific to Sage 300.
- **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.

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.

Alabama

Alabama withholding tables and instructions have been updated, effective January 1, 2022. Refer to the state publication for more details.

District of Columbia

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

Code	Description	Rate	Effective Date
DC0001	District of Columbia Paid Family Leave Tax	0.26%	7/1/2022

Kentucky

The Unemployment Insurance wage base limit changes to \$10,800 for 2022.

Maryland

Maryland withholding tables and instructions have been updated, effective January 1, 2022. Refer to the state publication for more details.

Ohio

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

Code	Description	Rate	Effective Date
OH0255	Mantua VI Regular IT	2%	7/1/2022

Pennsylvania

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
PA0281	Schuylkill TP, Tamaqua SD (NR) LST	\$52	1/1/2022
PA4565	New Castle CT, New Castle SD (NR) Regular IT	1.815%	1/1/2022
PA5875	Manns Choice BO, Bedford SD (NR) Regular IT	1%	1/1/2022
PA7946	Scranton CT, Scranton SD Payroll Preparation Tax	0.2787%	1/1/2022
PA7947	Hazleton CT, Hazleton SD Payroll Preparation Tax	0.26%	1/1/2022

Utah

Utah withholding tables and instructions have been updated, effective May 1, 2022. Refer to the state publication for more details.

Washington

The planned Washington Cares Fund Tax (WA0004) has been suspended. The tax has been removed from U.S. Payroll.

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.

Improved Security for Sensitive Data

We have increased security for SSN numbers and EFT bank account numbers. You can no longer print unmasked SSN numbers on checks.

More security enhancements are managed with the following new security authorizations:

- **SSN Number Maintenance.** Allows users to:
 - See and enter employees' SSN numbers on the Payroll Employees window.
 - On reports that include employees' SSN numbers, choose whether the numbers are masked.
 - Print the following reports:
 - Qtrly Wage on Disk(ette)
 - Qtrly Wage on Disk(ette) Status
 - W-2 Tax Filing
 - Federal Tax Filing
 - State Tax Filing
- **EFT Bank Account Maintenance.** Allows users to:
 - See and enter EFT numbers on the Payroll Employees window.
 - Generate and combine EFT files.
 - Print the EFT Direct Deposit report.
 - On reports that include EFT numbers, choose whether the numbers are masked.

By default the new security authorizations are not assigned to any users. You must assign them to users who need to manage SSN and/or EFT bank account numbers.

Note: Some reports now require multiple security authorizations. For example, to use the W-2 Tax Filing report, a user previously needed only Government Reporting security authorization. Now the user also needs SSN Number Maintenance security authorization.

Non-binary Gender

On the Other tab of the Payroll Employees window, you can now select Non-binary in the **Gender** field.

Reviewing Comments for Employees

If you print the Employee Information report with only comments included, the report lists only employees with comments.

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>

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

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 asked if you want to continue updating company-level local tax records with information from the local repository, click one of the following:
 - **Yes** to automatically update the company rates for all local taxes.
 - **No** to update local taxes individually (select each tax and click the Update button to apply the rate changes). Doing this enables you to validate rates before and after the changes.
4. Depending on your choice in the previous step, update employee-level local tax records as follows:
 - If you clicked **Yes** in the previous step, when asked if you want to continue updating employee local tax records from the local tax repository, click one of the following:
 - **Yes** to automatically update the employee-level rates for all local taxes.
 - **No** to select each employee or use the Update Taxes tax, then update each tax or employee individually.
 - If you clicked **No** in the previous step, you must 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**.

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.