Sage

Sage 300 U.S. Payroll

Q2 2024 Release Notes

June 2024

Contents

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.

> **Important!** If you are using Sage 300 Web Screens AND you install Sage 300 version 2024 Product Update 1 after the US or Canadian Q2 2024 Payroll Tax Update, make sure you apply the recent hotfix. For more information, see Sage Knowledgebase article: Hot Fix Q4 tax update (Solution ID: 231213165156483).

Product update information

Product: Sage 300 U.S. Payroll

Version: Product Update Q2 2024

Software requirements

To use this product update, you must have Sage 300 U.S. Payroll 8.0, which is supported in Sage 300 2024, 2023, 2022, and 2021.

> **Note:** Sage 2021 will no longer be supported following this tax update. Please reach out to you Business Partner for your upgrade options.

Payroll 8.0

As of Sage 300 2024 in September 2023, there is a new version of Payroll, 8.0. The tax tables for Payroll 7.3 will be available until March 2024. After this date, tax tables and support will only be available for Payroll 8.0.

> **Important!** If you are upgrading from Payroll 7.3 to Payroll 8.0, make sure you have the latest Payroll 8.0 Tax Update. There might be an activation issue if not

> using the latest Payroll 8.0 Tax Update.

> **Note:** If you are using an older version of Sage 300, please reach out to your Business Partner for your upgrade options.

	Sage 300 2024	Sage 300 2023	Sage 300 2022	Sage 300 2021
Payroll versions supported **up to** March 2024	7.3 & 8.0	7.3 & 8.0	7.3 & 8.0	7.3 & 8.0
Payroll versions supported **after** March 2024	8.0	8.0	8.0	8.0

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.

- **Community Hub:** Visit https://communityhub.sage.com/us for blogs, tips, and guidance specific to Sage 300.

- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at https://us-kb.sage.com/portal/ss/ 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.

Georgia

- Georgia withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

Idaho

- Idaho withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

Illinois

Chicago Paid Leave and Paid Sick and Safe Leave

- Effective July 1, 2024, the new paid sick leave accrual rate will be 1 hour for every 35 hours worked.

Kentucky

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

Code	Description	Rate	Effective Date
KY0140	Middlesboro CT Regular IT	2.45%	04/01/2024

Ohio

- Ohio withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

- Those who work in Mingo Junction and had tax withheld above 1% must request a refund by filing a 10A application for municipal income tax refund form with RITA.

    - For more information see, https://www.timesleaderonline.com/news/local-news/2024/05/mayor-the-village-of-mingo-junction-collected-from-the-expired-income-tax-levy/.

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

Code	Description	Rate	Effective Date
OH0342	Bellefontaine CT Regular IT	1.6 %	07/01/2024
OH0374	Mingo Junction VI Regular IT	1%	01/01/2023
OH1067	Violet TP-Lancaster JEDD CT Regular IT	2.3%	01/01/2024
OH1068	Blanchester VI Regular IT	1%	07/01/2024
OH1069	College Corner VI Regular IT	1%	07/01/2024
OH1070	Glenmont VI Regular IT	1%	07/01/2024
OH1071	Holmesville VI Regular IT	1%	07/01/2024

Oregon

Effective July 1, 2024, the Eugene Community Safety Payroll Tax exemption will increase accordingly with Oregon state minimum wage.

The minimum rates will increase as follows:

- Standard Minimum Wage: $14.70 per hour

- Portland Metro Minimum Wage: $15.95 per hour

- Non-Urban Minimum Wage: $13.70 per hour

For more information, including details about setting up related local tax codes, see Sage Knowledgebase article: (220924960111399).

Pennsylvania

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

Code	Description	Rate	Effective Date
PA4193	Waynesboro BO, Waynesboro SD (NR) Regular IT	1%	01/01/2024
PA4235	Antrim TP, Greencastle-Antrim SD (NR) Regular IT	0%	01/01/2024
PA7495	Duquesne CT, Duquesne SD (NR) Regular IT	1%	01/01/2024

Code	Description	Rate	Effective Date
PA7496	Duquesne CT, Duquesne SD Regular IT	1%	01/01/2024
PA6378	Upper Augusta TP, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6384	Sunbury CT, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6386	Snydertown BO, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6394	Rockefeller TP, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6400	Point TP, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6402	Northumberland BO, Shikellamy SD Regular IT	1.45%	07/01/2024

Virginia

Virginia withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Vermont

Effective July 1, 2024, Vermont legislature will impose a new payroll tax called the Child Care Contribution. For more information, see Knowledgebase article: [The Vermont Child Care Contribution Effective 1st July, 2024 (240606174850653)](#).

Product updates

The following product updates are included with this release.

Payroll product updates

US Payroll Product Updates

- We have fixed the following issues:

    - The **Calculate Payroll Screen** no longer closes without completing successfully when there are Common Deduction Limits that have been reached.

    - **Alabama or Oregon State Income Tax** may not be calculated correctly if there are earning codes that are State taxable and non-taxable. Support Ticket: 8010047600.

- The North Carolina Department of Commerce will begin collecting the SOC Codes for quarterly reports.

    - You can add the SOC Code on the Employee Supplemental Information window, in the Occupational Code field.

- This tax update supports HR Integration for Sage 300.

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 Sage Knowledgebase articles:

- Producing Quarterly Wage Reports on Disk(ette) or Hard Disk (Solution ID: 240315223951660)

- State-Specific Information for Quarterly Wage on Disk(ette) (Solution ID: 240315225836580)

- Entering Employee Supplemental Information (Solution ID: 223924350032880)

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.