Sage

Sage 300 U.S. Payroll

Q3 2024 Release Notes

September 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.

Product update information

Product: Sage 300 U.S. Payroll

Version: Product Update Q3 2024

Software requirements

To use this product update, you must have Sage 300 U.S. Payroll 8.0, which is supported in Sage 300 2025, 2024 PU3, 2023 PU7, and 2022 PU8.

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

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.

Arkansas

Effective July 1st, 2024, Arkansas withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

District of Columbia

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

Code	Description	Rate	Effective Date
DC0001	District of Columbia Paid Family Leave Tax	0.75%	07/01/2024

Kansas

Effective July 1st, 2024, Kansas withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Kentucky

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

Code	Description	Rate	Effective Date
KY0091	Winchester CT Regular IT	2.15%	10/01/2024
KY0181	Flemingsburg CT Regular IT	1.5%	07/01/2024
KY0207	Bourbon CO Regular IT	1.25%	07/01/2024
KY0256	Grant CO Regular IT	2.5%	07/01/2024
KY0286	Hurstbourne Acres CT Regular IT	1%	07/01/2024

Ohio

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

Code	Description	Rate	Effective Date
OH0428	Indian Hill VI Regular IT	0.45%	01/01/2024
OH0893	Mercy West JEDD III CT Regular IT	1%	10/01/2024

Pennsylvania

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

Code	Description	Rate	Effective Date
PA0482	Penn TP, Huntingdon SD (NR) LST	$10	06/15/2024
PA0491	Lincoln TP, Huntingdon SD (NR) LST	$10	06/15/2024

Utah

Effective June 1st, 2024, Utah withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.

Vermont

Vermont Child Care Contribution (CCC) is now supported on W-2.

- If an employer chooses to deduct and withhold a portion of the Child Care Contribution from an employee, the employer should report the portion of CCC withheld from the employee for the tax year on Box 14 of the employee's W-2.

- For more information, see Sage Knowledgebase article: 240606174850653.

Product updates

The following product updates are included with this release.

Payroll product updates

US Payroll Product Updates

Fix for Aatrix error

We have fixed the Aatrix error that appeared when updating government forms.

Fix for display of invalid G/L Accounts

We have fixed Payroll Processing Exceptions where invalid G/L Accounts were not displayed correctly.

Tax Calculation Analysis Reports

There are two new summary Tax Calculation Analysis reports:

- Calendar Year Totals Summary

- Date Range Summary

To print these reports, go to, **Payroll Transaction Reports > Tax Calculation Analysis > Report Style dropdown with new reports.**

Use longer numbers for checks

In Sage 300 versions 2022 PU8, 2023 PU3, 2024 PU2 and 2025, you can now enter Payroll check numbers that are up to fifteen characters long.

> **Note:** You will not be able to install Q3 2024 Tax Update on older versions of Sage 300. Please reach out to your Business Partner for your upgrade options.

New Payroll Web Screens in version 2025

In Sage 300 version 2025, Payroll web screens are installed with the Q3 2024 Payroll Tax Update.

- If you are running Sage 2025 web screens, you will have an option to install Payroll web screens.

- Selecting this checkbox will install the required US Payroll web screens.

The following are the new Payroll web screens included in this release:

- **Employees.** Use the Employees screen to add, modify, delete an employee record.

- **Assign Employee Tax Audit Report.** Use the Assign Earnings/Deductions screen to assign an earning or deduction automatically to all or a range of employees.

- **Assign Employee Earn/Ded Audit Report.** Print this report after you use the Assign Earnings/Deductions function.

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.