



Sage 300 ERP 2014 U.S. Payroll Q2 2015 Release Notes

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Product Update Release Notes

Important! All customers who update, maintain, and use Sage 300 ERP 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 ERP 2014 U.S. Payroll

Version: Product Update Q2 2015

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 ERP.
- **Customer Support:** For additional articles and resources, visit <https://support.na.sage.com> or contact Customer Support at 800-829-0170 (U.S. and Canada). Please have your Customer ID handy when contacting Customer Support.

Payroll Tax Updates

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

State and Local Legislative Updates

This section lists the state and local 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.

California

Effective July 1, 2015, California employers must show the number of available sick days each employee has on their pay stub or in a document issued the same day as their paycheck. Employers must also keep record of how many hours each employee earned and used for three years. This information may be stored on documents available to employees electronically.

Tip: You can use SAP® Crystal Reports to make the required edits to the payroll checks.

Kentucky

- A new tax code has been added for Pulaski County for employees working in Somerset so that the reduced tax rate for the county will be calculated. The new code is KY0250 - Pulaski (Som) CO Regular IT. There were no changes made to the existing code (KY0120 - Pulaski CO Regular IT). The new tax code rates are as follows:
 - For April 1, 2015 through June 30, 2015 individuals working in Somerset are to be withheld 0.9% for Pulaski County payroll occupational tax.
 - For July 1, 2015 through June 30, 2016 individuals working in Somerset are to be withheld 0.8% for Pulaski County payroll occupational tax.
 - There is a state mandated offset of 0.1% for the fiscal year ending 6/30/15 and a 0.2% offset for the fiscal year ending 6/30/16 for revenue sharing. After that the offset is no longer applicable and employees working in Pulaski County will be withheld 1% regardless of whether or not they work in Somerset.
- The following local taxes have either been added or have updated rates in the supported tax tables:

Tax code	Description	Rate	Effective Date
KY0079	Clinton CO Regular IT	1.25%	4/1/2015
KY0130	Owensboro CT Regular IT	1.39%	7/1/2015

Tax code	Description	Rate	Effective Date
KY0127	Paintsville CT Regular IT	1.25%	4/1/2015
KY0230	Raceland CT Regular IT	1.5%	4/1/2015
KY0249	Somerset CT Regular IT	0.6%	4/1/2015

New York

A recent legislative change to the New York City personal income tax for taxpayers with taxable income over \$500,000 has caused New York City withholding tax changes (NYCIT - New York City Regular IT). Effective for payrolls made on or after June 1, 2015, employers who elect (or are required) to use Method II, Exact Calculation Method, must use the revised exact calculation method (s) due to changes in the line 7, Column 5 amounts in each of the tables.

Ohio

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

Tax code	Description	Rate	Effective Date
OH0910	Holland-SpringfieldTP JEDZ CT Regular IT	2.25%	7/1/2015
OH0911	Wayne VI Regular IT	0.75%	1/1/2015

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

Tax code	Description	Rate	Effective Date
OH0446	Cedarville VI Regular IT	1.25%	7/1/2015
OH0505	Coshocton CT Regular IT	2.0%	7/1/2015
OH0522	New Carlisle CT Regular IT	1.5%	7/1/2015
OH0253	Ravenna CT Regular IT	2.25%	7/1/2015

- Effective June 30, 2015, the following local tax is expired:

Tax code	Description
OH0820	Waynesville VI Regular IT

After installing the Q2, 2015 tax update and after processing your last payroll for this quarter, you can inactivate the Waynesville VI Regular IT tax by following these steps:

- Select the **Inactive** check box to inactivate the local tax code (Setup > Payroll > Local and Other Custom Taxes) and to prevent it from being added to employees.

2. Remove the local tax (OH0820) from each employee record (Payroll > Employees > Tax tab).

Note: If the local tax is not removed from the employees, it will continue to calculate when you process payroll.

- Effective July 1, 2015, the following Ohio localities will report to RITA:

Tax code	Description
OH0365	Eastlake CT Regular IT
OH0746	Holland VI Regular IT
OH0191	Peninsula VI Regular IT

Pennsylvania

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

Tax code	Description	Rate	Effective Date
PA4366	Arnold CT, New Kensington-Arnld SD Regular IT	1.0%	1/1/2015
PA4365	Arnold CT, New Kensington-Arnld SD (NR) Regular IT	1.0%	1/1/2015
PA2097	Scranton CT, Scranton SD (NR) LST	\$156 annually	1/1/2015
PA6390	Shamokin CT, Shamokin SD Regular IT	2.0%	1/1/2015
PA7929	Westfall TP, Delaware Valley SD (NR) Regular IT	1.0%	5/15/2015
PA7930	Westfall TP, Delaware Valley SD Regular IT	1.0%	5/15/2015

Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage 300 ERP 2014. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a small fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Federal Tax Filing** or **State Tax Filing** from **Payroll > Government Reports** after installing this update. 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/index.php/sage300erp>

Quarterly Wage on Disk(ette)

If you use Sage 300 ERP 2014 U.S. Payroll, you can use the Quarterly Wage on Disk(ette) feature to produce the following quarterly wage reports:

- State Unemployment Tax (SUTA) quarterly wage reports on diskette or hard disk (for states or regions not supported by Sage Payroll Tax Forms and eFiling by Aatrix).

Note: As of tax year 2006, the Social Security Administration (SSA) no longer accepts W-2s on physical media (such as diskettes or CD), although some states still do. For more details about the submission methods that are acceptable for W-2 reporting and submission deadlines, consult your tax authorities.

For more information about using the Quarterly Wage on Disk(ette) feature, and on state-specific requirements for using the feature, see the following articles on the Sage Support website at <https://support.na.sage.com>:

- [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.
- Download the Product Update from the Sage Customer Portal.
- 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 ERP.

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 ERP.
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**.

Note: After installing this update, under **System Information** in Sage 300 ERP, the tax update version will be listed with a product update number. This has no impact on the content delivered with the tax and product update.

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 into Sage 300 ERP.
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 ERP to access all employees. Otherwise you may not receive the prompts as described above and employee rates will not be updated.