

# Sage 300

# U.S. Payroll

## Q3 2016 Release Notes

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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 Q3 2016

## Software Requirements

To use this update for Sage 300 U.S. Payroll, you must have:

- The most current product update for your version of Sage 300.

To check that you have the most current product update, see [Knowledgebase article 45415](#).

- The correct version of Sage 300 U.S. Payroll for your version of Sage 300:
  - Sage 300 U.S. Payroll 7.3 is supported in Sage 300 2017.
  - Sage 300 U.S. Payroll 7.2 is supported in Sage 300 2014 and 2016.

## 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 City:** Visit <http://sagecity.na.sage.com> for blogs, tips, and guidance specific to Sage 300 Payroll.
- **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 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.

### Idaho

The Idaho State Tax Commission has issued new percentage method and wage bracket withholding tables, effective January 1, 2016. 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
KY0046	Russell CT Regular IT	1.15%	7/1/2016
KY0063	Greensburg CT Regular IT	1.5%	7/1/2016
KY0117	Rowan CO Regular IT	1.5%	7/1/2016
KY0164	Hillview CT Regular IT	1.8%	7/1/2016
KY0225	Simpsonville CT Regular IT	0.5%	7/1/2016
KY0231	Vine Grove CT Regular IT	1.5%	7/1/2016
KY0254	Corbin CT Regular IT	1%	7/1/2016

## Ohio

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

Code	Description	Rate	Effective Date
OH0854	Eaton JEDD CT Regular IT	2.25%	7/1/2016
OH0935	Toledo Express Airport JEDD CT Regular IT	0.5%	1/1/2016
OH0936	Richfield JEDD CT Regular IT	2%	1/1/2005
OH0937	Clarksville VI Regular IT	1%	7/1/2016
OH0938	Darbyville VI Regular IT	1%	7/1/2016
OH0939	Millersport VI Regular IT	1%	7/1/2016
OH0940	Zanesville-Newton TP JEDD CT Regular IT	1.9%	1/1/2016
OH0941	Zanesville-Springfield TP JEDD CT Regular IT	1.9%	1/1/2016
OH0942	Lebanon-Turtle Creek TP JEDD CT Regular IT	1%	12/3/2013
OH0943	Hubbard TP-Hubbard CT JEDD CT Regular IT	1.5%	12/3/2001
OH0944	Saybrook TP JEDD II CT Regular IT <b>Note:</b> To ensure that the correct amount is withheld for this tax, do not add the updated local tax to your employees until the payroll for which the new rate is effective.	1.8%	10/1/2016

## Pennsylvania

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

Code	Description	Rate	Effective Date
PA0566	Youngstown BO, Greater Latrobe SD (NR) LST	\$52.00	1/1/2016
PA0919	Liberty TP, Keystone Central SD (NR) LST	\$52.00	1/1/2016

Code	Description	Rate	Effective Date
PA1246	McClure BO, Mid-West SD (NR) LST	\$52.00	1/1/2016
PA2216	Harrisburg CT, Harrisburg SD (NR) LST <b>Note:</b> To ensure that the 2016 tax year ends with the correct amount withheld, this rate is set to \$260.00 in the tax table.	\$156.00	1/1/2016
PA2983	Long Branch BO, California SD (NR) Regular IT	1%	1/1/2016
PA3001	Ellsworth BO, Bentworth SD (NR) Regular IT	1%	1/1/2016
PA6940	Union TP, Littlestown SD Regular IT	1.6%	7/1/2016
PA7093	Philadelphia City SD (NR) Regular IT	3.4741%	1/1/2016
PA7094	Philadelphia CT, Philadelphia City SD Regular IT	3.9004%	1/1/2016
PA7166	Mt Pleasant TP, Littlestown SD Regular IT	1.6%	7/1/2016
PA7174	Mt Joy TP, Littlestown SD Regular IT	1.6%	7/1/2016
PA7246	Littlestown BO, Littlestown SD Regular IT	1.6%	7/1/2016
PA7378	Germany TP, Littlestown SD Regular IT	1.6%	7/1/2016
PA7618	Bonneauville BO, Littlestown SD Regular IT	1.6%	7/1/2016



# Product Updates

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

# 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 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.