



Version 2.077

Release Notes



25B Hanover Road * Florham Park, NJ 07932
Phone: 800-343-6844 * Fax: 973-360-0699

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State Income Tax Withholding Changes for 2023

North Dakota – The state published an update to the Income Tax and Withholding Rates and Instructions document For Wages Paid in 2023. The revision date on the document was July 2023. The state clarified that while the new withholding rates are effective for all of 2023, it does not expect employers to make retroactive withholding adjustments. The Tax Tables to be used for employees whose most recent Form W-4 was from before 2020 changed for both Single and Married filing statuses – and now match the tables to be used for employees whose most recent Form W-4 was from 2020 and later. There are no other changes to the percentage method formula. Previously, special programming was in effect when these tables did not match to calculate the tax correctly. That special programming will be removed.

State Income Tax Withholding Changes for 2024

- Kentucky – The Standard Deduction increases to \$3,160.00 for 2024. The flat tax decreases from 4.5% to 4.0%. There are no other changes to the percentage method formula.
- California –
 - The Low Income Exemption amount-Single or Married with 0 or 1 Allowance changes to \$17,769 (was \$17,252 in 2023).
 - The Low Income Exemption amount-Married with 2 or more Allowances, or Head of Household changes to \$35,538 (was \$34,503 in 2023).
 - The Standard Deduction amount-Single or Married with 0 or 1 Allowance: \$5,363 (was \$5,202 in 2023).
 - The Standard Deduction amount-Married with 2 or more Allowances, or Head of Household: \$10,726 (was \$10,404 in 2023).
 - The State Secondary Exemptions/Number of Additional Allowances for Estimated Deductions is \$1,000 annually for each allowance in 2024 (unchanged from 2023).
 - The State Exemptions/Annual Tax credit changes to \$158.40 for 2024 (was \$154.00 in 2023).
 - There are Tax Table changes also.
- Arkansas – There are changes for the calculation of Arkansas State Income Tax effective January 1, 2024. These include programming changes and tax table changes. The Standard Deduction increases from \$2,270 to \$2,340.00. The formula does not use the percentage method in the traditional way, so please see the Taxes document in Help for more information

Updated Manager Services Functions

This section describes updated functions in Manager Services.

Quarterly State Income Tax Report

The state of Alabama will require – for 2023 – the Amount of Overtime Wages paid in 2023 for Alabama Employees – and the number of employees who received such overtime. They also require the same information for 2024 – based on how often you file state taxes in Alabama – Monthly or Quarterly. So the data will be provided in this report for Month to Date, Quarter to Date, and Year to Date totals.

Previous updates made to the application were to identify Overtime Pay Types by Pay Code in the Manager Services function Pay Code Definition / Pay Process Control. This report uses that flag to identify the Pay Codes whose totals will appear on this report for the Alabama requirement.

This report has been programmed so that when running the report as follows – the totals required from the state will appear at the end of the report.

For 2023 annual data:

- 1) At the Legal Entity field, click on the down-arrow and select the one you want to work with.
- 2) At the State/Province field, click on the down-arrow and select the state you want to work with. The information about Overtime is only required for Alabama.
- 3) Leave the Payroll Processing Group field at the default selection of *no value.
- 4) Check the Break By Payroll Processing Group checkbox.
- 5) At the Tax Year field – select 2023.
- 6) At the Month field – select December.
- 7) Leave the Summary checkbox unchecked.
- 8) If you don't want to use the default name, go to the Report ID field and enter a name that will uniquely identify your report. If two or more reports are given the same name by the same user, the only way to distinguish them is by the time and date they were created. This field accepts up to 25 alphanumeric characters.
- 9) Click on Submit to create the report.

Quarterly State Income Tax Report

* = Required

Selection:

*Legal Entity:

State/Province:

Payroll Processing Group:

Break By Payroll Processing Group:

*Tax Year:

Month:

Summary Only:

*Report ID:

→ submit
← cancel

The overtime data for the December 2023 report will appear similar to the below – with the data under the Y/T/D column.

Date: 11/28/2023
Time: 12:47PM
State Income Tax Report
Olympics1 National Committee of Salt Lake City
Page: 2
User: mruberto

Payroll Processing Group: Semi-Monthly State: ALABAMA State ID#: 700000 Q/E Date: 12/31/2023 Month: December

Employee#	SSN	Name	Y/T/D Taxable Wages	Y/T/D State Tax	Q/T/D Taxable Wages	Q/T/D State Tax	M/T/D Taxable Wages	M/T/D State Tax
900101	667-48-2211	Battenberg, Louis	10,886.63	426.06	2,662.83	104.22	0.00	0.00
999542	416-90-2030	Jersey3, Marco	1,947.91	70.63	0.00	0.00	0.00	0.00
900391	444-44-4444	Lawrence, Christine	1,826.12	71.59	0.00	0.00	0.00	0.00
922119	765-88-2211	Straight, Curtis	4,566.11	180.12	0.00	0.00	0.00	0.00
Totals for Semi-Monthly			19,226.77	748.40	2,662.83	104.22	0.00	0.00
NUMBER OF EMPLOYEES 4								
Totals for ALABAMA			25,834.99	1,003.84	2,662.83	104.22	0.00	
NUMBER OF EMPLOYEES 5								
TOTAL AMOUNT OF OVERTIME WAGES:			2,177.13					
TOTAL NUMBER OF EMPLOYEES WITH OVERTIME WAGES:			5					

For 2024 Monthly or Quarterly data:

- 1) At the Legal Entity field, click on the down-arrow and select the one you want to work with.
- 2) At the State/Province field, click on the down-arrow and select the state you want to work with. The information about Overtime is only required for Alabama.
- 3) Leave the Payroll Processing Group field at the default selection of *no value.
- 4) Check the Break By Payroll Processing Group checkbox.
- 5) At the Tax Year field – select 2024.
- 6) At the Month field – select any month.
- 7) Leave the Summary checkbox unchecked.
- 8) If you don't want to use the default name, go to the Report ID field and enter a name that will uniquely identify your report. If two or more reports are given the same name by the same user, the only way to distinguish them is by the time and date they were created. This field accepts up to 25 alphanumeric characters.

9) Click on Submit to create the report.

Quarterly State Income Tax Report

* = Required

Selection:

*Legal Entity: Olympics, Inc. ▼

State/Province: Alabama ▼

Payroll Processing Group: *no value ▼

Break By Payroll Processing Group:

*Tax Year: 2024 ▼

Month: Apr ▼

Summary Only:

*Report ID: QuarterlyStateIncomeTax

→ submit
← cancel

The overtime data for the 2024 report will appear similar to the below – with the data under the M/T/D, Q/T/D, and Y/T/D columns. The report below is an example of a report run for payments through April 2024. The April 2024 data appears in the M/T/D column, the 2nd quarter 2024 data appears in the Q/T/D column, and the data for all of tax year 2024 appears in the Y/T/D column.

Date: 11/28/2023 Time: 03:44PM		State Income Tax Report Olympics1 National Committee of Salt Lake City				Page: 2 User: mruberto		
Payroll Processing Group: Semi-Monthly		State: ALABAMA		State ID#: 700000		Q/E Date: 06/30/2024 Month: April		
Employee#	SSN	Name	Y/T/D Taxable Wages	Y/T/D State Tax	Q/T/D Taxable Wages	Q/T/D State Tax	M/T/D Taxable Wages	M/T/D State Tax
900101	667-48-2211	Batesberg, Louis	5,678.62	218.46	0.00	0.00	0.00	0.00
900391	444-44-4444	Lawrence, Christine	1,703.60	64.66	1,703.60	64.66	1,703.60	64.66
922119	765-88-2211	Straight, Curtis	7,250.00	279.61	3,625.00	141.10	3,625.00	141.10
Totals for Semi-Monthly			14,632.22	562.73	5,328.60	205.76	5,328.60	205.76
Totals for ALABAMA			21,171.69	815.45	5,328.60	205.76	5,328.60	
NUMBER OF EMPLOYEES			3					
NUMBER OF EMPLOYEES			4					
TOTAL AMOUNT OF EXEMPT OVERTIME WAGES:			2,213.77		368.12		368.12	
TOTAL NUMBER OF EMPLOYEES EXEMPT FROM OVERTIME WAGES:			4		2		2	

SUI Data Generation and SUI File Creation

Starting with the 4q2023 SUI file for North Carolina that is filed by January 31, 2024 and going forward, the file that results from this function will be in ICESA format. This file will be accepted in the new North Carolina State Unemployment Insurance Tax System (NC SUITS).

W-2 Data Generation - Forms

For employees who have contributed to Colorado Family and Medical Leave Insurance program, the label on the employee contribution amount that will appear in Box 14 has been programmed to be specifically FAMLFI as required by the state. This still requires that Colorado FLI Tax as been added in the **W-2 Additional State Taxes** function. For Hosted and On-Premise customers who print and file their own W-2s, this is a customer responsibility. If you are a hosted customer and your organization has employees who contribute to the Colorado Family and Medical Leave Insurance program, you must add Colorado Family Leave in the **W-2 Additional State Taxes** function.

The screenshot shows the 'W-2 Additional State Taxes' interface. At the top left, the title 'W-2 Additional State Taxes' is displayed in orange, with a blue '+ add' button to its right. Below the title, a note states '* = Required'. A dropdown menu for '*State/Province:' is set to 'Colorado'. A table with two columns, 'State Tax' and 'Action', is shown. The first row contains 'Family Leave' under 'State Tax' and a red 'X delete' button under 'Action'. At the bottom center, there is a blue '+ add' button.

State Tax	Action
Family Leave	delete

W-2 History

The US and Puerto Rico W-2 Forms in this function will be updated to the Tax Year 2023 version of the forms and instructions.

Updated Employee Self Service Functions

This section describes updated functions in Employee Self Service.

W-2 History

The US and Puerto Rico W-2 Forms in this function will be updated to the Tax Year 2023 version of the forms and instructions.

Updated Unicorn HCM Tools Functions

This section describes updated functions in Unicorn HCM Tools.

Reconciliation Tax Summary

Corrections were made per MasterTax Specifications for records related to Oregon Paid Family Leave and Colorado Paid Family Leave.

SUI Magnetic Data Generation and SUI Diskette Creation

Starting with the 4q2023 SUI file for North Carolina that is filed by January 31, 2024 and going forward, the file that results from this function will be in ICESA format. This file will be accepted in the new North Carolina State Unemployment Insurance Tax System (NC SUITS).

Updated Customer Management Module Functions

This section describes updated functions in the Customer Management Module.

RTS Information and Generate RTS Export File

Corrections were made per MasterTax Specifications for records related to Oregon Paid Family Leave and Colorado Paid Family Leave.

SUI Data Generation and SUI File Creation and Inquiry

Starting with the 4q2023 SUI file for North Carolina that is filed by January 31, 2024 and going forward, the file that results from this function will be in ICESA format. This file will be accepted in the new North Carolina State Unemployment Insurance Tax System (NC SUITS).