



Version 2.067 Release Notes

11/26/2019



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Getting the Latest iCON Information

The Unicorn HRO website (<http://www.UnicornHRO.com>) contains the most up-to-date information about iCON.

On our web site, there are three documents that are of particular interest at year-end: *Taxes*, *SUI Reporting Set Up by State* and *W2 Reporting By State*. The *Taxes* document explains how each state tax is calculated for 2019. The *SUI Reporting Set Up by State* document explains how to set up your system to create SUI wage files. The *W2 Reporting By State* document gives information about the state W-2 file formats, state websites and any special set-up instructions that may be required.

These documents are available from the Documents section of the Help window in Manager Services, on our website through the iCON Documentation section of the Downloads area, or you can access them from the main page of iCON Tools:

1. From the main window, click on the question mark icon  for **Help**.
2. Click on **Documents** 
3. Select the document you wish to view.

Federal Tax Changes

FICA Wage Limit Is Announced

The annual taxable wage limit for the Social Security portion (OASDI) of the FICA tax increased to **\$137,700** for 2020.

FUTA Ceiling Remains the Same

The FUTA wage ceiling remains \$7,000.

Railroad Retirement Board Announces Changes

The U.S. Railroad Retirement Board has announced that the taxable earnings base for Tier I will increase to **\$137,700** in 2020. The taxable earnings base for Tier II increases to **\$102,300** in 2020. The maximum monthly taxable earnings for Railroad Unemployment Insurance purposes changes to **\$1,655**.

W-4 Form for 2020 and Federal Income Tax Calculation changes

The IRS has drafted new **2020 Form W-4** – renamed **Employee's Withholding Certificate**. The renaming has to do with the fact that the form is very different from previous versions, due to the federal tax law changes that took place in 2018. The Internal Revenue Service (IRS) is not requiring all employees to complete the revised form and has announced that they will design the withholding tables so that they will work with both the new and prior year forms. However, certain employees will be required to use the new form: those hired in 2020 and anyone who makes withholding changes during 2020.

The new form no longer includes the concept of “Exemptions”, and the formula for determining the amount of Federal Income Tax to withhold for an employee in 2020 who has submitted the new 2020 Form W-4 also does not use any Withholding Allowance Amount.

iCON has been updated to allow the user to enter the information from whichever Form W-4 applies to the employee based on the date that the information is being entered.

As of this writing, the IRS has not finalized the 2020 W-4 Form or the Withholding Calculation for Federal Income Tax. Therefore, in this release we are providing the users the ability to enter data in the new fields that the IRS has assured us will not be changing significantly after the first two drafts of the form, and our system is basing the withholding calculation for Federal Income Tax on the formulas provided as of the third draft of Publication 15-T.

On-Line Changes: Retirement Plan Amounts

The following 2020 dollar limitations for qualified retirement plans have been published by the IRS. Changes are shown in bold.

Plan Type	2019	2020
Elective deferrals, section 402(g)(1); affects 401(k) and 403(b) plans, among others.	19,000	19,500
Catch-up contributions for individuals age 50 or over (i.e., 401(k), 403(b) and 457 plans)	6,000	6,500
Defined contribution plan, section 415(c)(1)(A)	56,000	57,000
Annual compensation limit, sections 401(a)(17), 404(l), 408(k)(3)(C) and 408(k)(6)(D)(ii)	280,000	285,000
Defined benefit plan, section 415(b)(1)(A)	225,000	230,000
Simple retirement accounts, section 408(p)(2)(E)	13,000	13,500
Catch-up contributions for individuals age 50 or over for SIMPLE retirement accounts	3,000	3,000
Highly compensated employee, section 414(q)(1)(B)	125,000	130,000

Annual Compensation Limit

If you have set up the system to automatically stop deferred compensation deductions when employees reach the annual compensation limit (\$280,000 for 2019 and \$285,000 for 2020), you have two options to update this amount.

1. From the Customer Management Module, access the function called **Global Defined Compensation Limit Update**. This will allow you to enter the new compensation limit and update all databases that currently have this limit set to something other than zero.
2. To update the corresponding information in either Manager Services or iCON Tools, use the **HR System Defaults** function and change the Annual Compensation Limit For Deferred Compensation Plans.

Timing: *This amount is not effective dated. Therefore, this step must be done after the last payroll of 2019 and prior to processing the first Check Date of 2020.*

State Tax Changes

New York Paid Family Leave Insurance Changes for 2020

The following changes were made for withholding for New York state Paid Family Leave Insurance:

- Effective Jan. 1, 2020, the rate of New York's Paid Family Leave tax is to be 0.270 percent
- The New York State Average Weekly Wage has increased to \$1,401.17 which increases the annual maximum contribution to \$196.72 for 2020.

Iowa Withholding Changes for 2020

Iowa released the following changes to the State Income Tax Withholding Calculations for 2020:

- The standard deduction changes from \$1,690 to \$1,880 for employees claiming 0 or 1 in the state exemptions field, and from \$4,160 to \$4,630 employees claiming 2 or more the state exemptions field.
- There are also Tax Table changes.

Unemployment and Disability Wage Bases Updates

Several states have adjusted their unemployment wages bases and other tax ceilings for 2020. A table is provided in the next section showing the states whose ceilings need to be changed on your system.

On-Line Changes: Employer Portion of State Taxes

The rates for employee-paid taxes are included as part of the product update. No action is required on your part to update employee-paid taxes. However, the rates for *employer-paid* taxes are stored by legal entity. Therefore, we cannot provide them for you as part of the December update. You must make these on-line changes to your system. This can be done at any time, since they are effective-dated. The changes must be done before processing the first payroll with a Check Date in 2020. These changes can be made at any time prior to that.

To change the state tax ceilings for the employer-paid portion, you can use either the Customer Management Module or iCON Tools. To use the Customer Management Module, enter the new ceilings from the following table in **Global State Employer Tax Ceilings**, and then use the **Global State Tax Ceiling Update** to copy the new ceilings to all iCON Tools databases. Or, update each iCON Tools database individually by following these steps:

1. Access **Tax Manager**. Select **State** and **Employer** on the top portion of the window. The **Effective Date** should be 01/01/2020.

2. In the **State/Province** field, select a state from the table on the next page. In the **State Tax** field, select the Tax Type to be changed. Click on the **Select** button.
3. Select a legal entity to be changed. Click on the **Add** button. Enter the 2020 **Employer Tax Percent** if it is available, or enter the current rate from the existing tax record. Enter the **Employer Wage Ceiling** shown in the table on the next page (note that not all states have announced their 2020 taxable wage base as of this writing). Click on **Save** to store this data. Repeat this step for each legal entity. Click on **Exit** after you finishing entering 2020 data for the selected state, then update each additional state tax shown below by repeating Steps 2 and 3.

State	Tax Type	Employer Wage Ceiling
Arkansas (AK)	Unemployment	7,000
Colorado (CO)	Unemployment	13,600
Iowa (IA)	Unemployment	31,600
Kentucky (KY)	Unemployment	10,800
Missouri (MO)	Unemployment	11,500
Montana (MT)	Unemployment	34,100
Nebraska (NE)	Unemployment	9,000 or 24,000*
Nevada (NV)	Unemployment	32,500
New Jersey (NJ)	Disability Family Leave Insurance	134,900
New Jersey (NJ)	Unemployment Workforce Development	35,300
New Mexico (NM)	Unemployment	25,800
New York (NY)	Unemployment	11,600
Ohio (OH)	Unemployment	9,000
Oklahoma (OK)	Unemployment	18,700
Oregon (OR)	Unemployment	42,100
Vermont (VT)	Unemployment	16,100
Washington (WA)	Unemployment	52,700
Wyoming (WY)	Unemployment	26,400

* For Nebraska, the standard unemployment wage base will be **\$9,000**. For employers that pay at the highest UI tax rate, the wage base will be **\$24,000**.

Updated Manager Services Functions

This section describes updated functions in Manager Services.

Common Object Dictionary – Pay Codes

The Common Object Dictionary for Pay Codes has been updated to include two new fields that are required on the Puerto Rico form 499/W-2.

There are two new fields that have been added to Common Object Dictionary for Pay Codes, to provide an indicator that payments of this code to employees represent a type of service that needs to be reported on the Puerto Rico form 499/W-2.

Update Common Object Dictionary for Pay Codes

<p>* Type Of Pay:</p> <p>* Short Description:</p> <p>Long Description:</p> <p>Disposable Earning:</p> <p>W-2 Box 9: Adv Earned Income:</p> <p>W-2 Box 10: Dependent Care:</p> <p>W-2 Box 11: Nonqualified Plans:</p> <p>(up to 2000: W-2 Box12 Fringe Benefits):</p> <p>W-2 Box 12: Code:</p> <p>W-2 Box14: Other:</p> <p>Puerto Rico W-2 Box:</p> <p>Include in FMLA:</p> <p>Puerto Rico W-2 Exempt Code:</p> <p>Puerto Rico W-2 Physician Service:</p> <p>Puerto Rico W-2 Domestic Service:</p> <p>Puerto Rico W-2 Other Services:</p> <div style="border: 2px solid red; padding: 2px;"> <p>Puerto Rico W-2 Agricultural Service:</p> <p>Puerto Rico W-2 Religious Service:</p> </div>	<p>PSA</p> <p>PR Serv Agric</p> <p>PR Service Agricultural</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>▼</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>▼</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>▼</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p>
---	--

→ submit
← cancel

Puerto Rico W-2 Agricultural Service: A check in this box will identify this pay code as representing services in agricultural work, as defined in Section 1062.01(a)(8) of the Code, excluding services rendered by executive, administrative, clerical or supervisory employees and by employees who hold permanent positions. It will also print a check in Box C, in the section on the Puerto Rico form 499/W-2 form labeled “Employer: Indicate if the remuneration includes payments to the employee for:”

Puerto Rico W-2 Religious Service: A check in this box will identify this pay code as representing services rendered by a minister of a church duly ordained, commissioned or authorized, in the exercise of his or her ministry, or by a member of a religious order in the performance of duties required by said order. It will also print a check in Box D, in the section on the Puerto Rico form 499/W-2 form labeled “Employer: Indicate if the remuneration includes payments to the employee for:”

As a result of these two new fields that are being added, any pay codes that have been identified as Puerto Rico W-2 Other Services will print a checkbox in Box E on the Puerto Rico form 499/W-2 form in the section labeled “Employer: Indicate if the remuneration includes payments to the employee for:”

Employer Deductions

In some scenarios, when an employee’s compensation reached the Annual Compensation Limit for Deferred Compensation Plans as defined in HR System Defaults, and set to only suspend the Employer Deduction when this limit was reached, the Employer Deduction was recalculating on subsequent payments. This has been corrected.

Legal Entity Definition

The Legal Entity Definition function has been updated. In the Paystub Additional Information Usage field, the label that was displayed on the item in the listbox that was previously “OR: Entity phone and Business ID” has been changed to “OR/MN: Entity phone and Business ID.” This is due to the new wage statement requirements for employees working in the state of Minnesota. By selecting this item, the legal entity's phone number and SIT Account Number will print under the company's name and address for employees who work in Minnesota. If you have employees in Minnesota as well as Oregon, California and/or New York, select OR/MN, since this will meet the requirements of all four states.

Update Legal Entity Definition

* = Required

*Legal Entity: Olympics, Inc.

*Entity Name: Olympic Committee, Inc. Olympic Intl Committee

Doing Business As: Olympic International Committee Inc.

*Federal Employer ID Number: 43-0212002

*Description for Chart of Account: York Group

City Tax: *no value

Work State: *no value

Address: 108 Main St.

City: Salt Lake City

Zip: 84302

Phone Number: (435) 555-1234

☐ Suspend Arizona SIT in December

Cease of Operations Date: 12/15/2013

Paystub Additional Information Usage:

Tax Collection Agency:

County Tax: *no value

Month: *none

State/Province: Utah

Country: U.S.A.

Currency: U.S. Dollar

PERA Employer Number: 0

☐ Common Paymaster

Paymaster Entity: *no value

☒ Employs J1 Visa Employees

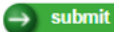
OR/MN: Entity phone and Business ID

*no value

CA: Rates for Pay Earned

NY: Dates for Pay Earned in prior period

OR/MN: Entity phone and Business ID

 submit

Paycheck Calculator - Updated for 2020 W-4 Changes

The Paycheck Calculator function has been updated to allow for a user to enter the new fields from the 2020 W-4. In the Federal Income Tax section of this screen, the system will either display the # of Federal Allowances field, or will not display that field and will display the new 2020 W-4 fields based on the on the employee's tax elections as of the current date.

In the below example, this employee will not be effective until 2020, and her only Tax Election record contains the new 2020 W-4 fields, so this is what displays for this employee.

Summary	Address	Education	Employee Positions	Employee Overview	Employee
Jill Briden Human Resources Assistant CONS. Group / Olympics / USA / Bobsled / Women / California / Northern					
Employee Details Number: 3169 Status: Active (as of 01/01/2020) Hire Date: 01/01/2020 Reports To: Direct Reports: 0					
Paycheck Calculator This calculator can be used to estimate the employee's paycheck to simulate changes to his/her pay, taxes DISCLAIMER: The results provide an estimate only and the employee's actual check amounts may vary. Also, that a change to the Work State will not automatically make any changes to localities to which the employee					
General Information Company: Olympics, Inc. ▼ <input checked="" type="checkbox"/> Gross Pay: 0.00 *no value ▼ <input type="checkbox"/> Use Last Paycheck <input type="checkbox"/> Use Paycheck From: *no value ▼ Pay Frequency: *no value ▼ Federal Income Tax Federal Filing Status: Single ▼ Additional Federal Withholding: 0.00 <div style="border: 2px solid red; padding: 2px;"> Multiple Jobs: <input type="radio"/> Yes <input checked="" type="radio"/> No Dependent Credit and other Credit Amount: 0.00 Other Income Amount: 0.00 Other Deductions Amount: 0.00 </div> State Taxes Work State: California ▼					

In this next example, this employee was hired in 2019, and his only Tax Election record effective today contains 2019 W-4 fields, so this is what displays for this employee.

Summary	Address	Education	Employee Positions	Employee Overview	Employee
Paul Pennino Human Resources Assistant CONS. Group / Olympics / USA / Alpine Ski / Men's Team / California / Northern					
Employee Details Number: 3162 Status: Active Hire Date: 01/15/2019 Reports To: Direct Reports: 0					
Paycheck Calculator This calculator can be used to estimate the employee's paycheck to simulate changes to his/her pay, tax DISCLAIMER: The results provide an estimate only and the employee's actual check amounts may vary. Also, that a change to the Work State will not automatically make any changes to localities to which the employee					
General Information Company: Olympics, Inc. ▼ <input type="checkbox"/> Gross Pay: 0.00 *no value ▼ <input checked="" type="checkbox"/> Use Last Paycheck <input type="checkbox"/> Use Paycheck From: *no value ▼ Pay Frequency: Semi-monthly ▼ Federal Income Tax Federal Filing Status: Single ▼ <div style="border: 2px solid red; padding: 2px;"> # of Federal Allowances: 000 </div> Additional Federal Withholding: 0.00 State Taxes Work State: Pennsylvania ▼					

Pay Modeling - Updated for 2020 W-4 Changes

The Pay Modeling function has been updated to allow for a user to enter the new fields from the 2020 W-4, to get the results of “what if” scenarios, which will

calculate how an employee's pay will be affected if he or she changes tax and deduction information. These fields will only be displayed if the calculation is for a 2020 check date, and employee has a 2020 effective Tax Election record for Federal Income Tax that is effective on or prior to the Check Date associated with the Pay Period End Date you enter in this function. Similarly, the Federal Exemptions field will no longer display if the calculation is for a 2020 check date, and the employee has a 2020 effective Tax Election record for Federal Income Tax that is equal to, or prior to, the Check Date associated with the Pay Period End Date you enter on this screen.

In this first example – this employee was hired for 2020 and her Tax Election record is effective for Check Dates beginning January 1, 2020. The Pay Modeling for a Payroll Processing Date of January 15, 2020 (which in this example has a Check Date of January 15, 2020) will show the new 2020 W-4 fields and no longer show the Federal Exemptions field.

Summary
Jill Briden
Human Resources Assistant
CONS. Group / Olympics / USA / Bobsled / Women / California / Northern

Employee Details
Number: 3169
Status: Active (as of 01/01/2020)
Hire Date: 01/01/2020
Reports To:
Direct Reports: 0

Pay Modeling
* = Required
*Tax Year: 2020 *Legal Entity: Olympics, Inc.
*Payroll Processing Group: Semi-Monthly *Pay Period End Date: 01/15/2020
Federal Tax Filing Status: Single
Multiple Jobs: ☐ Yes ☒ No
Other Income Amount: 0.00
State Tax Filing Status: Single
Local Tax Filing Status: *no-value
Scheduled Hours: 86.667
Net Amount: 0.00
Dependent Credit and other Credit Amount: 0.00
Other Deductions Amount: 0.00
State Exemptions: 000
State Secondary Exemptions: 000
Local Exemptions: 000
Gross Amount: 0.00
To update, click on information in the left column

Type Of Pay	Hours	Total Pay	Rate Index	Job Class	Job Grade	Shift	Job Title	Special Rate	Pa

calculate review cancel

+ add

Summary
Jill Briden
Human Resources Assistant
CONS. Group / Olympics / USA / Bobsled / Women / California / Northern

Employee Details
Number: 3169
Status: Active (as of 01/01/2020)

Tax Elections
To update, click on information in the left column. Click to access the address lookup site for: New York City/Yonkers, Ohio cities, Ohio school districts, Pennsylvania localities


Eff. Check Date	Tax Type	Filing Status	Exempt	Active	Action
01/01/2020	Fed. Unempl.	*no value	000	yes	view delete
01/01/2020	Federal Income	Single	000	yes	view delete
01/01/2020	FICA/Medicare	*no value	000	yes	view delete

+ add

In this next example – this employee was hired in 2019 but made a change in his Tax Election record effective for Check Dates beginning June 15, 2020. The Pay Modeling for a Payroll Processing Date (and Check Date) of May 31, 2020 will still show the Federal Exemptions field and not the new 2020 W-4 fields.

However, Pay Modeling for a Payroll Processing Date (and Check Date) of June 15, 2020 will show the new 2020 W-4 fields and no longer show the Federal Exemptions field.

Summary



Paul Pennino

Human Resources Assistant

CONS. Group / Olympics / USA / Alpine Ski / Men's Team / California / Northern

Employee Details

Number: 3162

Status: Active

Hire Date: 01/15/2019

Reports To:

Direct Reports: 0

Address

Education

Employee Positions

Employee Overview

Employment Status

Paychex

Tax Elections

To update, click on information in the left column.

Click to access the address lookup site for:
[New York City/Yonkers, Ohio cities, Ohio school districts, Pennsylvania localities](#)

Federal:

Eff. Check Date	Tax Type	Filing Status	Exempt.	Active	Action
06/15/2020	Federal Income	Married	000 yes		view delete
01/15/2019	Fed. Unempl.	*no value	000 yes		view delete
01/15/2019	Federal Income	Single	000 yes		view delete
01/15/2019	FICA/Medicare	*no value	000 yes		view delete
01/15/2019	FICA/OASDI	*no value	000 yes		view delete

Summary	Address	Education	Employee Positions	Employee Overview	Employment Status	Payroll																				
<div> <div> Paul Pennino Human Resources Assistant CONS. Group / Olympics / USA / Alpine Ski / Men's Team / California / Northern </div> <div> <h3>Pay Modeling</h3> <p>* = Required</p> <div> <div>*Tax Year:</div> <div>2020</div> </div> <div> <div>*Payroll Processing Group:</div> <div>Semi-Monthly</div> </div> <div> <div>*Legal Entity:</div> <div>Olympics, Inc.</div> </div> <div> <div>*Pay Period End Date:</div> <div>05/31/2020</div> </div> <div> <div>Federal Tax Filing Status:</div> <div>Single</div> </div> <div> <div>Federal Exemptions:</div> <div>000</div> </div> <div> <div>State Tax Filing Status:</div> <div>Single</div> </div> <div> <div>State Exemptions:</div> <div>000</div> </div> <div> <div>State Secondary Exemptions:</div> <div>000</div> </div> <div> <div>Local Tax Filing Status:</div> <div>*no-value</div> </div> <div> <div>Local Exemptions:</div> <div>000</div> </div> <div> <div>Scheduled Hours:</div> <div>86.667</div> </div> <div> <div>Gross Amount:</div> <div>0.00</div> </div> <div> <div>Net Amount:</div> <div>0.00</div> </div> </div> <p>To update, click on information in the left column</p> <table border="1"> <thead> <tr> <th>Type Of Pay</th> <th>Hours</th> <th>Total Pay</th> <th>Rate Index</th> <th>Job Class</th> <th>Job Grade</th> <th>Shift</th> <th>Job Title</th> <th>Special Rate</th> <th>Pay</th> </tr> </thead> <tbody> <tr> <td colspan="10"> <div> <div>+ calculate</div> <div>⌂ review</div> <div>← cancel</div> </div> </td> </tr></tbody> </table> </div>							Type Of Pay	Hours	Total Pay	Rate Index	Job Class	Job Grade	Shift	Job Title	Special Rate	Pay	<div> <div>+ calculate</div> <div>⌂ review</div> <div>← cancel</div> </div>									
Type Of Pay	Hours	Total Pay	Rate Index	Job Class	Job Grade	Shift	Job Title	Special Rate	Pay																	
<div> <div>+ calculate</div> <div>⌂ review</div> <div>← cancel</div> </div>																										
<div> <div>Employee Details</div> <div> <div>Number: 3162</div> <div>Status: Active</div> <div>Hire Date: 01/15/2019</div> <div>Reports To:</div> </div> <div>Direct Reports: 0</div> </div>																										

[illegible]

Similar to the other functions affected by the new 2020 W-4, in the Pay Modeling screen, the Federal Tax Filing Status field will contain an item in the listbox for the new Head of Household filing status.

Pay Modeling

* = Required

*Tax Year:	2020 ▼	*Legal E
*Payroll Processing Group:	Semi-Monthly ▼	*Pay Per
Federal Tax Filing Status:	Married ▼	
Multiple Jobs:	*no value Single	Depend
Other Income Amount:	Married	Other D
State Tax Filing Status:	Head of House. Single ▼	State Ex State S

Payroll Activation and New Hire-Payroll Activation - Updated for 2020 W-4 Changes

The Payroll Activation function, and the third screen in the New Hire function which is Payroll Activation, has been updated to allow for a user to enter the new fields from the 2020 W-4 if an employee has supplied a 2020 W-4. These fields will only be displayed if the record being added has an effective date of January 1, 2020 or later.

The Exemptions Claimed field will no longer display in the Tax Withholding-Federal

selection if the record that is being added has an effective date of January 1, 2020 or later.

Summary

Jill Briden
Human Resources Assistant
CONS. Group / Olympics / USA / Bobsled / Women / California / Northern

Employee Details

Number: 3169
Status: Active (as of 01/01/2020)
Hire Date: 01/01/2020
Reports To:
Direct Reports: 0

Payroll Activation

* = Required

Payroll Information:

*Employee No.: 3169
*Effective Date: 01/01/2020
*Company: Olympics, Inc.
*Payroll Processing Group: *no-value
*Deduction Group: *no-value
Scheduled Hours:
Default Type Of Pay: *no-value
*Tax Year: 2020
*Payroll Status: *no-value
*Pay Frequency: *no-value
Time Card Exempt: ☐ Yes ☒ No
Check Sorting Code:
Suppress Printing of Direct Deposit Voucher: ☐ Yes ☒ No
Accumulate Retirement Earnings: ☒ Yes ☐ No
Workers Compensation: *no-value

Exempt From Workers Compensation: ☐ Yes ☒ No
J1 Visa: ☐ Yes ☒ No

W-2 Information:

Retirement Plan: ☐ Yes ☒ No
Statutory Employee: ☐ Yes ☒ No

Tax Withholding:

Federal:

*Filing Status: *no-value
Additional amount to be withheld per pay period:
Employee claims exemption from FIT: ☐ Yes ☒ No
Exempt Expiration Date:
Employee is Police/Firefighter hired after March 31, 1986 who is NOT subject to FICA: ☐
Multiple Jobs: ☐ Yes ☒ No
Dependent Credit and other Credit Amount:
Other Income Amount:
Other Deductions Amount:

State:

*Work State: *no-value
SUI Location: *no-value
*Filing Status: *no-value
Exemptions Claimed:

The new fields that will display in the Tax Withholding / Federal section of the Payroll Activation screen are:

- **Multiple Jobs** – the user would select Yes for this field if the employee has checked the box in Step 2 of the 2020 W-4.
- **Dependent Credit and Other Credit Amount** – the user would enter an amount here that matches the amount the employee entered on Line 3 of the 2020 W-4.
- **Other Income Amount** - the user would enter an amount here that matches the amount the employee entered on Line 4(a) of the 2020 W-4.
- **Other Deductions Amount** - the user would enter an amount here that matches the amount the employee entered on Line 4(b) of the 2020 W-4.

The deployment of the release will also add another item to the listbox for the field Filing Status in the Tax Withholding / Federal section of the Payroll Activation screen. This new item will be labeled Head of House., which is an abbreviation of the new Head of Household filing status that can be selected on a new 2020 W-4 Form.

W-2 Information:

Retirement Plan: ☐ Yes ☒ No

Tax Withholding:

Federal:

*Filing Status:

Exemptions Claimed:

Employee claims exemption from FIT: ☐

Employee is Police/Firefighter hired after March 31, 1986 who is NOT subject to FICA: ☐

State:

Payroll Feeder

On the second screen of the Payroll Feeder function, the label to the checkbox Deposit Net Pay to Employee's Balance Bank Account has been changed to Deposit Net Pay to Employee's Balance Bank Account (for Lump Sums Only).

Reports – Federal Exemptions

Being that the concept of Federal Exemptions for Federal Income Tax purposes will be phased out starting in 2020, Federal Exemptions will no longer display on the following reports:

- Combined Register
- Employee Change Report
- Employee Payroll Report
- Employee Payroll Totals Report
- Labor Distribution Report

SUI Data Generation, SUI File Creation - Pennsylvania

As of January 1, 2020, Pennsylvania will no longer accept the SSA format (iCON's current format) for electronically filing Pennsylvania SUI Wages and Taxes. The SUI Data Generation and SUI File Creation functions have been updated to produce the Pennsylvania SUI file in the ICESA format.

Tax Elections - Updated for 2020 W-4 Changes

The Tax Elections function has been updated to allow for a user to enter the new fields from the 2020 W-4 if an employee has supplied a 2020 W-4. These fields will only be displayed in the Federal section when selecting Federal Tax Type: Federal Income if the record being added has an effective date of January 1, 2020 or later.

The Number of Withholding Allowances field will no longer display on the screen when adding or updating a Federal Income Tax elections record for an employee if the record that is being added has an effective date of January 1, 2020 or later.

Summary

Jill Briden
Human Resources Assistant
CONNS. Group / Olympics / USA / Bobsled / Women / California / Northern

Employee Details

Number: 3169
Status: Active (as of 01/01/2020)
Hire Date: 01/01/2020
Reports To:
Direct Reports: 0

Update Tax Elections - Federal

Legal Entity: Olympics, Inc.

* = Required

* Effective Check Date: 01/01/2020 * Federal Tax: Federal Income

Active (accumulate wages): ☒ Yes ☐ No Exempt (from withholding): ☐ Yes ☒ No

Exempt Expiration Date:

Filing Status (where applicable):

Additional amount to withhold per pay period:

Adjustment Amount: Adjustment Effective Date:

Percent of Base to Tax: Override Tax Amount:

Nonresident Alien Annual Adjustment:

IRS Lock-In in effect: ☐ Yes ☒ No IRS Lock-In Letter Date:

Lock-In Filing Status: Maximum number of exemptions:

Multiple Jobs: ☐ Yes ☒ No Dependent Credit and other Credit Amount:

Other Income Amount: Other Deductions Amount:

The new fields that will display on the screen when adding or updating a Federal Income Tax elections record are:

- **Multiple Jobs** – the user would select Yes for this field if the employee has checked the box in Step 2 of the 2020 W-4.
- **Dependent Credit and Other Credit Amount** – the user would enter an amount here that matches the amount the employee entered on Line 3 of the 2020 W-4.
- **Other Income Amount** - the user would enter an amount here that matches the amount the employee entered on Line 4(a) of the 2020 W-4.
- **Other Deductions Amount** - the user would enter an amount here that matches the amount the employee entered on Line 4(b) of the 2020 W-4.

The deployment of the release will also add another item to the listbox for the field Filing Status (where applicable) field when adding or updating Federal Income Tax election. This new item will be labeled Head of House., which is an abbreviation of the new Head of Household filing status that can be selected on a new 2020 W-4 Form.

Update Tax Elections - Federal

* = Required

* Effective Check Date: 01/01/2020 * Fe

Active (accumulate wages): ☒ Yes ☐ No Ex

Exempt Expiration Date:

Filing Status (where applicable): **Single** ▼

Additional amount to withhold per pay period: *no value

Adjustment Amount: **Single** Adj

Percent of Base to Tax: **Married** Ov

Head of House.

Nonresident Alien Annual Adjustment: 0.00

User Defined Field Setup and WFM Field Setup

The two custom field functions have been enhanced to allow a user to setup as many as 35 employee fields or 35 WFM fields.

W-2 Data Generation, W-2 Data Generation for Administrators

- Both the W-2 Data Generation and W-2 Data Generation for Administrators screens, when selecting Magnetic Media or Forms, have been updated so that the Sequence Number From and To fields will not all allow the user to enter numbers in the range from 900000000 to 999999999. Per the specifications for the Form 499R-2/W-2PR, starting for tax year 2019 the sequence from 900000000 to 999999999 will be reserved only for the use of the Puerto Rico Department of the Treasury for all other submissions, excluding text file submissions.
- For customers who have Common Paymasters in their organization, the Transmitter and Legal Entities list boxes will not display the child entities that report to that Common Paymaster in the lists, but their data will be included in the forms and files when the Common Paymaster Legal Entity is selected.
- W-2 Forms for Massachusetts employees are required to display the employee's contributions to Massachusetts Paid Family Leave and Medical Leave Insurance in Box 14 with the label **MAPFML**. ***Note:** To have this display on the W-2 forms, these taxes must be added in the **W-2 Additional State Taxes** function for Massachusetts.
- The W-2 Functions will no longer generate data, or create a W-2 file, for the state of New York. iCON produces a Quarterly Combined Wage and Withholding Tax File (per Publication 69) under the SUI Data Generation and SUI File Creation functions which satisfies New York's requirements for Tax and Wage Reporting for the year. Please use the SUI functions to create this electronic file for reporting.

W-2 File Creation

Puerto Rico 2019 W-2 File Changes

- The RS Record has been changed to include indicators for Agricultural Service (position 193) and Religious Service (position 194) for 2019.

Common Paymaster

- For customers who have Common Paymasters in their organization, the W-2 files will include the EIN of the Paymaster Entity in positions 31-39 of the RE record for any Legal Entity that rolls up to a Common Paymaster. The RE record of the Common Paymaster will have a “2” in position 7.

Updated iCON Tools Functions

This section describes updated functions in iCON Tools.

Employee Tax Option - Updated for 2020 W-4 Changes

The Employee Tax Option function has been updated to allow for a user to enter the new fields from the 2020 W-4 if an employee has supplied a 2020 W-4. These fields will only be displayed in the Federal section when selecting Federal Tax Type: Federal Income if the record being added has an effective date of January 1, 2020 or later. The Federal Exemptions field will no longer display on the screen when adding or updating a Federal Income Tax elections record for an employee if the record that is being added has an effective date of January 1, 2020 or later.

The new fields that will display are:

- **Multiple Jobs** – the user would select Yes for this field if the employee has checked the box in Step 2 of the 2020 W-4.
- **Dependent Amount** – the user would enter an amount here that matches the amount the employee entered on Line 3 of the 2020 W-4.
- **Other Income Amount** - the user would enter an amount here that matches the amount the employee entered on Line 4(a) of the 2020 W-4.
- **Other Deductions Amount** - the user would enter an amount here that matches the amount the employee entered on Line 4(b) of the 2020 W-4.

The deployment of the release will also add another item to the listbox for the field Federal Filing Status on the Payroll Activation Process screen. This new item will be labeled Head of House., which is an abbreviation of the new Head of Household filing status that can be selected on a new 2020 W-4 Form.

Legal Entity Definition

The Legal Entity Definition function has been updated. In the Paystub Additional Information Usage field, the label that was displayed on the item in the listbox that was previously “OR: Entity phone and Business ID” has been changed to “OR/MN: Entity phone and Business ID.” This is due to the new wage statement requirements for employees working in the state of Minnesota. By selecting this item, the legal entity's phone number and SIT Account Number will print under the company's name and address for employees who work in Minnesota. If you have employees in Minnesota as well as Oregon, California and/or New York, select OR/MN, since this will meet the requirements of all four states.

Payroll Activation Process - Updated for 2020 W-4 Changes

The Payroll Activation Process function has been updated to allow for a user to enter the new fields from the 2020 W-4 if an employee has supplied a 2020 W-4. These fields will only be displayed if the record being added has an effective date of January 1, 2020 or later. The Federal Exemptions field will no longer display if the record that is being added has an effective date of January 1, 2020 or later.

The new fields that will display are:

- **Multiple Jobs** – the user would select Yes for this field if the employee has checked the box in Step 2 of the 2020 W-4.
- **Dependent Amount** – the user would enter an amount here that matches the amount the employee entered on Line 3 of the 2020 W-4.
- **Other Income Amount** - the user would enter an amount here that matches the amount the employee entered on Line 4(a) of the 2020 W-4.
- **Other Deductions Amount** - the user would enter an amount here that matches the amount the employee entered on Line 4(b) of the 2020 W-4.

The deployment of the release will also add another item to the listbox for the field Federal Filing Status on the Payroll Activation Process screen. This new item will be labeled Head of House., which is an abbreviation of the new Head of Household filing status that can be selected on a new 2020 W-4 Form.

Payroll Common Object Dictionary – Pay Codes

The Payroll Common Object Dictionary for Pay Codes has added two new fields to provide for the updates to the 2019 Puerto Rico form 499/W-2, as described above in the same function in Manager Services.

Puerto Rico W-2 Agricultural Service: A check in this box will identify this pay code as representing services in agricultural work, as defined in Section 1062.01(a)(8) of the Code, excluding services rendered by executive, administrative, clerical or supervisory employees and by employees who hold permanent positions. It will also print a check in Box C, in the section on the Puerto Rico form 499/W-2 form labeled “Employer: Indicate if the remuneration includes payments to the employee for:”

Puerto Rico W-2 Religious Service: A check in this box will identify this pay code as representing services rendered by a minister of a church duly ordained, commissioned or authorized, in the exercise of his or her ministry, or by a member of a religious order in the performance of duties required by said order. It will also print a check in Box D, in the section on the Puerto Rico form 499/W-2 form labeled “Employer: Indicate if the remuneration includes payments to the employee for:”

Payroll Feeder

On the main landing screen for the Payroll Feeder function, the label to the checkbox Deposit Net Pay to Employee's Balance Bank Account has been changed to Deposit Net Pay to Employee's Balance Bank Account (for Lump Sums Only).

Reconciliation Tax Summary – Washington Family and Medical Leave

For customers that use Master Tax, the Reconciliation Tax Summary file has been updated to correct the labeling of tax codes for Washington Family and Medical Leave contributions, per the Master Tax Version 36 Import Specifications. The 601 records which were previously identified as WAFLIEE now must use WA0000-014 in positions 16-35. There will be an additional 500 record which is identified as WA0000-014 in positions 16-35 which is an exact copy of the 500 record identified as WAFLIEE in positions 16-35.

Reports – Federal Exemptions

Being that the concept of Federal Exemptions for Federal Income Tax purposes will be phased out starting in 2020, Federal Exemptions will no longer display on the following reports:

- Check Print
- Check Print for Administrator
- Combined Register
- Employee Change Report
- Employee Payroll Report
- Employee Payroll Totals Report
- Labor Distribution Report

SUI Magnetic Data Generation and SUI Diskette Creation – Pennsylvania

As of January 1, 2020, Pennsylvania will no longer accept the SSA format (iCON's current format) for electronically filing Pennsylvania SUI Wages and Taxes. The SUI Magnetic Data Generation and SUI Diskette Creation functions have been updated to produce the Pennsylvania SUI file in the ICESA format.

W-2 Data Generation, W-2 Data Generation – Official Forms, W-2 Data Generation for Administrators

- The W-2 Data Generation, W-2 Data Generation – Official Forms, and W-2 Data Generation for Administrators screens, when selecting Magnetic Media or Forms, have been updated so that the Sequence Number From and To fields will not all allow the user to enter numbers in the range from 900000000 to 999999999. Per the specifications for the Form 499R-2/W-2PR, starting for tax year 2019 the sequence from 900000000 to 999999999 will be reserved only for the use of the Puerto Rico

Department of the Treasury for all other submissions, excluding text file submissions.

- For customers who have Common Paymasters in their organization, the Transmitter and Legal Entities list boxes will not display the child entities that report to that Common Paymaster in the lists, but their data will be included in the forms and files when the Common Paymaster Legal Entity is selected.
- W-2 Forms for Massachusetts employees are required to display the employee's contributions to Massachusetts Paid Family Leave and Medical Leave Insurance in Box 14 with the label **MAPFML**. ***Note:** To have this display on the W-2 forms, these taxes must be added in the **W-2 Additional State Taxes** function for Massachusetts.

W-2 Diskette Creation

Puerto Rico 2019 W-2 File Changes

- The RS Record has been changed to include indicators for Agricultural Service (position 193) and Religious Service (position 194) for 2019.

Common Paymaster

- For customers who have Common Paymasters in their organization, the W-2 files will include the EIN of the Paymaster Entity in positions 31-39 of the RE record for any Legal Entity that rolls up to a Common Paymaster. The RE record of the Common Paymaster will have a "2" in position 7.

New Customer Management Module Functions

This section describes new functions in the Customer Management Module.

Global Election Workers Threshold

If your system is hosted by Unicorn HRO, the election workers' thresholds are maintained for you. If you host your system, use this function to enter election workers' thresholds.

According to the Social Security Administration, for Tax Year 2019, election workers must earn \$1,800 or more in a calendar year before they are required to pay FICA taxes, unless an employee's election wages are subject to Social Security and Medicare taxation by their state under Section 218 of the Social Security Act.

For 2020, this threshold rises to \$1,900. FICA taxes apply from the first dollar paid if an election worker is paid the federal threshold amount or more.

This function will currently be used to store the threshold amount for a particular jurisdiction and effective date, and will currently be used for informational purposes only. In the future, Unicorn HRO plans to implement in the baseline product a way to identify election workers for whom this threshold applies.

Updated Customer Management Module Functions

This section describes updated functions in the Customer Management Module.

Pay Calendar Manager - Output

There were some display errors on the PDF version of the Pay Calendar Output file. These have been corrected.

Reconciliation Tax Summary – Washington Family and Medical Leave

For customers that use Master Tax, the Reconciliation Tax Summary file has been updated to correct the labeling of tax codes for Washington Family and Medical Leave contributions, per the Master Tax Version 36 Import Specifications. The 601 records which were previously identified as WAFLIEE now must use WA0000-014 in positions 16-35. There will be an additional 500 record which is identified as WA0000-014 in positions 16-35 which is an exact copy of the 500 record identified as WAFLIEE.

W-2 Data Generation

- This function has been updated so that the Sequence Number From and To fields will not all allow the user to enter numbers in the range from 9000000000 to 9999999999. Per the specifications for the Form 499R-2/W-2PR, starting for tax year 2019 the sequence from 9000000000 to 9999999999 will be reserved only for the use of the Puerto Rico Department of the Treasury for all other submissions, excluding text file submissions.

- For customers who have Common Paymasters in their organization, the Legal Entities Not Selected list box will not display the child entities that report to that Common Paymaster, but their data will be included in the forms and files when the Common Paymaster Legal Entity is selected.

W-2 File Creation and Inquiry

In the Taxes menu – the W-2 Disk Creation and Inquiry function has been renamed to W-2 File Creation and Inquiry. This function has also been enhanced to allow the user to sort the list by Customer, Transmitter, or State. The label “Create Diskettes In” has been changed to “Create Files In” and the radio buttons for A and B (referring to disk drives) has been removed.

Puerto Rico 2019 W-2 File Changes

- The RS Record has been changed to include indicators for Agricultural Service (position 193) and Religious Service (position 194) for 2019.

Common Paymaster

- For customers who have Common Paymasters in their organization, the W-2 files will include the EIN of the Paymaster Entity in positions 31-39 of the RE record for any Legal Entity that rolls up to a Common Paymaster. The RE record of the Common Paymaster will have a “2” in position 7.