Payroll Release Notes

April 2021

R74

This document contains detailed descriptions of enhancements for the release date / month shown above, as well as explanations of resolved issues.

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R74 Payroll Release Notes

This document contains detailed descriptions of release notes for the specified release, as well as explanations of bug fixes.

Release Dates

A System Release will take place on the following dates and times for the following servers. System downtime for each respective release can be expected during the maintenance windows:

- **EU Server:** April 05, 2021 at 11:00pm - 3:30am BST
- **POD 60:** April 06, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD2:** April 07, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD5:** April 21, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD4:** April 21, 2021 at 11:30pm - 4:00am EDT
- **U.S. Server POD3:** April 22, 2021 at 11:30pm - 4:00am EDT
- **AUS Server:** April 22, 2021 at 12:00am - 4:30am AEST
- **U.S. Server POD6:** April 22, 2021 at 11:30pm – 4:00am EDT

Supported Operating Systems and Browsers

The following tables show the operating systems and browsers currently supported.

> **Note:** All of these operating systems and browsers are supported, but some may not be actively tested.

Platform	OS Version
Desktop	
Windows	10
Mac	10.13.4 (High Sierra)
Mobile	
iOS	11.4.1 -> latest
Android	6.0.1-> latest

Browser	Version
Internet Explorer	11
Microsoft Edge	latest
Google Chrome	latest
Mozilla Firefox	latest
Safari	latest

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Enhancements

We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!

The following enhancements have been added to this release.

Important! Quick Payroll Under Construction

WFR-219834: In the February 2021 release notes, we notified you that we are making some required UI changes to Quick Payroll, and that the functionality would not be available when the April 2021 release is applied to your server. As of this release (April 2021), Quick Payroll will be unavailable, and its unavailability will likely extend into future releases. When it is ready, we will notify you in the release notes.

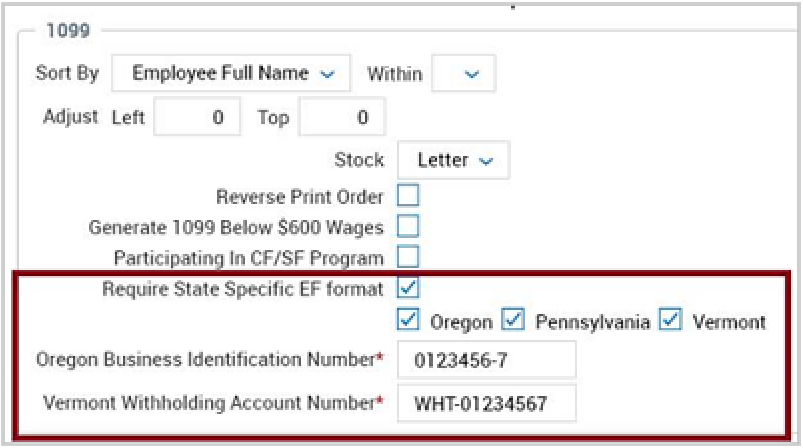
1099-NEC data can now be reported in Electronic Forms

WFR-223244: On the **EF W2/1099 Files** page, when users click the **Create EF W2/1099 Files** button to create a form 1099 for the following states, the system creates one Electronic File with the B record for 1099-MISC and 1099-NEC forms:

- Oregon
- Vermont

Pennsylvania is slightly different from Oregon and Vermont. When users click the **Create EF W2/1099** Files button to create a form 1099 for Pennsylvania, the system creates separate Electronic Files: one containing 1099-MISC forms, and one containing 1099-NEC forms.

For all three states, users must enable the state-specific EF formats at **Company Settings > Global Setup > Company Setup** on the **Payroll Tab** in the Printed W2/1099 Options widget and the **1099** section.



2021 State Forms are updated

WFR-204763: The following updated state-specific forms for 2021 are now available in the system:

- Connecticut: W-4
- Maryland: MW507
- Minnesota: W-4
- New Jersey: W-4
- North Carolina: NC-4, NC-4EZ

CARES Act retention credits are extended into 2021

WFR-216585: The system is updated to calculate the CARES Act retention credit into 2021. The calculation is based on the earnings and deductions in a pay statement.

FFCRA earnings types are extended into 2021

WFR-216570: The system is updated to extend into 2021 the Earning Limit for the three FFCRA earnings types, which are as follows:

- FFCRA Family 10 day with 2000 limit
- FFCRA Sick 10 day with 5110 limit
- FFCRA Family Leave 10 week with 10000 limit

MasterTax specification updates are applied

WFR-230144, WFR-231612: MasterTax RTS and PTS files are now updated to match the MasterTax specifications for the first quarter of 2021.

New Look for Process Payroll (Mobile)

The Process Payroll steps have been converted for use in the Mobile App. All of the general Process Payroll functionality is the same as the Desktop version, with the following features:

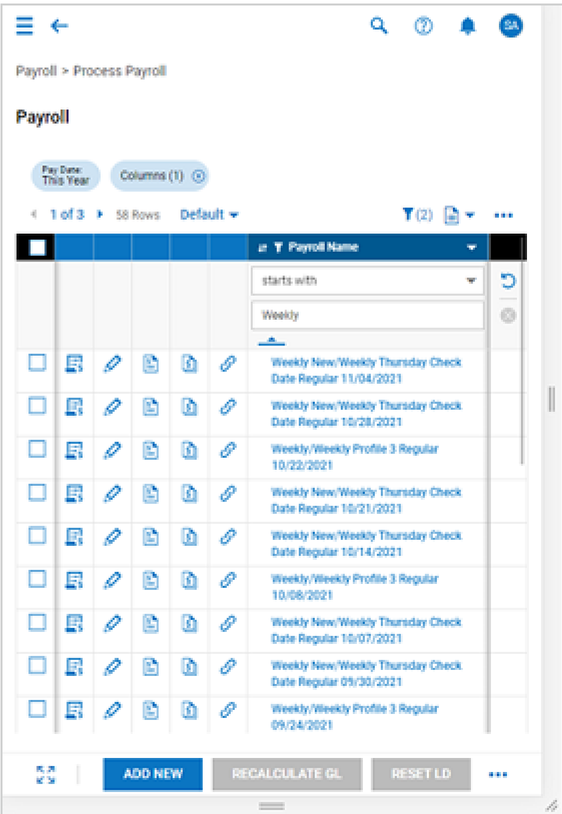
- The Payroll Process steps adapt to fit all screens. You can perform all functions on any device.
- Processes are grouped by Type so that you can easily navigate Payroll steps.
- Steps are visually marked as completed via a visual task bar at the top of the screen so that users can identify their progress through the payroll process.

Access the Process Payroll steps from the Menu under **Payroll >Process Payroll**.

Process Payroll Overview

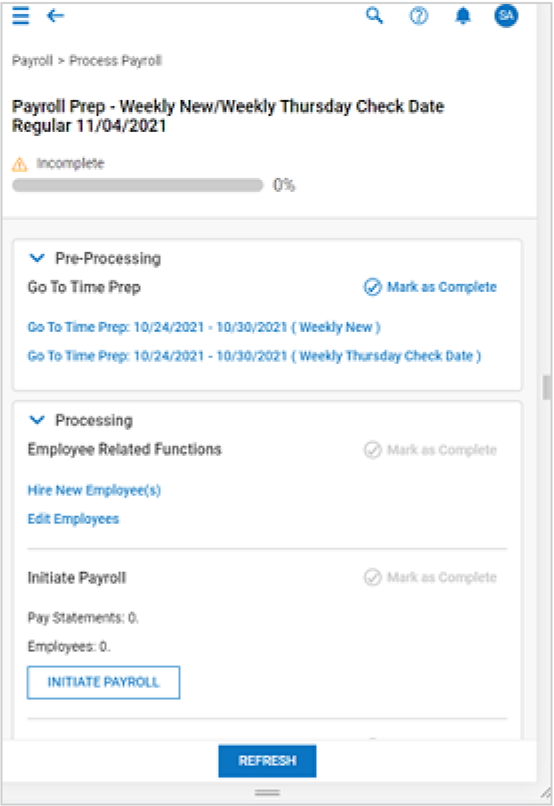
All errors and warnings appear at the top of the page for each step in the process, followed by requests.

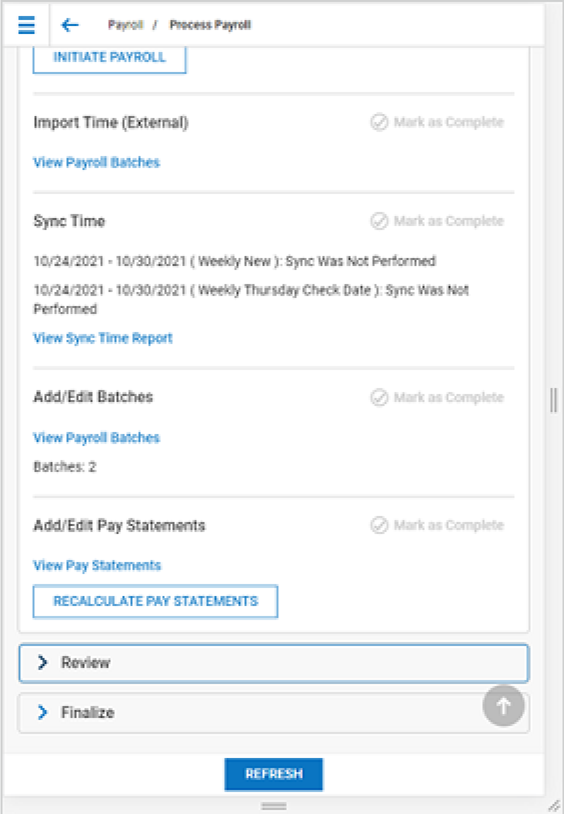
The various icons have been updated but the functionality is the same as in previous versions.



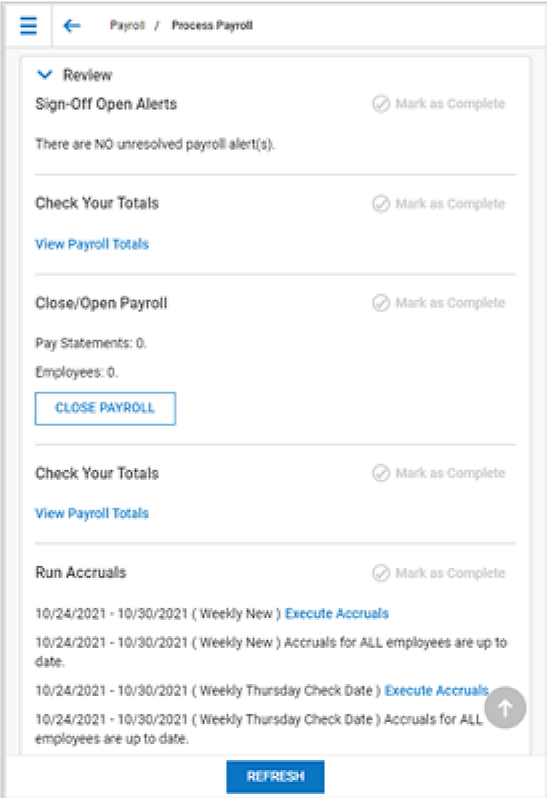
Business Process Steps Overview

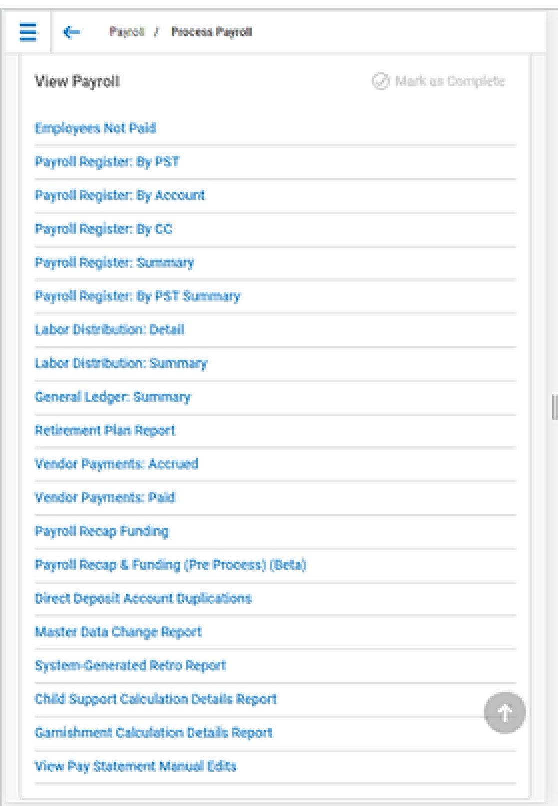
Select the Processing link to go to the processing steps. In the Processing section, you can click on **Employee Related Functions**, **Initiate Payroll**, **Import Time (External)**, **Sync Time**, **Add/Edit Batches**, and **Add/Edit Pay Statements**. As always, only the steps that you have configured in the business process steps are available.



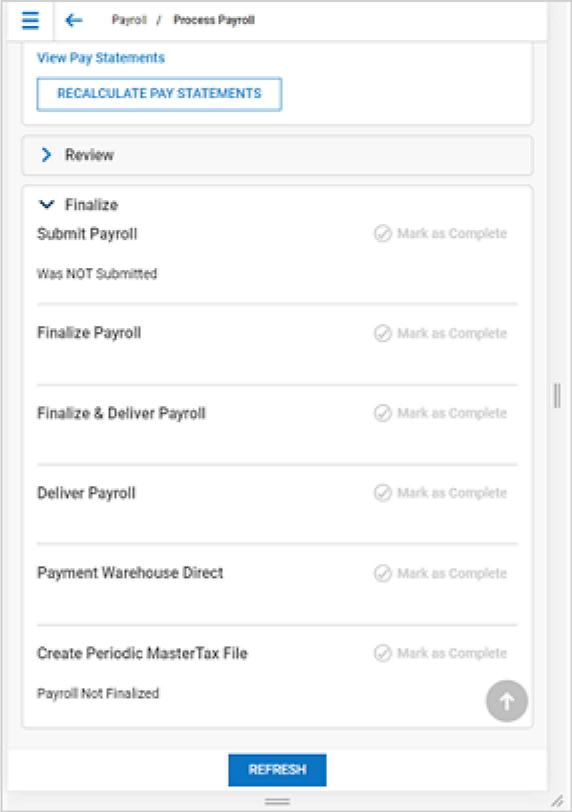


The next section in the Process Payroll steps is Review. You can review and **Sign-Off Open Alerts**, **Check Your Totals**, **Close/Open Payroll**, **Run Accruals**, and **View Payroll**.


Payroll / Process Payroll
Review
Sign-Off Open Alerts
Mark as Complete
There are NO unresolved payroll alert(s).
Check Your Totals
Mark as Complete
View Payroll Totals
Close/Open Payroll
Mark as Complete
Pay Statements: 0.
Employees: 0.
CLOSE PAYROLL
Check Your Totals
Mark as Complete
View Payroll Totals
Run Accruals
Mark as Complete
10/24/2021 - 10/30/2021 (Weekly New) Execute Accruals
10/24/2021 - 10/30/2021 (Weekly New) Accruals for ALL employees are up to date.
10/24/2021 - 10/30/2021 (Weekly Thursday Check Date) Execute Accruals
10/24/2021 - 10/30/2021 (Weekly Thursday Check Date) Accruals for ALL employees are up to date.
REFRESH


Payroll / Process Payroll
View Payroll
Mark as Complete
Employees Not Paid
Payroll Register: By PST
Payroll Register: By Account
Payroll Register: By CC
Payroll Register: Summary
Payroll Register: By PST Summary
Labor Distribution: Detail
Labor Distribution: Summary
General Ledger: Summary
Retirement Plan Report
Vendor Payments: Accrued
Vendor Payments: Paid
Payroll Recap Funding
Payroll Recap & Funding (Pre Process) (Beta)
Direct Deposit Account Duplications
Master Data Change Report
System-Generated Retro Report
Child Support Calculation Details Report
Garnishment Calculation Details Report
View Pay Statement Manual Edits

The last section is Finalize. In the Finalize section, you can access the steps to **Submit Payroll**, **Finalize Payroll**, **Finalize and Deliver Payroll**, **Deliver Payroll**, **Payment Warehouse Direct**, and **Create Periodic MasterTax File**. Again, these options are based on the business steps your company has selected.



Admin Enhancements

We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!

The following administrative enhancements have been added to this release.

1099-NEC By State page includes more options

WFR-223249: For Admin companies, the **1099-NEC By State** page has been updated to include options for users to select one record, multiple records, all records on the page (based on the applied filters), and all records on all pages (based on the applied filters). Also, the page now includes a **Download** button so that users can export one or more forms. Currently, the **Download Type** field for the export includes only the option **Two Employees Per Page (Copy C)**.

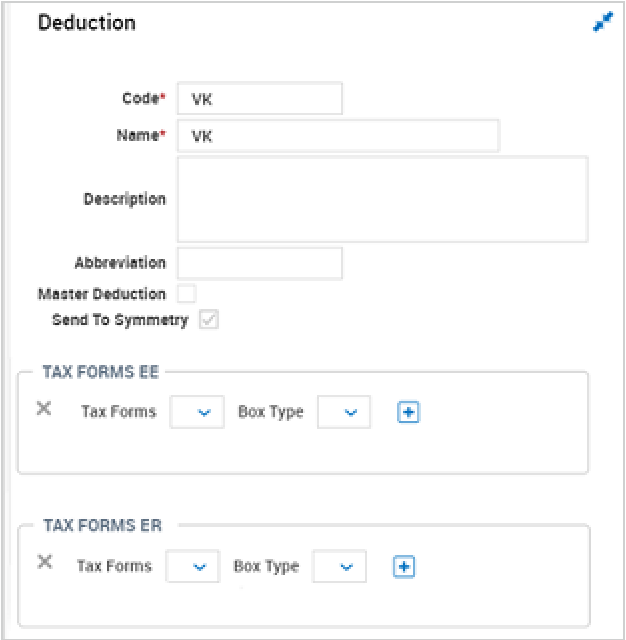
Company Tax List for billing service calculation method

WFR-150137: When accessing the Company Taxes report, users have the ability to create, edit, and delete tax lists. Now, when using the **Payroll: Taxes (List) Calculation Method**, Admin accounts with the appropriate permissions in an Admin Company with the Payroll Admin sub-system enabled can create, edit, and delete tax lists. This applies to:

- Admin companies with the Payroll Admin or Payroll Canada Admin sub-systems enabled, and without the Payroll or Payroll Canada sub-systems enabled.
- Admin accounts with permission to view and edit the Company Taxes report (**Maintenance > Admin Company > Payroll**).

Deduction mapping to tax forms is improved

WFR-132408, WFR-203764: When Admin companies and Client companies configure Deductions, the system now displays widgets for **Tax Forms EE** and **Tax Forms ER** to enable mapping deductions to specific boxes on specific tax forms. In each of these widgets, users can add a maximum of two tax forms. These widgets are now similar to the options for mapping Earnings.



Mass Edit Company Taxes options now include Large Employer

WFR-223908: In Admin companies, on the **Company Taxes** page (at **Maintenance > Companies > Client Resources > Payroll Taxes > Company Taxes**), the **Mass Edit Company Taxes** pop-up box now includes the option to mass edit **Large Employer** data.

New settings to configure footer in Payroll Recap & Funding Report Export Settings

WFR-220230, WFR-223719: For Admin companies, the **Export Settings** for the **Payroll Recap & Funding** report (**Maintenance > Configuration > Report Export Settings UI Page**) include a new section named **Payroll Recap & Funding Report Export Settings**. This new section includes configuration settings for the export's footer. The settings are as follows:

- Print Address
- Print Phone #
- Extra Text

Bug Fixes

The following issues have been fixed in this release.

Deductions: 457b limit was combined with other plan limits

WFR-209295: The system now handles 457b retirement plan contributions as stand-alone contributions and does not combine them with other plans (such as 401k) to reach the employee's retirement plan contribution limit. Previously, for example, if an employee contributed to a 457b and to a 401k, the system applied both of those toward the employee's maximum retirement plan contribution limit.

Deductions: End-dated scheduled deductions appeared in an HR Action Request

WFR-227154: My Information HR Action Requests sometimes displayed end-dated scheduled deductions, which made it difficult for employees to discern which deduction they needed to update. This is fixed, and end-dated scheduled deductions no longer appear in these HR Action Requests.

Deductions: Blank screen appeared instead of scheduled deduction

WFR-227421: In the New UI, when users clicked a scheduled deduction in an employee profile, they sometimes received a blank screen. This is fixed, and users can click to view these scheduled deductions as expected.

External Tax Integration: Label on GL tab included exclamation mark (!)

WFR-88225: An exclamation mark (!) incorrectly appeared in the TRNSTYPE column label on the GL tab of QuickBooks (IIF) v2 Data Exports. This is fixed, and the exclamation mark no longer appears in this column label.

External Tax Integration: VeriFund 2 export had incorrect ID for the EIN

WFR-157273: In a multi-EIN company, the VeriFund 2 Data Export's Invoice file displayed the same MasterTax Company ID for all EINs. This is fixed, and this export now displays the correct EIN in which the invoice is created.

External Tax Integration: Company phone numbered appeared twice in ADP export

WFR-187070: In ADP PPS data exports, the company phone number sometimes appeared twice: in P00015 Position 50-64, and in P00020 position 71-82. This is fixed, and now the company phone number appears only once (in P00020 position 71-82), as expected.

External Tax Integration: Label on Empl Check tab included exclamation mark (!)

WFR-218834: An exclamation mark (!) incorrectly appeared in the TRNSTYPE column label on the Empl Check tab of QuickBooks (IIF) v2 Data Exports. This is fixed, and the exclamation mark no longer appears in this column label.

External Tax Integration: OR Transit Tax code did not populate in BSI W2 file

WFR-222593: In BSI State W2 files, the Oregon (OR) Transit Tax code (**ORTRA7UP---MH3M**) did not populate in Box 14 of the BSI State W2 file. This is fixed, and this code now populates in the box as expected.

Money Movement: Duplicate direct deposit accounts were added

WFR-182525: When users added a new direct deposit account to an employee record, the system sometimes added that direct deposit account twice. This is fixed, and users can now add a direct deposit account to an employee without it being incorrectly duplicated.

Platform Infrastructure: Employee filter showed all company employees to users without permissions

WFR-221020: In the **My To Do Items** report, employees without the correct security permissions could see all company employees in the Employee filter. This is fixed, and for these users, this Employee filter no longer displays all company employees.

Processing: Back button didn't return to Check Payroll Totals page

WFR-144951: In Payroll Prep, when users clicked **Check Your Totals**, viewed a pay statement, and then clicked the back button, the system returned them to the **Payroll Prep** page. This is fixed, and clicking the back button in this situation now returns users to the **Check Payroll Totals** page, as expected.

Reports: Preview Pay Statement button was missing

WFR-219020: On the **Pay Statement History** page (at **My Team > Employee Information > Employee Quick Links > Pay Statement History**), the **Preview Pay Statement** button was sometimes missing. This is fixed, and the **Preview Pay Statement** button now always appears, as expected.

Reports: Last sequential pay statement did not appear

WFR-221621: In the **Pay Statement History (Detail)** report, the last sequential pay statement now displays when an employee has more than one pay statement finalized at the same time, and the **Last Day Paid** setting is enabled. Previously, in this situation, the last sequential pay statement did not appear.

Tax: In 943 filings, tips were included in two records instead of one

WFR-203042: When an employer filed a 943 and created a MasterTax RTS file, the file sometimes reported tip amounts in the FE0000-101/102 records and the FE0000-122/142 records. This is fixed, and the file now reports tips in only the FE0000-122/142 records, as expected.

Tax: PDF download of Federal W-4 omitted some saved changes

WFR-225607: On a 2021 Federal W-4 form, some users who filled out the form and saved found that the system saved all of their changes but that the PDF download of the form included only some of their changes. This is fixed, and the PDF download of a Federal W-4 no longer omits any saved changes.

Tax Calc: NY SDI Subject Wage and Tax Amount weren't calculated in payroll

WFR-224217: In some companies, for a 2021 Payroll, the system did not calculate NY SDI Subject Wage and Tax Amount for a few employees. This is fixed, and the NY SDI Subject Wage and Tax Amount now calculate as expected for these employees.

