Deltek

Deltek Costpoint Hot Fix Readme

Release Date: November 15, 2019

2020 Federal Tax Withholding Form W-4

The 2020 Form W-4 has been redesigned by the IRS to reduce the form's complexity and to increase transparency and accuracy in the withholding system. Employees filling out the 2020 Form W-4 (Employee's Withholding Certificate) will no longer be able to claim withholding allowances. Instead, employees need to provide whole dollar amounts to employers for more accurate withholding during the year.

Beginning in 2020, the following must use the redesigned form:

- All new employees.
- Employees hired prior to 2020 who want to adjust withholding from their pay dated January 1, 2020, or later.

To comply with the redesigned Form W-4 and to be able to calculate the federal withholding tax correctly for pay date starting January 1, 2020, this release updates the Federal Withholding form in Costpoint and adds new fields to multiple applications.

This release also updates the federal income tax withholding calculation to match the changes in the new form. The new computation calculates the tax withholding correctly regardless of whether the employee provided a Form W-4 in an earlier year or will provide a new Form W-4 in 2020.

Warning: The 2020 federal tax table data will be released separately by Q4 2019. If your company needs to test the 2020 Form W-4 enhancement before the release of the 2020 federal tax table data, you must manually enter the applicable tax information on the Manage Federal Taxes screen and the Manage Federal Tax Tables screen.

Frequently Asked Questions

How will this work in the Costpoint Payroll system? Will you have two sets of tax tables?

The Manage Federal Tax Tables screen will provide six tax tables effective 01/01/2020 which consist of the following:

- Three tables containing the standard withholding rate schedules. There is one table for each filing status (Married, Single, and Head of Household) where Step 2 of Form W-4 is unchecked.
- Three tables containing the non-standard withholding rate schedules. There is one table for each filing status (Married, Single, and Head of Household) where Step 2 of Form W-4 is checked.

How will the system distinguish if the employee filled out a new Form W-4 or still has the old form active?

If the **Form W-4 Version** is **2019** on the Manage Employee Taxes screen, it means the most recent W-4 form submitted by the employee is 2019 or its earlier versions.

If the **Form W-4 Version** is **2020** on the Manage Employee Taxes screen, it means the employee has submitted the 2020 W-4 form or its succeeding versions.

Will taxes be calculated the same as they are today for those people who do not have the new 2020 Form W-4?

Taxes will be calculated the same as they are in tax year 2019 if the **Form W-4 Version** is **2019** in Manage Employee Taxes (PRMETAX).

Application Updates

Compute Payroll (PRPCPR)

The federal withholding tax calculation for regular paychecks was updated. The Compute Payroll process will apply the following:

- If Form W-4 is from before 2020, the tax withholding calculation works for any number of withholding allowances claimed.
- If Form W-4 is from 2020 or later and check date is after 2019, the tax withholding calculation will use the following:
  - Employee provided amounts to increase or reduce taxes, and
  - Employee provided amounts to increase or decrease the amount of wage income subject to income tax withholding.

Configure State Tax Settings (AOMESSST)

The Configure State Tax Settings screen provides the following updated error/validation message for the Equal to Federal – **Filing Status** check box: “The only valid filing statuses are single, married, or head of household if “Equal to Federal Filing Status” check box is selected.”

Federal Withholding (ESMFEDWH)

The following are updates to the Federal Withholding screen:

- To comply with the redesigned Form W-4, the screen provides the following new tabs for entering 2020 information:
  - Federal Withholding (2020 W-4)
  - Additional WH/Deduction Worksheet (2020 W-4)
- You can access the existing tabs in the new 2019 W-4 subtask. The labels for the existing 2019 tabs changed as follows:
  - The “Federal Withholding” tab label changed to “Federal Withholding (2019 W-4)”
  - The “Allowances Worksheet” tab label changed to “Allowances Worksheet (2019 W-4).”

Life Events/New Hires (ESMLIFEEVENT)

The following are updates to the Federal Withholding tab on the Life Events/New Hires screen:

- To comply with the redesigned Form W-4, the screen provides the following new tabs for entering 2020 information:
  - Federal Withholding (2020 W-4) and
  - Additional Withholding
  - Deduction Worksheet

Manage Federal Tax Tables (PRMFTT)

The following are the updates to the Manage Federal Tax Tables screen:

- A new **Head of Household** option is available in the **Filing Status** field.
- A new **Step 2 of W-4** check box allows you to indicate if the rates in the Federal Tax Table will be used when the employee selects the **Step 2 of W-4** check box on the Manage State Taxes screen.

Manage Federal Taxes (PRMFTI)

The following are the updates to the Manage Federal Taxes screen:

- The new **Adjusting Amount Multipliers** group box provides fields for entering the multiplier for the applicable tax table that will be used in the calculation of federal withholding tax. The amounts in this group box come from IRS Publication 15-T.This group box contains the following fields:
  - Step 2 of W-4
  - Married
  - Single
  - Head of Household
- The new **Dependent Credit Amounts** group box provides fields for entering credit amount for employee's dependents. The amounts in this group box come from Step 3 of 2020 Form W-4. This group box contains the following fields:
  - Qualifying Children under 17
  - Other Dependents
- The new **Deductions** group box provides fields for entering the deduction amount for each filing status. The values come from the Deductions Worksheet of the 2020 Form W-4. This group box contains the following fields:
  - Married
  - Single
  - Head of Household

Manage Employee Earnings History (PRMERF)

The following are the updates to the Manage Federal Taxes screen:

- The Employee Tax Setup tab contains the following new fields/check box/drop-down list:

  - Dependents (Qualifying Children under 17)
  - Other Dependents
  - Other Tax Credit Amount
  - Other Income
  - Deductions
  - Step 2 of W-4
  - Form W-4 Version
- A new Paystub Information tab was added but will not be populated at this time. The following fields in this tab are reserved for future use:
  - Name (employee's name used on the paycheck/advice) (PAYSTUB_NAME)
  - Employee Type (S_EMPL_TYPE_CD)
  - Rate Type (Hourly or Salaried) (S_HRLY_SAL_CD)
  - FLSA Classification (EXMPT_FL)
  - Pay Frequency (S_PR_FREQ_CD)
  - Pay Period Salary Amount (Exempt Employees) (SAL_AMT)
  - Line 1 (LN_1_ADR)
  - Line 2 (LN_2_ADR)
  - Line 3 (LN_3_ADR)
  - City (CITY_NAME)
  - State/Province (MAIL_STATE_DC)
  - Postal Code (POSTAL_CD)
- A new Paystub Hourly Rate Detail subtask was added but will not be populated at this time. The following fields in this subtask are reserved for future use:
  - Employee ID (EMPL_ID)
  - Paycheck Type (S_PAYCHK_TYPE)
  - Synthetic key to provide key uniqueness (HRLY_RATE_KEY)
  - Pay Type (PAY_TYPE)
  - Pay Type Description (PAYSTUB_SHORT_DESCRIPTION)
  - Earnings Week (PAYSTUB_WEEK)
  - Hours (PAYSTUB_HOURS)
  - Hourly Amount (PAYSTUB_HRLY_AMT)
  - Paystub Additional Amount (PAYSTUB_ADD_AMT)
  - Paystub amount (PAYSTUB_AMOUNT)

Manage Employee Information (LDMEINFO)

The following are the updates to the Taxes subtask of the Manage Employee Information screen:

- A new **Head of Household** option is available in the **Filing Status** field.

- The **Federal** group box contains the following new fields/check box/drop-down list:
  - Dependents (Qualifying Children under 17)
  - Other Dependents
  - Other Tax Credit Amount
  - Other Income
  - Deductions
  - Step 2 of W-4
  - Form W-4 Version

Manage Employee Taxes (PRMETAX)

The following are the updates to the Manage Employee Taxes screen:

- A new **Head of Household** option is available in the **Filing Status** field.
- The **Federal** group box contains the following new fields/check box/drop-down list:
  - Dependents (Qualifying Children under 17)
  - Other Dependents
  - Other Tax Credit Amount
  - Other Income
  - Deductions
  - Step 2 of W-4
  - Form W-4 Version

Manage Payroll Records (PRMPTF)

The following are updates to the Manage Payroll Records screen:

- The federal withholding tax calculation for regular paychecks was updated.
- The Employee Tax Setup tab contains the following new fields/check box/drop-down list:
  - Dependents (Qualifying Children under 17)
  - Other Dependents
  - Other Tax Credit Amount
  - Other Income
  - Deductions
  - Step 2 of W-4
  - Form W-4 Version
- A new Paystub Information tab was added but will not be populated at this time. The following fields in this tab are reserved for future use:
  - Name (employee's name used on the paycheck/advice) (PAYSTUB_NAME)
  - Employee Type (S_EMPL_TYPE_CD)
  - Rate Type (S_HRLY_SAL_CD)

  - FLSA Classification (EXMPT_FL)
  - Pay Frequency (S_PR_FREQ_CD)
  - Pay Period Salary Amount (Exempt Employees) (SAL_AMT)
  - Line 1 (LN_1_ADR)
  - Line 2 (LN_2_ADR)
  - Line 3 (LN_3_ADR)
  - City (CITY_NAME)
  - State/Province (MAIL_STATE_DC)
  - Postal Code (POSTAL_CD)
- A new Paystub Hourly Rate Detail subtask was added but will not be populated at this time. The following fields in this subtask are reserved for future use:
  - Employee ID (EMPL_ID)
  - Paycheck Type (S_PAYCHK_TYPE)
  - Synthetic key to provide key uniqueness (HRLY_RATE_KEY)
  - Pay Type (PAY_TYPE)
  - Pay Type Description (PAYSTUB_SHORT_DESCRIPTION)
  - Earnings Week (PAYSTUB_WEEK)
  - Hours (PAYSTUB_HOURS)
  - Hourly Amount (PAYSTUB_HRLY_AMT)
  - Additional Amount (PAYSTUB_ADD_AMT)
  - Amount (PAYSTUB_AMOUNT)

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report provides information for the new columns in the following database tables:

- Federal Tax Info (FED_TAX_INFO)
- Federal Taxability (FED_TAX_TBL)
- Employee Tax (EMPL_TAX)
- Employee Tax Audit (EMPL_TAX_ADT)
- Employee Payroll (EMPL_PAYROLL)
- Employee Payroll Audit (EMPL_PAYROLL_ADT)
- Employee Earnings (EMPL_EARNINGS)
- Employee Earnings Audit (EMPL_E_ADT)
- Federal Tax Override (S_FED_TAX_OVRD)

Print Quarterly Federal Tax Report (PRRFDTAX)

The application is fully compatible with the enhancements for the 2020 Form W-4.

Print Soc Sec and Medicare Reconciliation Report (PRRFICA)

The application is fully compatible with the enhancements for the 2020 Form W-4.

Post Payroll Journal (PRPPPCLS)

The Post Payroll Journal screen now includes the following new columns from the Employee Payroll (EMPL_PAYROLL) and Employee Earnings (EMPL_EARNINGS) database tables when posting payroll:

- Dependents (Qualifying Children under 17) (FED_DEP_NO)
- Other Dependents (FED_OTHER_DEP_NO)
- Other Tax Credit Amount (FED_OTHER_CREDITS_AMT)
- Other Income (FED_OTHER_INC_AMT)
- Deductions (FED_DED_AMT)
- Step 2 of W-4 (FED_STEP2_W4_FL)
- Form W-4 Version (FED_W4_NO)
- Paystub Name (employee's name used on the paycheck/advice) (PAYSTUB_NAME)
- Employee Type (S_EMPL_TYPE_CD)
- Rate Type (Hourly or Salaried) (S_HRLY_SAL_CD)
- FLSA Classification (EXMPT_FL)
- Pay Frequency (S_PR_FREQ_CD)
- Pay Period Salary Amount (Exempt Employees) (SAL_AMT)
- Paystub Employee Mailing Address Line 1 (LN_1_ADR)
- Paystub Employee Mailing Address Line 2 (LN_2_ADR)
- Paystub Employee Mailing Address Line 3 (LN_3_ADR)
- Paystub Employee Mailing City Name (CITY_NAME)
- Paystub Employee Mailing State/Province (MAIL_STATE_DC)
- Paystub Employee Mailing Postal Code (POSTAL_CD)
- Hourly Rates Consolidated Flag (CONSOLIDATED_FL)

The Post Payroll Journal application will not post the following new columns from the Employee Payroll (EMPL_PR_PAYSTUB_HRLY_RATES) to the Employee Earnings (EMPL_E_PAYSTUB_HRLY_RATES) database table when posting payroll:

- Employee ID (EMPL_ID)
- Paycheck Type (S_PAYCHK_TYPE)
- Synthetic key to provide key uniqueness (HRLY_RATE_KEY)
- Pay Type (PAY_TYPE)
- Pay Type description (PAYSTUB_SHORT_DESCRIPTION)
- Earnings week (PAYSTUB_WEEK)
- Paystub hours (PAYSTUB_HOURS)
- Hourly amount for the paystub line (PAYSTUB_HRLY_AMT)

- Paystub additional amount (PAYSTUB_ADD_AMT)
- Paystub amount (PAYSTUB_AMOUNT)

Recompute Taxable Wages (PRPRCOMP)

The work tables for the Recompute Taxable Wages screen now include the following columns:

- Dependents (Qualifying Children under 17 (FED_DEP_NO)
- Other Dependents (FED_OTHER_DEP_NO)
- Other Tax Credit Amount (FED_OTHER_CREDITS_AMT)
- Other Income (FED_OTHER_INC_AMT)
- Deductions (FED_DED_AMT)
- Step 2 of W-4 (FED_STEP2_W4_FL)
- Form W-4 Version (FED_W4_NO)

View Employee Taxes (PRQETAX)

The following are updates to the View Employee Taxes screen:

- A new **Head of Household** option is available in the **Filing Status** field.
- The **Federal** group box contains the following new fields/check box:
  - Dependents (Qualifying Children under 17)
  - Other Dependents
  - Other Tax Credit Amount
  - Other Income
  - Deductions
  - Step 2 of W-4
  - Form W-4 Version

Void/Replace Posted Paychecks (PRPAVCK)

The Void Replace Posted Paychecks process now populates the following columns on the Manage Payroll Records screen for replacement checks (V and W records):

- Dependents (Qualifying Children under 17) (FED_DEP_NO)
- Other Dependents (FED_OTHER_DEP_NO)
- Other Tax Credit Amount (FED_OTHER_CREDITS_AMT)
- Other Income (FED_OTHER_INC_AMT)
- Deductions (FED_DED_AMT)
- Step 2 of W-4 (FED_STEP2_W4_FL)
- Form W-4 Version (FED_W4_NO)

System Requirements

This enhancement requires the following Costpoint 7.1.1 releases:

- PATCH3695
- PATCH3720
- Common lib – CPCPR (cp711_cmnlib_CPCPR_015.zip)
- Common lib – BENEFITSLIB (cp711_cmnlib_BENEFITSLIB_013.zip)
- Common lib – LDMEINFOLIB (cp711_cmnlib_LDMEINFOLIB_015.zip)

Application JAR Requirements

The following table lists the Costpoint 7.1.1 screens affected by this update. It includes the required JAR version for each application, if applicable.

Domain	Module	Application ID	Application Name	Application File
People	Employee	LDMEINFO	Manage Employee Information	cp711_ldmeinfo_028.zip
People	Employee Self Service	AOMESSST	Configure State Tax Settings	cp711_aomessst_007.zip
People	Employee Self Service	ESMFEDWH	Federal Withholding	cp711_esmfedwh_009.zip
People	Employee Self Service	ESMLIFEEVENT	Life Events/New Hires	cp711_esmlifeevent_022.zip
People	Payroll	PRMERF	Manage Employee Earnings History	cp711_prmerf_020.zip
People	Payroll	PRMFTI	Manage Federal Taxes	cp711_prmfti_004.zip
People	Payroll	PRMFTT	Manage Federal Tax Tables	cp711_prmftt_003.zip
People	Payroll	PRMPTF	Manage Payroll Records	cp711_prmptf_021.zip
People	Payroll	PRPAVCK	Void/Replace Posted Paychecks	cp711_prpavck_005.zip
People	Payroll	PRPCPR	Compute Payroll	cp711_prpcpr_029.zip
People	Payroll	PRPPPCLS	Post Payroll Journal	cp711_prpppcls_007.zip
People	Payroll	PRPRCOMP	Recompute Taxable Wages	cp711_prprcomp_008.zip

Domain	Module	Application ID	Application Name	Application File
People	Payroll	PRQETAX	View Employee Taxes	cp711_prqetax_006.zip
People	Payroll	PRRFDTAX	Print Quarterly Federal Tax Report	cp711_prrfdtax_011.zip
People	Payroll	PRRFICA	Print Soc Sec and Medicare Reconciliation Report	cp711_prrfica_011.zip

Custom Programs Affected

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Support Center at https://deltek.custhelp.com before you install the update.

To Download the Hot Fix/Feature Update

1. From Internet Explorer, go to https://dsm.deltek.com.
2. Click **Run Deltek Software Manager**.
3. Log in using your Deltek Support Center credentials.
4. In the left pane of the Deltek Software Manager, expand your Deltek product.
5. Expand the Hot Fixes folder for your product, and select the update to download.
6. Click **Download** at the bottom of the screen.

To Install the Hot Fix/Feature Update

Refer to the installation instructions posted on Deltek's Support Center site, https://deltek.custhelp.com.

- For Costpoint 7.1.1 updates, refer to Knowledge Base article 79232.
- For Costpoint 7.0.1 updates, refer to Knowledge Base article 73769.
- For Costpoint 7.0 updates, refer to Knowledge Base article 67722.

Before you install this update, please review all previous updates in the Knowledge Base article. You may need to install prerequisite programs or database patches (described in the Knowledge Base article) prior to installing this update. Note that when you download an update using Deltek Software Manager (DSM), all dependent files are automatically downloaded.

To Check to See if the Hot Fix is Installed

1. Open the application that was updated.
2. Click **Help » About Costpoint** from the Costpoint toolbar. This will display a screen that shows you the latest update JAR for the application that is open, as well as the latest system JAR and all patches applied to the system.

To Check to See if the Feature is Installed

1. Click **Help » About Costpoint** from the Costpoint toolbar.
2. Open the Features subtask and click the Feature that was just installed.
3. Open the Applications subtask. Check the list of applications and their corresponding application jars and see if they are correct and have been successfully deployed (highlighted in green).
4. Open the Patches subtask. Check the list of patches and see if they are correct and have been successfully deployed (highlighted in green).

> **Note:** Most of the features installed have their corresponding patches, but not all.

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Deltek Support Center provides:

- Search for product documentation, such as release notes, install guides, technical information, online help topics, and white papers
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Support Center Community
- Access Cloud-specific documents and forums
- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes
- Initiate a Chat to submit a question to a Customer Care analyst online

> **Attention:** For more information regarding Deltek Support Center, refer to the online help available from the Web site.

Access Deltek Support Center

To access the Deltek Support Center:

1. Go to https://deltek.custhelp.com.
2. Enter your Deltek Support Center **Username** and **Password**.
3. Click **Login**.

> **Note:** If you forget your username or password, you can click the **Need Help?** button on the login screen for help.

About Deltek

Better software means better projects. Deltek is the leading global provider of enterprise software and information solutions for project-based businesses. More than 23,000 organizations and millions of users in over 80 countries around the world rely on Deltek for superior levels of project intelligence, management and collaboration. Our industry-focused expertise powers project success by helping firms achieve performance that maximizes productivity and revenue. www.deltek.com