Deltek

Deltek Costpoint® Enterprise GovCon Cloud

January 2024 Release Notes

(Costpoint MR Version 8.1.27)

January 2024

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Contents

Overview

This document is a compilation of Costpoint, Costpoint Planning, and Time & Expense enhancements and software defect resolutions from January 2024 (CP Maintenance Releases 8.1.27) and includes any regulatory enhancements.

These will be applied to the Cloud environment mid-January. See announcements on your portal page for details.

Note that the version numbers above (for example, 8.1.27) refer to the Costpoint Maintenance Release (MR) upon which this document is based are for reference only.

If you have feedback or questions, please send an email to DeltekDocumentationFeedback@deltek.com

Database Changes

Database Change documents detail data dictionary changes from one release to the next. To see the Database Change document for this MR, refer to 8.1.x Data Dictionary Updates.

Costpoint Business Intelligence 8.1.18+ and Cognos Analytics with Watson

Costpoint BI 8.1.18+ is compatible with Cognos Analytics with Watson 11.2.4 only. If you are leveraging Cognos Analytics 11.1.7, the highest version of Costpoint BI MR that you can apply is Costpoint BI 8.1.17. Note that you can continue to apply the Costpoint MRs beyond 8.1.17, regardless of which Cognos version you are deploying. Costpoint and Costpoint BI MRs are independent of each other.

Regulatory Enhancements

This section includes summaries of the regulatory enhancements made to existing features in this release.

Federal

2023 FUTA Credit Reductions

For 2023, employers in California, New York, and U.S. Virgin Islands will be assessed a general FUTA credit reduction on wages paid to employees for work attributed to any of these states and territory. This Costpoint release adds records on the Manage Federal Taxes screen for the corresponding states:

State	Final 2023 FUTA Credit Reduction
California	0.6%
New York	0.6%
US Virgin Islands	3.9%

2024 ESS W-4 Updates

The Federal W-4 screen in Costpoint Employee Self Service was updated to reflect the 2024 W-4. This release updates the instructions and wording in the following sections of the W-4:

- Instructions for Steps 2-4 on Step 1 tab
- Federal W-4 Step 2 (a)
- Federal W-4 Step 2 (b)
- **Exempt from federal taxes** checkbox years on Step 4 tab
- Deductions Worksheet tab

Attention: For more information, see: https://www.irs.gov/pub/irs-pdf/fw4.pdf.

This enhancement requires the following:

- cp81_bundle_CYE2023_003.zip

2024 Federal Tax Table Updates

The 2024 federal income tax withholding methods were released by the Internal Revenue Service.

- The percentage method's tax brackets were adjusted.
- The annual additional amount if the nonresident alien employee was first paid wages before 2020 and has not submitted a Form W-4 for 2020 or later increases from $9,550 to **$10,300**.
- The annual additional amount if the nonresident alien employee has submitted a Form W-4 for 2020 or later or was first paid wages in 2020 or later increases from $13,850 to **$14,600**.

To support the federal requirements, updates were applied to the following screens:

- Manage Federal Tax Tables
- Manage Federal Taxes

Attention: For more information, see:

- **Draft Pub 15-T**: https://www.irs.gov/pub/irs-dft/p15t--dft.pdf
- **Pub 15-T**: https://www.irs.gov/pub/irs-pdf/p15t.pdf

2024 Form W-4 Updates

Costpoint supports the Form W-4 for Payroll Year 2024. The basic form was updated with minimal changes, most of which are regarding the use of an estimator. The 2024 itemized deductions in Step 2 of the Deductions Worksheet have been updated:

- Married: $29,200
- Head of Household: $21,900
- Single: $14,600

To support the federal requirements, updates were applied to the Manage Federal Taxes screen.

ACA 2023 1094/1095-C Substitute Form Fillable PDF Update

The 2023 PDF template file for 1094-C and 1095-C forms are now available in Costpoint, which will let you create PDF files with data for the calendar year 2023. You can then use the PDF files to print the forms on plain paper.

Print 1094-Cs

The 2023 Form 1094-C PDF template was added to the application. The following updates were applied to the Print and Preview menus:

- The **Print 1094-Cs Prior Report Layout** option was removed.
- The existing **Print 1094-Cs Current Report Layout** option is now the **Print 1094-Cs Report Layout** option.

Print 1095-Cs

The 2023 Form 1095-C PDF template was added to the application. The following updates were applied to the Print and Preview menus:

- The **Print 1095-Cs Prior Report Layout** option was removed.
- The existing **Print 1095-Cs Current Report Layout** option is now the **Print 1095-Cs Report Layout** option.

ACA 2023 Electronic Filing

Costpoint now provides the ability to generate manifest and data files that comply with the latest tax year 2023 schema for the UI transmission channel. This release updates the Create 1094-C and 1095-C Electronic File screen to support the following federal requirements:

- The system table S_SOFTWARE_ID was inserted with the following data:
  - CAL_TY_NO = 2023

    - SOFTWARE_ID = 23A0017797
    - FIRST_NAME = <carry over the value from 2022>
    - MID_NAME = <carry over the value from 2022>
    - LAST_NAME = <carry over the value from 2022>
    - NAME_SFX_CD = <carry over the value from 2022>
    - PHONE_ID = <carry over the value from 2022>
- The tax year in all applicable namespaces was updated to "ty23" in the manifest and data files.
- The following are used to generate manifest and data files for calendar year 2023 if Government Agency is “Federal”:
    - Manifest file from tax year 2023 schema package
    - Form data file from tax year 2023 schema package
    - PaymentYr value “2023”
    - Software ID for 2023

Attention: For more information, refer to:

- Affordable Care Act Assurance Testing System (AATS) Information Returns
- Tax Year 2023 Affordable Care Act Information Returns (AIR) Known Issues, Schemas and Business Rules

Form W-2c Support for Tax Year 2023

Costpoint has been fully tested to support the pre-printed Form W-2c from Deltek’s partner form vendors for the 2024 filing. If you encounter alignment issues when you print on pre-printed forms, you may need to adjust the margins on your printer settings or Costpoint’s page setup. Refer to your printer’s documentation for information on how to configure the margins of your printer.

This enhancement requires the following:

- cp81_bundle_CYE2023_003.zip

Plain Paper Printing and Alignment Enhancements for 1099 Forms

You can now print recipient statements (copies 1, B, 2, and C) of 1099 forms directly onto plain paper or blank stock. This feature eliminates the need for pre-printed forms and, at the same time, enhances convenience and reduces costs.

The recipient statements you can print in Costpoint are fully compliant with the specifications outlined in IRS Publication 1179: General Rules and Specifications for Substitute Forms. This ensures that your printed forms meet all necessary legal requirements.

In addition, print alignment settings on the Print/Create 1099s and Magnetic Media screen have been enhanced to ensure optimal output quality, simplify your 1099 printing process, and reduce the risk of errors.

To support this feature, multiple updates were implemented for the Print/Create 1099s and Magnetic Media screen. These enhancements are designed to provide a more user-friendly interface and improve the overall functionality of the feature. This means a more efficient and seamless experience for you when managing your tax forms.

Print/Create 1099s and Magnetic Media (APR1099) Screen Updates

The Print/Create 1099s and Magnetic Media interface has been revamped to support blank paper printing. This update includes the addition of several new elements, relocation of existing ones, and the removal and replacement of others.

Taxable Entity Field

Since you can print or create 1099 magnetic media for only one entity at a time, the taxable entity selection ranges have been removed from the interface and replaced with a straightforward **Taxable Entity** field. You can directly enter the entity in this text field or use the Lookup function to select the entity for which you want to print or create 1099 magnetic media.

1099 Types to Include Group Box

The **1099 Types to Include** group box, which allows you to select the types of 1099 to be included in the magnetic media file, has been relocated. Previously part of the **Selection Ranges** group box, it now resides in the **Magnetic Media Information** group box. The elements and functionality remain the same, providing you with a familiar experience in a more accurate location.

Print Options Group Box

The previous **Options** group box has been upgraded to the **Print Options** group box. This new group box is a hub for various group boxes, each serving a unique purpose.

Some of these group boxes contain settings for the newly introduced blank paper printing feature, others house elements that have been relocated from different sections of the screen, while the **Copy B Options** group box and the **NEC Pre-Printed Copy to Print** group box, formerly named **NEC Copy to Print**, continue to hold their elements and functionality from the former **Options** group box.

The following are the new contents of the **Print Options** group box.

1099 Type

Use the options in this group box to select the type of 1099 form that you want to print.

- **1099-MISC**
- **1099-NEC**

1099 Paper

This new group box now integrates the functionalities of the previous **Print Option** drop-down list in the **Generate** group box and the former **Print Format** group box. In addition, it introduces the ability to print 1099s on plain paper or blank stock.

Use the options in this group box to select the print media for your 1099.

- **Test**
- **Self-Mailer Test**
- **Pre-Printed**
- **Self-Mailer**
- **Blank Stock / Plain Paper**

Blank Stock/Plain Paper Group Box

Use the fields in this group box to configure the settings for printing on plain paper. The fields in this group box are enabled only if you select **Blank Stock / Plain Paper** in the **1099 Paper** group box.

This group box contains the following elements:

- **Copy B**: Select this option to print Copy B - For Recipient.
- **Copy C**: Select this option to print Copy C - For Payer.
- **Copy 1**: Select this option to print Copy 1 - For State Tax Department.
- **Copy 2**: Select this option to print Copy 2 - To be filed with recipient's state income tax return, when required.
- **Copy B and Copy 2**: Select this option to print both copies B and 2.
- **One PDF File per Vendor**: Select this checkbox to create a separate PDF file for each vendor.
- **File Location**: Enter or select the directory where the PDF file will be saved.

Global Toolbar Updates

The new Create 1099 Forms option has been added to the drop-down menu of the **Default Action** button on the Global Toolbar. This option displays only if you access the toolbar from the Print/Create 1099s and Magnetic Media screen.

If you selected the **Blank Stock / Plain Paper** option, you must use the **Create 1099 Forms** process to generate the PDF file for printing 1099s on blank paper. You can also run this process in batch mode.

This enhancement requires the following files:

- cp81_bundle_CYE2023_002.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

State

2024 SUTA Wage Base

This Costpoint release adds tax table records effective January 1, 2024 on the Manage State Taxes screen for states where the unemployment-taxable wage base has been updated for tax year 2024.

Alaska

The unemployment-taxable wage base increases from $47,100 to **$49,700**.

Colorado

The unemployment-taxable wage base increases from 20,400 to **$23,800**.

Illinois

The unemployment-taxable wage base increases from $13,271 to **$13,590**.

Minnesota

The unemployment-taxable wage base increases from $40,000 to **$42,000**.

Montana

The unemployment-taxable wage base increases from $40,500 to **$43,000**.

North Dakota

The unemployment-taxable wage base increases from $40,800 to **$43,800**.

Oregon

The unemployment-taxable wage base increases from $50,900 to **$52,800**.

Rhode Island

The unemployment-taxable wage base increases:

- From $29,700 to **$30,700** for employers assigned the highest tax rate.
- From $ 28,200 to **$29,200** for all other employers.

Utah

The unemployment-taxable wage base increases from $44,800 to **$47,000**.

Arkansas 2024 Tax Table Update

Arkansas provided the following tax updates for 2024:

- The highest rate decreases from 4.7%. to **4.4%.**
- The standard deduction used in the formula increases from $2,270 to **$2,340**.
- The Formula Method for computing the amount of withholding was updated.

To support the state requirements, this release updates the tax calculation in Payroll and adds new records on the following screens for Arkansas:

- Manage State Taxes (PRMSTI)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage Payroll Records (PRMPTF)
- Compute Payroll (PRPCPR)

Attention: Attention: For more information, refer to: https://www.dfa.arkansas.gov/images/uploads/incomeTaxOffice/whformula_2023.pdf.

Colorado 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- For employees with a federal filing status of married filing jointly or qualifying surviving spouse, the standard deduction amount increases from $9,000 to **$10,000**.
- For all other filing statuses, the standard deduction amount increases from $4,500 to **$5,000**.

> **Attention:** For more information, see:
>
> - Colorado Employee Withholding Certificate: https://tax.colorado.gov/DR0004
> - Withholding Worksheet: https://tax.colorado.gov/sites/tax/files/documents/DR1098_2023.pdf

To support the state requirements, this update adds records/changes to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)
- State Withholding (ESMSTATEWH)
- Life Events/New Hires (ESMLIFEEVENT)

Connecticut 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The two lowest tax rates in the withholding calculation rules were reduced to **2%** and **4.5%**, instead of 3% and 5%, for all withholding codes.
- The Phase-Out Add-Back tax rate decreases from 3% to **2%**.
- The Tax Recapture table has been updated.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Florida 2023 Reemployment Tax Electronic Filing Schema Version 1.3 Update

Florida has added schema version 1.3 for 2023. Costpoint now supports Florida's updated Reemployment Tax XML package, in which the pattern **[-)|+-ÿ]+** has been replaced with **([A-Za-z0-9'\-] ?)[-)|+-ÿ]+** for the name fields, address fields, and title field.

The Create Quarterly SUTA Tax File screen was updated to comply with Florida's XML requirements.

> **Attention:** Please refer to the RT_changes.xlsx file in the Reemployment Tax XML Package for all the changes from version 1.2.

This enhancement requires the following:

- cp81_bundle_CYE2023_003.zip

Georgia 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The 2024 withholding methods use a flat tax rate of **5.49%**.
- The graduated tax rates used for supplemental payments were mostly unchanged, except the highest rate decreased from 5.75% to **5.49%**.
- The standard deduction amount increases from $7,100 to **$24,000** for employees that are Married Filing Joint Return.
- The standard deduction amount increases from $5,400 to **$12,000** for employees that are Single or Head of Household.
- The standard deduction amount increases to $3,550 to **$12,000** for employees that are Married Filing Separate Return.
- The personal allowance that depended on filing status has been removed.

> **Attention:** For more information, see: https://dor.georgia.gov/employers-tax-guide.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Indiana 2023 Tax Table Updates

The Indiana Department of Revenue added a new exemption for qualifying dependents claimed for the first time. The new exemption is effective for withholding on or after September 15, 2023. Employees are entitled to deduct $1,500 per year per qualifying first-time dependent exemption claimed on line 7 of their Form WH-4.

Costpoint can now store the data on the employee’s first-time claimed additional dependent exemptions. You can now enter the employee’s first-time claimed additional dependent exemptions when calculating state and county tax for Indiana.

> **Attention:** For more information, refer to:
>
> - **Departmental Notice #1**: https://www.in.gov/dor/files/dn01.pdf
> - **Form WH-4**: https://www.in.gov/dor/tax-forms/withholding-tax-forms/

Manage Employee Taxes (PRMETAX)

The following fields were added on the State tab, Multi-State Taxes subtask, and Local Taxes subtask of the Manage Employee Taxes screen:

Field	Description
First-time claimed dependents	Enter the number of additional dependent exemption being claimed for the first time. This exemption is good only for the

Field	Description
	calendar year in which the WH-4 claiming the exemption is submitted. The first-time claimed dependents year is required if the number of first-time claimed dependents is not zero. This field will be enabled only for the State of Indiana.
First-time claimed dependents year	Enter the year of the additional dependent exemption being claimed for the first time. The first-time claimed dependent exemption will be applied only in the year specified on this field. This field is required if the number of first-time claimed dependents is not zero and is only applicable for State of Indiana.

Note: These updates are also reflected on the Taxes subtask of the Manage Employee Information screen.

View Employee Taxes (PRQETAX)

The following fields were added on the State Withholding tab, Multi-State Taxes subtask, and Local Taxes subtask of the View Employee Taxes screen:

Field	Description
First-time claimed dependents	This field displays the number of additional dependent exemption being claimed for the first time.
First-time claimed dependents year	This field displays the year the additional dependent exemption is being claimed for the first time.

State Withholding (ESMSTATEWH)

The following fields were added on the main screen and on the Other Withholding State(s) subtask of the State Withholding screen:

Field	Description
Number of first-time claimed dependents	If an additional dependent exemption on Line 6 is being claimed for one or more children for the first time, enter the number of children for whom you are claiming. This exemption is good only for the calendar year in which the WH-4 claiming the exemption is submitted. If you claim this in multiple tax years, you must submit a new WH-4 each year for which this exemption is claimed. Do not claim this exemption if the child was eligible for the additional dependent exemption in any previous year, regardless of whether the exemption was claimed. This includes instances where the child was eligible for the additional dependent exemption before 2023. This also includes instances where the child was eligible to be claimed for the additional dependent exemption by another individual.

Field	Description
	This field will be enabled only for the State of Indiana.
First-time claimed dependents year	This field displays the year the additional dependent exemption is being claimed for the first time.

Note: These updates are also reflected on the State Withholding tab of the Life Events/New Hires screen.

Manage State Tax Withholding Adjustments (PRMSTAC)

You can now select **First-Time Claimed Dependent Exemption** from the **Type** drop-down list. When you select this this option, the screen sets the **Wage Type** to **Gross Wages**, and you can enter the **Amount per Credit/Exemption** value.

Manage Local Taxes (PRMLTI)

The following field was added in the Local Tax Details table of the Manage Local Taxes screen:

Field	Description
Exempt Amount First-Time Claimed Dependent	Enter the first-time claimed dependent exemption amount (used as a deduction from income) for the employee's first-time claimed dependents. The locality exemption allowance is used in the computation of the amount of locality income tax withheld from each employee paycheck.

Compute Payroll (PRPCPR)

The Compute Payroll process applies the following:

- Deduct first-time claimed dependent exemption amount for the applicable year when determining the annual state taxable wages.
- Deduct first-time claimed dependent exemption amount for the applicable year when determining the annual local taxable wages.

Manage Payroll Records (PRMPTF)

The Manage Payroll Records screen applies the following:

- Deduct first-time claimed dependent exemption amount for the applicable year when determining the annual state taxable wages.
- Deduct first-time claimed dependent exemption amount for the applicable year when determining the annual local taxable wages.

The following fields were added on the State Taxes and Local Taxes subtasks of the screen.

Field	Description
First-time claimed dependents	This field displays the number of additional dependent exemption being claimed for the first time.

Field	Description
First-time claimed dependents year	This field displays the year the additional dependent exemption is being claimed for the first time.

View Payroll Edit Table (PRQPTF)

The following fields were added on the State Taxes and Local Taxes subtasks of the View Payroll Edit Table screen.

Field	Description
First-time claimed dependents	This field displays the number of additional dependent exemption being claimed for the first time.
First-time claimed dependents year	This field displays the year the additional dependent exemption is being claimed for the first time.

Manage Employee Earnings History (PRMERF)

The following fields were added on the State Taxes and Local Taxes subtasks of the Manage Employee Earnings History screen.

Field	Description
First-time claimed dependents	This field displays the number of additional dependent exemption being claimed for the first time.
First-time claimed dependents year	This field displays the year the additional dependent exemption is being claimed for the first time.

View Employee Earnings (PRQERF)

The following fields were added on the State Taxes and Local Taxes subtasks of the View Employee Earnings screen.

Field	Description
First-time claimed dependents	This field displays the number of additional dependent exemption being claimed for the first time.
First-time claimed dependents year	This field displays the year the additional dependent exemption is being claimed for the first time.

Post Payroll Journal (PRPPPCLS)

The Post Payroll process now includes the number and the year of first-time claimed dependents.

Print Soc Sec and Medicare Reconciliation Report (PRRFICA)

The dynamic tables used by the Print Soc Sec and Medicare Reconciliation Report screen were updated to support this enhancement.

Print Quarterly Federal Payroll Tax Report (PRRFDTAX)

The dynamic tables used by the Print Quarterly Federal Payroll Tax Report screen were updated to support this enhancement.

Recompute Taxable Wages (PRPRCOMP)

The Recompute Taxable Wages process now includes the first-time claimed dependent exemption if you select the **State** checkbox in the **Apply Employee's Current Taxability** group box.

Void/Replace Posted Paychecks (PRPAVCK)

The Void/Replace Posted Paychecks process now populates the number of first-time claimed dependents and its year on the Manage Payroll Records screen for void and replacement checks (V and W records).

Print Data Dictionary Report (SYRDD)

The report now provides information for the new columns that were added in the following tables:

- EMPL_TAX
- EMPL_TAX_ADT
- EMPL_TAX_MULTI
- EMPL_TAX_MULTI_ADT
- EMPL_PR_STATE
- EMPL_PR_STATE_ADT
- EMPL_EARN_STATE
- EMPL_E_STATE_ADT
- EMPL_TAX_LOCAL
- EMPL_TAX_LOCAL_ADT
- EMPL_PR_LOCAL
- EMPL_PR_LOCAL_ADT
- EMPL_EARN_LOCAL
- EMPL_E_LOCAL_ADT
- LOCAL_TAX_HS

Indiana 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The state withholding rate decreases from 3.15% to **3.05%**.
- The employer is not required to withhold state or county income tax on some employees if the employee will work in Indiana for 30 days or less during the taxable year.

Attention: For more information, see: https://www.in.gov/dor/files/dn01.pdf.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Maine 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The value of a state allowance increased from $4,700 to **$5,000**.
- The maximum standard deduction increased from $11,000 to **$11,750** for single employees and from $24,850 to **$26,350** for married employees.
- The standard deduction decreases according to a formula for single employees who earn more than $97,150 annually, up from $91,500, or for married employees who earn more than $194,300 annually, up from $183,050.
- The deduction reaches zero when a single employee earns at least $172,150 annually, up from $166,500, or when a married employee earns at least $344,300 annually, up from $333,050.
- The tax brackets used in the percentage method were also adjusted.

> **Attention:** For more information, see: https://www.maine.gov/revenue/sites/maine.gov.revenue/files/inline-files/24_wh_tab_instr.pdf.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Maryland 2023 W-2 Electronic Filing

The RW record must now be included in the electronic file according to the 2023 Maryland Employer Reporting of W2s Instructions and Specifications.

> **Attention:** For more information, see: 2023 Maryland Employer Reporting of W2s Instructions and Specifications.

The Create State W-2 File (PRPW2S) screen was updated to support the latest electronic file W-2 file format for Maryland.

- The **NAICS Code** field should be a 6-digit value for Maryland.
- The following values are set in the file for Maryland:
  - RE record, Location 26 (Terminating Business Indicator) is now set to **0**.
  - RE record, Location 31-39 (Other EIN) is now set to blank.

This enhancement requires the following:

- cp81_bundle_CYE2023_003.zip

Missouri 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The withholding formula now uses tax rates of **zero to 4.8%**, instead of the previous range of zero to 4.95%.
- The state's standard deductions have increased for all filing statuses.
- The state's supplemental tax rate decreased to **4.8%**.

> **Attention:** For more information, see: https://dor.mo.gov/forms/Withholding%20Formula_2024.pdf.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Montana 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- Employees are now required to use the same filing status they use for federal purposes.
- New tax brackets are now used in the withholding formula.
- The supplemental tax rate decreased from 6% to **5%**.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Nebraska 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The annual state allowance increased from $2,140 to **$2,250**.
- The percentage method tables have been updated.

> **Attention:** For more information, see: https://revenue.nebraska.gov/sites/revenue.nebraska.gov/files/doc/business/Cir_En_2023/2024cir_en_whole.pdf.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)

- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

New Mexico 2024 Tax Table Updates

Effective,01/01/2024, the tax brackets were updated in the New Mexico Wage Withholding Tables for Percentage Method of Withholding.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

North Carolina 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The rate used for withholding decreases from 4.85%. to **4.6%**.
- The supplemental tax rate decreases from 4.85%. to **4.6%.**

> **Attention:** For more information, see: https://www.ncdor.gov/tax-forms/2024-nc-30/open.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

North Carolina Q4 2023 SUTA Electronic Filing - New/Updated File Formats

Costpoint now supports the new and updated file formats to be used in the new North Carolina State Unemployment Insurance Tax System (NCSUITS) beginning Q4. NCSUITS is a new, modernized system to administer North Carolina's unemployment insurance tax program.

> **Attention:** For more information, see:
>
> - https://www.des.nc.gov/documents/files/suits-wage-report-and-payment-file-specification/open
> - https://www.des.nc.gov/documents/files/employer-efw2-interface-file-definition/open

Create Quarterly SUTA Tax File (PRPSMM)

- The following are the changes to the file format for North Carolina:
  - N and RS records were removed.

  - The RE record was updated.
  - RA, RW, RT, and RF records were added.
- The screen displays a warning if the file name is blank or its extension is not ".efw."
- Validations were added for Configure Company Information screen fields.

Manage SUTA Tax File Data (PRMSMM)

- The following fields are now enabled for North Carolina:
  - Contact Name
  - Telephone Number
  - Ext
  - E-mail
  - Unit/Division Location/Plant Code
  - Pay Types Excluded in Hours Worked
- The following fields are now required for North Carolina:
  - Contact Name
  - E-mail
- The following fields are now disabled for North Carolina:
  - Remitter Number/Employees Outside County
  - Seasonal Wage Code

Manage SUTA Quarterly Reporting Data (PRMQRD)

This update adds adjustment reason codes for North Carolina on the S_SUTA_ADJ_RSN_CD table.

Manage Employee Taxes (PRMETAX)

The **Owner/Officer** and **Occupational/SOC Code** fields are now applicable to North Carolina.

> **Note:** This update also applies to the View Employee Taxes screen and the Taxes subtask of the Manage Employee Information screen.

This enhancement requires the following:

- cp81_bundle_CYE2023_003.zip

North Dakota Correction on Supplemental Tax Rate for 2023

North Dakota updated its 2023 Income Tax Withholding and Instructions to correct errors in an earlier revision. The correct supplemental withholding rate in North Dakota is 1.5%, as noted in the revision released in July. The previous instructions released in May listed the rate as 1.84%. In an example, the July revision uses the incorrect 1.84% rate.

This release updates the Supplemental Tax Rate to 1.5000% on North Dakota's record effective 01/01/2023 on the Manage State Taxes screen.

Oklahoma 2024 Tax Table Updates

The top tax bracket was increased for married employees.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Rhode Island 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The brackets used in the percentage method were adjusted.
- The annual wage threshold above which the value of a state allowance is zero increased from $260,550 to **$274,650**.

Attention: For more information, refer to: https://tax.ri.gov/sites/g/files/xkgbur541/files/2023-12/2024%20Withholding%20Tax%20Booklet.pdf.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

South Carolina 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The value of a state allowance increased from $4,310 to **$4,610**.
- The maximum standard deduction increased from $6,475 to **$6,925**.
- The tax brackets used in the percentage method were also adjusted.

Attention: For more information, see: https://dor.sc.gov/forms-site/Forms/WH1603F_2024.pdf.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Vermont 2024 Tax Table Updates

The following state tax updates are effective 01/01/2024:

- The value of a state allowance increased from $4,850 to **$5,100**, annually.
- The tax brackets used in the percentage method were adjusted.

Attention: For more information, see: https://tax.vermont.gov/sites/tax/files/documents/GB-1210-2024.pdf.

To support the state requirements, this update adds records to the following screens:

- Manage State Taxes (PRMSTI)
- Manage State Tax Withholding Adjustments (PRMSTAC)
- Manage State Standard Deductions (PRMSSD)
- Manage State Tax Tables (PRMSTT)

Enhancements

This section includes summaries of the enhancements made to existing features in this release.

People

Alabama Overtime Pay Exemption

For the tax year beginning on or after January 1, 2024, through June 30, 2025, overtime pay received by a full-time hourly wage-paid employee for hours worked above 40 in any given week are excluded from gross income and, therefore, exempt from Alabama state income tax. Tied with this exemption are employer reporting requirements to the Alabama Department of Revenue.

Employers are required to report the total aggregate amount of overtime paid and the total number of employees who received overtime pay in the State of Alabama in compliance with ACT 2023-421 Alabama Overtime Pay Exemption.

Employers must report the following:

- **One-Time Report – Historical 2023 Overtime Data**:
  - This report is due by January 31, 2024.
  - Employers are required to report the following:
    1. Aggregate amount of overtime paid during 2023 calendar year
    2. Total number of full-time hourly employees who received overtime pay in 2023
- **Monthly/Quarterly Reporting Beginning for 2024 Tax Year**:
  - This is reported with Form A-6 (monthly) and Form A-1 (quarterly) withholding returns.
  - Employers are required to report the following:
    1. Aggregate amount of overtime paid during the period (month/quarter)
    2. Total number of full-time hourly employees who received overtime pay

> **Attention:** For more information, see: https://www.revenue.alabama.gov/individual-corporate/overtime-exemption/.

Costpoint provides a new application that allows employers to comply with the new reporting requirements of Alabama.

Print State Overtime Wages Report (PRRSOTW)

The new Print State Overtime Wages Report will print the aggregate amount paid and the total number of hourly employees who received overtime pay in the specified **Taxable Entity**, check date range, and **Withholding State**. You may opt to include a list of employees in the report. Currently, this report is applicable for the State of Alabama only. To access this screen, click **People » Payroll » Tax Reporting » Print State Overtime Wages Report**.

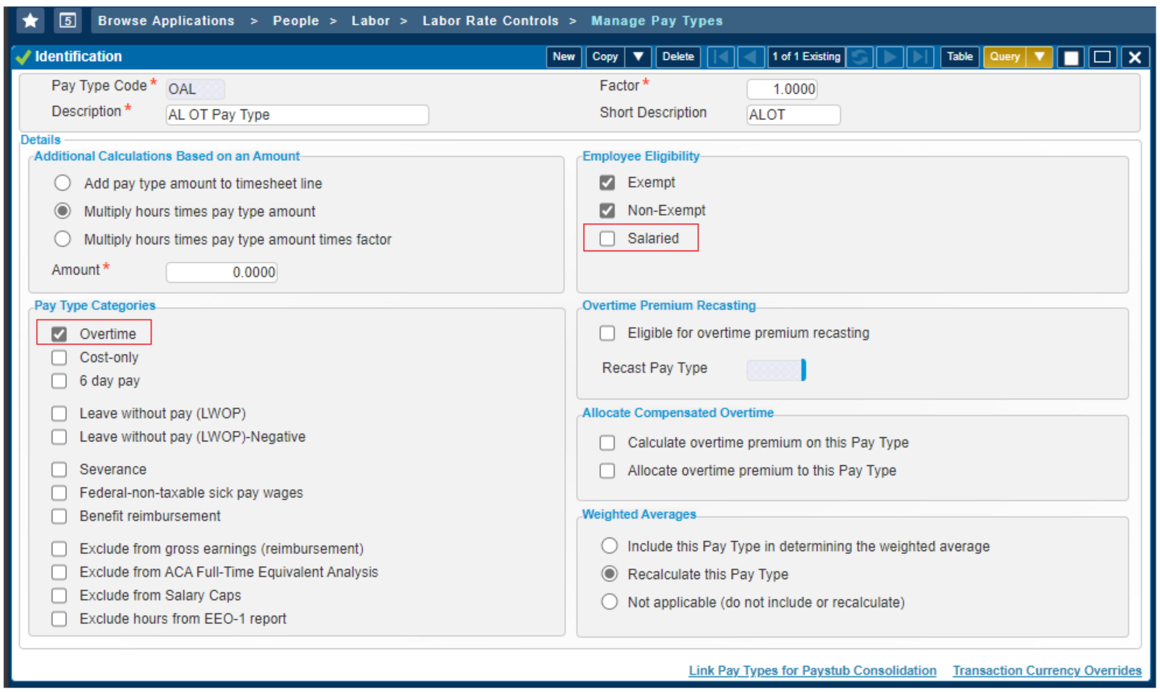
If check dates are before January 1, 2024, or after June 30, 2025, which are outside the effectivity of Alabama's temporary Overtime Pay Exemption, the overtime wages paid shall be determined using overtime pay types only. The pay type's **Overtime** checkbox must be selected on the Manage Pay Types screen.

If check dates are within the effectivity of Alabama's temporary Overtime Pay Exemption, the overtime wages paid shall be determined using overtime pay types and overtime pay type taxability. The following setup must be done on the Manage Pay Types screen and Manage Pay Type Taxability screen.

How to Set Up Alabama Overtime Pay Exemption

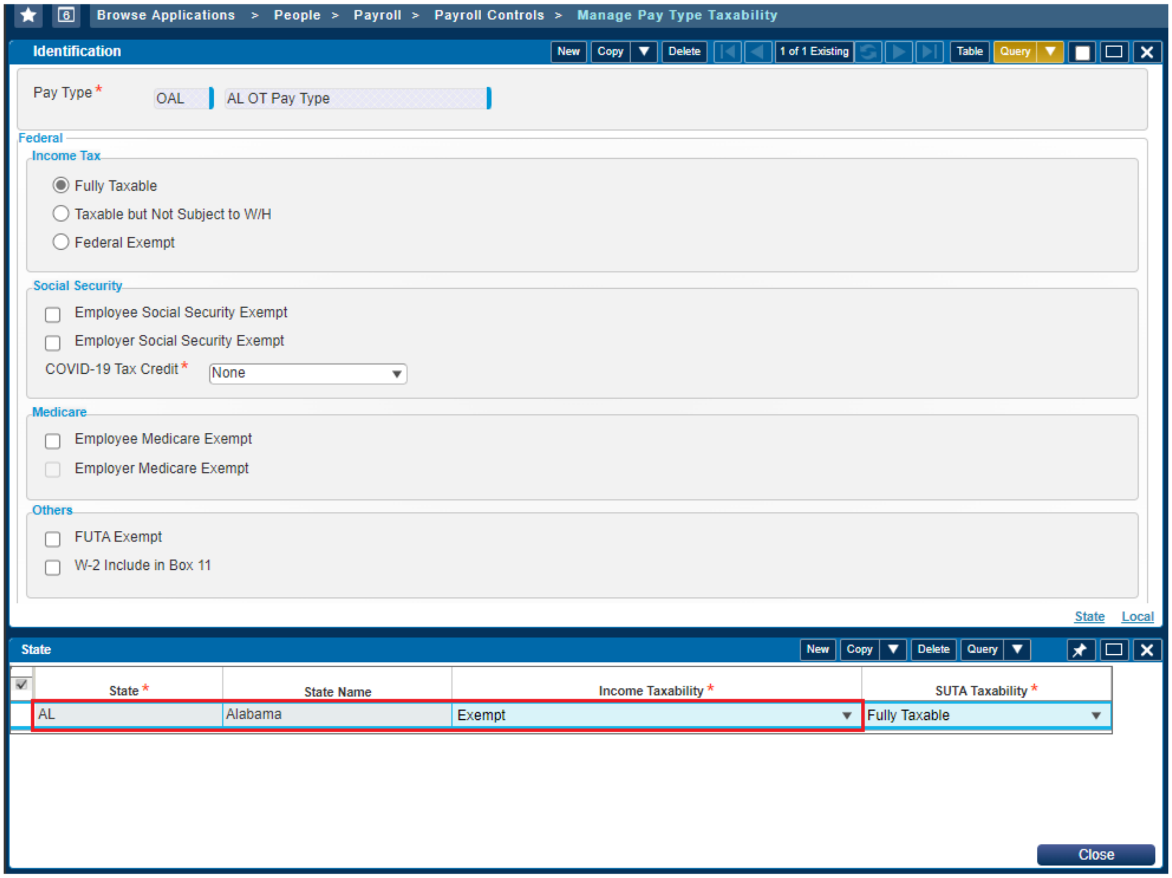
1. On the Manage Pay Types screen, add a pay type code to represent the Alabama Overtime Pay Exemption pay type.
2. Set up the following for the added pay type code:
   - Select the **Overtime** checkbox.
   - Clear the **Salaried** checkbox.

   Here is an example of the Alabama Overtime Pay Exemption pay type setup on the Manage Pay Types screen:



3. On the Manage Pay Type Taxability screen, add a record for the Alabama Overtime Pay Exemption pay type code.
4. On the State subtask, add a row for Alabama and select **Exempt** from the **Income Taxability** drop-down list.

   Here is an example of the Alabama Overtime Pay Exemption pay type setup on the Manage Pay Type Taxability screen:



5. On the Manage Timesheet screen, create a timesheet line for overtime wages by setting up the following:
    - Assign the Alabama Overtime Exemption pay type code in the Timesheet Line's **Pay Type** field.
    - Enter the amount of overtime wages that are exempt from Alabama's withholding tax in the **Labor Cost** field.

Export Payroll Taxes (PRPEXTAX)

This update adds the following fields to the Employee Tax (ET) Record - Employee State Tax Withholding (STEE):

- Field 88: CHECK Alabama Overtime Exempt Wages
- Field 89: QTD Alabama Overtime Exempt Wages
- Field 90: YTD Alabama Overtime Exempt Wages

Audit Tracking for the Manage Payroll Records and Manage Employee Earnings History Screens

Costpoint's audit tracking capabilities for the Manage Payroll Records screen and Manage Employee Earnings History screen have been updated to properly log the changes made on these screens.

View Payroll Edit Table (PRQPTF)

- The **Add**, **Delete**, and **Update** checkboxes in the **Transaction Type** group box are now selected by default.
- The **Employee** field lookup results are now limited to only the records that exist in the audit table. Previously, the results displayed all employees.
- The **Modified By** field lookup results are now limited to only the records that exist in the audit table.
- **Transaction Source** (SOURCE_APP_CD) columns have been added to the following audit tables, which relate to the EMPL_PAYROLL_ADT table:
  - EMPL_PAYROLL_ADT
  - EMPL_PR_CNTRB_ADT
  - EMPL_PR_DED_ADT
  - EMPL_PR_FRNG_DETL_ADT
  - EMPL_PR_LOCAL_ADT
  - EMPL_PR_PAY_TP_ADT
  - EMPL_PR_STATE_ADT
  - EMPL_PR_ST_CD_ADT
  - EMPL_PR_WC_ADT
  - EMPL_PR_PAYSTUB_HRLY_RATES_ADT
  - EMPL_P_DED_GRN_ADT
- The screen provides a new **Transaction Source** field in the Federal/State Wages and Taxes table.

Field	Description
Transaction Source	This field displays the application where the update to the audit record originated.

- The **Transaction Type** field has been added to all subtasks:

Field	Description
Transaction Type	This field displays if the record has been added, deleted, updated, or not changed.

View Employee Earnings (PRQERF)

- The **Add**, **Delete**, and **Update** checkboxes in the **Transaction Type** group box are now selected by default.
- The **Employee** field lookup results are now limited to only the records that exist in the audit table. Previously, it displayed all employees.
- The **Modified By** field lookup results are now limited to only the records that exist in the audit table.

- Transaction Source (SOURCE_APP_CD) columns have been added to the following audit tables, which relate to the EMPL_E_ADT table.
  - EMPL_E_ADT
  - EMPL_E_CNTRB_ADT
  - EMPL_E_DED_ADT
  - EMPL_E_FRNG_DETL_ADT
  - EMPL_E_LOCAL_ADT
  - EMPL_E_PAY_TP_ADT
  - EMPL_E_STATE_ADT
  - EMPL_EARN_ST_C_ADT
  - EMPL_E_WC_ADT
  - EMPL_E_PAYSTUB_HRLY_RATES_ADT
  - EMPL_E_DED_GRN_ADT
- The screen provides a new **Transaction Source** field in the Federal/State Wages and Taxes table.

Field	Description
Transaction Source	This field displays the application where the update to the audit record originated.

- The **Transaction Type** field has been added to all subtasks:

Field	Description
Transaction Type	This field displays if the record has been added, deleted, updated, or not changed.

Manage Payroll Records (PRMPTF)

The following are the changes to the Manage Payroll Records screen:

- The screen now saves all header and subtask data to the audit table, not just the changed data.
- Any action on the screen will add a new record in the audit table for the header and all the subtasks.
- If the header record was deleted/added, the **Transaction Type** will be deleted/added for all subtasks as well.
- If there are changes to any subtask, the system will create new records in the audit table for the header and all subtasks. The records for the header and the subtask that have changes have a transaction type of **Update**. All subtasks that were not updated will have a transaction type of **No Change**.
- If you delete a V (Void) record, Costpoint clears the **Voided Check** flag on the original record and inserts a record into the audit table for original record. If you delete a V record and a corresponding W record exists, Costpoint will also mark the W record as deleted. Three records can be created in this process, two in payroll audit and one in employee earnings.

Manage Employee Earnings History (PRMERF)

The following are the changes to the Manage Employee Earnings History screen:

- The screen now saves all header and subtask data to the audit table, not just the changed data.
- Any action on the screen will add a new record in the audit table for the header and all the subtasks.
- If the header record was deleted/added, the **Transaction Type** will be deleted/added for all subtasks as well.
- If there are changes to any subtask, the system will create new records in the audit table for the header and all subtasks. The records for the header and the subtask that have changes have a transaction type of **Update**. All subtasks that were not updated will have a transaction type of **No Change**.
- If you delete a V (Void) record, Costpoint clears the **Voided Check** flag on the original record and adds a record marked undeleted to the audit table. Two records will be created in the audit table.

This enhancement requires the following:

- cp81_bundle_CYE2023_003.zip

Prorate Employer Contributions to an HSA When an Employee Starts Mid-Year

Prior to this release, if an employee started mid-year, Costpoint prorated the contribution limit by the number of months that the employee worked in that year. However, the employer contribution was not prorated no matter when the employee joins the company. In this scenario, the employer matching should also be prorated.

To address this issue, Costpoint now allows employers to set if the employer HSA match amount should be prorated when an employee elects an HSA mid-year.

Manage HSA Plan Year (HBMHSET)

The Manage HSA Plan Year screen provides the following new checkbox:

Field	Description
Prorate employer contribution for employees starting mid-plan year	Select this checkbox if you want to prorate the employer contribution amount when an employee elects an HSA deduction mid-year.

Update Employee Package Deductions (HBPAPDED)

The Update Employee Package Deductions screen was updated to use the new checkbox on the Manage HSA Plan Year screen to determine if the yearly employer HSA contribution should be prorated based on the HSA contribution start date.

If an employee is hired mid-year or decides to elect an HSA mid-year through a life event, the employer contribution amount is determined by prorating the amount by either the number of pay period or paychecks left in the plan year.

Manage Employee HSA Elections (EMMEHSA)

The Manage Employee HSA Elections screen was updated to use the new checkbox on the Manage HSA Plan Year screen to determine if the yearly employer HSA contribution should be prorated based on the HSA contribution start date.

If an employee is hired mid-year or decides to elect an HSA mid-year through a life event, the employer contribution amount is determined by prorating the amount by either the number of pay period or paychecks left in the plan year.

Print Data Dictionary Report (SYRDD)

The report now provides information on the **Prorate employer contribution for employees starting mid-plan year** (PRORATE_CNTRB_FL) column in the HB_HSA_SETUP table.

This enhancement requires the following files:

- cp81_dbc_810_11251_001.zip
- cp81_emmehsa_001.zip
- cp81_hbmhset_001.zip
- cp81_hbpapded_001.zip
- DeltekCostpointMaintenanceRelease_8.1.22.5012.exe

Software Issues Resolved

Accounting

Accounting

Defect 1989358: The common folder "dvgar" has been converted into a "dvgarlib" library.

Defect 1989364: The common folder "glmtax" has been converted into a "glmtaxlib" library.

Accounts Payable » Create 1099 Information

Defect 2058331: A system error occurred when you processed a 1099 vendor record that had a posted PO voucher with check.

Accounts Payable » Manage Accounts Payable Vouchers

Defect 2060285: You encountered the following error message when you tried to save a record with a **Fiscal Year/Period/Subperiod** combination outside the project's period of performance: "Cannot insert this record. The parent key was not found."

As a workaround, clear the **Show Period of Performance Warning Message** checkbox on the Configure Project Settings screen.

Accounts Payable » Manage Vendors

Defect 2026930: When you entered a record on the User-Defined Info subtask with the **Costpoint Validation Field** set to **Class Code** and clicked the **Text Value** field Lookup, you encountered a system error.

Accounts Payable » Print 1099 Edit Report

Defect 2011804: When you selected the **At Vendor** checkbox, the report displayed only one 1099 type per page even if the 1099 records were for the same **Pay Vendor**.

Accounts Payable » Reverse Posted Vouchers

Defect 2025903: When you reversed a posted voucher, Costpoint restored the date of the voucher in the **Period End Date** instead of the **Subperiod End Date**.

General Ledger » Update Tax Report Tables

Defect 2061984: You encountered an error when you selected **Project Product** in the **Bill Type** group box and updated the tax report tables. As a workaround, clear the **Project Product** checkbox and update the tax report tables for other bill types.

Admin

Security » Manage System Integration Accounts

Defect 2066157: You could not enter information on the Twillio Integration tab on the Manage System Integration Accounts screen.

System Administration » View Help About

Defect 2038530: Patch names that begin with “MR” will no longer display in the DB Patches subtasks.

Framework

Framework

Defect 2028348: The color of the **Approval** button did not change when you started the approval workflow.

Defect 2036977: The following critical system error occurred when you clicked **Save & Continue (F6)** on the Enter Manufacturing Order Reliefs screen:

The MasterServlet failed with the following exception:

com.deltek.enterprise.system.serverapi.remoteapi.MasterBeanException: MasterBean: across line validation failed invoking application specific class: com.deltek.enterprise.application.pc.pcmrelmo.PcmrelmoHdrValidateRS.validateRS-----java.lang.NullPointerException

MasterBean: across line validation failed invoking application specific class:

Also, the **Manufacturing Order** and **Material Handler** fields on this screen were overwritten when you tried to select a value from the suggestive text.

Defect 2039205: A long-running query caused database blocking for Cloud clients.

Defect 2042849: The Expense Report screen froze and sometimes a system error occurred when you clicked the Lookup for **Alternate File Location** in Wizard Mode.

Defect 2056481: Notes line breaks in the JSON code (\n) in Manage Vendors did not convert to line breaks when data was pushed into Costpoint via web services. This issue affected ORA and MSS users via web services with JSON.

Defect 2061561: An unexpected scripting error occurred on the Development Tools Console tab when you used extensibility.

Materials

Bills of Material » Manage Engineering Bills of Material

Defect 2053323: When you entered a scrap percentage greater than 99.99% in the **Scrap** field, you received a message saying you can enter a value of up to 99.99% only. To resolve this issue, the application has been updated to allow a scrap rate of up to 9,999.99%.

Bills of Material » Manage Manufacturing Bills of Material

Defect 2053311: When you entered a scrap percentage greater than 99.99% in the **Scrap** field, you received a message saying you can enter a value of up to 99.99% only. To resolve this issue, the application has been updated to allow a scrap rate of up to 9,999.99%.

Bills of Material » Print Indented Bills of Material Report

Defect 2042445: When you ran the Print Indented Bills of Material Report with the **Include Scrap/Yield Quantities** and **Multiply Out Subassembly Quantities** checkboxes selected, the **Quantity per Assy** field calculated the quantity differently from MRP, with MRP appearing to be correct.

Bills of Material » Release Manufacturing Bills of Material

Defect 2052261: When you used global find and replace in the release of multiple MBOM, you encountered the following error for every line: "The following field is required. Release All Components." However, when you selected them individually, you did not get an error.

Bills of Material » View Bills of Material

Defect 2035216: The Bills of Material (BOM) inquiry did not properly display the indented levels below 10. To address this issue, an indented level padding logic has been added to the application to support maximum level BOMs.

Bills of Material » View Where-Used Bills of Material

Defect 2036017: The Where Used inquiry did not properly display the indented levels below 10.

Engineering Change Notices » Apply Engineering Change Notices

Defect 2057066: When you created a new revision impacted part for a pre-released part with an EBOM (unreleased BOM), and you loaded the EBOM components and set the new part rev BOM status to **Released**, you encountered this error: "This EBOM part cannot be released. One of more components are not released." You encountered this as well even when everything under the level and within the new EBOM were released.

Engineering Change Notices » Manage Engineering Change Notices

Defect 2053333: The application validation has been updated to allow 9,999.99% scrap rate.

Engineering Change Notices » Update Approved Engineering Change Notices

Defect 2040602: Costpoint displayed one row of rejection per company when the rejection codes were the same on all companies.

Inventory » Create Mass Inventory Transfers

Defect 2057385: The mass transfer process did not populate the SERIAL_ID_TO, LOT_ID_TO, SERIAL_KEY_TO fields, which made the serial numbers unavailable for reversing the transaction.

Inventory » Create Physical Count Adjustments

Defect 2038016: When you created an adjustment with **Create and Print Physical Count Adjustment**, the adjustment number was not displayed on the screen.

Inventory » Enter Issues to Project/Account/Org or PO

Defect 2036971: When you autoloaded the serial/lot, disposal transactions did not load all UID information and overwrote UID information in the Serial_lot table.

Inventory » Manage Warehouses

Defect 2040945: When you tried to inactivate a warehouse location with no inventory/dependent data, the following message was displayed: "Since Warehouse Location is used in many other master tables, it is highly recommended that you remove it from there before you inactive it. Otherwise, errors could occur in applications that call for the records with the Warehouse location."

To avoid confusion, the messages related to warehouse locations/warehouses were revised to make them clearer.

Master Production Scheduling » Print Production Backlog Report

Defect 2030380: The month printed on the header of the Production Backlog Report was incorrect.

Material Requirements Planning » Firm Material Requirements Planning Planned Orders

Defect 2033176: A manufacturing order (MO) created from Materials Requirements Planning (MRP) produced an incorrect Yield calculation.

Defect 2034097: When you processed data to create requisitions and ran MRP, Costpoint did not generate the planned order.

Material Requirements Planning » Manage Detailed Part Schedule

Defect 2032982: When you filtered by warehouse, the application displayed an incorrect projected ending balance.

Defect 2056921: When you viewed the Detailed Part Schedule with **Option** set to **All Projects**, there were requirements that did not show. When you changed the **Option** to **Single Project**, the missing requirements were displayed. This was an MSS-specific issue.

Material Requirements Planning » Manage MRP Action Messages

Defect 2036848: When multi-revision was not enabled, the revision did not display on the Requirements subtask.

Material Requirements Planning » Update Material Requirements Plan

Defect 2052947: When you created reservations for parts, MRP overplanned items with multiple projects and multiple order policies.

Materials Estimating » Manage Proposal Bills of Material

Defect 2053337: When you entered a scrap percentage greater than 99.99% in the **Scrap** field, you received a message saying you can enter a value of up to 99.99% only. To resolve this issue, the application has been updated to allow a scrap rate of up to 9,999.99%.

Procurement Planning » Manage Request for Quotes by Vendor

Defect 2057215: When you tried to close or void a request for quote, you received the following error message: "The Requisition ID/Line No combination does not exist for the Item/Rev or Misc Type."

Procurement Planning » Manage Simple Purchase Requisitions

Defect 2034417: You encountered an error in the logs after you modified a requisition line and clicked **Save**. However, this error was not displayed in the UI.

Product Definition » Import Items

Defect 2034164: When you tried to import an input file PCP and CPS record type for CLIN ID, you encountered a system error.

Defect 2036967: A trailing space in the Manufacturing ID prevented you from using the preprocessor.

Product Definition » Manage Parts

Defect 2052872: When you entered a scrap percentage greater than 99.99% in the **Scrap** field, you received a message saying you can enter a value of up to 99.99% only. To resolve this issue, the application has been updated to allow a scrap rate of up to 9,999.99%.

Product Definition » Manage Provisional Parts

Defect 2053328: When you entered a scrap percentage greater than 99.99% in the **Scrap** field, you received a message saying you can enter a value of up to 99.99% only. To resolve this issue, the application has been updated to allow a scrap rate of up to 9,999.99%.

Production Control » Configure Shop Floor Calendar

Defect 2035439: When you changed the number of shifts and clicked **Save**, the Shop Days were numbered incorrectly, which may cause a gap in the Shop Floor schedule.

Production Control » Manage Manufacturing Orders

Defect 2014091: When you generated a manufacturing order (MO) for a rework or repair, and you used an existing ID from a part that was no longer in inventory, Costpoint did not load the serial data that you entered.

Defect 2038716: When you cloned a manufacturing order record, kept the **Manufacturing Order ID** field blank in the new record, and then saved the new record, the application stopped responding and eventually displayed a critical system error.

As a workaround, enter a **Manufacturing Order ID** before saving the record.

Production Control » Print Manufacturing Order Cost Report

Defect 2036721: When you added the 2022 burden cost in the manufacturing order (MO), the application did not include the burden cost in the report.

Purchasing » Import Purchase Orders

Defect 2042220: You encountered a connection error in the application.

Purchasing » Manage Purchase Orders

Defect 2017522: When you changed the cost/quantity in a 2-way match with purchase order (PO) voucher, Costpoint did not display a warning message.

Receiving » Import Purchase Order Receipts

Defect 2036996: When two users ran the application simultaneously with two different import files, the users encountered a constraint error.

Sales Order Entry » Manage Invoices

Defect 2036210: When you processed and reversed an in-transit invoice and then processed an invoice only, you received the following error message: "The values Unit Cost Amount, Ext Cost Amount and Invoice Quantity are inconsistent."

Sales Order Entry » Manage Sales Orders

Defect 2050377: When you changed the sales order (SO) to invoice only and changed the warehouse for two items, only the first item reservation was deleted.

People

Affirmative Action » Print New Hire Analysis Report

Defect 2039130: The Employees with Inactive Affirmative Action Race Codes report should not include employees that were terminated prior to the screen analysis start date.

Affirmative Action » Print Personnel Action Analysis Report

Defect 2039166: The Employees with Inactive Affirmative Action Race Codes report should not include employees that were terminated prior to the screen analysis start date.

Affirmative Action » Print Termination Report

Defect 2039164: The Employees with Inactive Affirmative Action Race Codes report should not include employees that were terminated prior to the screen analysis start date.

Benefits » Manage Benefit Plans

Defect 2037192: When the coverage table or rate table is based on the spouse's age, and there is no coverage option where the **Dependent Type** is set to **Spouse**, the screen should display an error message.

Benefits » Manage HSA Plan Year

Defect 2023775: When the assigned deduction code had no contribution and the employer maximum had a value greater than **0.00**, the screen did not display a warning message.

Employee Self Service » Manage Taxable Entity Settings

Defect 2061162: The **Allow download and email of W-2s** checkbox is now the **Allow Employees to download and email W-2s in the official W-2 format** checkbox.

Employee Self Service » W-2s

Defect 2055805: The labels of buttons on the screen were updated.

- **Print W-2 Data** is now **Print W-2 Report**.
- **Download and E-mail** is now **Download in Official W-2 Format**.

The **Download in Official W-2 Format** button is now hidden if the **Allow employees to download and e-mail W-2s in the official format** checkbox on the Manage Taxable Entity Settings screen is selected.

Leave » Post Leave Accruals

Defect 1980584: The application populated **Vendor Name** fields with the names of employees when labor was suppressed for the logged-in user. This issue affects you if you use Microsoft SQL Server database with Costpoint.

Note: When you apply this hotfix, the data will be correct going forward. If you want to correct historical records on the GL_DETL table, you can run the following script on your database server:

```
UPDATE GL_DETL
SET S_ID_TYPE = 'E'
WHERE EXISTS (
SELECT * FROM GL_POST_SUM GPS
WHERE
GL_DETL.GLPSUM_SRCE_KEY = GPS.SRCE_KEY
AND GL_DETL.GLPSUM_LVL1_KEY = GPS.LVL1_KEY
AND GL_DETL.GLPSUM_LVL2_KEY = GPS.LVL2_KEY
AND GL_DETL.GLPSUM_LVL3_KEY = GPS.LVL3_KEY
AND GPS.S_JNL_CD = 'LVA'
AND GPS.FY_CD = ‘Current Fiscal Year’  )
AND (
    ID IS NOT NULL
    AND (S_ID_TYPE IS NULL OR S_ID_TYPE = ' ')
)
```

Leave » Print Employee Leave Report

Defect 1072450: The Print Employee Leave Report screen displayed an incorrect leave accrual rate when you generated the report for all employees.

Payroll » Create State W-2 File

Defect 2059805: An error message displayed an incorrect screen name. “Manage Tax File Data” should be “Manage Tax Report Data.”

Payroll » Create W-2 Table

Defect 2061095: If you recreated the W-2 of a New York employee who already had an existing W-2 with New York withholding on the Manage W-2 table, the application populated the state taxable wage with existing W-2 federal taxable wage.

Payroll » Manage Payroll Records

Defect 2052045: When you deleted a record on the Manage Payroll Records screen, you received this error message: “The column name 'SOURCE_APP_CD' is specified more than once in the SET clause or column list of an INSERT.”

Defect 2059572: When you modified the State Taxes subtask of an X/Y record and saved your changes, the following message was displayed: "text not found for the resource id: PRMPTF_STATE_WARNINGS.”

Defect 2063539: When you manually edited the payroll record, the value in the **Reimbursements** field changed to zero. This resulted in an out of balance error when you ran the Post Payroll process.

Payroll » Manage W-2s

Defect 2041862: If the combination of the taxable entity, city, state, postal code, and country exceeded 40 characters, a system error occurred when you clicked **Clone**. The error indicated the following message: “Maximum precision is exceeded for the field TAX_CITY_NAME on line 0.”

Payroll » Print Employees Eligible for Retirement Catch-Up

Defect 2051989: The error message that displays when you enter an invalid deduction type was updated to list valid deduction types in alphanumeric order.

Payroll » Print W-2s

Defect 2062133: The application stopped responding when you attempted to generate PDFs for more than 100 W-2s. This issue occurred when you sorted the report by Employee Name.

Planning

Administration » Maintain Fiscal Year Periods

Defect 2061642: There were future fiscal year periods that displayed **HISTORY** as status instead of **OVERRIDE** or **FUTURE**.

Budgeting

Defect 2057368: You encountered delays when you loaded a project that had a large Work Breakdown Structure (WBS).

Cost Analysis

Defect 2025549: The labor report periods did not sync when you used sub-periods for project-based org budgets.

New Business Budgeting » Multi-New Business Budget Consolidation (Revenue/Cost)

Defect 2036528: The **New Business Budget ID Filter** field was not auto-capitalized.

New Business Budgeting » New Business Budget Summary (Revenue/Cost)

Defect 2036519: The **New Business Budget ID** field was not auto-capitalized.

Organization Budgeting » Organization Budgets / Outlooks

Defect 2052308: You encountered a system error when you tried to delete a line from the Non-Labor Percent subtask of a Working budget or outlook.

Organization Budgeting » Utilization Analysis

Defect 2038680: The Generic Staff item did not display in the Utilization Analysis report.

Project Budgeting » Project Budgets / EACs

Defect 1946332: You encountered an issue when an employee and a vendor shared the same ID. When you loaded the employee record, the **ID Type** column displayed **Key Entry** instead of **Employee**, and the **Name** column displayed the account name instead of the employee's last and first names.

Defect 2040590: You encountered a problem with Employee Lookup when you tried to create, commit, and approve a budget.

Defect 2051988: When the lower revenue levels linked to the source PLC project differed from the top-level project that you selected, the latter neither picked up the bill rates for the PLCs nor calculated revenues to create a budget.

Defect 2053512: You experienced slow system performance when creating and committing an EAC.

Project Budgeting » Project Labor Analysis

Defect 2037005: A critical system error occurred when the PLC description exceeded 30 characters. As a workaround, the number of characters allowed in the field was increased to display complete values.

Project Budgeting » Revenue Integration

Defect 2059456: Projects with the following revenue formulas did not display on the Revenue Integration screen:

- FVEAC - Cost Incurred using Estimate At Completion (Funded Value)
- FVETC - Cost Incurred using Estimate To Complete (Funded Value)

Resource Planning » Budget By Resource

Defect 2032315: Column headers that are related to available work hours have been updated to enable labor cost calculations with matching effective rates.

Defect 2055649: The FROM keyword did not display in Oracle databases. You also encountered an error when you tried to save a team.

Projects

Billing » Calculate Standard Bills

Defect 1990967: When you ran this application with the **Current Activity Only**, **Transactions with Zero Bill Rate**, **Transactions with Zero Cost Amount**, and **Transactions with Zero Units Quantity** checkboxes selected, Costpoint applied the same **Amount on Hold** value to the **Amount Prev Billed** field on the Manage Open Billing Detail screen. This caused the **Amount to Bill** field to have a negative value. The **Amount Billed** field on the Manage Closed Billing Detail screen was also updated with the same Amount on Hold value.

Billing » Print Billing Worksheet

Defect 2051944: When you ran this application with the **Detail Invoices** checkbox selected, you encountered a system error.

Billing » Print Unbilled Analysis Report

Defect 2056283: You were unable to run this application when you selected **All** from the **Project** drop-down list.

Project Inquiry and Reporting » Create Project Report Tables

Defect 2039140: You encountered a performance issue when you ran this application with the **T&M Analysis** checkbox selected.

Projects

Defect 1993758: The common folder "pj\commonpj" has been converted into a PJMCOGS library.

Defect 1993759: The common folder "pj\commonpj" has been converted into a PJMDELIV library.

Defect 1993760: The common folder "pj\commonpj" has been converted into a PJMREV library.

Defect 1993761: The common folder "pj\commonpj" has been converted into a PJMTCEIL library.

Defect 1993763: The common folder "pj\commonpj" has been converted into PJMVNWRK and PJMVEWRK libraries.

Subcontractor Management » Manage Subcontractor Invoices

Defect 2042020: When you queried a subcontractor invoice voucher, the **Address Code** field on the Address tab was not editable.

Subcontractor Management » Manage Work Assignments

Defect 2037864: Performance tuning has been conducted for this application to improve performance.

Reports & Analytics

Business Intelligence

Defect 2041013: When you used a Role Code with the **Apply Charge Level Security** checkbox selected in Costpoint's Security Roles application and then accessed the Charge Activity Report in **Team Content » Time » Reports**, no selections were available in the **Functional Role** drop-down list.

Time & Expense

Configuration » Import Master Data

Defect 2057040: In Oracle systems, when you imported resource records, deleted actions were included in the process even though no records were deleted.

Expense » Batch Expenses

Defect 2052148: When you imported a Mastercard credit transaction type 20, the amount value was not displayed as a negative value.

Expense » Expense Report

Defect 2039201: The expense report workflow included tasks with dates outside the task end date.

Defect 2052295: A non-employee attendee was incorrectly validated as the owner of an expense report, which resulted in multiple errors.

Defect 2056976: The expense report email notification workflow was not sending emails to the next approver after the first approve task was completed.

Time » Company Work Schedules

Defect 2035397: Find and replace functions did not work for fields related to time in and time out.

Defect 2039041: When you set up a company work schedule, time in and out did not allow overlapping from one day to the next for third shift work schedules.

Time » Manage/Approve Timesheets

Defect 2062024: After you clicked the **Mass Approve** button, the total count of approved timesheets was not refreshed.

Time » Resource Schedules/Leave

Defect 2054237: When you set up a company work schedule, time in and out did not allow overlapping from one day to the next for third shift work schedules.

Time » Timesheet

Defect 1959081: Time In/Out and Lunch Start/End were validated too early in the process.

Defect 2007811: You received a deadlock system error after you performed a charge lookup.

Defect 2037986: When timesheet class entry mode was changed to Standard and you entered leave hours on a timesheet, you received an error stating that the leave exceeded the minimum leave balance.

Defect 2038502: When you printed a timesheet report, it displayed "T12_UDT02_ABBREV_ID" instead of the correct UDT02 abbreviation.

Time » Work Schedule/Leave

Defect 2054235: When you set up a company work schedule, time in and out did not allow overlapping from one day to the next for third shift work schedules.

Security Enhancements

There are no security enhancements or security issues addressed in this release.

Database Changes

Database Change documents detail data dictionary changes from one release to the next. To see the Database Change document for this MR, refer to 8.1.x Data Dictionary Updates.

Appendix: For Additional Information

Deltek Support Center

The Deltek Support Center is a support website 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 website.

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 delivers software and information solutions that enable superior levels of project intelligence, management and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue. www.deltek.com