



**Deltek**

# Deltek Costpoint® 8.0.29

Release Notes

**December 21, 2022**

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## Overview

Welcome to Deltek Costpoint 8.0.29 Release Notes. These release notes contain a summary of the following:

- Enhancements
- Software Issues Resolved

These release notes address all of the modules associated with Deltek Costpoint 8.0.29, some of which your firm may not use. Skip the sections that do not apply to your implementation of Deltek Costpoint.

## New Release Notes Format

Costpoint Release Notes are now delivered in HTML format and can be viewed at this link: <https://help.deltek.com/product/Costpoint/8.0/ReleaseNotes>. This web page contains links to the Release Notes for each release version as well as links to the Costpoint online help, Costpoint Information Center (CIC), and Costpoint Cloud Information Center (CCIC).

We will continue to provide PDFs for the next few releases as we transition to the new format.

If you have feedback or questions, please send an email to [DeltekDocumentationFeedback@deltek.com](mailto:DeltekDocumentationFeedback@deltek.com).

## Installation Notes

The MR installer reads all Costpoint systems selected. If a Time & Expense segment exists, the installer searches for the presence of a Time & Expense license in that Costpoint system, and lists any systems for which there is no Time & Expense license.

If a prompt displays, review the list and select the appropriate action:

- Using the Apply License utility in the Costpoint DB Wizard, apply a Time & Expense license to the Costpoint system(s) in the list for which the connected Time & Expense segment is not for a stand-alone, external connection that should have a Time & Expense license applied to it.  
Any stand-alone, external Time & Expense segments for which a Time & Expense license is not present, or for which the Time & Expense segment is for a Time & Expense 901 system, will not have the MR Time & Expense patches, SPs, or Data Dictionary files applied to them. These Time & Expense segments are marked as External TESS segments.
- If all the systems listed are actual stand-alone, external (non-licensed) Time & Expense segments and you want them converted to external segments without applying the MR to them, click **OK** to proceed.

If you are unsure, please contact Deltek Costpoint Technical Support.

## Enhancements

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

### Regulatory

#### Federal

##### 2022 Federal ACA Electronic Filing Updates

Costpoint now provides the ability to generate manifest and data files that comply with the latest tax year 2022 schema for the UI transmission channel. This release applies the following updates for the Create 1094-C and 1095-C Electronic File screen to support the latest federal requirements:

- The software ID "22A0014924" for Calendar Year 2022 must be added.
- The tax year in all applicable namespaces must be updated to "ty22".

**Attention:** For more information, refer to:

- [Release Memo for Tax Year 2022 Forms 1094-B, 1095-B, 1094-C, and 1095-C \(irs.gov\)](#)
- Schema: <https://www.irs.gov/pub/irs-schema/aca-schemas-ty2022-v1.zip>

**Note:** This update requires patch dbc\_800\_11001.

##### 2022 Forms 1094-C/1095-C Updates

Costpoint now allows you to print 1094-C and 1095-C data on forms that will be accepted by the IRS for tax year 2022 filing. The 2022 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 2022. You can then use the PDF files to print the forms on plain paper.

##### Print 1094-Cs (HBR1094C)

The Print 1094-Cs application now uses the 2022 1094-C PDF template file if you print for calendar year 2022.

##### Print 1094-C Forms with Data on Plain Paper

Use the Print 1094-Cs screen to print 1094-C forms on plain paper instead of on pre-printed forms.

##### To print 1094-C forms on plain paper:

1. On the Print 1094-Cs screen, enter the selection ranges for the calendar year and taxable entity for the 1094-C Form.
2. In the **Options** group box, select the options for the report.

Field	Description
1094-C Type	Select <b>Regular</b> , <b>Correcting</b> , or <b>Correcting 1095-Cs</b> .

Field	Description
<b>PDF File Options</b>	<p>Select <b>One PDF File for all Taxable Entities</b> if you want to create only one PDF file for all 1094-C forms.</p> <p>The generated PDF file will have the following file name format: 1094C_&lt;Calendar Year&gt;_&lt;Timestamp&gt;.pdf</p> <p>Select <b>One PDF File per Taxable Entity</b> if you want to create a separate PDF file for each taxable entity so that only one 1094-C form is included in each file.</p> <p>The generated PDF file will have the following file name format: &lt;Taxable Entity&gt;_1094C_&lt;Calendar Year&gt;_&lt;Timestamp&gt;.pdf</p>
<b>File Location</b>	Enter the location where to save the PDF files.

3. Select the **Print 1094-C Forms with Data** option from the Action Menu to generate 1094-C PDFs with data.  
The application saves the forms as PDF files in the specified file location.
4. In a PDF reader, open the generated PDF files and review the data on the 1094-C forms.
5. Load your printer with the appropriate plain paper and print the forms using black ink. You must configure your printer settings to print the forms in actual size. If you opt to print the form on plain paper, you must use 8.5 x 11-inch plain paper.

### Print 1095-Cs (HBR1095C)

The Print 1095-Cs screen provides the following updates:

- The application uses the 2022 1095-C PDF template file if you print for calendar year 2022.
- You now have the option to create the PDF file in portrait mode.
- You now have the following new option on the screen:

Field	Description
<b>Exclude Instructions for Recipient (Portrait Orientation)</b>	Select this checkbox if you want to exclude the Instructions to Recipient page in the PDF file. This option is applicable only for the portrait orientation of Form 1095-C. You must not select this checkbox if you are printing the PDF file to plain paper. However, you must select this checkbox if you are printing to a portrait blank stock with backer (with instructions at the back).

- The application now allocates two lines for the names in Part III – Covered Individuals.
- The existing **Options for Printing Forms with User Data** group box is now the **Options for Printing Forms with Data** group box.

### Print 1095-C Forms with Data on Blank Stock or Plain Paper

Use the Print 1095-Cs screen to print 1095-C forms on blank stock or plain paper instead of on pre-printed forms.

**To print 1095-C forms on blank stock/plain paper:**

1. On the Print 1095-Cs screen, enter the selection ranges for the 1095-C Form.
  - Employee Name/Employee ID/Social Security Number/Home Organization/Mailing Address State/Mailing Address Postal Code/Locator Code
  - Taxable Entities
  - Calendar Year
2. In the **Report Options** group box, select the options for the report.
  - 1095-C Type
  - Orientation
  - 1st Sort
  - 2nd Sort
  - Print Test Pattern
  - Truncate Payee Identification Numbers (Employer and Employees)
3. In the Options for Printing Forms with Data, select the applicable options and enter the PDF file location.

Field	Description
<b>PDF File Options</b>	<p>Select <b>One PDF File for all Employees</b> if you want to create only one PDF file for all 1095-C forms. The generated PDF file will have the following file name format: 1095C_&lt;Calendar Year&gt;_&lt;Timestamp&gt;.pdf</p> <p>Select <b>One PDF File per Employee</b> if you want to create a separate PDF file for each employee so that only one 1095-C form is included in each file. The generated PDF file will have the following file name format: &lt;Employee ID&gt;_1095C_&lt;Calendar Year&gt;_&lt;Timestamp&gt;.pdf</p>
<b>File Location</b>	Enter the location where to save the PDF files.
<b>Exclude Instructions for Recipient (Portrait Orientation)</b>	Select this checkbox if you want to exclude the Instructions to Recipient page in the PDF file. This option is applicable only for the portrait orientation of Form 1095-C. You must not select this checkbox if you are printing the PDF file to plain paper. However, you must select this checkbox if you are printing to a portrait blank stock with backer (with instructions at the back).

4. Select the **Print 1095-C Forms with Data** option from the Action Menu to generate 1095-C PDFs with data.  
The application saves the forms as PDF files in the specified file location.
5. In a PDF reader, open the generated PDF files and review the data on the 1094-C forms.
6. Load your printer with the appropriate plain paper or blank stock and print the forms using black ink. You must configure your printer settings to print the forms in actual size. If you opt to print the form on plain paper, you must use 8.5 x 11-inch plain paper.

### 2022 FUTA Credit Reductions

For 2022, employers in California, Connecticut, Illinois, and New York will be assessed a general FUTA credit reduction of 0.3% on wages paid to employees for work attributed to any of these states. The reduction will cause employers to pay an effective tax rate of 0.9% or up to \$63 for each employee when applied to the federal unemployment-taxable wage base of \$7,000.

Employers in the U.S. Virgin Islands will be assessed a general FUTA credit reduction of 3.6% on wages paid to employees for work attributed to the territory. The reduction will cause employers in the US Virgin Islands to pay an effective federal unemployment tax rate of 4.2%, or up to \$294 for each employee when applied to the federal unemployment-taxable wage base.

This Costpoint release adds records on the Manage Federal Taxes screen for the corresponding states:

State	Final 2022 FUTA Credit Reduction
California	0.3%
Connecticut	0.3%
Illinois	0.3%
New York	0.3%
US Virgin Islands	3.6%

**Note:** This update requires patch dbc\_800\_11019.

### 2023 401(k) Limits

The IRS provided the following 401(k) updates for 2023:

- The salary deferral limit increased from \$20,500 in 2022 to **\$22,500** in 2023.
- The annual compensation limit increased from \$305,000 in 2022 to **\$330,000** in 2023.

To support the 2023 limits, Costpoint sets the 401(k) Deferral Limit to **\$22,500** and 401(k) Wage Limit to **\$330,000** for payroll year 2023 on the Manage Federal Taxes screen.

**Attention:** For more information, refer to:

- **IRS website:** <https://www.irs.gov/retirement-plans/401k-plans-deferrals-and-matching-when-compensation-exceeds-the-annual-limit>
- **Notice 2022-55:** <https://www.irs.gov/pub/irs-drop/n-22-55.pdf>

**Note:** This update requires patch dbc\_800\_11014.

### 2022 Form 1099-MISC Updates

The IRS released the 2022 updates to form 1099-MISC.

**Note:** The 1099-MISC updates discussed in this section are retrieved from the IRS 2022 Instructions for Forms 1099-MISC and 1099-NEC document. Download the official IRS document through this link: <https://www.irs.gov/pub/irs-pdf/i1099mec.pdf>.

Form 1099-MISC has the new Box 13, which is assigned to the Foreign Account Tax Compliance (FATCA) filing requirement checkbox. Furthermore, the previous box numbers 13 to 17 have been renumbered to box numbers 14 to 18, respectively.

### Print/Create 1099s and Magnetic Media

The Print/Create 1099s and Magnetic Media screen has been updated to accommodate the IRS 2022 updates to forms 1099-MISC and 1099-NEC.

When you set the **Calendar Year** to 2022 and you print 1099s on this screen, the output displays using the 2022 format and layout for the 1099 forms.

The magnetic media format has also been updated according to the 2022 Specifications for Electronic Filing of Forms.

**Note:** For details on the 2022 specifications for electronic filing, download the IRS Publication 1220 through this link: <https://www.irs.gov/pub/irs-pdf/p1220.pdf>.

## State

### 2023 SUTA Wage Base Updates

This Costpoint release adds tax table records effective January 1, 2023 on the Manage State Taxes screen for states where the unemployment-taxable wage base has been updated for tax year 2023.

#### Colorado

The unemployment-taxable wage base increases from 17,000 to **\$20,400**.

#### Idaho

The unemployment-taxable wage base increases from 46,500 to **\$49,900**.

#### Montana

The unemployment-taxable wage base increases from \$38,100 to **\$40,500**.

#### New Jersey

The unemployment-taxable wage base increases from \$39,800 to **\$41,100**.

#### New Mexico

The unemployment-taxable wage base increases from \$28,700 to **\$30,100**.

#### New York

The unemployment-taxable wage base increases from \$12,000 to **\$12,300**.

Enhancements

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Oklahoma

The unemployment-taxable wage base increases from \$24,800 to **\$25,700**.

Wyoming

The unemployment-taxable wage base increases from \$27,700 to **\$29,100**.

**Note:** These updates require patches `dbc_800_11014` and `dbc_800_11024`.

Arizona 2023 Tax Table Updates

Tax rates used in Arizona's withholding certificate decreases for 2023, and all taxpayers must complete a new form for 2023.

The rates used in the 2023 Form A-4, Employee's Arizona Withholding Election, range from **0.5%** to **3.5%**, down from 0.8% to 5.1%.

If an employee does not submit Form A-4, the tax rate to be used is **2%**, down from 2.7%, as the middle of the seven rates provided.

To support the state requirements, this release adds records on the following screens:

- Manage State Standard Deductions
- Manage State Taxes
- Manage State Tax Tables
- Manage State Tax Withholding Adjustments

**Attention:** For more information, refer to: <https://azdor.gov/forms/withholding-forms/arizona-withholding-percentage-election>.

**Note:** This update requires patch `dbc_800_11015`.

California 2023 Tax Table Updates

California's withholding methods were updated for 2023. The following are the details:

- The annual low income exemption threshold increases to **\$17,252** or **\$34,503**, up from \$15,916 or \$31,831. The amount depends on the employee's filing status and, for married employees, the number of allowances claimed.
- The annual standard deduction increases to **\$5,202** or **\$10,404**, up from \$4,803 or \$9,606. The amount depends on the employee's filing status and, for married employees, the number of allowances claimed.
- The value of a state allowance increases from \$141.90 to **\$154** annually.
- The tax rates used in Method B continue to range from 1.1% to 14.63%. The tax brackets used are to be adjusted compared to 2022.

To support the state requirements, this release adds records on the following screens:

- Manage State Standard Deductions
- Manage State Taxes

Enhancements

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- Manage State Tax Tables
- Manage State Tax Withholding Adjustments

**Note:** This update requires patch dbc\_800\_11015.

### Colorado FAMILI Program Deduction Type

Colorado voters approved Proposition 118 in November of 2020, paving the way for a state-run Paid Family and Medical Leave Insurance (FAMILI) program. The FAMILI program is a social insurance program with both employers and employees contributing to the fund that will eventually pay out benefits.

The premiums are set to 0.9% (through 2024) of the employee's wage, with 0.45% paid by the employer and 0.45% paid by the employee. Premiums are paid on wages up to the Federal Social Security Wage Cap. Employers are required to begin these premium deductions on January 1, 2023. Wages subject to FAMILI premiums will be the same wages subject to Unemployment Insurance (UI).

Costpoint adds a new **COPFML** (Colorado FAMILI) deduction type on the Manage Deductions screen. This will allow you to indicate which deduction codes will be used for employer and employee contributions in the FAMILI program beginning January 1, 2023.

**Attention:** For more information, refer to: <https://famli.colorado.gov/employers>.

**Note:** This enhancement requires patch dbc\_800\_11012.

### Manage Employee Information

The screen will display a warning message if the deduction or contribution has a deduction type of **COPFML** but the employee's SUTA state is not **CO** (Colorado).

### Manage Employer Contributions

The screen will display a warning message if the contribution has a deduction type of **COPFML** but the employee's SUTA state is not **CO** (Colorado).

### Manage Employee Deductions

The screen will display a warning message if the deduction has a deduction type of **COPFML** but the employee's SUTA state is not **CO** (Colorado).

### Indiana Withholding Tax Updates (Phase 1): Track the Number of Adopted Children

Effective October 1, 2022, the state's Departmental Notice No. 1 was updated to add a third deduction constant table for a new exemption for adopted children. The \$3,000 annual exemption for adopted children was added in the legislation. Form WH-4, Employee's Withholding Exemption and County Status Certificate, was also updated to include the adopted child exemption.

Currently, there is no field in Costpoint that can store and track the adopted child exemptions throughout Costpoint payroll. To be able to deduct this exemption when Costpoint calculates the state and local withholding amount, you must:

1. Take note of the number of adopted child dependent exemptions claimed on line 7 of Form WH-4 and multiply the number by 2.

2. Add the result to the value in the **Dependents** field on the Manage Employee Taxes screen.

The actual number of adopted child dependent exemptions claimed on line 7 of Form WH-4 will be tracked in a new information-only field, **Actual number of adopted children**. This field was added to the following screens in Costpoint:

- Manage Employee Taxes
- Manage Employee Information
- View Employee Taxes
- State Withholding
- Life Events/New Hires

Costpoint will be able to use the **Actual number of adopted children** field information during database conversion of the new fields for adopted child dependent exemptions that will be added later throughout payroll processing.

The **Actual number of adopted children** field will be enabled for the State of Indiana only.

#### Manage Employee Taxes Data Setup for Indiana

To comply with the state requirements, you must use the following data setup on the Manage Employee Taxes screen for Indiana employees:

Field	Instructions
<b>Withholding State Filing Status</b>	<b>All Filers (All Filers, Married and Single):</b> Select as the filing status for all employees.
<b>State Withholding Exemptions</b>	Enter the number of personal exemptions the employee is claiming on line 5 of the employee's Form WH-4.
<b>State Withholding Dependents</b>	<p>Enter the number of additional dependent exemptions the employee is claiming on line 6 of the employee's Form WH-4.</p> <p>If the employee is claiming adopted child dependent exemptions on line 7 of the employee's Form WH-4, multiply it by two and add the number to this field.</p> <p>For example, if the employee has 3 additional dependent exemptions (Form WH-4 line 6) and 2 adopted child dependent exemptions (Form WH-4 line 7), enter 7 as the total number of exemptions for State Withholding Dependents.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> The number of dependent exemptions for Indiana county tax (local) withholding must be the same as the number of dependent exemptions for Indiana state withholding.</p> </div>
<b>Local Taxes Dependents</b>	Enter the number of additional dependent exemptions the employee is claiming on line 6 of the employee's Form WH-4.

Field	Instructions
	<p>If the employee is claiming adopted child dependent exemptions on line 7 of the employee's Form WH-4, multiply it by two and add the number to this field.</p> <p>For example, if the employee has 3 additional dependent exemptions (Form WH-4 line 6) and 2 adopted child dependent exemptions (Form WH-4 line 7), enter 7 as the total number of exemptions for Local Taxes Dependents.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin-top: 10px;"> <p><b>Note:</b> The number of dependent exemptions for Indiana county tax (local) withholding must be the same as the number of dependent exemptions for Indiana state withholding.</p> </div>
<p><b>Actual number of adopted children</b></p>	<p>Use this field to specify the number of adopted children claimed by the employee on the Form WH-4. This value will not be used with the first phase of the Indiana 2022 tax withholding updates but should still be entered as it will be used in the second phase. It's important that you provide this information if the State Withholding Number of Dependents and Local Withholding Number of Dependents include exemptions for an adopted child or children.</p>

**Attention:** For more information, refer to:

- **Departmental Notice #1:** <https://www.in.gov/dor/files/reference/dn01.pdf>
- **WH-4:** <https://www.in.gov/dor/tax-forms/withholding-tax-forms/>

**Note:** This enhancement requires patch dbc\_800\_10997.

### Indiana W-2 Reporting Box 20 Format

The Indiana Department of Revenue issued an information bulletin that provides employers with the necessary information to correctly indicate Indiana adjusted gross income tax withheld and county income tax withheld on the state copy of Federal Form W-2, Wage, and Tax Statement.

All Indiana state and county income tax withheld by an employer must be designated in the appropriate boxes of the state copy of the W-2 form.

- Box 15 – abbreviation IN
- Box 16 – amount of wages subject to Indiana income tax
- Box 17 – amount of Indiana income tax withheld
- Box 18 – amount of wages subject to county income tax
- Box 19 – amount of county income tax withheld
- Box 20 – enter C and the adopting county code in box 20

Prior to this release, if the local tax was a county income tax in the State of Indiana, box 20 was automatically populated with the description of the locality code when you ran the Create W-2 Table application. The description may not necessarily be the county code number in the correct format.

Enhancements

To support the state requirement, Costpoint updates the following applications to ensure that the county code assigned to Indiana is correct.

**Manage Local Taxes (PRMLTI)**

The Manage Local Taxes screen now ensures that the county code assigned to Indiana is a valid two-digit number.

- The screen provides a validation to ensure that the county code assigned to Indiana is a valid two-digit number. A valid Indiana county code is within **01** to **92**.
- If you enter an Indiana county code that is a non-zero one-digit number, the application adds a leading zero.

**Create W-2 Table (PRPCW2)**

The Create W-2 Table screen can now populate Box 20 in W-2s with Indiana’s county code in the required format.

- If the local tax is a county income tax linked to the State of Indiana, the application retrieves the county number from the SCHOOL\_CD column on the LOCALITY table and not from the LOCAL\_NAME column. If the value is a non-zero one-digit number, the screen adds a leading zero. If the county code value is not within **01** to **92**, the screen displays an error.
- The application now populates Box 20 with the letter C and the 2-digit county number in the following applicable columns:

Table	Field
LOCAL_W2_FILE	LOCAL_NAME
LOCAL_W2C_FILE	PREV_LOCAL_NAME
LOCAL_W2C_FILE	LOCAL_NAME

**Manage W-2s (PRMW2)**

The Manage W-2s screen can now populate Box 20 in W-2s with Indiana’s county code in the required format.

If the local tax is a county income tax linked to the State of Indiana:

- The application retrieves the county number from SCHOOL\_CD column on the LOCALITY table and then inserts the value in LOCAL\_NAME column on the LOCAL\_W2\_FILE table.
- The application adds a leading zero if the value is a non-zero one-digit number.
- The application populates the **Locality Name (Box 20)** field with the letter C and the two-digit county number.

The screen displays a warning message if the **Locality Name (Box 20)** field is blank or not a valid two-digit Indiana County Number in the required format.

**Manage W-2Cs (PRMW2C)**

The Manage W-2Cs screen now can populate Box 20 in W-2s with Indiana’s county code in the required format.

If the local tax is a county income tax linked to the State of Indiana:

Enhancements

- The application retrieves the county number from the SCHOOL\_CD column on the LOCALITY table and then inserts the value in the LOCAL\_NAME and PREV\_LOCAL\_NAME columns in the LOCAL\_W2\_FILE table.
- The application adds a leading zero if the value is a non-zero one-digit number.
- The application populates the following fields with the letter C and the two-digit county number:
  - Previously reported – 20 Locality name
  - Correct information – 20 Locality name

The screen displays a warning message if the **Previously reported – 20 Locality name** field or the **Correct information – 20 Locality name** field is blank or not a valid two-digit Indiana County Number in the required format.

**Attention:** For more information, refer to *Income Tax Information Bulletin #16*: <https://www.in.gov/dor/files/reference/ib16.pdf>.

Iowa 2023 Tax Table Updates

Iowa’s 2023 withholding formula and instructions were released with the following updates:

- For 2023 Iowa withholding calculations, federal withholding is no longer subtracted from taxable wages.
- The amounts of the standard deduction (in Step 1), rates, and brackets (in Step 2) have been updated for 2023.

**Attention:** For more information, refer to the *Iowa Withholding Formula For Wages Paid Beginning January 1, 2023*: <https://tax.iowa.gov/sites/default/files/2022-11/IAWithholdingFormulaAndInstructionsTY2023.pdf>.

**Note:** This update requires patch dbc\_800\_11026.

Maine 2023 Tax Table Updates

Maine released the 2023 withholding methods, which provide the following updates:

- The value of a state allowance increases from \$4,450 to **\$4,700**.
- The maximum standard deduction increases from \$10,100 to **\$11,000** for single employees and from \$23,050 to **\$24,850** for married employees.
- The standard deduction decreases according to a formula for single employees who earn more than \$91,500 annually, up from \$85,850, or for married employees who earn more than \$183,050 annually, up from \$171,700.
- The deduction reaches zero when a single employee earns at least \$166,500 annually, up from \$160,850, or when a married employee earns at least \$333,050 annually, up from \$321,700.
- The tax brackets used in the percentage method were also adjusted.

**Attention:** For more information, refer to the *2023 Withholding Tables for Individual Income Tax*: [https://www.maine.gov/revenue/sites/maine.gov.revenue/files/inline-files/23\\_wh\\_tab\\_instr.pdf](https://www.maine.gov/revenue/sites/maine.gov.revenue/files/inline-files/23_wh_tab_instr.pdf).

**Note:** This update requires patch dbc\_800\_11024.

### Minnesota 2023 Tax Table Update

The following are the tax updates for Minnesota effective January 1, 2023:

- In the 2023 computer formula, the value of a state allowance increased from \$4,450 to **\$4,800**.
- The formula's tax brackets were also adjusted, and tax rates continue to range from 5.35% to 9.85%.
- The unemployment-taxable wage base increases from \$38,000 to **\$40,000**.

To support the state requirements, this release adds records on the following screens:

- Manage State Taxes
- Manage State Tax Tables
- Manage State Tax Withholding Adjustments

**Attention:** For more information, refer to the *Withholding Computer Formula*: [https://www.revenue.state.mn.us/sites/default/files/2022-11/wh\\_inst\\_23\\_0.pdf](https://www.revenue.state.mn.us/sites/default/files/2022-11/wh_inst_23_0.pdf).

**Note:** This update requires patch dbc\_800\_11026.

### Missouri 2023 Tax Table Update

Missouri's 2023 employer's guide and withholding methods were released with the following updates:

- The withholding formula uses tax rates of zero to 4.95%, instead of the previous range of 1.5% to 5.3%.
- The standard deduction for employees who are married with nonworking spouses increased from \$25,900 to **\$27,700**.
- The standard deduction for heads of households increases from \$19,400 to **\$20,800**.
- The standard deduction for other filing statuses increases from \$12,950 to **\$13,850**.
- The flat tax rate for supplemental payments decreases from 5.3% to **4.95%**.

**Attention:** For more information, refer to: [https://dor.mo.gov/forms/4282\\_2023.pdf](https://dor.mo.gov/forms/4282_2023.pdf).

**Note:** This update requires patch dbc\_800\_11026.

### Montana 2023 Tax Table Updates

Montana's withholding methods were adjusted for inflation effective January 1, 2023. The following are the updates:

- The value of a state allowance in the withholding methods increased from \$1,900 to **\$2,070** annually.

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## Enhancements

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- The tax brackets used in the withholding formula were also adjusted.

To support the state requirements, this release adds records on the following screens:

- Manage State Standard Deductions
- Manage State Taxes
- Manage State Tax Tables
- Manage State Tax Withholding Adjustments

**Attention:** For more information, refer to: <https://mtrevenue.gov/publications/withholding-tax-guide-with-montana-withholding-tax-tables/>.

**Note:** This update requires patch dbc\_800\_11017.

## Nebraska 2023 Tax Table Updates

The following are the tax updates for Nebraska effective January 1, 2023:

- The annual withholding allowance increases from \$2,080 to **\$2,140**.
- The annual withholding tables for Single and Married have been updated.

To support the state updates, this release adds records on the following screens:

- Manage State Standard Deductions
- Manage State Taxes
- Manage State Tax Tables
- Manage State Tax Withholding Adjustments

**Attention:** For more information, refer to: [https://revenue.nebraska.gov/sites/revenue.nebraska.gov/files/doc/2023\\_Circular\\_EN\\_8-429r2023\\_Whole\\_Book\\_4.pdf](https://revenue.nebraska.gov/sites/revenue.nebraska.gov/files/doc/2023_Circular_EN_8-429r2023_Whole_Book_4.pdf).

**Note:** This update requires patch dbc\_800\_11014.

## New York State and City of Yonkers Tax Table Updates

The withholding methods for New York state and the city of Yonkers, effective January 1, 2023, were released and the annual tax rate tables used in the exact calculation method (Method II) were adjusted.

To support the state updates, this release adds records on the following screens:

- Manage Local Taxes
- Manage State Standard Deductions
- Manage State Taxes
- Manage State Tax Tables
- Manage State Tax Withholding Adjustments

**Attention:** For more information, refer to:

- **New York State Withholding:**  
[https://www.tax.ny.gov/pdf/publications/withholding/nys50\\_t\\_nys\\_123.pdf](https://www.tax.ny.gov/pdf/publications/withholding/nys50_t_nys_123.pdf)
- **Yonkers Withholding:**  
[https://www.tax.ny.gov/pdf/publications/withholding/nys50\\_t\\_y\\_123.pdf](https://www.tax.ny.gov/pdf/publications/withholding/nys50_t_y_123.pdf)

**Note:** This update requires patch dbc\_800\_11024.

### Oregon SUTA Electronic Filing

Costpoint adds a new **ORPFML** (Paid Leave Oregon) deduction type on the Manage Deductions screen. This will allow you to indicate which deduction codes will be used for employer and employee contributions in the Paid Leave Oregon program beginning January 1, 2023.

Beginning in the first quarter of 2023, the appropriate value for the Statewide Transit Tax (STT) and Paid Leave Oregon contributions shall be reported in the RS (State Record Layout) in the quarterly unemployment electronic file. Currently, both STT and Paid Leave are blank if the reporting quarter is earlier than Q1 2023.

**Attention:** For more information, refer to:

- **FAQs:** <https://www.oregon.gov/employ/modernization/Pages/Frances-Online-FAQs.aspx>
- **File Layout:**  
<https://www.oregon.gov/employ/modernization/Documents/Single%20BIN%20EFW2%20Form132%202022.xlsx>

**Note:** This enhancement requires patch dbc\_800\_11012.

### Manage Employee Information

The screen will display a warning message if the deduction or contribution has a deduction type of **ORPFML** but the employee's SUTA state is not **OR** (Oregon).

### Manage Employer Contributions

The screen will display a warning message if the contribution has a deduction type of **ORPFML** but the employer's SUTA state is not **OR** (Oregon).

### Manage Employee Deductions

The screen will display a warning message if the deduction has a deduction type of **ORPFML** but the employee's SUTA state is not **OR** (Oregon).

### Create Quarterly SUTA Tax File

When you create a quarterly SUTA tax file for Oregon, the following will be applied:

- Populate the following with appropriate values beginning Q1 2023:
  - State Quarterly PFMLI Total Wages (RS 341-351)

Enhancements

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- State Wide Transit Tax Subject Wages (RS 352-362)
- State Wide Transit Tax (STT) (RS 363-373)
- An error will display if the amounts are negative for the following:
  - State Quarterly Unemployment Insurance Total Wages (RS 203-213)
  - State Quarterly PFMLI Total Wages (RS 341-351)
- State Wide Transit Tax Subject Wages (RS 352-362)
- State Wide Transit Tax (STT) (RS 363-373)

## South Carolina 2023 Tax Table Updates

The following are the tax updates for South Carolina effective January 1, 2023:

- The number of tax brackets used in the formula decreased to three, with rates of **zero**, **3%**, and **6.5%**, instead of the previous six, with rates ranging from 0.2% to 7%.
- The value of a state allowance increased from \$2,750 to **\$4,310**, and the maximum standard deduction increased from \$4,580 to **\$6,475**.
- The state also released the 2023 Form SC W-4, South Carolina Employee's Withholding Allowance Certificate.

To support the state requirements, this release adds records on the following screens:

- Manage State Standard Deductions
- Manage State Taxes
- Manage State Tax Tables
- Manage State Tax Withholding Adjustments

**Attention:** For more information, refer to:

- **Formula:** [https://dor.sc.gov/forms-site/Forms/WH1603F\\_2023.pdf](https://dor.sc.gov/forms-site/Forms/WH1603F_2023.pdf)
- **SC W-4:** [https://dor.sc.gov/forms-site/Forms/SCW4\\_2023.pdf](https://dor.sc.gov/forms-site/Forms/SCW4_2023.pdf)

**Note:** This update requires patch dbc\_800\_11022.

## People

### Ability to Print W-2s and W-3s on Blank Stock Using PDF Template

Prior to this release, you were able to print Form W-2 on only pre-printed forms from recommended vendors. In this release, Costpoint adds the ability to save Form W-2s as PDF files, which you can use to print on plain paper or blank stock. This feature will prevent alignment problems that occur when you use pre-printed forms.

This Costpoint release adds multiple W-2 options, including an option to create a Substitute Copy A on the Print W-2s screen, which automatically creates a corresponding Form W-3. The W-3 includes additional employer information that you can now set up on the existing Manage Tax Report Data screen.

Print W-2 or W-3 Forms with Data on Blank Stock or Plain Paper

Use the Print W-2s screen to print W-2 or W-3 Forms on blank stock or plain paper instead of on pre-printed forms.

**To print W-2 or W-3 forms on blank stock/plain paper:**

1. On the Print W-2s screen, enter the selection ranges for employees, taxable entity, and payroll year for the W-2 or W-3 Form.

**Note:** To print on blank stock or plain paper, you must enter a **Payroll Year of 2022** or later.

2. In the **Report Type** group box, select the **W-2** option.

**Note:** To print on blank stock or plain paper, you must select **W-2** as the **Report Type**.

3. In the **Paper** group box, select the **Blank Stock/Plain Paper (Saved as PDF Files)** option and enter the location for saving the PDF files in the **File Location** field.

**Attention:** Please see *IRS Publication 1141 - General Rules and Specifications for Substitute Forms W-2 and W-3* for the requirements of the Internal Revenue Service (IRS) and the Social Security Administration (SSA) regarding the preparation and use of substitute forms for Form W-2 (Wage and Tax Statement) and Form W-3 (Transmittal of Wage and Tax Statements) for wages paid during the 2022 calendar year.

4. In the **W-2 (Form with Data)** group box, select the options for printing employee W-2 forms with data to a PDF.

Option	Description
<p><b>One Copy per Page</b></p>	<p>Select this option if you want to print only one W-2 form per page. You can use this option to print employee copies on 8.5 x 11-inch plain paper.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin: 10px 0;"> <p><b>Note:</b> Deltek's partner forms providers do not have blank stock forms for one W-2 per page.</p> </div> <p>This option allows you to do either one of the following:</p> <ul style="list-style-type: none"> <li>▪ Print per copy (for example, print Copy B first, then Copy C, then Copy 2, and then Employee Filing Instructions last), and then collate the printed copies per employee.</li> <li>▪ Print a set of employee copies, which will include the filing instructions.</li> </ul> <p>The One Copy per Page options are:</p> <ul style="list-style-type: none"> <li>▪ <b>Copy B:</b> Select this option to generate one W-2 Form Copy B per page, per employee.</li> </ul>

Option	Description
	<p><b>Note:</b> According to IRS regulations, instructions similar to those contained on the back of Copies B, C, and 2 of the official IRS Form W-2 must be provided to each employee. Because the filing instructions will not print on the back of the W-2 Form (Copy B), you can use the Employee Filing Instructions options to create a PDF, print it for each employee, and then include it with the W-2 Form Copies B, C, and 2 that will be mailed to the employee.</p> <ul style="list-style-type: none"> <li>▪ <b>Copy C:</b> Select this option to generate one W-2 Form Copy C per page, per employee.</li> <li>▪ <b>Copy 2:</b> Select this option to generate one W-2 Form Copy 2 per page, per employee.</li> <li>▪ <b>Employee's W-2 Set (B, C, 2, Instructions):</b> Select this option if you want to print a set of W-2s per employee with only one W-2 form per page. This set includes Copy B, Copy C, Copy 2, and a copy of filing instructions per employee. Four separate pages will print for each employee. The generated PDF file will have the following file name format: &lt;Taxable Entity&gt;_&lt;Payroll Year&gt;W2_Set_&lt;Timestamp&gt;.pdf.</li> </ul> <p><b>Note:</b> If you want a separate PDF file for each set of W-2s per employee, then you must also select the <b>One PDF File per Employee</b> checkbox in the <b>Print Options</b> group box. The generated PDF files will have the following file name format: &lt;Last name of employee&gt;_&lt;Employee ID&gt;_&lt;Payroll Year&gt;W2_&lt;Timestamp&gt;.pdf.</p>
<p><b>2-Up</b></p>	<p>Select this option if you want to print two W-2 forms per page. This is used for government reporting or employer copies where two employee records are printed per page. You can print this either on 2-Up blank stock from Deltek partner forms providers or on 8.5 x 11-inch plain paper.</p> <ul style="list-style-type: none"> <li>▪ <b>Substitute Copy A (SSA-Approved):</b> Select this option if you want to print a black and white Copy A of Form W-2. A PDF will be generated, and you can use that file to print the W-2 Forms (Copy A). Two W-2 Forms (Copy A) will print per page. A separate PDF file for the W-3 will be automatically created and saved in the same location as the Form W-2 Copy A.</li> </ul>

Option	Description
	<p><b>Note:</b> According to <i>IRS Publication 1141 - General Rules and Specifications for Substitute Forms W-2 and W-3</i>, W-2 Forms (Copy A) must be printed on 8.5 x 11-inch single-sheet paper only. There must be two W-2 Forms (Copy A) printed on a page. There must be no horizontal perforations between the two W-2 Forms (Copy A) on each page. All forms and data must be printed in nonreflective black ink only.</p> <ul style="list-style-type: none"> <li>▪ <b>Copy 1:</b> Select this option if you want to print two W-2 Forms (Copy 1) per page.</li> <li>▪ <b>Copy D:</b> Select this option if you want to print two W-2 Forms (Copy D) per page.</li> </ul>
<p><b>4-Up (B, C, 2, 2)</b></p>	<p>Select this option to generate a PDF file for employee W-2 Forms Copy B, Copy C, and two copies of Copy 2. The employee's Copy B, Copy C, and two copies of Copy 2 will be printed on one sheet per employee. The paper for all copies must be white and printed in black ink.</p> <p><b>Note:</b> It is highly recommended to print this on 4-Up perforated blank stock from Deltek partner form providers. According to IRS regulations, "Employee copies of Form W-2 (Copies B, C, and 2), including those that are printed on a single sheet of paper, must be easily separated. The best method of separation is to provide perforations between the individual copies. Whatever method of separation is used, each copy should be easily distinguished."</p> <p>The IRS and SSA guidelines also state that the employee filing instructions must be provided to each employee. Because the filing instructions will not print on the back of the 4-Up if you print to plain paper, you can use the Employee Filing Instructions options to create a PDF, print it for each employee, and then include it with the 4-Up W-2 Form that will be mailed to the employee.</p>
<p><b>Employee Filing Instructions</b></p>	<p>Select this option to generate a PDF file of the employee filing instructions found at the back of Copies B, C, and 2 of the official IRS Form W-2. After you generate the PDF file, you can print the instructions on 8.5 x 11-inch plain paper and include it with the W-2 Forms Copy B, C, and 2 that will be mailed to the employee.</p>

5. Select the **Print W-2 Forms with Data** option from the Action Menu to generate W-2 or W-3 forms with data.

Enhancements

The application saves the forms as PDF files in the specified file location. PDF files will have an appropriate file name depending on the selected W-2 copies. For example, if you select Substitute Copy A (SSA-Approved), the generated PDF files will have the following file name format:

- W-2 Copy A: < Taxable Entity>\_< Payroll Year>W2\_CopyA\_< Timestamp>.pdf
- W-3: < Taxable Entity >\_\_< Year>W3\_< Timestamp>.pdf

**Note:** If you select **Substitute Copy A (SSA-Approved)**, the application will automatically create a separate Form W-3 PDF file.

6. In a PDF reader, open the generated PDF files and review the data on the W-2s or W-3 forms.
7. Load your printer with the appropriate plain paper or blank stock and print the forms using black ink. You must configure your printer settings to print the forms in actual size.

Manage Tax Report Data (PRMMAG)

The Manage Tax Report Data adds the following new fields that are included on Form W-3:

Field	Description
<b>Kind of Payer</b>	<p>From the drop-down list, select the option that best describes the kind of payer that will be reported in the W-3 PDF file when the Substitute Copy A (SSA-Approved) option is selected on the Print W-2s screen. Options are:</p> <ul style="list-style-type: none"> <li>▪ <b>Regular (Form 941):</b> This is the <b>941</b> box in Form W-3.</li> <li>▪ <b>Agriculture (Form 943):</b> This is the <b>943</b> box in Form W-3.</li> <li>▪ <b>Household (Schedule H):</b> This is the <b>Hshld. Emp.</b> box in Form W-3.</li> <li>▪ <b>Military (Form 941):</b> This is the <b>Military</b> box in Form W-3.</li> <li>▪ <b>Medicare Qualified Government Employment (Form 941):</b> This is the <b>Medicare gov't. emp.</b> box in Form W-3.</li> <li>▪ <b>Railroad (CT-1):</b> This is the <b>CT-1</b> box in Form W-3.</li> <li>▪ <b>Regular (Form 944):</b> This is the <b>944</b> box in Form W-3.</li> </ul>
<b>Establishment Number</b>	Enter a value to identify separate establishments in your business in W-3.

The Manage Tax Report Data screen was previously named the Manage Tax File Data screen.

Print W-2s (PRRW2)

The Print W-2s screen provides the ability to print W-2s on blank stock or plain paper through the new **Print W-2 Forms with Data** option on the Action Menu. When you run this process, the application will save Form W-2s as PDF files in the specified location.

To support this new functionality, the application adds the following group boxes/fields:

Group Box/Field	Description
<p><b>Paper</b></p>	<p>Use this group box to select if the W-2 will be printed on a pre-printed form or on plain paper or blank stock.</p> <div data-bbox="581 396 1404 510" style="border: 1px solid #0070C0; padding: 5px;"> <p><b>Note:</b> This group box will be enabled only if the <b>Report Type</b> is <b>W-2</b> and the <b>Payroll Year</b> is <b>2022</b> or later.</p> </div> <ul style="list-style-type: none"> <li data-bbox="589 533 1382 621">▪ <b>Pre-Printed:</b> Select this option if you are printing W-2 or W-2c user data only on pre-printed forms. Use the Print Menu for this option.</li> <li data-bbox="589 640 1390 789">▪ <b>Blank Stock / Plain Paper (Saved as PDF Files):</b> Select this option if you are printing W-2 form with data on blank stock or plain paper. With this option, the W-2 will be printed to a PDF, rather than a printer. The W-2s will be saved as PDF files in the specified location. You must use the Action Menu for this option.</li> </ul> <p>After generating the PDFs, you can open the forms in a PDF reader and print them using blank stock from a forms provider or plain paper. You must configure your printer settings to print the forms in actual size. If you opt to print the form on plain paper, you must use 8.5 x 11-inch plain paper.</p> <div data-bbox="638 974 1404 1178" style="border: 1px solid #0070C0; padding: 5px;"> <p><b>Note:</b> This option is not available yet for the printing W-2c forms. If you select the <b>Blank Stock / Plain Paper (Saved as PDF Files)</b> option, you must specify the <b>File Location</b> where the PDF files will be saved, and then select the type of <b>W-2 copy from the W-2 (Form with Data)</b> group box.</p> </div> <div data-bbox="638 1199 1404 1556" style="border: 1px solid #0070C0; padding: 5px;"> <p><b>Attention:</b> For more information, please refer to <i>Print W-2 or W-3 Forms with Data on Blank Stock or Plain Paper</i> procedure. Please see <i>IRS Publication 1141 - General Rules and Specifications for Substitute Forms W-2 and W-3</i> for the requirements of the Internal Revenue Service (IRS) and the Social Security Administration (SSA) regarding the preparation and use of substitute forms for Form W-2 (Wage and Tax Statement) and Form W-3 (Transmittal of Wage and Tax Statements) for wages paid during the 2022 calendar year.</p> </div> <ul style="list-style-type: none"> <li data-bbox="589 1577 1411 1665">▪ <b>File Location:</b> Enter the location where W-2s will be saved. If you run the <b>Print W-2 Forms with Data</b> process, the application will save the Form W-2s as PDF files in the specified file location.</li> </ul>
<p><b>W-2 (Form with Data)</b></p>	<p>Use this group box to select the type of report you are printing on blank stock or plain paper.</p>

Group Box/Field	Description
	<p data-bbox="597 331 1365 422"><b>Note:</b> This group box will be enabled only if <b>Blank Stock / Plain Paper (Saved as PDF Files)</b> is selected for Payroll Year <b>2022</b> or later.</p> <p data-bbox="578 470 824 499"><b>One Copy per Page</b></p> <p data-bbox="578 516 1406 606">Select this option if you want to print only one W-2 form per page. You can use this option to print employee copies on 8.5 x 11-inch plain paper.</p> <p data-bbox="597 648 1341 709"><b>Note:</b> Deltek's partner forms providers do not have blank stock forms for one W-2 per page.</p> <p data-bbox="578 753 1174 785">This option allows you to do either of the following:</p> <ul data-bbox="589 804 1398 968" style="list-style-type: none"> <li data-bbox="589 804 1398 894">▪ Print per copy (for example, print Copy B first, then Copy C, then Copy 2, and then Employee Filing Instructions last), and then collate the printed copies per employee.</li> <li data-bbox="589 911 1317 968">▪ Print a set of employee copies, which will include the filing instructions.</li> </ul> <p data-bbox="578 987 1013 1016">The One Copy per Page options are:</p> <ul data-bbox="589 1035 1406 1094" style="list-style-type: none"> <li data-bbox="589 1035 1406 1094">▪ <b>Copy B:</b> Select this option to generate one W-2 Form Copy B per page, per employee.</li> </ul> <p data-bbox="654 1136 1385 1377"><b>Note:</b> According to IRS regulations, instructions similar to those contained on the back of Copies B, C, and 2 of the official IRS Form W-2 must be provided to each employee. Because the filing instructions will not print on the back of the W-2 Form (Copy B), you can use the Employee Filing Instructions options to create a PDF, print it for each employee, and then include it with the W-2 Form Copies B, C, and 2 that will be mailed to the employee.</p> <ul data-bbox="589 1428 1406 1791" style="list-style-type: none"> <li data-bbox="589 1428 1406 1486">▪ <b>Copy C:</b> Select this option to generate one W-2 Form Copy C per page, per employee.</li> <li data-bbox="589 1503 1406 1562">▪ <b>Copy 2:</b> Select this option to generate one W-2 Form Copy 2 per page, per employee.</li> <li data-bbox="589 1579 1406 1791">▪ <b>Employee's W-2 Set (B, C, 2, Instructions):</b> Select this option if you want to print a set of W-2s per employee with only one W-2 form per page. This set includes Copy B, Copy C, Copy 2, and a copy of filing instructions per employee. Four separate pages will print for each employee. The generated PDF file will have the following file name format: &lt;Taxable Entity&gt;_&lt; Payroll Year&gt;W2_Set_&lt;Timestamp&gt;.pdf.</li> </ul>

Group Box/Field	Description
	<p><b>Note:</b> If you want a separate PDF file for each set of W-2s per employee, then you must also select the <b>One PDF File per Employee</b> checkbox in the <b>Print Options</b> group box. The generated PDF files will have the following file name format: &lt;Last name of employee&gt;_&lt;Employee ID&gt;_&lt;Payroll Year&gt;W2_&lt;Timestamp&gt;.</p> <p><b>2-Up</b></p> <p>Select this option if you want to print two W-2 forms per page. This is used for government reporting or employer copies where two employee records are printed per page. You can print this either on 2-Up blank stock from Deltek partner forms providers or on 8.5 x 11-inch plain paper.</p> <ul style="list-style-type: none"> <li>▪ <b>Substitute Copy A (SSA-Approved):</b> Select this option if you want to print a black and white Copy A of Forms W-2. A PDF will be generated, and you can use that file to print the W-2 Forms (Copy A). Two W-2 Forms (Copy A) will print per page. A separate PDF file for the W-3 will be automatically created and saved in the same location as the Form W-2 Copy A.</li> </ul> <p><b>Note:</b> According to <i>IRS Publication 1141 - General Rules and Specifications for Substitute Forms W-2 and W-3</i>, W-2 Forms (Copy A) must be printed on 8.5 x 11-inch single-sheet paper only. There must be two Forms W-2 (Copy A) printed on a page. There must be no horizontal perforations between the two Forms W-2 (Copy A) on each page. All forms and data must be printed in nonreflective black ink only.</p> <ul style="list-style-type: none"> <li>▪ <b>Copy 1:</b> Select this option if you want to print two W-2 Forms (Copy 1) per page.</li> <li>▪ <b>Copy D:</b> Select this option if you want to print two W-2 Forms (Copy D) per page.</li> </ul> <p><b>4-Up (B, C, 2, 2)</b></p> <p>Select this option to generate a PDF file for employee W-2 Forms Copy B, Copy C, and two copies of Copy 2. The employee's Copy B, Copy C, and two copies of Copy 2 will be printed on one sheet per employee. The paper for all copies must be white and printed in black ink.</p>

Group Box/Field	Description
	<p><b>Note:</b> It is highly recommended to print this on 4-Up perforated blank stock from Deltek partner form providers. According to IRS regulations, "Employee copies of Form W-2 (Copies B, C, and 2), including those that are printed on a single sheet of paper, must be easily separated. The best method of separation is to provide perforations between the individual copies. Whatever method of separation is used, each copy should be easily distinguished." The IRS and SSA guidelines also state that the employee filing instructions must be provided to each employee. Because the filing instructions will not print on the back of the 4-Up if you print to plain paper, you can use the Employee Filing Instructions options to create a PDF, print it for each employee, and then include it with the 4-Up W-2 Form that will be mailed to the employee.</p> <p><b>Employee Filing Instructions</b></p> <p>Select this option to generate a PDF file of the employee filing instructions found at the back of Copies B, C, and 2 of the official IRS Form W-2. After you generate the PDF file, you can print the instructions on 8.5 x 11-inch plain paper and include it with the W-2 Forms Copy B, C, and 2 that will be mailed to the employee.</p>
<p><b>One PDF File per Employee</b></p>	<p>Select this checkbox to create a separate PDF file for each set of W-2s per employee. The file names will have a format of &lt;Last name of employee&gt;_&lt;Employee ID&gt;_&lt; Payroll Year&gt;W2_&lt; Timestamp&gt;.pdf.</p> <p><b>Note:</b> This checkbox is applicable only for <b>Employee's W-2 Set (B, C, 2, Instructions)</b>.</p>

The screen layout was updated to accommodate the new fields. The following are the details of the changes:

- The screen now lists the pre-printed paper options in new **W-2 (Data Only)** and **W-2c (Data Only)** group boxes. These options were formerly available in the **W-2 Form Type** and **W-2c Form Type** drop-down lists. These options are enabled only if you select the **Pre-printed** option in the **Paper** group box.
- The following fields are now in a **Print Options** group box:
  - Starting Control Number
  - Print only the last 4 numbers of SSN
  - One PDF File per Employee

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report reflects the field updates in this enhancement. The following are the details of the changes in the report:

## Enhancements

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- The report now provides information for the new PAYER\_KIND and ESTABLISHMENT\_NO columns in the MAG\_MEDIA\_RPT table.
- The description of the MAG\_MEDIA\_RPT table is now "Tax Report Data."
- The definition of the MAG\_MEDIA\_RPT table was updated to "Stores employer information used in the W-2 or W-3 report."

## Software Issues Resolved

### Descriptions of Software Issues

You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. For the most part, these issues were addressed before this release through hot fixes, and the additional information was developed to help you decide whether or not you needed to install the hot fixes.

When you install this release, you must install all fixes in the release; you cannot choose to install some and not others. Nevertheless, this additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

### Accounting

#### [Accounts Payable » Import Vendors](#)

**Defect 1825898:** The **Vendor Approval** status of an existing and previously approved vendor was overwritten to **Not Approved**.

This occurred when:

- The **Requires Approval** checkbox was cleared on the Configure Accounts Payable Settings screen.
- You selected the **Overwrite the existing records** checkbox.
- You imported an input file that contains an existing vendor and a new vendor.

As a workaround, temporarily select the **Requires Approval** checkbox and manually approve the vendor.

### Framework

#### [Framework](#)

**Defect 1821316:** Costpoint updated metadata in SharePoint when it should not have.

#### [Runtime » Client](#)

**Defect 1754127:** When you saved revisions to a timesheet, the Revision Explanation window opened but then closed immediately, so you could not add an explanation. You had to click **Save** again.

### Materials

#### [Material Requirements Planning » Manage Detailed Part Schedule](#)

**Defect 1761533:** When you ran Update Material Requirements Plan and you verified the warehouse in Manage Detailed Part Schedule, the application displayed an incorrect transfer reservation warehouse.

## People

### [Employee » Manage Employee HSA Elections](#)

**Defect 1640035:** The **Plan YTD Deductions** amount should include employee earnings that have a **Pay Cycle End Date** from the previous year in the following cases:

- The **FSA/HSA Deduction Method** of the pay period is set to **Calculate based on the check date** and the check date of employee earnings is within the HSA plan year.
- The **FSA/HSA Deduction Method** of the pay period is set to **Calculate based on the pay period end date** and the record's **Pay Period End Date** is within the HSA plan year.

### [Employee Self Service » Life Events/New Hires](#)

**Defect 1831395:** The following error message referenced an incorrect location for selecting beneficiaries: "You cannot confirm your elections until you have selected a beneficiary. Please navigate to the Beneficiaries tab and make your selection."

### [Labor » Apply Weighted Average Rates to Timesheets](#)

**Defect 1833721:** A fatal error occurred when you processed a timesheet that had a certain combination of pay types (for example, an Overtime pay type together with a Cost-only pay type that is eligible for labor cost recalculations).

### [Leave » Manage Leave Periods](#)

**Defect 1830126:** The application should not allow you to delete a leave period that has already been computed or posted.

### [Payroll » Print W-2s](#)

**Defect 1817608:** If the values of **Box 18** and **Box 19** on the Manage W-2s screen were **0.00**, the values of the corresponding fields in the Print W-2 report were blank.

## Planning

### [Project Budgeting » Project Budgets / EACs](#)

**Defect 1823724:** When cost pools were not set up for a future fiscal year and you created a budget for that year, Burdened Cost was not calculated for the corresponding pool.

## Projects

### [Billing » Calculate ACRN Bills](#)

**Defect 1748595:** As with existing functionality, when the **Use Project Mapping** checkbox is selected on the Manage ACRN Bills screen, only one line in the Project ACRN Details table window can have the **Include Schedule Bill** checkbox selected. The issue comes in when you have **Calculation Method** set to **Proration** and you have more than one line in Project ACRN Details with the same **Project Level at And Below** value.

After you processed Calculate ACRN Bills, the schedule bill amount was not always allocated in full since Costpoint was prorating this amount across the lines with the same **Project Level at And Below** value, and allocating it only in the single line where **Include Schedule Bill** was selected.

Logic has been updated such that Costpoint will not include the schedule bill amount in proration computation. This amount will be allocated after the proration of non-schedule bill amounts or what remains of the ACRN value for the line where **Include Schedule Bill** is selected.

## Billing » Calculate Standard Bills

**Defect 1759405:** Costpoint did not print the Non-Labor Supporting Schedule when the **Suppress (1035 Format Only)** checkbox was selected in the **Show Labor** group box of the Manage Supporting Schedule Formats screen.

## Billing » Print Unbilled Analysis Report

**Defect 1760192:** You encountered the following error when you ran the report: "java.sql.SQLException: [FMWGEN][SQLServer JDBC Driver][SQLServer]Cannot continue the execution because the session is in the kill state."

## Cost and Revenue Processing » Compute Revenue

**Defect 1739411:** When you used the ITD Fee on Cost (ITDCPFC) revenue formula, Costpoint included the **Other Fee** amount from previous periods into the current period. In addition, the **Other Fee** from prior periods remained at the revenue level and did not get reversed in the current period when using ITDCPFC. This resulted in twice the amount in **Other Fee** than you should have.

**Defect 1753519:** Costpoint excluded the OTH\_FEE\_AMT value from ceiling calculations when you computed revenue using the ITD Fee on Cost (ITDCPFC) revenue formula.

## Time & Expense

### Configuration » Resource Information

**Defect 1746332:** The wrong taxable entity was populated when you created a new user account.

### Time » Export Timesheets

**Defect 1765468:** Timesheets rejected by Costpoint due to errors remained unavailable for editing or correction.

### Time » Manage/Approve Timesheets

**Defect 1838937:** A system error occurred when a supervisor tried to approve multiple timesheets. This issue also affected other applications.

Affected Applications	Defect No.
Timesheet	1838939

## 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.

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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](http://www.deltek.com)