




Deltek

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Overview

This document is a compilation of Costpoint, Costpoint Planning, and Time & Expense enhancements and software defect resolutions from December 2020 (Maintenance Release 7.1.12), including any regulatory enhancements as well.

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

Note that the version numbers in the filenames above (for example, 7.1.12) refer to the Costpoint maintenance release upon which this document is based are for reference only.

Enhancements

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

Regulatory Enhancements

Federal

2020 Forms 1099-NEC and 1099-MISC

The IRS released the 2020 Form 1099-NEC, Nonemployee Compensation, which replaces Box 7 in Form 1099-MISC for reporting nonemployee compensation. This shifts the role of the 1099-MISC for reporting all other types of compensation.

1099-NEC

The new 1099-NEC captures any payments to nonemployee service providers, such as independent contractors, freelancers, vendors, consultants, and other self-employed individuals, commonly referred to as 1099 workers.

According to the IRS, a combination of these four conditions distinguishes a reportable payment:

- It is made to someone who is not your employee.
- It is made for services in the course of your trade or business.
- It was made to an individual, partnership, estate, or, in some cases, a corporation.
- Payments were \$600 or more for the calendar year.

The following are critical guidelines for reporting with Form 1099-NEC:

- Do verify that the recipient's taxpayer ID is correct. You must have Form W-9 from each recipient with the current taxpayer ID before you complete Form 1099-NEC.
- Do not use Form 1099-NEC to report personal payments.
- Do not use Form 1099-NEC to report employee wages; use Form W-2 instead.
- Do not report gross proceeds to an attorney (not fees) on Form 1099-NEC; use Form 1099-MISC instead.
- Do not use Form 1099-NEC to report payments of rent to real estate agents or property managers; use Form 1099-MISC instead.

1099-MISC

The IRS also redesigned the 2020 Form 1099-MISC due to the removal of nonemployee compensation reporting in Box 7. The revised form includes other changes to the box numbers for reporting miscellaneous compensation.

The following are critical guidelines for reporting with Form 1099-MISC:

- Do report gross proceeds to an attorney (not fees) on Form 1099-MISC.
- Do complete a 1099-MISC if you made royalty payments of at least \$10 during the year.
- Do use Form 1099-MISC for miscellaneous income, such as rents, royalties, and medical and health care payments.
- Do not use Form 1099-MISC to report personal payments.

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- Do not use Form 1099-MISC to report employee wages; use Form W-2 instead.

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

To support the IRS requirements, this Costpoint release adds a new **1099-NEC** option and updates the functionality of existing options on the **Print Format** group box.

Field	Description
1099-MISC Standard	<p>Select this option to print standard 1099-MISC forms. Two forms print per page. You can use this option with either impact or laser printers. This option is selected by default.</p> <p>If you select this option and the Calendar Year is 2019 or earlier, Costpoint uses the old report format for 1099-MISC. Otherwise, if you select this option and the Calendar Year is 2020, Costpoint uses the new report format for 1099-MISC.</p>
1099-MISC Self-Mailer	<p>Select this option to print 1099-MISC Self-Mailers (sealed automatically by machine). You typically use this option if you have a large number of 1099s to print. You can use this option only with laser printers.</p> <p>If you select this option and the Calendar Year is 2019 or earlier, Costpoint uses the old report format for 1099-MISC. Otherwise, if you select this option and the Calendar Year is 2020, Costpoint uses the new report format for 1099-MISC.</p>
1099-NEC	<p>If you entered 2020 as the Calendar Year, select this option to print standard 1099-NEC forms. Two forms print per page.</p> <p>Use 1099-NEC forms to report:</p> <ul style="list-style-type: none"> Non-employee compensation (formerly in 1099-MISC Box 7, now in 1099-NEC Box 1) such as payments to independent contractors, freelancers, vendors, consultants, and other self-employed individuals; Federal income tax withheld (formerly in 1099-MISC Box 1, now in 1099-NEC Box 4) which is a portion of an employee's wage that is not included in their paycheck but is remitted directly to the federal, state, or local tax authorities. <p>If you select this option and the Calendar Year is earlier than 2020, printing the format displays error and validation messages stating that the NEC format is not available for calendar years prior to 2020.</p>
1099-NEC Self-Mailer	<p>Select this option to print 1099-NEC Self-Mailers (sealed automatically by machine). You typically use this option if you have a large number of 1099-NECs to print. You can use this option only with laser printers.</p> <p>If you select this option and the Calendar Year is earlier than 2020, printing the format displays error and validation messages stating that the NEC format is not available for calendar years prior to 2020.</p>

In addition to the application changes, the **1099 Types to Include** group box will now be available only if the **Calendar Year** is **2019**.

Enhancements

2021 Social Security Wage Limit Update

The 2021 Social Security Taxable Wage Base is **\$142,800**. Costpoint now supports this new limit with an effective date of 01/01/2021.

State

2021 SUTA Wage Base Updates

This Costpoint release adds tax table records effective 01/01/2021 for states where the unemployment-taxable wage base has been updated for tax year 2021.

Arkansas

The SUTA limit for 2021 is **\$10,000**.

New York

The SUTA limit for 2021 is **\$11,800**.

Vermont

The SUTA limit for 2021 is **\$14,100**.

Arizona 2020 W-2 Electronic Filing Updates

The Arizona Department of Revenue updated their W-2 electronic reporting requirements with the following changes:

- Beginning with the 2020 tax year (due January 31, 2021), all W-2s and 1099s must be submitted electronically.
- In the RS-State Record, positions 298-307, you must provide the employer's EIN as the State ID number; zero fill to the left.

This Costpoint release updates the Create State W-2 File screen to support the file format updates for Arizona W-2 electronic reporting.

Attention: Please see the following Arizona Department of Revenue site for additional information:
https://azdor.gov/sites/default/files/media/PUBLICATION_701.pdf.

California 2021 Tax Table Updates

The following are the 2021 tax withholding updates for California:

- The annual standard deduction increases from \$4,537 to **\$4,601**.
- The value of a state annual allowance increases \$134.20 to **\$136.40**.
- The low income exemption table was updated for all filing statuses.
- The withholding tax rate table has been updated for all filing statuses.

This Costpoint release updates the following screens to support the 2021 California tax changes:

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

- Manage State Tax Tables (PRMSTT)

Delaware 2020 W-2 Electronic Filing

The State of Delaware provided the specifications for the W-2 data files. Delaware follows the SSA EFW2 specifications (formerly MMREF-1). The following are the changes for tax year 2020 data which will be reported in 2021:

- EFW2 “RW” records should be included in W-2 submissions.
- The employee SSN should not be truncated on the W-2 “Copy 1—For State, City, or Local Tax Department” or in the EFW2 “RS” record. All nine digits must be present.

Attention: For more information, refer to the following:

- <http://www.ssa.gov/employer/pub.htm>
- <https://revenue.delaware.gov/frequently-asked-questions/w-2-and-1099-form-faqs/>

Maine 2021 Tax Table Updates

The following are the 2021 tax withholding updates for Maine:

- The standard deduction amounts have been updated.
- The annual withholding tax tables for Married and Single have been updated.

MAINE INCOME TAX WITHHOLDING — PERCENTAGE METHOD — 2021

If you use the percentage method to compute Maine income tax withholding, use the following steps:

- Step 1** Convert total wages to annualized wage amount. Multiply by the payroll frequency: 52 for weekly, 26 for biweekly, 24 for semimonthly, 12 for monthly, 260 for daily or miscellaneous payroll period.
- Step 2** Multiply the number of withholding allowances the employee claims by \$4,300.
- Step 3** Calculate the Maine Standard Deduction.

If the annualized wage amount determined under Step 1 is \$83,850 or less for a single taxpayer, the Maine standard deduction amount for withholding purposes is \$9,700. If the annualized income determined under Step 1 is \$167,700 or less for a married taxpayer, the Maine standard deduction amount for withholding purposes is \$22,250.

If the annualized wage amount determined under Step 1 is \$158,850 or more for a single taxpayer or \$317,700 or more for a married taxpayer, the Maine standard deduction amount is \$0.

If the annualized wage amount determined under Step 1 is between \$83,850 and \$158,850 for a single taxpayer or between \$167,700 and \$317,700 for a married taxpayer, calculate the Maine standard deduction amount as follows:

Single Taxpayers

$\$9,700 * (\$158,850 - \text{Amount from Step 1}) / \$75,000$

Married Taxpayers

$\$22,250 * (\$317,700 - \text{Amount from Step 1}) / \$150,000$

*Round to 4 decimals (see Example 3 on the next page)

- Step 4** Subtract the results from Steps 2 and 3 from the annualized wage amount calculated in Step 1 to compute the annualized income.
- Step 5** Compute the annualized withholding amount using the withholding rate schedules below based on the annualized income computed in Step 4.
- Step 6** Divide the annualized withholding amount computed in Step 5 by the payroll frequency used in Step 1 and round to the nearest dollar. The result is the amount of Maine income tax to be withheld from the payment being made.

For Single Taxpayers	
If the annualized income is:	The annualized withholding is:
Less than \$22,450	5.80% of income
\$22,450 but less than \$53,150	\$1,302 plus 6.75% of excess over \$22,450
\$53,150 or more	\$3,374 plus 7.15% of excess over \$53,150
For Married Taxpayers	
If the annualized income is:	The annualized withholding is:
Less than \$44,950	5.80% of income
\$44,950 but less than \$106,350	\$2,607 plus 6.75% of excess over \$44,950
\$106,350 or more	\$6,752 plus 7.15% of excess over \$106,350

Attention: For more information, refer to https://www.maine.gov/revenue/sites/maine.gov/revenue/files/inline-files/21_wh_tab_instr_1.pdf.

This Costpoint release updates the following screens to support the 2021 Maine tax changes:

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

South Carolina 2021 Tax Withholding Updates

The following are the 2021 tax withholding updates for South Carolina:

- The lowest tax rate used decreases from 0.8% to **0.5%**.
- The value of a state allowance increases from \$2,590 to **\$2,670**.
- The maximum state standard deduction increases from \$3,820 to **\$4,200**.
- The income brackets were updated.

Enhancements

SUBTRACTION METHOD:			Example:
At least:	But less than:	Tax withheld:	
\$0	\$2,800	0.5%	Taxable income: \$27,090.00
\$2,800	\$5,610	3%, then subtract \$70.00	X 0.07
\$5,610	\$8,410	4%, then subtract \$126.10	\$1,896.30
\$8,410	\$11,220	5%, then subtract \$210.20	- \$462.70
\$11,220	\$14,030	6%, then subtract \$322.40	Total to be Withheld: \$1,433.60
\$14,030	and above	7%, then subtract \$462.70	

ADDITION METHOD:			Example:
At least:	But less than:	Tax withheld:	
\$0	\$2,800	0.5%	Taxable income: \$27,090.00
\$2,800	\$5,610	Subtract \$2,800, multiply by 3%, then add \$14.00	- \$14,030.00
\$5,610	\$8,410	Subtract \$5,610, multiply by 4%, then add \$98.30	\$13,060.00
\$8,410	\$11,220	Subtract \$8,410, multiply by 5%, then add \$210.30	X 0.07
\$11,220	\$14,030	Subtract \$11,220, multiply by 6%, then add \$350.80	\$914.20
\$14,030	and above	Subtract \$14,030, multiply by 7%, then add \$519.40	+ \$519.40
			Total to be Withheld: \$1,433.60

This Costpoint release updates the following screens to support the 2021 South Carolina tax changes:

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

People

2020 Affordable Care Act (ACA) Updates

This Costpoint release applies the following 2020 Affordable Care Act enhancements:

Updated Form 1095-C

The IRS released the updated Form 1095-C, which includes the following updates:

- "Employee's Age on January 1" was added in Part II.
- "Zip Code" was added in Part II, line 17.
 - Line 17 is for reporting the applicable ZIP code that the employer used for determining affordability if the employee was offered an individual coverage health-reimbursement arrangement.
 - If Code 1L, 1M, or 1N were used on line 14, then this ZIP code will be the employee's primary residence location.
 - If Code 1O, 1P, or 1Q were used on line 14, then this ZIP code will be the employee's primary work location.
- Part III starts at line 18 instead of line 17 in 2019.
- Part III ends at line 30 instead of line 34 in 2019
- New codes related to Health Reimbursement Arrangements (HRA) were added for use in Line 14 (1L, 1M, 1N, 1O, 1P, 1Q, 1R, and 1S).

Attention: Refer to the IRS website for the final Form 1095-C: <https://www.irs.gov/pub/irs-pdf/f1095c.pdf>.

For reporting offers of coverage for 2020, an ALE Member relying on the multiemployer arrangement interim guidance should enter code 1H on line 14 for any month for which the ALE Member enters code 2E on line 16 (indicating that the ALE Member was required to contribute to a multiemployer plan on behalf of the employee for that month and, therefore, is eligible for multiemployer interim rule relief). A warning validation was added in Costpoint for this requirement.

A validation was also added in Costpoint to require a value in the **Employee's Age on January 1** field if one of the codes in Line 14 is an HRA code.

In addition to these Costpoint updates, this release applies changes to multiple screens to support the updated Form 1095-C.

Warning: As of mid-October, the IRS has not yet provided guidance on the spacing in the 1095-C and 1094-C forms. Until that is provided, Deltek will not be able to update the alignment on Costpoint 1095-C and 1094-C reports.

When the IRS publishes the final spacing of these forms, we will update the Costpoint reports accordingly. Please continue to check this site for announcements to changes in the report spacing.

Manage 1095-C Data (HBM1095C)

The application provides the following new fields:

Field	Description
Employee's Age on January 1	Enter the age of the employee as of January 1st of the filing year. You must enter an age if the employee was offered an individual coverage HRA.
ZIP Code – All 12 Months (column/data field)	If the employee was offered an individual coverage health-reimbursement arrangement, enter the applicable ZIP code that the employer used for determining affordability. This field must only be populated if the same ZIP code applies to the employee for the entire calendar year. If more than one ZIP code applies during the calendar year, leave this field blank. If code 1L , 1M , or 1N were used on line 14, this will be the employee's primary residence location. If code 1O , 1P , or 1Q were used on Line 14, this will be the employee's primary work location.
ZIP Code– Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec (column/data field)	If the employee was offered an individual coverage health-reimbursement arrangement, enter the applicable ZIP code that the employer used for determining affordability, which applies to the specific month. This field must only be populated if the same ZIP code does not apply to the employee for the entire calendar

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Field	Description
	<p>year. If the same ZIP code applies during the entire calendar year, leave this field blank.</p> <p>If code 1L, 1M, or 1N were used on line 14, this will be the employee's primary residence location.</p> <p>If code 1O, 1P, or 1Q were used on line 14, this will be the employee's primary work location.</p>

The application now allows you to select the following new codes in the lookup of **Offer of Coverage** fields (All 12 Months; Jan–Dec):

- **1L**: Individual coverage health reimbursement arrangement (HRA) offered to you only with affordability determined by using employee's primary residence location ZIP Code
- **1M**: Individual coverage HRA offered to you and dependent(s) (not spouse) with affordability determined by using employee's primary residence location ZIP Code
- **1N**: Individual coverage HRA offered to you, spouse, and dependent(s) with affordability determined by using employee's primary residence location ZIP Code
- **1O**: Individual coverage HRA offered to you only using the employee's primary employment site ZIP Code affordability safe harbor
- **1P**: Individual coverage HRA offered to you and dependent(s) (not spouse) using the employee's primary employment site ZIP Code affordability safe harbor
- **1Q**: Individual coverage HRA offered to you, spouse, and dependent(s) using the employee's primary employment site ZIP Code affordability safe harbor
- **1R**: Individual coverage HRA that is NOT affordable offered to you; employee and spouse or dependent(s); or employee, spouse, and dependents
- **1S**: Individual coverage HRA offered to an individual who was not a full-time employee

Create 1094-C and 1095-C Data (HBP109XC)

The application process now includes the **Employee's Age on January 1** field.

Print 1095-Cs (HBR1095C)

The application adds the following changes in the report:

- The employee's age and ZIP code fields were added in Part II.
- Part III is now displayed on page 3. Part III starts at line 18 up to line 30 only.
- The employee name and SSN was removed from page 3.

The text, "(More than 6 dependents)," was removed from the label for the 1095-C **Page 2** option since it is no longer applicable.

Print Data Dictionary Report (SYRDD)

The report for the HB_1095C_DATA table now provides information for the new columns for age and ZIP codes.

Enhancements

New 1095-C Print Options

The IRS released their layout instructions for the ACA 1095-C forms, which included the following changes:

- “Name of employee (first name, middle initial, last name)” has been removed from Part III (Page 2).
- “Social Security Number” has been removed from Part III (Page 2).

These changes had a large impact on the printing of the 1095-C forms. Prior to this IRS update, you could print Page 2 separately and then use the “Name of employee” at the top of the page to match it with the employee’s Page 1. With the removal of the employee name and social security number from Page 2, it may not be possible to match Page 2 with Page 1 since the IRS did not retain or provide a field to match the two pages. In cases where the covered individuals have the same last name as the employee, this would not be an issue. But there may be cases where the covered individuals do not have the same last name or you have multiple employees with the same last name. This can be problematic in matching up the pages correctly.

In order to address this issue, this Costpoint release provides the following updated **1095-C Page** options on the Print 1095-Cs (HBR1095C) screen:

Field	Description
With Covered Individuals	<p>Select this option if you are printing employees with information in Part III, Covered Individuals.</p> <div style="border: 1px solid #0070C0; padding: 5px; margin: 10px 0;"> <p>Note: You must run the application with Page 1 option selected, and then you must run the application again with Page 2 option selected. Once printed, you will need to match the Page 2 with the appropriate 1095-C Page 1 before you submit/provide the 1095-C to the IRS or to employees.</p> </div> <p>When you select the With Covered Individuals option, you enable the following options:</p> <ul style="list-style-type: none"> ▪ Page 1: Select this option if you are printing the first page of the 1095-C, which provides employer and employee information on the front and instructions on the back. ▪ Page 2: Select this option if you are printing the second page of the 1095-C, which provides information in Part III, Covered Individuals.
Without Covered Individuals (Page 1 only)	<p>Select this option if you are printing employees with no information in Part III, Covered Individuals.</p>

To print 1095-Cs, you need to perform the following steps:

1. Print 1095-C Page 1 for employees with covered individuals.

Enhancements

2. Print 1095-C Page 2 for employees with covered individuals. You must use the same 1st Sort and 2nd Sort settings when printing Page 2.
3. After printing Page 2, carefully collate the Page 1 forms with the Page 2 forms.
4. Print 1095-C Page 1 for employees without covered individuals.

Electronic Filing Updates

The IRS released their E-file instructions for ACA electronic filing, which includes the following updates:

- Update 'ty19' to 'ty20' in the namespaces of both manifest and data files
- Update Software ID for 2020 to '20A0010933'
- Add element AgeNum
- Add elements for the ZIP Code, Line 17
 - AnnualICHRAZipCd
 - MonthlyICHRAZipCdGrp
 - JanICHRAZipCd
 - FebICHRAZipCd
 - MarICHRAZipCd
 - AprICHRAZipCd
 - MayICHRAZipCd
 - JunICHRAZipCd
 - JulICHRAZipCd
 - AugICHRAZipCd
 - SepICHRAZipCd
 - OctICHRAZipCd
 - NovICHRAZipCd
 - DecICHRAZipCd

This Costpoint release updates the Create 1094-C and 1095-C Electronic File application to support the IRS requirements.

2021 Repayment of Deferred Social Security Withholding

On August 8, 2020, the President signed an executive order which allowed employers to defer Social Security tax withholding for certain employees from September 1, 2020 through December 31, 2020. In late August, the Internal Revenue Service (IRS) announced that employers that opted to defer the withholding must pay the money back by April 2021.

Costpoint Solution

For employers who opted to defer employee Social Security tax withholding in 2020, Costpoint provides the following new functionality to track and process the repayments.

The Ability to Establish the Total Deferred Amount and the Rules for Repayment

Costpoint adds a new screen, titled Manage Deferred Tax Payments (EMMDFRDTAXPAY). This new screen allows you to manage an employee's deferred Social Security amount and set up the rules for repayment of the deferral. To access the new application, click **People » Employee » Employee Payroll Information » Manage Deferred Tax Payments**.

Use this screen to specify the deferral dates, the repayment date range, whether the employee or the employer is responsible for repaying the deferred amount, and, if necessary, an override amount to be withheld for any upcoming paychecks. Once the repayments have started, you will also be able to view the check detail for each repayment in the Deferred Tax Payment History table. The subtask will be populated with any pertinent data when an existing record is queried.

There are two methods for populating this new screen:

- **Method 1:** If you used Deltek's recommended method of deferring the employee Social Security withholding, you may populate this screen using the new **Create Manage Deferred Tax Payment Records** toolkit in the Payroll Toolkit application. To determine the **Total Deferred Amount**, the toolkit will sum the **Deferred Employee Withholding** amounts from Manage Employee Earnings History, where the check date is between the specified deferral dates.

Attention: To view the recommend method of deferring employee Social Security withholding, go to the Costpoint Information Center website, and then click **Regulatory Updates » Latest News » 2020 Employee Social Security Tax Withholding Deferred from 9/1 to 12/31**.

Timing: If this is the method that you choose to create the Deferred Tax Payment records, you should run this toolkit after your final paycheck of 2020 and before computing payroll for the first paycheck in 2021.

- **Method 2:** If you did not use Deltek's recommended method of deferring the employee Social Security withholding, you may manually enter the data in the Manage Deferred Tax Payments (EMMDFRDTAXPAY) screen. You will need to determine each affected employee's total deferred withholding and specify the amount in the **Total Deferred Amount** field.

Timing: If this is the method you choose to create the Deferred Tax Payment records, you should enter and save the records after your final paycheck of 2020 and before computing payroll for the first paycheck in 2021.

The Ability to Process the Repayment

Whether you use the new **Create Manage Deferred Tax Payment** records toolkit to generate the Manage Deferred Tax Payments (EMMDFRDTAXPAY) or manually enter the records, you may use either one of the following methods to process the deferred Social Security withholding repayments:

- **Method 1:** A new toolkit, titled **Create payroll records to repay deferred Social Security**, has been added to the Payroll Toolkit screen. This toolkit can be used to generate X or Y type records to repay the deferral. In order to determine the repayment amount, the toolkit will prorate the employee's balance due over the remaining number of checks within the repayment period or, if you specified an **Override Amount per Check**, the toolkit will use that value as the repayment amount. The X or Y records generated by this toolkit cannot be edited and will only include the repayment amount. If the Manage Deferred Tax Payments (EMMDFRDTAXPAY) record specifies the employee as the party responsible for the repayments, the amount will be withheld from the employee. Otherwise, if the employer is the responsible party, the repayment amount will be recorded as the employer's Social Security liability.
- **Method 2:** You can manually enter an X or Y record on the Manage Payroll Records screen. In order to identify the record as a deferred Social Security repayment record, you must select the

Deferred Social Security Withholding Repayment check box. By selecting this box, you will have limited access to fields on the screen, and you will only be able to either enter an employee Social Security withholding amount or an employer Social Security accrual amount. You must also have at least one row on the Pay Types subtask or the State Pay Types subtask (for multi-state users) with zero hours and amounts.

Timing: It is important to perform the correct steps in order to process the repayment correctly:

1. If you are using the new **Create payroll records to repay deferred Social Security** toolkit to generate the repayment records, ensure you have Check Dates assigned to your pay periods on the Manage Pay Periods screen. Each pay period with a check dated within the deferred Social Security withholding repayment period must have a check date assigned to it in order for the repayment amounts to be calculated correctly.
2. If the employee is responsible for repaying the deferred Social Security withholding, compute a Regular or Bonus payroll for the affected employee on the Compute Payroll screen. If the employer (not the employee) is responsible for repayment of the deferral, this step is not necessary.
3. Run the **Create payroll records to repay deferred Social Security** toolkit or manually enter the repayment record on the Manage Payroll Records screen.
4. Print paychecks or payment advices.
5. Post payroll.

The Ability to Export the Deferred Social Security Repayment Amounts to a Third-Party Tax-Reporting Software

This Costpoint release updates the Export Payroll Taxes (PRPEXTAX) application so that the process includes the following:

- **CHECK Deferred Social Security Withholding Paid Back by Employee** field to the Employee Social Security (SSEE) records (Field 76)
- **QTD Deferred Social Security Withholding Paid Back by Employee** field to the Employee Social Security (SSEE) records (Field 77)
- **YTD Deferred Social Security Withholding Paid Back by Employee** field to the Employee Social Security (SSEE) records (Field 78)
- **CHECK Deferred Social Security Withholding Paid Back by Employer** field to the Employer Social Security (SSER) records (Field 76)
- **QTD Deferred Social Security Withholding Paid Back by Employer** field to the Employer Social Security (SSER) records (Field 77)
- **YTD Deferred Social Security Withholding Paid Back by Employer** field to the Employer Social Security (SSER) records (Field 78)

Additional Application Updates

This Costpoint release also provides changes to the following screens to support this enhancement.

Manage Payroll Records (PRMPTF)

The screen provides the following new check box:

Field	Description
Deferred Social Security Withholding Repayment	<p>Select this check box to indicate whether the X or Y record is being used to pay back deferred Social Security withholding</p> <p>This check box will only be visible and enabled if the Record Type is X or Y and the Pay Period End Date is in 2020 or 2021.</p> <p>In order to track the repayments using this check box, you may do one of two things:</p> <ul style="list-style-type: none"> ▪ Method 1: Use the Costpoint Payroll Toolkit to generate an X or Y record that will use the data set up on the Manage Deferred Tax Payments screen to determine the repayment amount. This check box will automatically be selected when the X or Y record is created. It is very important to perform the following correct steps in order to utilize this functionality: <ol style="list-style-type: none"> 1. Compute the regular or bonus payroll for the employee. 2. Either manually enter the employee's repayment information on the Manage Deferred Tax Payments screen or use the Deferred Social Security option in the Payroll Toolkit to generate the records. 3. Before printing paychecks or advices, run the toolkit to generate the X record to be used as the Deferred Social Security Withholding Repayment record. 4. Print paychecks or payment advices. 5. Post payroll. ▪ Method 2: If you prefer not to use Costpoint's Manage Deferred Tax Payments application to manage the payments, you may use manually entered X or Y records to pay the deferred Social Security withholding. It is very important to perform the following correct steps in order to utilize this functionality: <ol style="list-style-type: none"> 1. Compute the regular or bonus payroll for the employee. 2. Before printing paychecks or advices, enter an X or Y record on the Manage Payroll Records screen, select the Deferred Social Security Withholding Repayment check box, and enter the repayment amount in either the Employee Social Security Withholding field or the Employer Social Security Accrual field (if the employer is repaying the deferred tax). 3. Print paychecks or payment advices. 4. Post payroll.

Enhancements

Field	Description
	<p>Note: If you do not use this check box to flag your repayment records, Costpoint will not be able to report your repayment amounts. When you use this check box to track the repayments, you will have the following advantages:</p> <ul style="list-style-type: none"> The IRS has not yet stated how the repayments will be reported. If 941 and 2021 W-2 reporting require separate reporting of the repayments, this check box will allow Costpoint to determine the amounts. If you use Costpoint Employee Self Service, any corresponding deferred Social Security repayments made by the employee will be reflected in the R (Regular), W (Replacement), or B (Bonus) records displayed in the ESS Payroll Checks screen. <p>If this check box is selected, it indicates the X or Y record was used to repay deferred Social Security withholding and only the following fields will be editable:</p> <ul style="list-style-type: none"> Record Type (only enabled for new records) Check Number Check Date Disbursement Type Reference Number Reference Date Social Security Employee Withholding Social Security Employer Accrual The Pay Type column on the Pay Types subtask (if the Enable Multi-State Tax Withholding check box is not selected for the employee's pay cycle) The Withholding State and Pay Type columns on the State Pay Types subtask (if the Enable Multi-State Tax Withholding check box is selected for the employee's pay cycle)

Post Payroll Journal (PRPPPCLS)

The application now has the ability to post the **Deferred Social Security Withholding Repayment** (SS_DFRD_REPAY_FL) check box value from the EMPL_PAYROLL table to the EMPL_EARNINGS table.

Manage Employee Earnings History (PRMERF)

The application provides the following new check box:

Field	Description
Deferred Social Security Withholding Repayment	<p>This check box indicates the X or Y record was used to repay deferred Social Security withholding. If this check box is selected, only the following fields will be editable:</p> <ul style="list-style-type: none"> Check Number Check Date Social Security Employee Withholding Social Security Employer Accrual The Pay Type column on the Pay Types subtask (if the Enable Multi-State Tax Withholding check box is not selected for the employee's pay cycle) The Withholding State and Pay Type columns on the State Pay Types subtask (if the Enable Multi-State Tax Withholding check box is selected for employee's pay cycle) <p>This check box will only be visible if the Record Type is X or Y and the Pay Period End Date is in 2020 or 2021.</p>

Payroll Checks (ESMPAYCHECKS)

When the application retrieves a check, it adds the Social Security Withholding from the retrieved check and the Social Security Withholding (EMPL_EARNINGS.ss_wh_amt) from records with the following criteria:

- The Record Type is X or Y.
- The Check Date is the same as the Check Date of the **R** (Regular), **W** (Replacement), or **B** (Bonus) check being retrieved.
- The Check Number is the same as the Check Number of the **R** (Regular), **W** (Replacement), or **B** (Bonus) check being retrieved
- The X/Y check's Deferred Social Security Withholding Repayment flag is Y.
- The Employee Social Security Withholding is not equal to 0.00, which means the employee paid for the Deferred Social Security Withholding.

Print Soc Sec and Medicare Reconciliation Report (PRRFICA)

If the screen's **Social Security** check box is selected and there are deferred social security withholding repayment records to be reported, the application now creates a new Deferred Social Security Withholding Repayment Report to report X and Y records that were used to repay deferred Social Security withholding.

The Deferred Social Security Withholding Repayment Report includes the following columns:

- Employee
- Employee Name
- Employee Repayment
- Employer Repayment

Enhancements

Since repayment amounts are reported in a separate Deferred Social Security Withholding Repayments Report, the application does not include the repayment amounts in the existing Employee Social Security Withholding Reconciliation Report.

Recompute Taxable Wages (PRPRCOMP)

When the application selects records for the recompute process, it excludes EMPL_EARNINGS records with the following values:

- EMPL_EARNINGS.s_paychk_type is X or Y.
- EMPL_EARNINGS.ss_dfrd_repay_fl is Y.

Print Data Dictionary Report (SYRDD)

The report now provides information for the new Deferred Social Security Withholding Repayment (SS_DFRD_REPAY_FL) column in the following tables:

- EMPL_PAYROLL
- EMPL_PAYROLL_ADT
- EMPL_EARNINGS
- EMPL_E_ADT

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 Vendor Employees

Defect 1371034: When you imported vendor employees, Costpoint was unable to update existing vendor employee information. This happened because Costpoint identified existing vendor employees as duplicate records.

Accounts Payable » Manage Purchase Order Vouchers

Defect 1365909: When you entered a purchase order (PO) voucher, manually entered account distribution lines, and clicked **Save**, Costpoint incorrectly updated the **Sales/VAT Tax Amount** of the account distribution lines.

Defect 1368022: When you entered a voucher for a purchase order (PO) with a line that has the **Taxable** drop-down list set to **No**, Costpoint incorrectly updated the **Invoice Unit Cost**. This happened when you manually entered the PO details, updated the exchange rates, and clicked **Save**.

Fixed Assets » Import Asset Records

Defect 1373925: When you imported asset records, Costpoint did not convert the **Asset No** to uppercase, which then caused issues when querying the **Asset No** of the imported assets in other applications.

Admin

System Administration » Set Up Company

Defect 1379694: The new Material Requirements Planning (MRP) settings option to process purchase orders before requisitions will be copied when you create a new company from another company.

Contracts

Contracts » Manage Subcontracts

Defect 1382037: A system error occurred when only CTM_DOCUMENTS (Documents) had **No Rights** selected on the Result Set Rights by Application subtask on the Manage User Groups screen and you performed any of the following actions in Manage Subcontracts:

- Save a line record on the Subcontract/Project Modifications subtask.
- Save a new subcontract record.

As a workaround, in Manage User Groups, provide rights to the Modifications and Subcontract/Project Modifications result sets, and remove Documents from the Result Set Rights by Application subtask.

Framework

Framework

Defect 1360599: You could not log in to Costpoint with FIDO authentication from an iPhone.

Defect 1380277: In the Manage Vendors (APMVEND) application, you might have received the following error message when you used Costpoint with French as the selected language:

Unexpected Script Error: TypeError: lbl.split is not a function in APMVEND

Runtime » Server

Defect 1379687: An error occurred when you tried to connect to SharePoint in Office 365 GCC High when using ADFS on-premises.

Materials

Material Requirements Planning » Configure Materials Requirements Planning Settings

Defect 1379691: A new check box, **Process Purchase Orders before Requisitions**, has been added to the screen. Select this check box to prioritize purchase orders (PO) over requisitions. If this is selected, during the MRP process, requisitions will be allocated only after all POs have been allocated, regardless of the requisition due dates. Any supply orders left over are decreased or cancelled, and applied to requisitions before purchase orders. There is no change to how other supply types are processed.

Material Requirements Planning » Update Material Requirements Plan

Defect 1379695: The MRP process logic has been modified to take into account the new **Process Purchase Orders before Requisitions** check box on the Configure Materials Requirements Planning Settings screen.

If the new check box is selected, purchase orders (POs) are prioritized before requisitions. All supply types (excluding requisitions) will have the same priority level (sorted by due date) and will be allocated to a demand (those with earlier due date first). If due dates are the same, the supply will be sorted by supply type (MO, then PO), order ID, and line number. If there is still demand with an outstanding balance, then the requisition is allocated to the demand.

Procurement Planning » Manage Request for Quotes By Vendor

Defect 1372053: When you used web services to process an XML, Costpoint took the values from the original XML except for the **Item Description** field, and no error message was displayed.

Product Definition » Manage Parts

Defect 1388285: You encountered an error in Costpoint when you selected a Cost Type on the Item Costs subtask.

Production Control » Enter Manufacturing Order Issues

Defect 1372130: When you created a manufacturing order (MO), and you recreated the reservation line quantity, the recreated Reservation line Qty did not match the MO Requirement Line Reserved Qty.

Production Control » Manage Manufacturing Orders

Defect 1382860: When you used Web Service to create a Customer Repair Type manufacturing order (MO) which had a Manufacturing Execution System (MES) Customer Repair type Routing, you encountered an error.

Receiving » Manage Vendor Returns

Defect 1373057: When you used the Web Integration Console (WIC), the TRN_QTY value from the XML was set to zero (0).

Defect 1382086: When you tried to push a negative (-) quantity, you encountered an error stating that a negative quantity is not allowed even though the Reversal Flag in the XML was enabled.

Sales Order Entry » Post Sales Order Journal

Defect 1347697: You received an Out of Balance error when you posted a sales order invoice and the rate was changed/updated in Manage Sales or Value Added Taxes table.

Defect 1366401: You encountered an Out of Balance Error when you posted invoices with the following conditions:

- The transaction currency was not equal to the functional currency.
- The **Taxable** check box was selected.
- The Tax ID had multiple accounts.

People

Employee » Manage Employee HSA Elections

Defect 1343251: The column name in the **Plan Year** field lookup was incorrect. The column name was "PLAN_YR_NO" instead of "Plan Year."

Employee » Manage Employee Leave

Defect 1389320: Congress passed legislation on March 18, Families First Coronavirus Response Act (H.R. 6201), which created a federal paid sick leave requirement for coronavirus-related needs and expanded the Family and Medical Leave Act to include a paid leave component for employees caring for children whose schools or child care facilities were closed because of the virus outbreak.

The legislation mandates covered employers to provide paid leave for employees affected by the coronavirus if those employees are unable to work or telework. Those employees will receive 2 weeks (80 hours) of paid sick time at the employee's full regular rate of pay, subject to dollar caps; this is reduced to two-thirds pay if the leave is due to caring for others (for example, a sick or quarantined family member or a child whose school is closed or whose childcare provider is unavailable due to the coronavirus).

To support the legislation, Costpoint must enable the **Average Hourly Compensation Rate** field on the Paid Family Leave subtask. The field should also be required. The Families First Coronavirus Response Act put a limit on the amount that can be paid to an employee; therefore, this field needs to be enabled for entry of the **Average Hourly Compensation Rate** in cases where the calculated amount (**Average**

Weekly Wage divided by the **Average Weekly Hours**) would cause the employee to exceed the mandated dollar cap.

[Employee » Manage Employee Taxes](#)

Defect 1381894: The **Disable ESS W-4** check box was not enabled even if your ESS version was higher than 7.5.

[Employee » Manage Employee Taxes » Documentation](#)

Defect 1338345: An error 404 displayed when you launched the Costpoint Online Help from the Manage Employee Taxes screen.

As a workaround, launch the online help from other Costpoint screens and browse through the table of contents for the Manage Employee Taxes screen information.

[Employee Self Service » Federal Withholding](#)

Defect 1387429: If an employee did not have an assigned withholding state on the Manage Employee Taxes screen, the Federal Withholding in Employee Self Service did not display.

[Employee Self Service » W-2s](#)

Defect 1374076: The page number on the report started with zero, for example, "0 of 2."

[Labor » Export Data to Deltek Time and Expense](#)

Defect 1386560: Field 19 in the EMPL export file should remain blank for Time and Expense 9. The User Login ID value should be saved in field 19 when the version is Time and Expense 10.

[Labor » Manage Correcting Timesheets](#)

Defect 1261912: The Fringe Reference Key and Recast Reference Key were saved as NULL values on both N and D correcting timesheets.

[Leave » Close Leave Year](#)

Defect 1376776: The screen should provide a check box which lets you know that you must post your timesheets for the final leave period prior to closing the leave year.

Planning

[Administration » Refresh Process](#)

Defect 1348240: During the refresh process, Project Labor Categories [SRC01_PROCESS_013A_BUILD_CUR_PROJ_SUM] took up to twelve hours to execute.

Defect 1348243: During the refresh process, Project Labor Categories [SRC01_PROCESS_BUILD_EPROJ_LAB_CAT_RT_SC] took up to five hours to execute.

Defect 1374158: The Refresh Process was affected by sluggish EREPORT table processing.

Defect 1394756: Duplicate records in the EPROJ_LAB_CAT_RT_SC table caused the refresh to fail.

Defect 1397353: A SQL timeout error occurred when you refreshed SRC00_PROCESS_BUILD_EREPOR_TREND.

New Business Budgeting » New Business Budgets

Defect 1370591: Autofill functionality did not work when you manually entered values into a field instead of selecting those values from a list.

Organization Budgeting » Create Top Level Outlook (AOM5)

Defect 1381747: Non-labor actuals were incorrectly summarized in the top level outlook.

Organization Budgeting » Organization Budgets / Outlooks

Defect 1363827: Entering both actual labor costs and forecasted labor dollars in different sheets on the same outlook for the same account ID caused duplicates when you ran the Actual Merge process in Outlooks.

Defect 1370587: Autofill functionality did not work when you manually entered values into a field instead of selecting those values from a list.

Defect 1394753: Labor Utilization tagged multiple accounts as the default account.

Defect 1397355: The rate calculation did not include prior allocations for service centers.

Project Budgeting » Project Budgets / EACs

Defect 1370583: Fill values did not work when you entered dates rather than select them from a list.

Projects

Billing » Calculate Standard Bills

Defect 1385472: There was a rounding issue in rate when you calculated bills.

Billing » Print Standard Bills

Defect 1380800: The bill was calculated correctly, but the rate printed on the invoice was incorrect. As a workaround, you can download the data to Microsoft Excel and change the rate.

Cost and Revenue Processing » Compute Revenue

Defect 1383300: This application has been updated to improve its performance in Oracle Database 2019.

Cost and Revenue Processing » Month End Processes

Defect 1306825: When you ran Month End Processes and there were no valid setups in Manage Base Creation Setups and Manage Cost Creation Setups, Costpoint stopped processing even if there were valid setups after the Create Pool Links process. Month End Processes should have proceeded in running the other processes, skipping just the Create Pool Links process.

This defect affects all customers who use multiple-process screens that include Create Pool Links.

As a workaround, you can do the following:

- Add lines to the Create Pool Links application for accounts/organizations that already exist in the base.
- Do not run the Month End Processes or the Cost Pool Processes application, and use only the Compute Revenue Processes and Report Processes screens.

Inter-Company Work Orders » Create IWO Allocations

Defect 1383759: Timesheet comments did not flow to the receiving company when processed through an IWO. As a workaround, you can manually enter comments on the Manage Open Billing Detail screen.

This issue also affected the following applications:

Affected Applications	Defect No.
Export IWO Allocations	1383761
Import IWO Allocations	1383760
Post IWO Journal	1347992
Validate IWO Allocations	1383762

This requires PATCH3813.

Project Setup » Manage Modifications

Defect 1268090: Some value combinations in the **Current** and **Cumulative** fields resulted to a rounding issue, causing the user-entered **Value** to change. **Cumulative Fee** also changed when you entered a second modification.

As a workaround, enter **Value** before entering **Fee%**.

Defect 1268091: When you entered **Fee%** before **Value**, the auto-calculated **Cumulative Value** did not match **Value**. Costpoint displayed the message "The values are inconsistent," prompting you to change field values to make the **Value** and **Cumulative Value** fields match.

As a workaround, enter other field values before **Fee%**.

Project Setup » Mass Add Project Master Data

Defect 1354326: Subcontract ID was not included when performing mass add that includes Project Modifications. As a workaround, you can manually enter the subcontract ID on the Manage Modifications screen or on the Modifications subtask of Manage Project User Flow.

Subcontractor Management » Create Subcontractor Invoices

Defect 1373937: Rounding issues occurred when you ran this application.

Time and Expense

Configuration » Import Master Data

Defect 1385260: The application allowed multiple imports to run simultaneously. This potentially caused performance issues.

Configuration » Manage MyDesktop

Defect 1373868: Approval Tasks were slow to display.

Expense » Manage Expense Report

Defect 1386024: The **Providers** drop-down list did not display the majority of available providers.

Time » Export Timesheets

Defect 1381412: The export process included corrections for entire timesheets during partial exports.

Time » Manage Timesheets

Defect 1376750: When an employee transferred between work schedules that had different work days, holidays, or other settings, this data did not transfer to relevant timesheets in Manage/Approve Timesheets or Manage Timesheets unless you queried for the specific timesheet week and employee.

Known Issues

The following are known issues in this release.

Affordable Care Act (ACA) Form 1095-C Alignment

The Affordable Care Act 1095-C form has not yet been released by our forms-providers. Therefore, we are not able to complete our updates to the form alignment.

Solution

We will release the 1095-C alignment updates in January 2021.

Additional Information - IRS Affordable Care Act 1094-C and 1095-C Due Dates

On October 2, 2020, the IRS announced it would extend the deadline for employers to provide employees with a copy of their Affordable Care Act (ACA) 1095-C reporting form. The deadline was extended from January 31, 2021, to March 2, 2021.

The deadlines were not extended for filing [1095-C](#) forms with the IRS, and they are still February 28, 2021 for paper filing or March 31, 2021 for electronic filing.

Print W-2s Alignment

When printing the 2-Up W-2, some of the values printed on the second W-2 on a page are printed too high in the field or check box. For example, if any of the Box 13 check boxes apply to the second W-2 printed on a page, the X marks are not fully printing within the box.

This issue will be fixed in MR 7.1.13.

Appendix: For Additional Information

Deltek Support Center

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

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

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

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

Access Deltek Support Center

To access the Deltek Support Center:

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

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

About Deltek

Better software means better projects. Deltek 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