

Deltak Costpoint HotFix Readme

Released: April 28, 2017

State Withholding Filing Status Update

Prior to this release, Costpoint allows you to select from a limited set of state withholding filing statuses which determines the calculation of an employee's state tax. This limit affected Maryland which allows each county within the state to withhold at a different rate. To address this issue, Maryland withholding was moved to local taxes and special programming was required in the Compute Payroll process in order for Maryland local taxes to display in the employee's state taxes. This previous system was difficult to set up for employers; and employees were not able to select their Maryland withholding status in Employee Self Service (ESS) because local taxes were not displayed.

Instead of using a limited drop-down list for state withholding filing statuses, Costpoint will now use a system table where withholding status could be set up for each state. To implement the enhancement, this Costpoint release will:

- Add a new system table for state withholding statuses (STATE_FILING_STATUS)
- Add new withholding status data for each state and set the initial value to **Inactive**
- Insert the old filing statuses into the new withholding status system table and set their initial value to **Active**
- Convert all existing screens/tables where a withholding status is displayed to 30 characters
- Convert existing table data containing the existing withholding status to the new withholding status
- Remove custom programming in the Compute Payroll process for Maryland
- Create new state tax information for Maryland and zero out existing local tax information for Maryland



All local Maryland tax information will be left in the employee files but local taxes will no longer be calculated on them.

You must initiate the change by running the new utility, Update State Withholding Statuses (toolkit). When you run the toolkit, the process maps the old withholding status/state combination to the new withholding status/state combination and it updates all employee tables. The state, local, and ESS tables will be updated with the new data upon conversion.



You will not be able to run the utility while there are existing payroll records.

It is recommended that you back up your data before running this toolkit. The following are the critical tables that you must back up:

- Employee Tax (EMPL_TAX)
- Employee Multi-State Tax Information (EMPL_TAX_MULT)
- Employee Earnings by State (EMPL_EARN_STATE)
- Local Tax History (LOCAL_TAX_HS)
- Local Taxability (LOCAL_TAX_TBL)
- Local Standard Deduction (LOC_STD_DED)
- ESS State Tax Settings -Child Table (ESS_STATE_TAX_LN)
- State Withholding Filing Status (STATE_FILING_STATUS)

All previously released tax table updates must be applied before applying this patch in order to ensure that the tax tables reflect the latest changes. Please refer to the [Patches and System JAR Requirements](#) section on this document.

The following applications contains the corresponding updates for this enhancement:

Configure ESS State Tax Settings (AOMESSST)

- The **Filing Status** field size increases to 30 characters. This field references the new State Filing Status system table.
- The **Filing Status Description** field size increases to 50 characters.
- The application converts new records for new filing statuses.
- A new **Active** check box indicates whether the filing status is active or inactive. This field is disabled.

Compute Payroll (PRPCPR)

- The **Filing Status** field size increased to 30 characters in all work tables for any table using S_ST_FIL_STAT_CD field.
- The application reference the new state filing status system table within the calculations if needed.
- The application code no longer contains custom code for Maryland state tax withholding calculations and other unnecessary filing status references.
- The application uses updated logic for new **Supplement Tax** type from the Manage State Tax Withholding Adjustments screen.

Manage Employee Earnings History (PRMERF)

- The size of **Filing Status** field size on the State Taxes subtask increased to 30 characters.
- The **Filing Status** field size increased to 30 characters in all work tables for any table using S_ST_FIL_STAT_CD field.
- The application reference the new state filing status system table within the calculations if needed.
- The application code no longer contains custom code for Maryland state tax withholding calculations and other unnecessary filing status references.
- The application uses updated logic for new **Supplement Tax** type from the Manage State Tax Withholding Adjustments screen.
- The **Filing Status** field lookup function displays both active and inactive filing statuses in order to be able to enter historical data.

Manage Employee Information (LDMEINFO)

- The **Filing Status** field size on the Tax Details and Multi-State Taxes subtask increased to 30 characters. The state filing status description field on both the Tax Details tab and Multi-State Taxes are no longer available. The Filing Status fields reference the new State Filing Status system table. The lookup function displays only the active filing statuses.
- The application uses new validations to ensure that the state filing status exists for the selected state.

Manage Employee Taxes (PRMETAX)

- The **Filing Status** field size on the Tax Details and Multi-State Taxes subtask increased to 30 characters. The state filing status description field on both the Taxes tab and Multi-State Taxes subtask are no longer available. The Filing Status fields reference the new State Filing Status system table. The lookup function displays only the active filing statuses.

- The application uses new validations to ensure that the state filing status exists for the selected state.

Manage Local Standard Deductions (PRMLSD)

When you run the new utility, Update State Filing Statuses, the process adds a new line for each Maryland local tax/withholding status to zero out Maryland local taxes.

Manage Local Tax Tables (PRMLTT)

When you run the new utility, Update State Filing Statuses, the process adds a new record for each Maryland local tax/withholding status to zero out Maryland local taxes.

Manage Local Taxes (PRMLTI)

When you run the new utility, Update State Filing Statuses, the process adds a new line in the Local Tax History (LOCAL_TAX_HS) table to zero out Maryland local taxes.

Manage Payroll Records (PRMPTF)

- The size of the **Filing Status** field on the State Taxes subtask increased to 30 characters.
- The **Filing Status** field size increased to 30 characters in all work tables for any table using S_ST_FIL_STAT_CD field.
- The application reference the new state filing status system table within the calculations if needed.
- The application code no longer contains custom code for Maryland state tax withholding calculations and other unnecessary filing status references.
- The application uses updated logic for new **Supplement Tax** type from the Manage State Tax Withholding Adjustments screen.

Manage State Standard Deductions (PRMSSD)

- The **Filing Status** field size increased to 30 characters. It now uses a lookup function instead of the previous drop-down list. The lookup function references the new State Filing Status system table.
- The application updates tables with Maryland tax information for each new filing status.
- The application creates new records for new filing status codes.

Manage State Tax Tables (PRMSTT)

- The **Filing Status** field size increased to 30 characters. It now uses a lookup function instead of the previous drop-down list. The lookup function references the new State Filing Status system table.
- The application adds state tax information for each new filing status.

Manage State Tax Withholding Adjustments (PRMSTAC)

- The **Filing Status** field size increased to 30 characters. It now uses a lookup function instead of the previous drop-down list. The lookup function references the new State Filing Status system table.
- The **Type** drop-down lists displays a new tax calculation type, **Supplemental Taxes**.
- A new **Wage Type** of **Bonus** is available for Maryland which has different bonus rates for each county.
- The application creates new records for the new filing status codes.

Print Soc Sec and Medicare Reconciliation Report (PRRFICA)

The size of columns in dynamic tables increased to allow for new state filing statuses.

Recompute Taxes (PRPRCOMP)

- The **Filing Status** field size increased to 30 characters in all work tables for any table using S_ST_FIL_STAT_CD field.
- The application reference the new state filing status system table within the calculations if needed.
- The application code no longer contains custom code for Maryland state tax withholding calculations and other unnecessary filing status references.
- The application uses updated logic for new **Supplement Tax** type from the Manage State Tax Withholding Adjustments screen.

Update State Filing Statuses (PRPUSFS)

- The new utility, Update State Filing Statuses, allows you to change the current withholding status of employees from either **Married, Single, Both, Head of Household, Misc 1, Misc 2, Misc 3, or Misc 4** to a longer, more descriptive, withholding status for their state which corresponds to the original one. You can launch the utility from **People » Payroll » Payroll Utilities » Toolkits**.
- This toolkit also creates new Maryland local tax table records with 0% rates so that any employee set up with Maryland local taxes will no longer have any local tax withheld. All Maryland taxes will now be withheld at the state level.
- Running this process converts the old filing statuses to Inactive and the new filing statuses will be activated.



You must run the report before running the Update State Filing Statuses process to ensure the statuses are being mapped correctly. Once the toolkit is run, all tables that contain state withholding statuses will be updated. This includes all employee tax screens as well as any state tax setup screens. This toolkit can only be run one time. After the statuses have been updated, this toolkit will no longer be available.

View Employee Earnings (PRQERF)

The size of **Filing Status** field size in the **State Information** group box increased to 30 characters.

View Employee Taxes (PRQETAX)

The **Filing Status** field size on the Tax Details and Multi-State Taxes subtask increased to 30 characters.

View Help About (SYMABOUT)

The State Withholding Filing Status Update feature has been registered on this screen.

View Payroll Edit Table (PRQPTF)

The size of **Filing Status** field size on the State Taxes subtask increased to 30 characters.

Patches and System JAR requirements

These enhancements require the following Costpoint 7.1.1 releases:

- System JAR 028 (cp711_sys_028.zip)
- PATCH3144 (State Withholding Filing Status Update)

- PATCH3131 (January 2017 Tax Table Update)
- PATCH3136 (February 2017 Tax Table Update)
- PATCH3140 (March 2017 Tax Table Update)
- PATCH5083 (SYMABOUT(About Costpoint))
- Common lib - CPCPR (cp711_cmplib_CPCPR_001.zip)
- Common lib - LDMEINFOLIB (cp711_cmplib_LDMEINFOLIB_001.zip)

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application ID	Application Name	Application File
People	Employee	AOMESSST	Configure ESS State Tax Settings	cp711_aomessst_001.zip
People	Employee	LDMEINFO	Manage Employee Information	cp711_ldmeinfo_018.zip
People	Employee	PRMETAX	Manage Employee Taxes	cp711_prmetax_008.zip
People	Payroll	PRMERF	Manage Employee Earnings History	cp711_prmerf_010.zip
People	Payroll	PRMPTF	Manage Payroll Records	cp711_prmptf_014.zip
People	Payroll	PRMSSD	Manage State Standard Deductions	cp711_prmssd_003.zip
People	Payroll	PRMSTAC	Manage State Tax Withholding Adjustments	cp711_prmstac_006.zip
People	Payroll	PRMSTT	Manage State Tax Tables	cp711_prmstt_002.zip
People	Payroll	PRPUSFS	Update State Filing Statuses	cp711_prpusfs_001.zip
People	Payroll	PRQERF	View Employee Earnings	cp711_prqerf_003.zip
People	Payroll	PRQETAX	View Employee Taxes	cp711_prqetax_004.zip
People	Payroll	PRQPTF	View Payroll Edit Table	cp711_prqptf_003.zip

More information about this release is on the following page.

Custom Programs Affected:

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

To Download the HotFix Update:

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

To Install the HotFix Update:

Refer to the installation instructions posted on Deltek's Customer Care Connect site, <https://deltek.custhelp.com>.

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

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

To Check to See if the HotFix is Installed:

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

More Information:

If you have any questions, please contact Deltek Customer Care at <https://support.deltek.com>.