




Deltek

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Overview

This document is a compilation of Costpoint, Costpoint Planning, and Time & Expense enhancements and software defect resolutions from March 2022 (CP Maintenance Release 8.1.6), and also includes any regulatory enhancements.

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

Note that the version numbers above (for example, 8.1.6) refer to the Costpoint Maintenance Release (MR) upon which this document is based are for reference only.

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

Enhancements

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

Regulatory

Federal

2022 Additional Amount for Nonresident Alien Employees

The Compute Payroll application now supports the updated additional amount for a nonresident alien employee who has not submitted a Form W-4 for 2020 or later. The application will now use the following amounts in the withholding tax calculation of both federal and territory:

- Nonresident alien additional amount is 8,650 if the employee's Form W-4 is 2019 or earlier, and check date is from tax year 2022.
- Nonresident alien additional amount is 8,250 if the employee's Form W-4 is 2019 or earlier, and check date is within tax year 2021.
- Nonresident alien additional amount is 8,100 if the employee's Form W-4 is 2019 or earlier, and check date is within tax year 2020.

2022 Form 941 Updates (DRAFT)

The draft Form 941, which has a March 2022 revision date, contained several changes when compared with the version in effect for the second through fourth quarters of 2021. The changes are the following:

- The note next to Lines 5a to 5d was revised to clarify the reporting of qualified paid sick and family leave wages. Qualified wages paid in 2022 for leave taken in the second and third quarters of 2021 are to be included in Line 5a. Lines 5ai and 5aii are to be used only for qualified leave wages paid in 2022 for leave taken after March 31, 2020, and before April 1, 2021.
- Lines 11c, 13d, 21, and 22, which were previously used to report amounts pertaining to the employee retention credit, were labeled "Reserved for future use" in the draft 2022 version. Lines 13h and 13i, which pertained to Form 7200 advances, were similarly labeled.

A draft of revised instructions for Form 941, Employer's Quarterly Federal Tax Return, were released January 31 by the Internal Revenue Service. The changes are the following:

- The credits for qualified paid sick and paid family leave wages may be claimed only for wages paid for leave taken after March 31, 2020, and before Oct. 1, 2021. However, employers that pay qualifying wages in 2022 for leave taken in that time period still may claim the credit; Lines 11b, 11d, 13c, and 13e may be used only for this purpose.
- The COBRA premium assistance credit expired Sept. 30, 2021. However, employers still may claim the credit if an eligible person elected coverage in the first quarter of 2022 for periods between April 1 and Sept. 30, 2021.
- The worksheets that allowed employers to calculate the employee retention credit, formerly named Worksheets 2 and 4, were removed.
- The worksheet for calculating the credit for qualified leave wages for leave taken in the second and third quarters of 2021, formerly named Worksheet 3, was renamed Worksheet 2 and updated to remove lines that referred to the employee retention credit.
- The worksheet for calculating the COBRA premium assistance credit, formerly Worksheet 5, was renamed Worksheet 3.

Earlier versions of Form 941 may not be used for reporting in 2022.

[Print Quarterly Federal Payroll Tax Report \(PRRFDTAX\)](#)

When you enter **2022** or later in the **Payroll Year** field, the screen disables the fields in the **Employee Retention Credit** group box.

- **Eligible for Employee Retention Credit** check box
- **Qualified health plan expenses** field
- **Qualified health plan expenses for Mar 13 – 31, 2020** field

The Quarterly Federal Payroll Tax Report features the following updates:

- The report uses a new layout if the screen start date is 01/01/2022 or later.
- The report prints the previous report layout if the screen start date falls on 04/01/2021 - 12/31/2021.
- The report prints the layout prior to 04/01/2021 if the screen start date falls before 04/01/2021.

The following changes are implemented in the new report:

- **Federal 941 Data**
 - The employee retention credit (Line 11c, Line 13d) was removed.
 - The label of Line 11d was updated to "Nonrefundable portion of credit for qualified sick and family leave wages for leave taken after March 31, 2021, and before October 1, 2021."
 - The label of Line 13e was updated to "Refundable portion of credit for qualified sick and family leave wages for leave taken after March 31, 2021, and before October 1, 2021."
- **Worksheet 1**
 - The Worksheet 1 label was updated to "Worksheet 1: Credit for Sick and Family Leave Wages for Leave Taken After March 31, 2020, and Before April 1, 2021."
- **Worksheet 2** (This is Worksheet 3 in the previous report layout.)
 - The Worksheet 2 label was updated to "Worksheet 2: Credit for Qualified Sick and Family Leave Wages Paid in 2022 for Leave Taken After March 31, 2021, and Before October 1, 2021."
 - The employee retention credit lines (2n, 2q) were removed.
 - Line 2p will now contain the nonrefundable portion of credit, which is now the smaller of 1f or 2m.
 - Line 2q will now contain the refundable portion of credit, which is now 2m-2p.
- **Worksheet 3** (This is Worksheet 5 in the previous report layout.)
 - The Worksheet 3 label was updated to "Worksheet 3: COBRA Premium Assistance Credit."
 - The employee retention credit lines (2d, 2e) were removed.
 - Line 2d will now subtract 2c from 1g (1g - 2c).
 - Line 2e will now contain the nonrefundable portion of COBRA premium assistance credit, which is now the smaller of 2a or 2d.
 - Line 2f will now contain the refundable portion of COBRA premium assistance credit, which is now 2a-2e.

State

2022 SUTA Wage Base

This Costpoint release adds tax table records effective January 1, 2022 for states where the unemployment-taxable wage base has been updated for tax year 2022.

West Virginia

The SUTA limit for 2022 decreases from \$12,000 to **\$9,000**.

Arkansas 2022 Tax Table Updates

Arkansas's withholding formula, effective Jan. 1, 2022, was released by the state Department of Finance and Administration. The following are the updates:

- Compared to the 2021 formula, the highest tax rate used decreased from 5.9% to **5.5%** and the number of tax brackets used increased.
- The supplemental withholding rate also decreased from 5.9% to 5.5%.

To support the state updates, this release applies changes to the following screens:

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

Attention: For more information, refer to:

<https://www.dfa.arkansas.gov/images/uploads/incomeTaxOffice/whformula.pdf>.

Colorado 2022 Tax Table Updates

Colorado introduced a new state W-4. Previously, Colorado employees used the federal W-4. Now, employees have the option of using either the federal W-4 or the new withholding certificate, Form DR 0004, Colorado Employee Withholding Certificate. The two certificates are similar, but the DR 0004 allows employees to specify a standard deduction amount that differs from the federal standard deduction amount. This change also caused a change to Step 2a of Colorado's state withholding formula.

The steps of the formula that reduce the amount of taxable wages and take into account additional withholding were changed to accommodate Form DR 0004.

In Step 2a of the formula, the standard amounts of \$8,000 or \$4,000 that depend on an employee's federal filing status are replaced with the amount from Line 2 of Form DR 0004 if the employee filled out the form. In Step 2e, for additional state withholding, the amount from Line 3 of Form DR 0004 is used if filled out. However, if the employee requested additional withholding before 2022, that amount can be used until the employee submits a new withholding certificate.

Compared to a draft of Form DR 0004 released Sept. 26, the final version adds an additional income bracket for the child tax credit allowance values on Worksheet 1, fills in amounts that were represented by placeholders in the draft, and makes changes to phrasing in the instructions.

Form DR 0004 is optional to fill out, but employers are required to provide it to employees who ask about adjusting their state withholding. Starting in 2022, employees who wish to adjust their state withholding must use Form DR 0004 to do so.

Attention: For more information, refer to:

- **Frequently Asked Questions:** <https://aboutbtax.com/0wh>
- **Form DR 0004:** <https://aboutbtax.com/0wg>
- **Formula:** <https://aboutbtax.com/0wf>

State Withholding (ESMSTATEWH)

The State Withholding screen now provides Colorado employees the option of basing their state withholding on either the federal W-4 or Colorado's withholding certificate (DR 0004). The following are the screen updates:

Note: The updates on the State Withholding screen also apply to the State Withholding tab on the Life Events/New Hires screen.

- A new **Colorado Annual Withholding Allowance** group box allows Colorado employees to select options that will be used in the calculation of their state tax withholding. The group box contains the following:

Field	Description
I would like to:	<p>Use this setting to specify the annual withholding allowance that will be used to reduce your Colorado withholding. Select one of the following options:</p> <ul style="list-style-type: none"> ▪ Use the federal standard deduction amount for my filing status (\$8,000 if married filing jointly or qualifying widow(er); or \$4,000 otherwise). ▪ Specify an annual withholding allowance amount based on the Standard Allowance table and Worksheet 1 from the DR 0004 Colorado Employee Withholding Certificate (If you want a greater amount withheld, you may enter a smaller amount than either calculation.)
Annual Withholding Allowance	<p>If you selected the option to specify an annual withholding amount, enter the annual withholding allowance amount based on the Standard Allowance table and Worksheet 1 from the DR 0004 Colorado Employee Withholding Certificate. If you want a greater amount withheld, you may enter a smaller amount than either calculation.</p>

Enhancements

- If the employee opts to specify an annual withholding allowance amount for Colorado, the screen enables the **Annual Withholding Allowance** field. Otherwise, if the employee opts to use the federal standard deduction amount, the **Annual Withholding Allowance** field will be hidden.
- If the employee opts to specify an annual withholding allowance amount, the **Annual Withholding Allowance** field will be required.
- The **Colorado Annual Withholding Allowance** group box and its contents will only be visible if the screen **Withholding State** is **CO** (Colorado).
- The **Colorado Annual Withholding Allowance** values will be stored in the following columns of the EMPL_TAX table when the employee saves the record:
 - STATE_STD_DED_SOURCE_CD
 - CO_ANNUAL_WH_ALLOW_AMT
- If the **Enable Multi-State Tax Withholding** check box is selected on the employee's pay cycle, the Other Withholding Status(es) subtask automatically displays in table view below the Home Withholding State section when you open the screen.
- Existing field labels were updated:

Old Label	New Label
Total Allowances	Total Allowances/Exemptions
Total Dependents	Number of Dependents
Total Credits	Number of Credits
Additional Withholding	Extra Withholding per Paycheck
Total Age 65 or Over Exemptions	Age 65 or Over Exemptions
Total Blindness Exemptions	Blindness Exemptions
Additional Information	State Information

- The Identification box at the top of the screen was replaced with the employee's name and employee ID.
- Updates on the main screen are also implemented on the Other Withholding State(s) subtask.

Manage Employee Taxes (PRMETAX)

The Manage Employee Taxes screen provides the ability to set up Colorado state tax withholding for employees based on either the federal W-4 or the Colorado withholding certificate (DR 0004).

Note: The changes on the Manage Employee Taxes screen also apply to the Taxes tab on the Manage Employee Information screen.

The screen format was updated to accommodate new state withholding controls and to allow for the addition of future controls. The following are the changes:

- The following fields/check boxes now display above the tabs:
 - **Pay Cycle** field

Enhancements

- **Tax Service Group ID** field
- **Retirement Plan Covered** check box
- **Nonresident Alien** check box
- The Taxes tab label changed to “Federal.”
- The Tax Reporting Information tab label changed to “State,” and the tab now includes the following:
 - **State Withholding** group box
 - **Withholding State** field
 - **Taxable Entity State** field
 - **Filing Status** field
 - **Exemptions** data field
 - **Blindness Exemptions** field
 - **Age 65 Exemptions** field
 - **Dependents** field
 - **Credits** data field
 - **Override Amount** field
 - **Override Percent** field
 - **Additional Amount** field
 - **Nebraska - Exempt from Minimum Withholding Rule** check box
 - **Puerto Rico – Veteran Exemption** check box
 - **Puerto Rico – Special Deduction** check box
 - **SUTA** group box
 - **State** data field
 - **Subject to SUTA** check box
- The screen provides a new Local tab. It contains the **Local** group box and its fields, which were previously on the Taxes tab.
- The State tab provides a set of **Colorado Deduction** options, which can be used to specify whether the employee wants to use the state standard deduction amounts or the amount from the employee’s Colorado DR 0004. These options were added as a result of 2021 Colorado withholding formula updates, where the employee can specify an override amount on their Colorado W-4 (DR 0004).

Field	Description
Use State Standard Deduction Table	Select this option to use the data from the Manage State Standard Deductions screen to determine the standard deduction amount. If you select this option, the Annual Withholding Allowance field will be hidden.

Field	Description
Use Amount from the Colorado DR 0004	Select this option to use the annual withholding allowance amount to determine the standard deduction amount.
Annual Withholding Allowance	Enter the annual withholding allowance amount. This field is only visible and enabled if you select the Use Amount from the Colorado DR 0004 option.

Note: The new **Colorado Deduction** options will be enabled only if the **Withholding State** is **CO** (Colorado). If the **Withholding State** is not **CO**, the options are disabled, and the screen sets the standard deduction to **Use State Standard Deduction Table**.

- The layout of the Multi-State Taxes subtask was updated. This subtask now contains the new **Colorado Deduction** options.
- If the login company's audit tracking is enabled for the Manage Employee Taxes screen, Costpoint stores the standard deduction and annual withholding allowance amount in the generated EMPL_TAX_ADT record when you save your changes.
- To support the changes in the application, Costpoint adds the following two new columns to the EMPL_TAX table:
 - Standard Deduction (STATE_STD_DED_SOURCE_CD)
 - Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

View Employee Taxes (PRQETAX)

The screen format was updated to accommodate new state withholding controls and to allow for the addition of future controls. The following are the changes:

- The following fields and check boxes are now included in the Inquiry Details header:
 - **Pay Cycle** field
 - **Tax Service Group ID** field
 - **Retirement Plan Covered** check box
 - **Nonresident Alien** check box
- The Taxes tab label changed to "Federal."
- The Tax Reporting Information tab label changed to "State," and the tab now includes the following:
 - **State Withholding** group box
 - **Withholding State** field
 - **Taxable Entity State** field
 - **Filing Status** field
 - **Exemptions** data field
 - **Blindness Exemptions** field

- **Age 65 Exemptions** field
- **Dependents** field
- **Credits** data field
- **Override Amount** field
- **Override Percent** field
- **Additional Amount** field
- **Nebraska - Exempt from Minimum Withholding Rule** check box
- **Puerto Rico – Veteran Exemption** check box
- **Puerto Rico – Special Deduction** check box
- **SUTA** group box
 - **State** data field
 - **Subject to SUTA** check box
- The screen provides a new **Local** tab. It contains the **Local** group box and its fields, which were previously on the **Taxes** tab.
- The **State** tab provides a set of **Colorado Deduction** options, which displays whether the employee wants to use the state standard deduction amounts or the amount from the employee's Colorado DR 0004. These options were added as a result of 2021 Colorado withholding formula updates, where the employee can specify an override amount on their Colorado W-4 (DR 0004).

Field	Description
Use State Standard Deduction Table	This option indicates if the data from the Manage State Standard Deductions screen is used to determine the standard deduction amount. If this option is selected, the Annual Withholding Allowance field is hidden.
Use Amount from the Colorado DR 0004	This option indicates if the annual withholding allowance amount is used to determine the standard deduction amount.
Annual Withholding Allowance	This field displays the annual withholding allowance amount. This field is only visible and enabled if you select the Use Amount from the Colorado DR 0004 option.

Note: The new **Colorado Deduction** options will be enabled only if the **Withholding State** is **CO** (Colorado). If the **Withholding State** is not **CO**, the options are disabled, and the screen sets the standard deduction to **Use State Standard Deduction Table**.

- The layout of the Multi-State Tax Inquiry subtask was updated. This subtask now contains the new **Colorado Deduction** options.
- To support the changes in the application, Costpoint adds the following two new columns to the EMPL_TAX_ADT table:
 - Standard Deduction (STATE_STD_DED_SOURCE_CD)

- Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

Compute Payroll (PRPCPR)

The State Standard Deduction logic used to calculate the employee's state withholding was updated.

Costpoint keeps a history of the employee's tax setup when computing payroll. As part of this, the application stores the following values when the EMPL_PAYROLL record is generated:

- The employee's Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
- The employee's Colorado Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

Manage Payroll Records (PRMPTF)

The Manage Payroll Records screen features the following updates:

- The State Standard Deduction logic used to calculate the employee's state withholding was updated.
- The State Taxes subtask provides the following new fields:

Field	Description
Colorado Standard Deduction Source	<p>This field displays the Colorado standard deduction source used by the Compute Payroll screen to calculate the Colorado state withholding amount.</p> <p>This field will be populated with the employee's Colorado standard deduction source from the Manage Employee Taxes screen if either the Compute Payroll process or the Recalculate button was used to calculate the state tax withholding. Otherwise, Not Applicable will be displayed in this field.</p>
Colorado Annual Withholding Allowance Amount	<p>If applicable, this field displays the Colorado Annual Withholding Allowance Amount used by the Compute Payroll screen to calculate the Colorado state withholding amount. This field will be populated only if all the following are true:</p> <ul style="list-style-type: none"> ▪ Either the Compute Payroll screen or the Recalculate button was used to calculate the state tax withholding. ▪ The Withholding State is CO (Colorado). ▪ The employee's Colorado Standard Deduction Source is Use Colorado DR 0004 Allowance Amount on the Manage Employee Taxes screen.

Enhancements

- When you enter a new record on the State Taxes subtask, the screen populates the following two fields based on the employee's setup on the Manage Employee Taxes screen (from the EMPL_TAX table):
 - The employee's Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
 - The employee's Colorado Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)
- If **Edit Payroll** audit tracking is enabled for the login company, Costpoint stores the following values in the EMPL_PR_STATE_ADT table when a record is added, updated, or deleted:
 - The employee's Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
 - The employee's Colorado Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

View Payroll Edit Table (PRQPTF)

The View Payroll Edit Table screen features the following updates:

- The State Taxes subtask provides the following new fields:

Field	Description
Colorado Standard Deduction Source	<p>This field displays the Colorado Standard Deduction Source used by the Compute Payroll screen to calculate the Colorado state withholding amount.</p> <p>This field will be populated with the employee's Colorado Standard Deduction Source from the Manage Employee Taxes screen if either the Compute Payroll process or the Recalculate button was used to calculate the state tax withholding. Otherwise, Not Applicable will be displayed in this field.</p>
Colorado Annual Withholding Allowance Amount	<p>If applicable, this field displays the Colorado Annual Withholding Allowance Amount used by the Compute Payroll screen to calculate the Colorado state withholding amount. This field will be populated only if all the following are true:</p> <ul style="list-style-type: none"> Either the Compute Payroll screen or the Recalculate button was used to calculate the state tax withholding. The Withholding State is CO (Colorado). The employee's Colorado Standard Deduction Source is Use Colorado DR 0004 Allowance Amount on the Manage Employee Taxes screen.

- To support the changes in the application, Costpoint adds the following two new columns to the EMPL_PR_STATE_ADT table:

Enhancements

- Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
- Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

Post Payroll Journal (PRPPPCLS)

After you run the Post Payroll Journal process, the application populates the following new columns in the EMPL_EARN_STATE table:

- Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
- Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

Manage Employee Earnings History (PRMERF)

The Manage Employee Earnings History screen features the following updates:

- The State Taxes subtask provides the following new fields:

Field	Description
Colorado Standard Deduction Source	<p>This field displays the Colorado Standard Deduction Source used by the Compute Payroll screen to calculate the Colorado state withholding amount.</p> <p>This field will be populated with the employee's Colorado Standard Deduction Source from the Manage Employee Taxes screen if either the Compute Payroll process or the Recalculate button was used to calculate the state tax withholding. Otherwise, Not Applicable will be displayed in this field.</p>
Colorado Annual Withholding Allowance Amount	<p>If applicable, this field displays the Colorado Annual Withholding Allowance Amount used by the Compute Payroll screen to calculate the Colorado state withholding amount. This field will be populated only if all the following are true:</p> <ul style="list-style-type: none"> ▪ Either the Compute Payroll screen or the Recalculate button was used to calculate the state tax withholding. ▪ The Withholding State is CO (Colorado). ▪ The employee's Colorado Standard Deduction Source is Use Colorado DR 0004 Allowance Amount on the Manage Employee Taxes screen.

- When you recalculate a State Taxes record, the application populates the following two fields in the EMPL_TAX table based on the Employee ID:
 - The employee's Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
 - The employee's Colorado Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

Enhancements

- If **Employee Earnings** audit tracking is turned on for the login company, Costpoint stores the following values in the EMPL_E_STATE_ADT table when a record is added, updated, or deleted:
 - The employee's Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
 - The employee's Colorado Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

View Employee Earnings (PRQERF)

The View Employee Earnings screen features the following updates:

- The State Taxes subtask provides the following new fields:

Field	Description
Colorado Standard Deduction Source	<p>This field displays the Colorado Standard Deduction Source used by the Compute Payroll screen to calculate the Colorado state withholding amount.</p> <p>This field will be populated with the employee's Colorado Standard Deduction Source from the Manage Employee Taxes screen if either the Compute Payroll process or the Recalculate button was used to calculate the state tax withholding. Otherwise, Not Applicable will be displayed in this field.</p>
Colorado Annual Withholding Allowance Amount	<p>If applicable, this field displays the Colorado Annual Withholding Allowance Amount used by the Compute Payroll screen to calculate the Colorado state withholding amount. This field will be populated only if all the following are true:</p> <ul style="list-style-type: none"> ▪ Either the Compute Payroll screen or the Recalculate button was used to calculate the state tax withholding. ▪ The Withholding State is CO (Colorado). ▪ The employee's Colorado Standard Deduction Source is Use Colorado DR 0004 Allowance Amount on the Manage Employee Taxes screen.

- To support the changes in the application, Costpoint adds the following two new columns to the EMPL_E_STATE_ADT table:
 - Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
 - Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

Enhancements

Recompute Taxable Wages (PRPRCOMP)

If you select the **State** check box in the **Apply Employee's Current Taxability** group box, Costpoint will keep a history of the employee's tax setup when recomputing taxable wages. When the application recomputes an EMPL_EARN_STATE record, it stores the following values:

- The employee's Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
- The employee's Colorado Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

Void/Replace Posted Paychecks (PRPAVCK)

When the application generates a V record, it copies the following values from the voided earnings record (on the EMPL_EARN_STATE table) to the V payroll record (on the EMPL_PR_STATE table):

- Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
- Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

When the application generates a W record, it copies the following values from the voided earnings record (on the EMPL_EARN_STATE table) to the W payroll record (on the EMPL_PR_STATE table):

- Colorado Standard Deduction Source (STATE_STD_DED_SOURCE_CD)
- Annual Withholding Allowance Amount (CO_ANNUAL_WH_ALLOW_AMT)

Print Data Dictionary Report (SYRDD)

The Print Data Dictionary Report now provides information for the new Colorado Deduction fields.

Ohio SUTA Electronic Filing

According to the Ohio Department of Job and Family Services, the ICESA file format has been updated for the new tax system, The SOURCE (State of Ohio Unemployment Resource for Claimants and Employers).

To support the state requirements, this release updates multiple screens in Costpoint.

Attention: For more information, refer to the Ohio Employer's Guide to Electronic Quarterly Unemployment Insurance Tax Filing: <http://www.odjfs.state.oh.us/forms/num/JFS%2007150/>.

Manage Employee Taxes (PRMETAX)

The **Owner** and **Occupational/SOC Code** fields on the Manage Employee Taxes screen now apply to Ohio. The corresponding labels on the screen were updated.

Note: This update also applies to the Taxes subtask on the Manage Employee Information screen.

Manage SUTA Quarterly Reporting Data (PRMQRD)

You can now select Ohio's adjustment reason codes from the **Adjustment Reason Code** field.

Manage SUTA Tax File Data (PRMSMM)

The screen provides the following updates for Ohio:

- The **E-mail** field is now enabled for Ohio.

Enhancements

- The validation for the **Unit/Division Location/Plant Code** field was updated.
- A validation for the **Contact Name** field was added.

Create Quarterly SUTA Tax File (PRPSMM)

The screen provides the following updates for Ohio:

- Ohio's file layout was updated to conform to the new ICESA file format.
- The validation on the file name was updated.
- The following fields are now disabled:
 - Employee Count - Month 1
 - Employee Count - Month 2
 - Employee Count - Month 3

Framework

Framework

When an application shares multiple modules across different domains, such as how AP, PO, and PP modules share the APMVEND application, the Browse Applications menu will show the application only in the domain where they have module rights. If the user does not have rights to any of the modules, the app will display in the associated domain listed last in the Browse Applications menu. Previously, a user could see multiple domains for the same application in the Browse Applications menu.

Software Issues Resolved

Accounting

Accounts Payable » Import Accounts Payable Multicurrency Vouchers

Defect 1607294: When you selected the **Freeze Rates** check boxes on the Exchange Rates subtask and clicked **Apply**, Costpoint cleared the **Freeze Rates** check boxes.

Accounts Payable » Print Vendor Information Report

Defect 1602650: Costpoint displayed the vendor tax ID in the Vendor Information Summary report even when the **Suppress AP Tax ID** check box was selected on the Company Access subtask of the Manage Users screen.

Accounts Receivable » Manage Cash Receipts

Defect 1578929: If you use Costpoint with an MS SQL database, Costpoint set the values in the **Amt Recvd** column to 0 and deleted the values in the **Bill Currency** column when you clicked **Save**. This occurred when you entered an invoice that does not exist yet in Costpoint in the Cash Receipt Details table window.

Fixed Assets » Export Asset Disposals

Defect 1492985: This screen was updated to change the action lock setting of the **Modify/View Data for Export** button of the Asset Master and Disposal Data Records subtask to User.

Fixed Assets » Export Asset Records

Defect 1492983: This screen was updated to change the action lock setting of the **Modify/View Data for Export** button of the Asset Master and Disposal Data Records subtask to User.

Fixed Assets » Manage Asset Master Information

Defect 1592925: Costpoint was unable to automatically enter the **Total Cost** on the Other Books Info subtask when you imported a template that contains Other Books data and clicked **Save**.

General Ledger » Post Journal Entries

Defect 1604609: When you posted a reversing journal entry, you encountered the error "Reversing journal entry number may not be posted. The fiscal year/period/subperiod combination for journal code REV must be set as Open." even when the fiscal year/period/subperiod you entered has an **Open** status for code **REV** on the Manage Subperiods screen.

CRM & Contracts

Opportunities » Manage Opportunities

Defect 1594312: On the Query and Sort tabs of the Query dialog box, the following fields have been renamed so you can find them easier when setting up query criteria:

- from Stage to **Stage Code**

- from Opportunity Stage Description to **Stage Description**

Opportunities » Manage Organizational Conflict of Interest (OCI)

Defect 1597375: When you deleted the values in the **Clear Date Review** group box, the **Status** and **Reviewed By** field values reappeared after you saved the record.

Framework

External Tools » XTDESIGNER

Defect 1613653: A Null pointer exception occurred in the Extensibility designer when you tried to set up a new result set.

Framework

Defect 1574334: In the mobile view of the Benefits Enrollment application, the "RequestBroker is busy. GET_RS_DATA failed" system error occurred when you switched back to the Medical FSA tab from the Dependent FSA tab, or vice versa, made another update without saving, and clicked **Show Steps**.

Defect 1574347: When you used Costpoint as a mobile app, the error "System error: RequestBroker is busy. GET_RS_DATA failed." occurred in the Life Events/New Hires application when you switched between the Medical FSA tab and the Dependent FSA tab and updated the amount without saving.

Runtime » Client

Defect 1628982: When you closed the Business Intelligence (ERCOGNOS) application and then tried to open any screen, Costpoint stopped responding.

Runtime » Server

Defect 1604969: You could not escape double quotes when sending data to JSON web service.

Materials

Engineering Change Notices » Print Engineering Change Notice Impact Report

Defect 1597604: When you tried to print an Engineering Change Notice (ECN) Impact Report, and the COMP_LN_NO column had five (5) characters and exploded the bills of material (BOM) past level 35, you encountered a system error.

Material Requirements Planning » Update Material Requirements Plan

Defect 1601537: When you ran Materials Requirement Planning (MRP), it generated planned supply orders for a lot-controlled part that had the same lot in two other warehouses and had an allocated quantity to a manufacturing order (MO). This happened even though there was enough inventory to cover all demands so that no supply reservations should have been generated.

Procurement Planning » Apply PO Info to Purchase Requisitions

Defect 1597599: When you saved a record, you encountered an error stating that the PO/Rise has been assigned to another ungenerated Assign PO line, even if there is no ungenerated record left.

Product Definition » Manage Parts

Defect 1604981: When you entered a cost type and then pressed TAB, you encountered the following error: "Error getObjValue() failed because column CLONE_FLG is not found in result set PDMEPD_PART_PARTINFO."

Production Control » Enter Manufacturing Order Issues

Defect 1601534: When you performed an over issue, the reserve quantity was reduced and did not match the requirements.

Purchasing » Import Purchase Orders

Defect 1609187: When you imported a purchase order (PO), there was only one field for revision. This field populated both ITEM_REV_ID and USER_REV_FLD with the revision. In a single rev system, this should populate only USER_REV_FLD, leaving the ITEM_REV_ID field blank.

Purchasing » Manage Branch Locations

Defect 1604994: The application has been modified to add a warning that deletion of a warehouse does not delete or inactivate the Ship ID.

Sales Order Entry » Import Sales Orders

Defect 1609185: When you reimported a sales order (SO) after adding header notes, the system changed the values in the SO.

Sales Order Entry » Manage Sales Orders Supervisor Screen

Defect 1594544: When you created an invoice for partial shipment and then updated the catalog, the system allowed you to change the Revenue Recognition instead of displaying an error.

Defect 1601540: You were unable to extend the net unit price with more than two (2) decimals on the sales order.

Sales Order Entry » Print Sales Order Pick Lists

Defect 1328821: When you set the Print Options to **Vertically** (default) and the Format was set to **Formless Laser Portrait**, the lot number did not print on the packing slip.

People

Benefits » Create 1094-C and 1095-C Data

Defect 1607241: The application did not assign Code 2D to the employee on the employee's first calendar month of employment. This issue occurred if the employee's hire date was not on the first day of the calendar month.

Employee » Manage Employee Life Events

Defect 1608970: When you clicked **Query**, the following fields were missing from the drop-down list on the Find tab:

- Life Event

- Life Event Date
- Benefit Year

The following fields were missing from the drop-down lists on the Query and Sort tabs:

- Life Event Date
- Life Event Type
- Benefit Qualifying Event
- Change Period End Date

Employee Self Service » Configure Life Events

Defect 1591835: When you deleted a record that had dependent data, a system error displayed.

Employee Self Service » Dependents/Beneficiaries

Defect 1574877: The screen should allow employees to change options and save changes in the **Type** field.

Employee Self Service » Direct Deposit

Defect 1588748: The Direct Deposit screen was redesigned to increase the usability for employees.

Employee Self Service » Life Events/New Hires

Defect 1588749: The Direct Deposit tab was redesigned to increase the usability for employees.

Labor » Apply Weighted Average Rates to Timesheets

Defect 1600956: When you processed/printed one timesheet cycle that was set up as a **Weighted Average Period** type on the Configure Weighted Average Overtime Settings screen, the following error displayed: "The following field is required: Starting Weighted Avg Period."

Labor » Create Retroactive Timesheet Adjustments

Defect 1604283: The application required every timesheet cycle being processed to be set up on the Configure Weighted Average Overtime Settings screen even if the **Apply Weighted Average Rates** check box was not selected. In this scenario, the following error displays: "Weighted average overtime settings have not been setup for this timesheet cycle. Please complete the setup in the Weighted Average Overtime Setup screen before proceeding."

Labor » Manage Correcting Timesheets

Defect 1389381: When you marked a timesheet line for deletion, the screen did not display the recalculated values in the **Other Hours** and **Total Hours** fields. Recalculated values should display similar to the amounts in the **Labor Amount** and **Trans Amount** fields.

Payroll » Compute Payroll

Defect 1595806: The application did not subtract **409A** (Deferred Compensation) and **NQDC** (Non-Qualified Deferred Compensation) from the gross amount before the 401k calculation.

Payroll » Manage Payroll Records

Defect 1611302: The application did not allow you to delete newly entered W and V records due to the following error: "Payroll posting is in progress for pay cycle XXXX. Therefore this record cannot be deleted."

Planning

Administration » Maintain Account Mapping

Defect 1604357: Accounts went missing when invalid entries were saved in the COST_TYPE table. However, the accounts will remain visible on the front end even when an error is present, allowing the end user to fix the account without technical intervention.

Administration » Report Table Update Process

Defect 1574983: When you added a future Fiscal Year with an alphanumeric code, the ESUB_PD table was not automatically updated after running the refresh process.

Defect 1592072: The Burden columns in the Business Intelligence (BI) report tables reflected mismatched amounts.

Project Budgeting » Calculate Earned Value

Defect 1605560: When Earned Value is calculated before an EAC is committed and marked as final for the current period, the Actual Cost of Work Performed (ACWP) values do not tie up to Costpoint. To ensure that accurate values are obtained, the onscreen instructions were updated with additional requirements.

Project Budgeting » Project Budgets/EACs

Defect 1585260: When you created a new budget, the application did not display PY_DIFF as ID Type for prior year's non-labor costs.

Defect 1593462: When you changed a vendor name or a user name, duplicate rows were inserted into the new EAC.

Defect 1628987: The Revenue Analysis subtask did not display correct values for costs and revenues when you entered hours and rates on the Subcontractor Hours and Consultant Hours subtasks, both in new and existing Budgets/EACs.

Projects

Billing » Calculate Standard Bills

Defect 1609286: When you calculated multicurrency bills for currencies that do not use decimals, the Select Bills for Posting application did not correct values for rounding adjustments.

As a workaround, you can manually select bills on the Manage Standard Bills screen to trigger the rounding correction.

Defect 1610437: When the burden cost ceiling type was set to **Ceiling**, this application did not take the lower value between the ceiling and provisional rates and instead used only the ceiling rate.

As a workaround, you can manually edit the bill or set the ceiling rate equal to the provisional rate.

Defect 1619835: When there were on-hold amounts on previous bills, the application incorrectly calculated previously billed amounts.

Billing » Print Unbilled Analysis Report

Defect 1599794: Performance tuning has been conducted for this application to prevent it from hanging when executed.

Billing » Update Billing Tables Bill Labor Category Description

Defect 1612040: A join with PROJ_ID was missing in a temporary table. Performance tuning has been conducted for this application to improve performance.

Defect 1613125: Costpoint did not update the project labor category (PLC) description when you have the following setup:

- On the Configure Project Settings screen, **First Row** was selected in the **T&M Rate Sequence Search For PLC Source Project** group box.
- On the Manage Project User Flow screen, the **Source Project** selected on the Def Rate Seq subtask was not a transaction-level project.

As a workaround, use a transaction-level project as the **Source Project** in Manage Project User Flow.

Cost and Revenue Processing » Compute Revenue

Defect 1601474: Performance tuning has been conducted for this application to improve its execution.

Cost and Revenue Processing » Process Organization Changes

Defect 1594523: This application was not picking up Beginning Balance records.

Project Inquiry and Reporting » Update Project Status Report Tables

Defect 1603112: PSR_FINAL_DATA.PY_INCUR_AMT was not updated for records with **Rate Type** set to **Target** for both Burden and COM amounts.

Subcontractor Management » Manage Work Assignments

Defect 1600202: The application randomly did not complete processing upon **Save**. Because of this and related issues, new indexes were created in the backend to improve the performance of work assignment management.

Reports & Analytics

Business Intelligence » Business Intelligence

Defect 1563000: The alternate project information was missing on the General Ledger Detail drill through of the legacy Project Status Report (PSR). The PSR is found in **Team Content » Costpoint Enterprise Reporting » Reports » Projects**.

Defect 1599307: When Resource detail from the Resource Management data module or dashboard was added to a query, some records were missing. This defect affects Costpoint Planning users of Costpoint BI.

Defect 1599308: When Customer detail from the Resource Management data module or dashboard was added to a query, some records were missing. This defect affects Costpoint Planning users of Costpoint BI.

Defect 1603355: Some reports which should have been removed were included in the build. The reports are:

- **Team Content » CRM & Contracts » Reports**
 - **Opportunity Revenue Forecast**
- **Team Content » Costpoint Enterprise Reporting » Reports » Projects**
 - **Labor Info**
 - **Project Info**
- **Team Content » *Packages* » Project Reporting**
 - **Project Status Report**
 - **Project Status Report (7.2.3 HF1)**
 - **Project Status Report (new)**
- **Team Content » *Packages* » Manufacturing**
 - **MO Build-To Inv Abbrev – Drill thru**

Defect 1620237: There are changes in Costpoint Planning tables that might impact BI reporting data. In order to eliminate the refresh process in Costpoint Planning 8.1, there are some changes to the key tables that are used for reporting in Costpoint Business Intelligence. Deltek made updates to the secured package **Project Planning Reporting** and the legacy package **Project Budgets** to accommodate these changes. However, if you are using any custom BI models or another reporting tool to report on Costpoint Planning, there is a chance that your reports will not run properly when you upgrade to Costpoint 8.1. For reference, use the Deltek model file to see the SQL query used.

Here is a list of the changes that might impact your model.

Table	Impact
EEMPL_LAB_INFO	Use EMPL_LAB_INFO, ROW_UID, ALT_ORG_ID, DFLT_PLC, COMPANY_ID. Columns were dropped.
EGL_DETAIL	Use GL_POST_SUM, GL_DETL, EEMPL, VEND, VEND_EMPL tables/views.
EORG	Column LEVEL10 (Org Name and Org ID) was dropped.
EPOOL_INFO	Use POOL_INFO, but some columns were dropped.
EPOOL_TYPE	Use POOL_TYPE.
EPROJ	Use PROJ, PROJ_BGT, and PROJ_REV_SETUP tables/views.
PROJ_NB	Column TASK_REV_FL was dropped.

Table	Impact
SRC01_AR_HDR_HS	Use AR_HDR_HS.
SRC01_REORG_ORG_LINK	Use REORG_ORG_LINK.
SRC01_REORG_STRUC	Use REORG_STRUC.
VW_EACCT_LEVELING	Use BI_ACCT_LEVELING.
VW_EORG_LEVELING	Use BI_ORG_LEVELING.
VW_EPROJ_LEVELING	Use PROJ view.
VW_REORG_LEVELING	Use VW_EREORG_LEVELING.

Time & Expense

Expense » Expense Report

Defect 1608092: When you added a manual outstanding expense to a multicurrency expense report, the exchange rate was not drawn from the currency schedule and so defaulted to "1.00."

Note: This has not yet been corrected for the Car Rental and Lodging expense report types. These are scheduled for correction in the next Maintenance Release (version 8.1.7).

Expense » Export Commitments

Defect 1604401: The export included data for a company that was not selected in the parameter for inclusion on the file.

Time » Mass Correct Timesheets

Defect 1591350: Cell Comments were deleted from the timesheet after you ran the Mass Correct Timesheets utility.

Time » Resource Schedules/Leave

Defect 1594253: When you had multiple roles over an employee, the Approve/Reject Leave task should have been performed using the role for which the task was created, while other roles you hold should not have received notifications.

Time » Timesheet

Defect 1591846: The timesheet for the new period did not include the expected number of days even though no change had been made to the timesheet schedule.

Defect 1626710: The Timesheet lookup for work assignments should have displayed only work assignments associated with Services.

[Time » Timesheet Status](#)

Defect 1603480: When you ran the Timesheet Status report, the default text, rather than custom text, was included in emails sent to supervisors.

Known Issues

The following are known issues in this release.

Error in Legacy Planning Reports in Costpoint BI

You may encounter an ambiguous column error when you generate the following reports in Costpoint Enterprise Reporting for Budgeting and Planning:

- Burdened Labor Costs by Project
- Revenue Forecast

In addition, you may encounter an error when you generate the following reports because of an Oracle compatibility issue.

- Project Status Cost Summary
- Burdened Labor Cost
- Labor Variance
- BnP PSR Trending Analysis

Appendix: For Additional Information

Deltek Support Center

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

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

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

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

Access Deltek Support Center

To access the Deltek Support Center:

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

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

About Deltek

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