

Adapt 2024.1.1us Release Notes

January 2024

Information

Adapt Engine Version: 2022.1.24

Adapt Desktop Agent (ADA) Version: 1.3.20

Adapt Outlook Add-in (AOA) Version: 2.2.57

Vertex v4.4.7

Adapt 2024.1.1us Release has been tested on the following browsers: Chrome 93.0 and above, and Firefox 92. Compatibility mode in browsers must be turned off.

Note: Once you have the 2024.1.1us delta in place, please clear your **Browser Cache** before logging in.

This document lists the new inclusions, enhancements, fixes, and tax updates included in the 2024.1.1us release of Adapt.

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2024.1.1us New Features

Batch Email Changes	Issue ID
An update has been made to comply with Google and Yahoo's required mass email changes. • An unsubscribe email address is required to comply with the mandate that solicitation (AKA mass or batch) emails have a one-click unsubscribe option for recipients. • This unsubscribe email address will be required for any sender who sends 5000 or more mass emails to Google/Gmail addresses in one day. • <u>Please provide your unsubscribe email address to Technical Support as soon as possible.</u> If there are no unsubscribe email addresses set in sysadmin, a warning message appears when running a batch Send Email workflow for more than 10 candidates or contacts. If an unsubscribe email address is set in sysadmin, when sending a Send Email batch for more than 10 candidates or contacts, those persons will receive emails to their addresses, and an <i>Unsubscribe</i> button will appear in the email header in some email clients (e.g., Mail app on iPhone).	AUS-18762

Back Office	Issue ID
An update has been made to the "Add/Modify Rates" screens so that adding or changing an existing Bill Rate to less than the Pay Rate will present a warning message: "Pay rate is greater than Bill rate, Press OK to Save". This is a warning only, and will not prevent the action.	AUS-18599
The existing Manage Company Financial permission has been modified to allow for Read-Only access to Company Financials. • If Yes is selected, the user will have full rights to view, add, or edit the Company Financials. • If No is selected, then the user will be able to view the Company Financials but not add or edit.	AUS-18596

Compass Onboarding	Issue ID
The 2024 Federal form W-4 has been added as an onboarding item in Compass.	AUS-18749

Email	Issue ID
The Broadbean integration will automatically set the value of the Email Opt Out field in the Candidate.	AUS-18721

Regulatory	Issue ID
The Federal Levy Table in Administration has been updated with values for 2024.	AUS-18642

Search	Issue ID
The Candidate Phone Number (Mobile) attribute is now available in the Formatter for Assignment searches.	AUS-16054

2024.1.1us Resolved Issues

Back Office	Issue ID
An update has been made to fix an issue where the burden may not update after changing the rates in a Contract Assignment.	AUS-18800

Onboarding	Issue ID
A fix has been applied to allow results to be returned if using only a partial onboarding title in the <i>Onboarding Item Name</i> field.	AUS-18788
An update has been made to prevent an issue where certain merge fields were not working as intended within internal notifications of onboarding items.	AUS-18772

Adapt Engine Delta 2024.1 Release Notes

Description	Release Notes	Issue ID
Unsubscribe header not working when sending bulk email via Outlook	The recent work to add an unsubscribe header to bulk emails did not apply to mail sent by ADA and Outlook. This functionality has now been added, so bulk emails sent by ADA and Outlook will also include the unsubscribe header. This update includes a new ADA version, which should auto-update in most cases. Clients using environments such as Citrix may need to make this update available in the usual way.	AD-12785
setUnsubscribeHeader functions catching wrong exception	An issue with the recent email header work was identified, which caused the BO compilation to incorrectly check for invalid email errors rather than invalid header errors. This issue has now been resolved.	AD-12784

Some segments in Abacus Search UI showing controls in wrong places.	The searching UI was missing a stylesheet that had been present before the iframe removal work. This stylesheet has now been re-added.	AD-12788
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Adapt Desktop Agent (Windows) v1.3.17 - v1.3.20 Release Notes

Description	Release Notes	Issue ID
Unsubscribe header not working when sending email via Outlook	There was some recent work in the email process object that allowed headers to be added to emails; however, these headers were lost when the email was sent via ADA and Outlook. This update adds functionality to the ADA to ensure the headers are also transferred to Outlook.	AD-12785
ADA crashing due to a large queue of Delete jobs	When processing a large dataset for a task sync, ADA could intermittently fail. The Outlook task/appointment searcher has now been improved to use fewer resources. This will enable the queue to complete.	AD-11868

Tax Updates January 2024

(All tax changes are effective January 1, 2024, unless otherwise noted.)

State Tax Changes

Arizona

- Decreased the maximum employer SUI tax rate from 18.78% to 14.03%.
- Decreased the minimum employer SUI tax rate from .07% to .05%.(This is a change to the documentation only.)

Colorado

- Changed the PFML taxability of the following deductions from exempt to taxable for regular and supplemental wages:
 - 125
 - Dependent Care
 - FSA
 - HSA Sec. 125
 - HSA Catch Up Sec. 125
- Decreased the maximum employer SUI tax rate from 10.39% to 8.68%.

- Decreased the minimum employer SUI tax rate from .75% to .64%. (This is a change to the documentation only.)
- Decreased the new employer SUI tax rate from 1.7% to 1.53%. (This is a change to the documentation only.)
- Added a SUI Surcharge with an employer tax rate of 3.66% and a wage base of \$23,800.00.
Note: The SUI Surcharge rate is the combination of the Support and Solvency Surcharges.

Connecticut

- Decreased the Phase-out tables from 3% to 2%.
- Revised the 2% Phase-out tables.
- Revised the Additional Recapture amount tables.
- Revised the withholding tables.

Georgia

- Added filing status Married Filing Separately or Married Filing Jointly Both Spouses Working to be consistent with the 2024 GA W-4. Georgia does not require all employees to file a new GA W-4 for 2024.
- For 2024, Georgia uses a flat rate of 5.49% to calculate the withholding tax on regular wages for all employees.
- Eliminated the personal allowance amounts.
- Revised the supplemental withholding table.
- Increased the standard deduction amount for single filers from \$5,400.00 to \$12,000.00.
- Increased the standard deduction amount for head of household filers from \$5,400.00 to \$12,000.00.
- Increased the standard deduction amount for married filing separately filers from \$3,550.00 to \$12,000.00.
- Increased the standard deduction amount for married filing jointly with 1 spouse working filers from \$7,100.00 to \$24,000.00.
- Increased the standard deduction amount for married filing jointly with 2 spouses working filers from \$3,550.00 to \$12,000.00.

Hawaii

- Increased the wage base from \$56,700.00 to \$59,100.00 for the following:
 - SUI
 - SUI Employment & Training Assessment
- Decreased the maximum employer SUI tax rate from 6.2% to 5.8%.
- Decreased the minimum employer SUI tax rate from 1.2% to .2%. (This is a change to the documentation only.)
- Decreased the new employer SUI tax rate from 4% to 3%. (This is a change to the documentation only.)

Idaho

- Increased the wage base from \$49,900.00 to \$53,500.00 for the following:
 - SUI
 - SUI Workforce Development
 - SUI Administrative Reserve

Illinois

- Increased the Line 1 withholding allowance from \$2,425.00 to \$2,775.00.

Indiana

- Decreased the withholding tax rate for regular and supplemental wages from 3.15% to 3.05%.

Iowa

- Added filing status Other to be consistent with the 2024 IA W-4. Iowa does not require all employees to file a new IA W-4 for 2024.
- Revised the withholding tables.
- Increased the Standard Deduction from \$13,850.00 to \$14,600.00 for total allowance amount claimed under \$80.00.
- Increased the Standard Deduction from \$27,700.00 to \$29,200.00 for total allowance amount claimed over \$80.00.
- Tax Credit was revised to reflect the total allowance amount claimed on the 2024 IA W-4 Line 6.
- Added the following filing statuses:
 - Head of Household
 - Married Filing Jointly One Spouse Working
 - Married Filing Jointly Two Spouse Working
- The Concurrent Aggregation will be the only and default calculation method when Regular and Supplemental wages are paid at the same time. When supplemental wages are included with regular wages, the two amounts are combined, and the withholding tables are to be used.

Iowa no longer requests the number of allowances claimed on the state's W4 form; the state now requires the actual allowance dollar amount to be provided on Line 6 of the 2024 IA W-4. The allowance dollar amount is used to determine the amount of the Standard Deduction to reduce taxable wages. Then, the actual allowance dollar amount is used as a tax credit.

Note: In Adapt, enter the total dollar amount shown on Line 6 of the IA W-4 in the **Employee > Payroll Taxes > State > Allowance** field. Entering zero will result in the highest rate being used to calculate the tax.

Kentucky

- Increased the wage base from \$11,100.00 to \$11,400.00 for the following:
 - SUI
 - SUI Service Capacity Upgrade Fund

Maine

- Increased the maximum employer SUI tax rate from 5.47% to 5.75%.
- Increased the new employer SUI tax rate from 1.97% to 2.04%. (This is a change to the documentation only.)
- Increased the SUI Competitive Skills Scholarship Fund tax rate from .07% to .13%.

Maryland

- Increased the minimum standard deduction from \$1,700.00 to \$1,800.00.
- Increased the maximum standard deduction from \$2,550.00 to \$2,700.00.
- Revised withholding tables and combined state and local supplemental tax rates for the following counties:
 - Anne Arundel County
 - Cecil County
 - Frederick County

Note: Vertex continues to calculate Maryland state taxes as a combined amount along with the Maryland county withholding, without the updated tiered rates for Anne Arundel and Frederick County taxes. Anne Arundel and Frederick County will be computed using the highest tier rate of 3.2%, as provided in the combined tables.

- Decreased the maximum employer SUI tax rate from 10.5% to 7.5%.
- Decreased the minimum employer SUI tax rate from 1% to .3%. (This is a change to the documentation only.)
- Increased the new employer SUI tax rate from 2.3% to 2.6%. (This is a change to the documentation only.)

Minnesota

- Increased the withholding allowance amount from \$4,800.00 to \$5,050.00.
- Revised the withholding tables.

Mississippi

- Revised the withholding tables.
- Decreased the supplemental withholding tax rate from 5% to 4.7%.

New Mexico

- Increased the SUI wage base from 30,100.00 to \$31,700.00.

North Carolina

- Decreased the withholding tax rate for regular and supplemental wages from 4.85% to 4.60%.
- Increased the SUI wage base from \$29,600.00 to \$31,400.00.

North Dakota

- Revised the withholding tables.
- Increased the SUI wage base from \$40,800.00 to \$43,800.00.
- Decreased the maximum employer SUI tax rate from 9.97% to 9.68%.
- Decreased the new employer SUI tax rate from 1.13% to 1.09%. (This is a change to the documentation only.)
- The new construction employer SUI tax rate is 9.68%. (This is a change to the documentation only.)

Oklahoma

- Increased the SUI wage base from \$25,700.00 to \$27,000.00.

Oregon

- Increased the standard deduction for Single filers from \$2,605.00 to \$2,745.00.
- Increased the standard deduction for Single with 3 or more allowances and Married filers from \$5,210.00 to \$5,495.00.
- Increased the allowance credit from \$236.00 to \$249.00.
- Increased the maximum federal subtraction for Single and Married filers from \$7,800.00 to \$8,250.00.
- Updated the federal tax phase-out amounts for wages in excess of \$50,000.00.
- Revised the withholding tables.

Metro Supportive Housing Services (SHS)

- Increased the standard deduction from \$5,210.00 to \$5,495.00.
- Updated the federal tax phase-out amounts.

Rhode Island

- Increased the SUI Tier 1 wage base from \$28,200.00 to \$29,200.00.
- Increased the SUI Tier 2 wage base from \$29,700.00 to \$30,700.00.
- Increased the SUI Job Development Fund Tier 1 wage base from \$28,200.00 to \$29,200.00.
- Increased the SUI Job Development Fund Tier 2 wage base from \$29,700.00 to \$30,700.00.
- Decreased the new employer SUI tax rate from .88% to .79%. (This is a change to the documentation only.)
- Increased the TDI wage base from \$84,000.00 to \$87,000.00.
- Increased the TDI tax rate from 1.1% to 1.2%.

Texas

- Increased the maximum employer SUI tax rate from 6.23% to 6.25%.
- Increased the minimum employer SUI tax rate from .23% to .25%. (This is a change to the documentation only.)
- Increased the SUI Replenishment tax rate from .13% to .15%. (This is a change to the documentation only.)

Vermont

- Increased the withholding allowance from \$4,850.00 to \$5,100.00.
- Revised the withholding tables.

West Virginia

- Increased the SUI wage base from \$9,000.00 to \$9,521.00.

Global Changes

Child GeoCode **26-165-5754 Kansas City-ParkPlaza TDD** was deactivated, and all associated records were reassigned to the parent GeoCode **Kansas City 26-165-0690**. Both child and parent GeoCodes had a tax rate of 1%.

Local Tax Changes

Indiana

Allen County (15-003-0000)

- Increased the resident tax rate from 1.48% to 1.59%.
- Increased the non-resident tax rate from 1.48% to 1.59%.

Blackford County (15-009-0000)

- Increased the resident tax rate from 1.5% to 2.5%.
- Increased the non-resident tax rate from 1.5% to 2.5%.

Crawford County (15-025-0000)

- Increased the resident tax rate from 1% to 1.65%.
- Increased the non-resident tax rate from 1% to 1.65%.

Floyd County (15-043-0000)

- Increased the resident tax rate from 1.35% to 1.39%.
- Increased the non-resident tax rate from 1.35% to 1.39%.

Franklin County (15-047-0000)

- Increased the resident tax rate from 1.5% to 1.7%.
- Increased the non-resident tax rate from 1.5% to 1.7%.

Howard County (15-067-0000)

- Increased the resident tax rate from 1.75% to 1.95%.
- Increased the non-resident tax rate from 1.75% to 1.95%.

Jefferson County (15-077-0000)

- Increased the resident tax rate from .9% to 1.03%.
- Increased the non-resident tax rate from .9% to 1.03%.

Ohio County (15-115-0000)

- Increased the resident tax rate from 1.5% to 2%.
- Increased the non-resident tax rate from 1.5% to 2%.

Pike County (15-125-0000)

- Increased the resident tax rate from .75% to 1.2%.
- Increased the non-resident tax rate from .75% to 1.2%.

Posey County (15-129-0000)

- Increased the resident tax rate from 1.25% to 1.45%.
- Increased the non-resident tax rate from 1.25% to 1.45%.

Putnam County (15-133-0000)

- Increased the resident tax rate from 2.1% to 2.3%.
- Increased the non-resident tax rate from 2.1% to 2.3%.

Ripley County (15-137-0000)

- Increased the resident tax rate from 1.38% to 2.38%.
- Increased the non-resident tax rate from 1.38% to 2.38%.

Steuben County (15-151-0000)

- Increased the resident tax rate from 1.79% to 1.99%.
- Increased the non-resident tax rate from 1.79% to 1.99%.

Ohio

Doylestown, Wayne County (36-169-5863)

- Decreased the credit limit from 2% to 1%.

Marion LSD (5403)

- Added the school district with a tax rate of .5%. This tax is calculated using the Earned Income Method with no personal exemption. The following jurisdictions are affected:
 - Chickasaw, Mercer County 36-107-5446
 - Franklin Township, Mercer County 36-107-0695
 - German Township, Auglaize County 36-011-0132
 - Granville Township, Mercer County 36-107-0697
 - Jackson Township, Auglaize County 36-011-0245
 - Marion Township, Mercer County 36-107-0701
 - Osgood, Darke County 36-037-5019
 - Patterson Township, Darke County 36-037-0244
 - Wabash Township, Darke County 36-037-0554

Ravenna, Portage County (36-133-2110)

- Changed the reciprocation to calculate tax more precisely for employees working in a taxing county.

Rittman, Medina County (36-103-2150)

- Eliminated the credit percentage of 100%, effective 1-1-23.
- Eliminated the credit limit of 1%, effective 1-1-23.

Rittman, Wayne County (36-169-2150)

- Eliminated the credit percentage of 100%, effective 1-1-23.
- Eliminated the credit limit of 1%, effective 1-1-23.

Yellow Springs EVSD (2907)

- Increased the tax rate from 1% to 2%. The following jurisdictions are affected:
 - Mad River Township, Clark County 36-023-0514
 - Miami Township, Greene 36-057-0588
 - Xenia Township, Greene 36-057-0568
 - Yellow Springs, Greene 36-057-2950

Oregon

Multnomah County (38-051-0000)

Multnomah County Preschool For All (PFA)

- Increased the standard deduction from \$5,210.00 to \$5,495.00.
- Updated the federal tax phase-out amounts.

Pennsylvania

Aliquippa City, Beaver County (39-007-0030)

- Decreased the Local Services Tax from \$104.00 to \$52.00.
- Decreased the municipal resident tax rate from .8% to .7%. The total resident tax rate is 1.2%: .7% municipality and .5% school district.
- Decreased the non-resident tax rate from 1.3% to 1.2%.

Bellwood Boro, Blair County (39-013-7459)

- Increased the Local Services Tax from \$10.00 to \$35.00.

Braddock Boro, Allegheny County (39-003-0400)

- Increased the municipal resident tax rate from 1.05% to 1.25%. The total resident tax rate is 1.75%: 1.25% municipality and .5% school district.
- Decreased the non-resident tax rate from 1.2% to 1%.

Brokenstraw Township, Warren County (39-123-0564)

- Increased the Local Services Tax from \$35.00 to \$52.00.

Conoy Township, Lancaster County (39-071-1073)

- Added a Local Services Tax of \$52.00.

Cussewago Township, Crawford County (39-039-1219)

- Increased the Local Services Tax from \$10.00 to \$20.00.

Dalton Boro, Lackawanna County (39-069-8221)

- Added a Local Services Tax of \$52.00.

Dunnstable Township, Clinton County (39-035-1405)

- Increased the Local Services Tax from \$30.00 to \$52.00.

Frailey Township, Schuylkill County (39-107-1871)

- Increased the Local Services Tax from \$10.00 to \$52.00.

Greenville Boro, Mercer County (39-085-1540)

- Increased the municipal resident tax rate from 1.25% to 1.75%. The total resident tax rate is 2.25%: 1.75% municipality and .5% school district.

Harrisville Boro, Butler County (39-019-7587)

- Added a Local Services Tax of \$52.00.

Johnsonburg Boro, Elk County (39-047-1840)

- Increased the non-resident tax rate from .5% to 1%.

Lansdowne Boro, Delaware County (39-045-1950)

- Increased the municipal resident tax rate from .5% to 1%.

- Increased the non-resident tax rate from .5% to 1%.

Loretto Boro, Cambria County (39-021-7632)

- Increased the Local Services Tax from \$10.00 to \$52.00.

Lower Southampton Twp, Bucks County (39-017-2140)

- Increased the Local Services Tax from \$10.00 to \$52.00.

Middle Smithfield Twp, Monroe County (39-089-3436)

- Increased the Local Services Tax from \$10.00 to \$52.00.

Narberth Boro, Montgomery County (39-091-2630)

- Increased the municipal resident tax rate from .5% to .75%, effective 2-1-24.
- Increased the non-resident tax rate from .5% to .75%, effective 2-1-24.

New Castle City, Lawrence County (39-073-2680)

- Decreased the non-resident tax rate from 1.856% to 1.332%.

Newville Boro, Cumberland County (39-041-7891)

- Increased the municipal resident tax rate from 0.5% to 2%. The total resident tax rate is 3.15%: 2% municipality and 1.15% school district.
- Increased the non-resident tax rate from 1% to 2.5%.

River Valley (32110)

- School District name was changed from Blairsville-Saltsburg S.D. to River Valley S.D. The following jurisdictions are affected:
 - Black Lick Township, Indiana County 39-063-0214
 - Blairsville Boro, Indiana County 39-063-0340
 - Burrell Township, Indiana County 39-063-0672
 - Conemaugh Township, Indiana County 39-063-1049
 - Loyalhanna Township, Westmoreland County 39-129-3174
 - Saltsburg Boro, Indiana County 39-063-8179
 - Young Township, Indiana County 39-063-6045

Sheffield Township, Warren County (39-123-0087)

- Increased the Local Services Tax from \$5.00 to \$52.00.

Tullytown Boro, Bucks County (39-017-7568)

- Added a resident tax rate of 1%.
- Added a non-resident tax rate of 1%.

Turbot Township, Northumberland County (39-097-5421)

- Increased the Local Services Tax from \$30.00 to \$52.00.

Warsaw Township, Jefferson County (39-065-5641)

- Increased the Local Services Tax from \$10.00 to \$52.00.

Westtown Township, Chester County (39-029-0162)

- Increased the municipal resident tax rate from .54% to .58%. The total resident tax rate is 1.08%: .58% municipality and .5% school district.

Wheatland Boro

- Wheatland Boro has merged with Hermitage City. Employees currently geocoded to Wheatland Boro GeoCode (39-085-8457) will automatically be reassigned to Hermitage City (39-085-8449), Farrel Area School District #43250 (PSD Code 430203).
The municipal resident tax rate for Hermitage City is 2.25%: 1.75% municipality and .5% school district.