

Adapt 2024.1.2us Release Notes

April 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 v4.5.1

Adapt 2024.1.2us 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 2024.1.2us 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 2024.1.2us release of Adapt.

2024.1.2us New Features	2
2024.1.2us Resolved Issues	4
Tax Updates February-March 2024	5
State Tax Changes	5
Idaho	5
Kansas	5
Massachusetts	6
Minnesota	6
North Dakota	6
Pennsylvania	6
Virginia	6
Global Changes	7
Local Tax Changes	7
Kentucky	7
Ohio	7
Pennsylvania	8
February and March 2024 GeoCode Changes	9

2024.1.2us New Features

Admin	Issue ID
An Unsubscribe Email List has been added to the <i>General Settings</i> segment of <i>System Settings</i> . Client Admin users with appropriate access can utilize this list to add (or edit existing) email addresses used for tracking mass email opt-out replies. The list can contain multiple email addresses and will contain any previously provided directly to technical support.	AUS-18872

Back Office	Issue ID
Commissions on various workflows have been updated to allow tracking for non-Adapt users. External Split is now available, allowing users to add any name as "free text" and not pick from a list of Adapt users. A 100% total for calculating splits now includes the Adapt users and external split options and is enforced and verified on save.	AUS-18635
When daily timecards are added, the Bill hours will automatically default to the Pay hours if they are empty.	AUS-17502
New batch-proof Minimum Wage diagnostic warnings for counties and cities have now been added. When the tax location matches the locality where a Minimum Wage is defined, the diagnostic will be shown when the Pay Rate is less than the minimum designated for this locality. The existing State and Federal minimum wages are still considered and those diagnostics are presented as appropriate. Note: Local minimum wages must be set up in <i>Manage Local Tax Settings</i> .	AUS-10552

Compass Onboarding	Issue ID
Journal entries are now recorded against the Candidate and Onboarding item when: 1. A document attached to the Onboarding Item is e-signed 2. The Onboarding Item is complete.	AUS-14643

Legacy Reporting	Issue ID
The <i>Timecard Batch Proof Register</i> will now sort by <i>Timecard ID</i> .	AUS-12061

Regulatory	Issue ID
Required revisions have been made to the <i>EEOC Labor Contractor Pay Data Report</i> .	AUS-18898
Required revisions have been made to the <i>EEOC (California) Pay Data Report</i> .	AUS-18897
A new field titled <i>California Remote Worker</i> has been added to the <i>employee > Payroll Taxes > Tax Information</i> screen. This field should appear under the <i>Tax Location</i> section, on the left side of the screen. This field will only be visible if the state is California .	AUS-18874
Changes have been made to the <i>Greenshades XML</i> to report newly required data fields in the West Virginia quarterly SUI filing. The new fields include County and SOC Code. • Data for the <i>SOC Code</i> will be obtained from <i>Employee Financial > Payroll Taxes > State Unemployment</i> and <i>SDI > Occupational Code</i>. • Data for the <i>County</i> will be obtained from the county name of the worksite on the assignment from the employee's last paid timesheet during the reporting quarter.	AUS-18791
Changes have been made to the <i>Greenshades XML</i> file to accommodate new requirements for the South Carolina quarterly unemployment reporting specifications. The state requires reporting of SOC Code for each employee. To meet this requirement, a value must now be entered in the <i>Employee Financial > Payroll Taxes > State Unemployment & SDI > Occupational Code</i> field for each employee working in South Carolina.	AUS-18790

Reporting	Issue ID
The following new report category fields have been added to the <i>Vendor Payroll Export</i> report category in R&A: • Amount_125_Med_Coverage_Check_Total • Amount_125_No_Cash_Check_Total	AUS-18893

2024.1.2us Resolved Issues

Compass Onboarding	Issue ID
An issue that caused the incorrect order of the Birthday Day drop-down values in Compass Onboarding has been resolved.	AUS-9288
An issue where the Completed box stayed checked instead of clearing when a new entry was added has now been resolved. Previously, when adding an additional Education History item in Compass Onboarding, the Completed box stayed checked.	AUS-1322

Back Office	Issue ID
The Bill Code size has been increased to 100 characters to resolve an error where they were not populating when their text exceeded 50 characters.	AUS-18890
An issue that could potentially cause the queue to partially reset when multiple Timecard Billing processes and updates are queued has now been resolved	AUS-18880
An issue that prevented an Employee's Direct Deposit account from being deleted, even if it had not been used for a timecard, has now been resolved. The new validation checks if the DD record is linked to any advice that has the status of 'Processed', 'Updated', or 'Extracted'. and if so, the DD record cannot be deleted.	AUS-1867

Legacy Reporting	Issue ID
An issue where the exclusion of Sick Pay from "Other Pay" in the WC report's calculations caused the sum of Regular , OT , DT/TT and Other Pay not to equal the Total Taxable has now been corrected.	AUS-5526

Recruitment	Issue ID
An issue that would present an incorrect error message in the Replace Direct Candidate workflow when filling out the candidate field has been resolved.	AUS-18941

An issue that would present an incorrect error message when checking the 1099 check box on an employee record has been resolved.	AUS-18931
An issue when linking candidates to a job using the Link Candidates to Job workflow has been corrected. Previously, the system would allow the user to select the same candidate multiple times, resulting in the creation of duplicate submittals.	AUS-18909
An issue that could prevent candidate Offer Letters from being created correctly when submitting 2 or more candidates has been resolved. Previously, if two or more candidates were submitted at the same time to a Contract or Direct job an Offer letter was only created for the last candidate.	AUS-470

Reporting	Issue ID
An issue has been resolved where the XMD_VIEW_COMPANY category was returning deleted records in reports. The view has been updated to exclude deleted or archived companies.	AUS-18953

Search	Issue ID
Spelling mistakes and duplicate entries found in Journal Workflows in Candidate Search have now been corrected.	AUS-11306

Tax Updates February-March 2024

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

State Tax Changes

Idaho

- Increased the SUI Administrative Reserve tax rate from .20927% to .55811%.
- Increased the SUI Workforce Development tax rate from .03693% to .09849%.
- Decreased the minimum employer SUI tax rate from .2816% to .2248%. (This is a change to the documentation only.)
- Decreased the new employer SUI tax rate from .9848% to .8%. (This is a change to the documentation only.)

Kansas

- Decreased the maximum employer SUI tax rate from 6.4% to 6%.

- Decreased the minimum employer SUI tax rate from .17% to .16%. (This is a change to the documentation only.)

Massachusetts

The Massachusetts Department of Revenue (DOR) recently published the finalized 2024 Circular M, featuring new percentage method instructions to account for the 4.000% surtax for high-income individuals. It includes the following changes.

- The default calculation method for checks with Supplemental Only wages is now Tiered Flat Rate.
- The default calculation method for checks with Regular Only wages is now Annualized.
- The default calculation method for checks with Regular and Supplemental wages is now Concurrent Aggregation.
- The following calculation methods are no longer allowed:
 - Flat Rate Supplemental Only
 - Flat Rate Combined Regular and Supplemental
 - Previous Aggregation Supplemental Only
- Replaced the Blind Exemption of \$2,200.00 with the Blind Tax Reduction of \$110.00, passed as a secondary exemption.
- Increased the maximum employer SUI tax rate from 8.62% to 11.13%.
- Increased the minimum employer SUI tax rate from .56% to .73%. (This is a change to the documentation only.)
- Increased the new employer SUI tax rate from 1.45% to 1.87%. (This is a change to the documentation only.)
- Decreased the SUI COVID-19 Recovery Assessment maximum tax rate from 10.896% to 4.469%.
- Decreased the SUI COVID-19 Recovery Assessment minimum tax rate from .708% to .293%. (This is a change to the documentation only.)

Minnesota

- Added nonresident alien functionality to withholding calculation. When the nonresident alien flag is set, \$10,300.00 is added to the taxable wages as described on Form W-4MN.

North Dakota

- Revised the withholding tables.

Pennsylvania

- Changed the taxability of Dependent Care from taxable to exempt for regular and supplemental wages for the following tax types:
 - State Withholding
 - City Withholding
 - Local Service
 - School District

Virginia

- Decreased the standard deduction from \$8,500.00 to \$8,000.00.
- Decreased the maximum employer SUI tax rate from 6.23% to 6.2%.
- Decreased the minimum employer SUI tax rate from .13% to .1%. (This is a change to the documentation only.)

- Decreased the new employer SUI tax rate from 2.53% to 2.5%. (This is a change to the documentation only.)

Global Changes

Child GeoCode **26-510-5503 Saint Louis-LoughboroughCommons CID** was deactivated, and all associated records were reassigned to the parent GeoCode **Saint Louis 26-510-1270**. Both child and parent GeoCodes had a tax rate of 1%.

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

Kentucky

Adair County (18-001-0000)

- Added a County Occupational License Fee of .5%.

Boone County (18-015-0000)

- Increased the annual maximum tax from \$583.25 to \$601.78.

Buckhorn, Perry County (18-193-2077)

- Added an Occupational License Fee of 1%. The total tax rate is 2%: 1% Perry County, 1% Buckhorn.

Lyndon, Jefferson County (18-111-1678)

- Added an Occupational License Fee of 1%. The total tax rate is 2.45%: 1.45% Jefferson County, 1% Lyndon City.

Middlesborough, Bell County (18-013-0550)

- Increased the Occupational License Fee from 2% to 2.45%, effective 4-1-24.

Paintsville, Johnson County (18-115-0660)

- Increased the Occupational License Fee from 1.25% to 1.5%.

Ohio

Apple Crk-E Union JEDD I, Wayne County (36-169-7502)

- ZIP Code 44606
- Added Apple Crk-E Union JEDD I with a tax rate of 1%.

Apple Crk-E Union JEDD II, Wayne County (36-169-7503)

- ZIP Code 44606
- Added Apple Creek-East Union Twp JEDD II with a tax rate of 1%.

Berkshire Township JEDD (Joint Economic Development District), Delaware County (36-041-7443)

- Changed the reciprocation to allow tax to be returned on the resident tax handle when residing in this JEDD. Previously, this was calculated as a work only tax.

Berkshire Twp JEDD II, Delaware County (36-041-7492)

- Changed the reciprocation to allow tax to be returned on the resident tax handle when residing in this JEDD. Previously, this was calculated as a work only tax.
- Added a credit percentage of 50%.
- Added a credit limit of .925%.

Harrison, Hamilton County (36-061-1050)

- Decreased the credit limit from 1% to .5%.

Marysville-Jerome JEDD, Union County (36-159-7504)

- ZIP Codes 43040 and 43064.
- Added Marysville-Jerome JEDD with a tax rate of 1.5%.

Pickerington LSD (2307)

- Added Columbus, Franklin County to Pickerington Local SD (2307) with a tax rate of 1%.
- The following jurisdiction is affected:
 - Columbus, Franklin County 36-049-0570

Ravenna-Rootstown JEDD, Portage County (36-133-7500)

- ZIP Codes 44240, 44266, and 44272
- Added Ravenna-Rootstown JEDD with a tax rate of 2%.

Shelby, Richland County (36-139-2290)

- Increased the tax rate from 1.5% to 1.75%.
- Increased the credit limit from .67% to .75%.

Violet Twp-Canal JEDD, Fairfield County (36-045-7501)

- ZIP Code 43110
- Added Violet Twp-Canal JEDD with a tax rate of 2%.

Washingtonville, Columbiana County (36-029-4964)

- Increased the tax rate from .5% to 1%, effective 4-1-24.

Washingtonville, Mahoning County (36-099-4964)

- Increased the tax rate from .5% to 1%, effective 4-1-24.

Williamsburg, Clermont County (36-025-4935)

- Added a credit percentage of 100%.
- Added a credit limit of 1%.

Pennsylvania

Bethel Park Boro, Allegheny County (39-003-6760)

- Increased the municipal resident tax rate from .9% to 1%. The total resident tax rate is 1.5%: 1% municipality and .5% school district.

Cressona Boro, Schuylkill County (39-107-4390)

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

Hazleton City, Luzerne County (39-079-1630)

- Decreased the municipal resident tax rate from 1.75% to 1.125%. The total resident tax rate is 2.125%: 1.125% municipality and 1% school district.
- Decreased the non-resident tax rate from 2% to 1.5%.

Homestead Boro, Allegheny County (39-003-1710)

- Added a non resident tax rate of 1%.
- Increased the Local Services Tax from \$40.00 to \$52.00.

North Towanda Township, Bradford County (39-015-0131)

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

Wheatland Boro, Mercer County (39-085-8457)

- Wheatland Boro merged with Hermitage City. All employees using **Wheatland Boro. Farrel Area School District GeoCode 39-085-8457-43250** will be automatically reassigned to **Hermitage City, Farrel Area School District GeoCode 39-085-8449-43250**.
 - The municipal resident tax rate for Hermitage City is 2.25%: 1.75% municipality and .5% school district. The Local Service Tax will remain \$52.00.

February and March 2024 GeoCode Changes

All records currently assigned to the GeoCodes listed below under the "Jurisdiction To Be Deleted" column will be reassigned to the GeoCodes listed under the "Suggested Jurisdiction Reassignment" column.

This table represents Invalid Jurisdictions . These are unincorporated areas which do not meet the Vertex criteria to be supported.				
State Name	Jurisdiction to be Deleted		Suggested Jurisdiction Reassignment	
	Name	GeoCode	Name	GeoCode
Arkansas	Jerome	04-043-1109	Drew	04-043-0000
Arkansas	College City	04-075-1293	Walnut Ridge	04-075-0620
Colorado	Kutch	06-039-1697	Elbert	06-039-0000
Colorado	Elbert Co-RamahReportingArea	06-039-5788	Elbert	06-039-0000

Colorado	Elbert Co-DeerTrailReportingArea	06-039-5789	Elbert	06-039-0000
Pennsylvania	Alum Bank	39-009-7385	Pleasantville	39-009-4284
Pennsylvania	New Bloomfield	39-099-8629	Bloomfield	39-099-0419