January 26, 2020 (Version 9.6.3)

Enhancements

Payroll

- **Reports** > **ACA Reporting**: Added ACA Reporting changes for 2019 reports.
- **Manage** > **Processing Payroll**: Made tax calculation changes for Idaho, and Oregon.

January 8, 2020 (Version 9.6.2)

Enhancements

Payroll

- **Modify** > **Employee Information** > **Taxes**: Added new fields to comply with IRS changes to Form W-4 2020 (W4 2020 and After, Other Income, Other Deductions, Allowances Deduction Amount, Only Two Jobs check box).
- **The following Tax Tables were updated for 2020**: US: Social Security, California, Colorado, Connecticut, Georgia, Illinois, Indiana, Maine, Maryland, Massachusetts, Michigan, Missouri, New Mexico, North Carolina, North Dakota, Ohio, Rhode Island, South Carolina, Vermont

Fixes

Accounts Payable

- **Reports** > **1099s**: Corrected Form 1099 INT's box 16.

Insurance Billing

- **Manage** > **Post To Accounts Receivable**: The Post to Accounts Receivable process no longer generates an error when ' Insurance Type/Plan/Election + Emplr./Part. ' exceeds 50 characters. Instead, the description is truncated.
- **Manage** > **Post To Accounts Receivable**: Corrected an issue where Insurance Billing items being posted to Accounts Receivable produced an error.

December 19, 2019 (Version 9.6.1)

Fixes

Payroll

- **Reports** > **Paid Family and Medical Leave**: Resolved an issue that prevented the report from launching if you are a self-hosted customer.
- **Reports** > **State Unemployment Wages**: Resolved an issue that prevented the report from launching if you are a self-hosted customer.

December 12, 2019 (Version 9.6)

NOTE: Visit the Year-End Checklists in the Online Help for more information regarding year-end procedures. You will receive Federal and/or State Tax Tables for 2020 as well as changes required for the Form W-4 2020 and ACA, once they become available.

Enhancements

Online Help

- Release Notes can now be accessed from a link in the footer of the Online Help.
- A "Send comments on this topic" link has been added to the header in Online Help.

Accounts Payable

- **Reports** > **1099s**: Updated the 1099 forms to the 2019 layout.
- **Reports** > **1099s** > **Report Type** > **Use E-File Service**: Updated the 1099 E-File to the 2019 format.

Loan Processing

- **Reports** > **1098s**: Updated the 1098 forms to the 2019 layout.

Payroll

- **Reports** > **W2s** > **Report Type** > **Print W2s**: Updated the W2 and W3 forms to the 2019 layout.
- **Reports** > **W2s** > **Report Type** > **Use E-File Service**: Updated the W2 E-File to the 2019 format.
- **Manage > Payroll Processing**: MICR Checks, Pre-Printed Checks, and ACH Vouchers were changed to print employees full name.

Remittance

- **Reports** > **Statements** > **Options**: Added Export Options (None, Email, and PDF). Selecting "PDF" creates a .zip file when Run Report is chosen, which contains individual .pdf files for each statement.
- **Reports** > **Statements** > **Options**: Added an optional "Email Message" text box, which is available when Email is selected as the Export Option.
- **Modify** > **Company Preferences**: Added a new field for "Conference Number Name". This field can be user defined, and used for additional tracking (e.g., CCID).

- **Modify** > **Church Information** > **Church Information Tab**: Added "Alternate Contact 1" and "Alternate Contact 2", which is now used to specify contacts for emailed statements in Modify > Statement Design. This information was previously located on the Modify > Company Preferences > Relationships Tab (now removed). The update automatically moves the information to the Church Information Tab for you.

Fixes

Accounts Receivable

- **Manage** > **Payment Processing**: Add New Payment - Outstanding amount ignores future payment dates; allows overpayments.
- **Portal** > **Accounts Receivable**: Fixed an issue when View Invoices To Pay & Pay Bill was selected. Payment amounts were being cleared out when scrolling down to load the next 20 records.

Bank Account Management

- **Modify** > **Bank Account Information** > **Images**: Added file size validation to avoid the use of extremely large file sizes. This prevents an issue where MICR Plus checks in Payroll and Accounts Payable were showing the first check correctly but no signatures on the second page, and then an error on the third page. You may need to adjust your existing images to comply with the recommended sizes described in the Online Help. See Modify > Bank Account Information > Update > Images Tab.

General Ledger

- **Modify** > **Year and Periods** > **Add New Year**: Fixed an issue where a "Login failed for user..." error could occurred when copying accounts from the previous fiscal year.
- **Reports** > **Detail Ledger** > **Run Report** > **Options**: Added an "Export Csv" option to fix an issue that caused repeating data to be included in the report when exporting to a .csv file.
- **Reports** > **Preliminary Budget** > **Run Report** > **Export Worksheet** > **Export**: Resolved an issue that caused errors during the Excel export.

Remittance

- **Reports** > **Statements**: Corrected an issue where the filters were not being honored.
- **Reports** > **Statements**: Resolved an issue where the Statements were printing amounts for inactive pledges.