Software Notice 09-C - Amended

March 20, 2009

Important: This notice has been amended to include a required version of the Sage Master Builder API. If you have already installed Software Notice 09-C, you only need to install the updated API (SMBAPI1340.exe).

Audience

Sage Master Builder customers using version 13 CD and/or later updates

Software

Sage Master Builder version 13 CD and/or later updates

Update Available

This notice provides a link and instructions to download the Sage Master Builder software update for changes to:

Federal payroll tax (Changes related the Federal stimulus package)

Federal form 941 (Changes related the Federal stimulus package)

Utah Workers' Compensation

Documentation updates – Readme, Release Notes, Help, User Guide

Updated API

Details are in the Release Notes section.

Important Update Information

- This update can be installed over Version 13 only. **If you are on Version 12 or prior, you will need to first upgrade to Version 13 from the installation CD and then install the update.** If you are unsure which Sage Master Builder version you have installed, follow these instructions:

  1. Launch Sage Master Builder, and log in to your company.

  2. Click **Help > About Sage Master Builder**. The second line displays the CD version number.

- Software changes in this update are cumulative. If you determine from reading the Release Notes that you were required to install an update released previously but did not, you can install this update to meet that requirement.

Solution

Download and install the Software Update 09-C to update Sage Master Builder for changes to Federal payroll tax tables, changes to the Federal form 941, Utah Workers' Compensation, updates to the documentation, and/or an updated API.

Download and Installation Instructions

To download the tax update and/or API update:

1. Close Sage Master Builder before downloading the Software Update 09-C.

2. Click each link below, or enter it into your Internet browser address line. If you see a security alert, click **[Allow]**.

    http://cdn.updates.timberline.com/SoftwareAlerts/SMB1340.exe

    http://cdn.updates.timberline.com/SoftwareAlerts/SMBAPI1340.exe

3. When the **File Download** window opens, click **[Save]**.

4. In the **Save As** window, select the drive and folder where you want to save the tax update file and/or API update then click **[Save]**. We recommend that you write down the location of the saved file so that it is easy to locate for the installation.

    a. For a multi-user/network configuration, save the file to a shared directory on a computer on your network.
    b. For a stand-alone configuration, save the file to a directory on your workstation.

    Tip: The file will start downloading. Downloading the file may take a few minutes.

To install the update:

Tip: It is important to install the update to all locations on your network. This will make sure that all locations contain the latest updates to the Federal payroll tax tables, 941 form, Utah Workers' Compensation, and updated documentation. To ensure that the update is installed to all necessary locations, first install the update directly to the server, and then install it to the local drives of all other workstations.

1. Close all open programs before installing the update.

2. Browse to the directory where you saved **SMB1340.exe** and **SMBAPI1340.exe**. **Important:** Install **SMB1340.exe** first. Both files will need to be installed.

3. Double-click the downloaded **SMB1340.exe** file to begin the installation.

    Note: For those running the Windows XP operating system. If you get a message advising you that the program publisher cannot be identified, click **[Run]**.

    Note: For those running the Windows Vista operating system. If you get a message advising you that an unidentified program wants to access your computer, click **[Allow]**.

4. **Click [Next]**.

5. Select the drive letter where Sage Master Builder is currently installed. The update installation process will verify that it is updating the correct version of Sage Master Builder.

6. Click **[Next]**.

7. Review the update modifications, and then click **[Next]**. The program files are installed.

8. Select **Yes, I want to restart my computer now** if you are prompted, then click **[Finish]**. If the option to restart your computer is not presented, click **[Finish]**.

9. Repeat steps 1-8 to update all other computers running Sage Master Builder and the computer where all your data is located.

    Note: On PCs running the Vista operating system, if you receive a Windows Program Compatibility Assistant message after completing the installation advising you that the program didn't install correctly, click the option, **This program installed correctly**.

Release Notes Section

These Release Notes pertain to Sage Master Builder Version 13 software updates. Each update is listed chronologically under its own heading. To view the entire Version 13 Release Notes document, from the main Sage Master Builder window, click **Help > Printable Documentation > Release Notes**.

Software Update 09-C - Amended

Updated Sage Master Builder API

Software Update 09-C
Payroll tax version 2009.1.0.9 (02/25/2009)

- **Federal payroll tax**

- **Utah Workers' Compensation -** Based on changes to Utah workers' compensation rules for all policies written or renewed after June 1, 2008, overtime pay will be excluded from payroll calculations. To accommodate the changes, a new menu option has been added to the **5-3-2 Workers' Compensation** window: **Options > Calculation for Utah excludes extra pay for overtime**. For more details see the Help topic, Utah Workers' Compensation.

- **Federal form 941 -** The Federal form 941 has been changed for 2009. The **5-4-1 941 Federal Quarterly Report** window has been updated to correspond to the changes in the Federal form. In addition, the Help topic, "Preparing the Federal Quarterly 941 Report," has also been updated.

    o **Line 12-a -** COBRA premium assistance payments. The form instructions note that employers should only report the COBRA premium assistance payments that they made on behalf of workers. The amount should be 65% of eligible workers' total COBRA premium payments.

    o **Line 12-b** - Number of individuals provided COBRA premium assistance reported on line 12a.

    o **Section 7, Tax Adjustments** - The adjustments in section 7 have changed.

- **Documentation Updates**

    o Readme

    o Help

    o User Guide

    o Release Notes

Software Update 09-B

- **Certified Payroll Reports**

    - **5-1-6-21** - Option to print with masked social security numbers (only the last 4 digits are visible and can be used as an identifier) and an option to exclude employee address information.

    - **5-1-6-31** - Option to print with masked social security numbers (only the last 4 digits are visible and can be used as an identifier) and an option to exclude employee address information.

    - **5-1-6-51** - Option to print with masked social security numbers (only the last 4 digits are visible and can be used as an identifier).

- **5-4-1 941 Quarterly Report Sage Master Builder form**

    - No changes to reporting or calculations.

    - Slight adjustments to fields on the form so that the information prints in the correct position.

    - Slight adjustments to the text in several lines of **5-4-1 Federal Quarterly (941)** window.

- **5-4-1 941 Schedule B**

    - New form designs displays calendar-year based on form design selected.

    - Two new form designs: **2008.941_ScheduleB** and **2009.941_ScheduleB**.

Software Update 09-A
Payroll tax version 2009.1.0.8 (01/13/2009)

- **State payroll tax** - The 2009 tax year payroll tax tables have been updated for:

    Missouri
- **Documentation updates**

    Readme

2008 Year-end Software Update 08-H
Payroll tax version 2009.1.0.6 (12/18/2008)

- **FICA limits** - The messages and defaults for the 2009 FICA limit have been updated in Sage Master Builder.

- **Changes to W-2 format for electronic filing** - The W-2 format for electronic filing in Sage Master Builder has been revised to conform to the 2008 changes. A column has been renamed from "Personal Identification Number" to "User Identification."

- **State payroll tax** - The 2009 tax year payroll tax tables have been updated for:

    - California
    - Connecticut
    - District of Columbia
    - Kentucky
    - Maine
    - Maryland
    - Michigan
    - Minnesota

- o New Mexico
- o North Dakota
- o Ohio
- o Oklahoma
- o Oregon
- o Rhode Island
- o Vermont
- **Federal payroll tax** - The 2009 federal payroll tax tables have been updated.

- **2009 Alaska wage base** - The **2009 Alaska Quarterly Contribution Report** has been added with the updated Alaska unemployment wage base.

- Year-end Close Checklists documentation as a printable PDF booklet and as a section in the Help under **1-6 Audit/Close Books**.

- Readme document.

Contact us

If you need help and your Service Plan provides support assistance, you can call Customer Support at 800-866-8049. Support hours are Monday through Friday from 6 a.m. to 5 p.m. PT (Pacific Time).

If your Customer Support Service Plan is no longer active, please contact our Service Plan renewal team at 800-858-7098 to renew.