



Your people. Our priority.®

Enhanced Retirement Plans

User Guide

For Microsoft Dynamics® GP (Formerly Version 2018)

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Introduction

Enhanced Retirement Plans for Microsoft Dynamics GP consists of four features:

1. Employer Benefit Variable Matching
2. Benefit Group Matching
3. Shared Maximums
4. Retirement Catch Up

Employer Benefit Variable Matching

Employer Benefit Variable Matching is designed to give employers maximum flexibility when matching the retirement contributions of employees. Companies may create a matching tier that is based on employee deduction percentages.

Employer Benefit Variable Matching supports Benefit Codes that have a Percent of Deduction method and a Based On Deduction with a method of Fixed Amount or Gross Wage.

Benefit Group Matching

Group Benefit Variable Matching schedule is designed to give employers maximum flexibility when matching a group of retirement contributions for employees. Companies may create a matching tier that is based on employee deduction percentages.

Employer Benefit Variable Matching supports Benefit Codes that have a Percent of Deduction method and a Based On Deduction with a method of Fixed Amount or Gross Wage.

Shared Maximums

Employees may contribute to more than one retirement plan but still need to comply with IRS regulations that specify maximum contributions allowable to retirement plans.

Shared Maximums allow companies to specify certain retirement deduction codes as belonging to a Retirement Code Group. The Retirement Code Group then has a shared maximum, which the employee deductions will not be allowed to exceed regardless of the individual maximums specified for the deductions.

Shared Maximums allow companies to specify certain retirement benefit codes as belonging to a Benefit Code Group. The Benefit Code Group then has a shared maximum, which the employee benefits will not be allowed to exceed regardless of the individual maximums specified for the benefits.

Retirement Catch Up

Retirement Code Group supports retirement catch up functionality that allows employees to make additional contributions above the regular maximum once they meet the age criteria.

Quick Setup Steps

The following are the quick reference steps necessary to set up the Enhanced Retirement Plans product and begin using the features.

Benefit Variable Matching

If the company is using Payroll only, complete these steps:

1. Check the Variable Matching checkbox in Benefit Setup window to enable the Employer Maximum Expansion button. The right conditions must be met for variable matching to be available (see Variable Conditions).
2. On the Benefit Setup window, click the expansion button in the Employer Maximum field to open the Benefit Variable Matching window and enter the tiers according to the company's benefit matching policy.
3. Roll down changes to all maintenance records or access the maintenance records to configure them individually if applicable.

If the company is using Advanced Human Resources, complete these steps:

1. To create the Percent Benefit Match tiers, open the Benefit Setup window, select the GoTo button and click Configure Variable Match.
2. Select the Enable Variable Matching checkbox and fill in the employee deduction tiers according to the company's benefit matching policy.
3. Select Ok to save the settings and then save the benefit record.
4. Roll down changes to all maintenance records or simply access the maintenance records to configure them individually if applicable.
5. Setup is complete, variable matching will now process during payroll.

Shared Maximums

If the company is using Payroll only, complete these steps:

1. Open the Retirement Contribution Setup window via Microsoft Dynamics GP > Tools > Setup > Payroll > Retirement Contribution.
2. In the Retirement Contribution Setup window, create a retirement code group and define a description.
3. Specify the shared maximum, catch up maximum and minimum age requirements.
4. Assign deduction codes to the retirement code group and save the record.

If the company is using Advanced Human Resources, complete these steps:

1. Open the Retirement Contribution Setup window via Microsoft Dynamics GP > Tools > Setup > Human Resources > Benefit Deductions > Retirement Plans > GoTo > Retirement Contribution.
2. In the Retirement Contribution Setup window, create a retirement code group and define a description.
3. Specify the shared maximum, catch up maximum and minimum age requirements.
4. Assign deduction codes to the retirement code group and save the record.

Retirement Catch Up

1. Open the Retirement Catch Up window to enable catch up retirement contributions for an employee. To open the window select an employee within the Employee Maintenance window and click the GoTo menu, select Payroll and click Retirement Catch Up.
2. In the Retirement Catch Up window, select the checkboxes next to the code group for which you want to enable the catch up provision.
3. Setup is now complete, shared maximums and the retirement catch up provisions will process during payroll.

Variable Conditions

The variable conditions for Enhanced Retirement Plans product depend upon the following requirements on the Benefit Setup and Employee Benefit Maintenance windows:

- Benefit Codes that have a Percent of Deduction method and
- Based On Deduction with a method of Fixed Amount or Gross Wage.

Installation Overview

Installation instructions are covered in the Installation Guide. The items below, however, are specific to Enhanced Retirement Plans or are general notes worth mentioning.

Prerequisite

Enhanced Retirement Plans may be used with or without the Human Resource module for Microsoft Dynamics GP. This document will assume both Payroll and Human Resources modules are installed and registered. Update Payroll from Human Resources per core functionality.

If the company is using only Payroll or they are using Advanced Human Resources features, see the appendix.

Install Notes

Prior to installing complete the steps:

- Confirm all users are logged out of Microsoft Dynamics GP
- Complete all payroll runs and validate no payroll runs are in process
- Make a backup of the Company and Dynamics databases

Files Installed

GP Folder (C:\Program Files (x86)\Microsoft Dynamics\GP2018

- ERP6491.cnk or ERP6491.dic
- Application.IntegrityDataActivation.dll
- Integrity.Registration.Constructor.dll
- IDA6537.cnk
- Integrity.Registration.Addin.dll

Documentation Folder C:\Program Files (x86)\Microsoft Dynamics\GP2018\Documentation

- Enhanced Retirement Plans User Guide.pdf

Alternate/Modified forms

The system requires using the Enhanced Retirement Plans modified forms for Benefits Setup and Employee Benefits Maintenance.

Microsoft Dynamics GP > Tools > Setup > System > Alternate and Modified Forms and Reports

1. Select the ID for the user setting up Enhanced Retirement Plans and processing payroll.
If you are not sure which ID to user review the user setup.
2. Select Enhanced Retirement Plans as the product
3. Select Windows as the Type
4. Select All as the Series
5. Expand Benefit Setup
6. Select Enhanced Retirement Plans radial button
7. Select Employee Benefit Maintenance
8. Select Enhanced Retirement Plans radial button
9. Select Save

Alternate/Modified Forms and Reports - TWO2...

Save Clear Delete Copy View File Print Tools Help Add Note

Actions View File Tools Help

ID: DEFAULTUSER

Description: Default User

Product: Enhanced Retirement Plans

Type: Windows

Series: All

Select: Change All

Alternate/Modified Forms and Reports List:

☐ Display Selected

Payroll

Benefit Setup

Enhanced Retirement Plans

Microsoft Dynamics GP

Employee Benefit Maintenance

Enhanced Retirement Plans

Microsoft Dynamics GP

<< < > >>

Version Information

To obtain the latest Enhanced Retirement Plans version information, visit our [website](#).

Within Microsoft Dynamics GP verify the version for Enhanced Retirement Plans by selecting the Help Button, select About Microsoft Dynamics GP and then select the Options button. Click OK until the Enhanced Retirement Plans window appears.

Security Settings

The Security Task Setup window may be used to grant or restrict access to the Enhanced Retirement Plans windows. To open the window, select the Microsoft Dynamics GP menu, select Tools, select Setup, select System, select Security Tasks and enter the system password.

1. Select the appropriate [Task](#) items. To identify the appropriate task item complete the steps below:
 - Open the User Security Setup window (Microsoft Dynamics GP > Tools > Setup > User Security), select the appropriate user and make a note of the Security Role ID assigned to the user.
 - Open the Security Role Setup window (Microsoft Dynamics GP > Tools > Setup > Security Roles), select the Role ID that has been assigned to the user and make note of the Security Task ID assigned to the Role. Use this Task ID to grant security to the Enhanced Retirement Plans.

NOTE: Enhanced Retirement Plans has a predefined Security Role (RET ADMN) and Security Task (RET_ADMN_001).
2. Select Enhanced Retirement Plans for the Product.
3. Select Windows for the Type and select 3rd Party for the Series.
4. Use the Access List to grant or restrict access to individual items.
 - To grant or restrict access to an item for this Task ID, click the checkbox to mark or unmark the item.
 - Click the Mark All button to grant access to all items in the list or click the Unmark All button to restrict access to all items in the list.
5. Click File > Print to print the Security Task Setup Report for the selected Task ID.
6. Choose OK to save your changes.

Enhanced Retirement Plans > Windows > 3rd Party > Access List

- APR Main Menu
- Benefit Group Lookup
- Benefit Group Matching Setup
- Contribution Group Lookup
- Employer Benefit Variable Matching
- Employer Benefit Variable Matching Maintenance
- Group Benefit Variable Matching
- Retirement Catch Up
- Retirement Contribution Setup

Enhanced Retirement Plans > Reports > 3rd Party > Access List

- ERP Retirement Code Groups
- Enhanced Retirement Plans Retirement Code Groups

When setting up Enhanced Retirement Plans, it is important to make sure appropriate security is set to the Benefit Setup window.

Use the Alternate/Modified Forms and Reports window to set Enhanced Retirement Plans for the Benefit Setup and Employee Benefit Maintenance windows. To open the window, select the Microsoft Dynamics GP menu, select Tools, select Setup, select System, select Alternate/Modified Forms and Reports and enter the system password.

1. Select the appropriate ID. To identify the appropriate ID complete the steps below:
 - Open the User Security Setup window (Microsoft Dynamics GP > Tools > Setup > User Security), select the appropriate user and make a note of the Alternate/Modified Forms and Reports ID assigned to the user.
2. Select All Products for the Product.
3. Select Windows for the Type.
4. Within the Alternate/Modified Forms and Reports List expand Payroll, expand:
 - Benefit Setup
 - Employee Benefit Maintenancethen select Enhanced Retirement Plans.
5. Employee Benefit Maintenance
6. Click Save to save the changes.

Security Task

The following windows will be assigned to the RET_ADMN_001* task:

- Employer Benefit Variable Matching
- Employer Benefit Variable Matching (HR Retirement Plans Setup Alternate)
- Retirement Catch Up
- Retirement Contribution Setup
- Benefit Group Matching Setup
- Group Benefit Variable Matching

The following reports will be assigned to the RET_ADMN_001* task:

- Retirement Code Groups
- Benefit Code Group Report

The following tasks will be assigned to the RET ADMN Role:

- RET_ADMN_001* task

Employer Benefit Variable Matching

Microsoft Dynamics GP > Tools > Setup > Human Resources > Benefits & Deductions > Retirement Plans > GoTo > Benefit Variable Matching

Use the Employer Benefit Variable Matching window to set up a matching tier that allows the employer to dynamically define the benefit amount.

To open the Employer Benefit Variable Matching window, within the Navigation Pane select HR & Payroll. In the Content Pane, select Setup. Under the heading Human Resources, select Benefits and Deductions and then click Retirement Plans. Within the Retirement Plans Setup window, click the GoTo button and click Benefit Variable Matching.

From	To	
0.00%	3.00%	100.00%
3.01%	5.00%	50.00%
5.01%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%

Enable Variable Matching checkbox – select to enable variable matching for the specified benefit code.

Benefit Code & Description – default from the Retirement Plans Setup window and are read-only.

Match Method– select a range to configure the employer benefit variable matching and based on definitions.

- Use Single Range allows the benefit to be calculated for the tier range in which the effective deduction amount falls into the percentage benefit or fixed benefit match amount.

- Cumulative Range Sum allows the benefit to sum an entire benefit amount then calculates each tier range and then sums the percentage benefit or fixed benefit match amount to define the total benefit amount for the employee.

Match Based On – select a based on deduction option to configure the employer benefits variable matching and based on definitions. *NOTE: Gross Wage is defined as the deduction and/or benefit "based on wages".*

This document includes six different business scenarios for [Employer Benefit Variable Matching](#):

- [Use Single Range match based on Deduction](#)
- [Use Single Range match based on Gross Wages](#)
- [Use Single Range match based on Fixed Amount](#)
- [Cumulative Range Sum match based on Deduction](#)
- [Cumulative Range Sum match based on Gross Wages](#)
- [Cumulative Range Sum match based on Fixed Amount](#)

From & To – define the tier for the employee deduction. If the deduction falls within the employee deduction tier then the system will match according to what is in the Percent Benefit Match or Fixed Benefit Match field.

Percent Benefit Match –enter the percentage the employer will match against the employee deduction in the From & To tiers specified.

Fixed Benefit Match – enter the fixed benefit amount the employer will match based on the effective deduction percentage within the From & To tiers specified.

The last percent defined in the To field is essentially the highest tier where employer matching applies and reflects the employer maximum. This percentage is reflected in the Employer Maximum field on the Employee Benefit Maintenance and Benefit Setup windows.

Benefit Group Matching Setup

Microsoft Dynamics GP > Tools > Setup > Payroll > Benefit Group Matching Setup

This window allows the user to establish Benefit Code Groups by assigning selected benefit codes to the group. The group can be assigned a specific shared maximum amount and group matching schedule.

The system allows the user to specify employer benefit matching setup information with the following fields:

- Benefit Code Group
- Description
- Shared Maximum
- Use Group Matching

Benefit Code Group – creates a new benefit code group or selects an existing benefit code group.

Description – enter a description for the new benefit code group or if recalling an existing benefit code group the description will prefill.

Shared Maximum – enter a maximum dollar amount shared between benefits for a calendar year.

Use Group Matching checkbox – will enable the Schedule button. When the Schedule button is selected the Group Benefit Variable Matching window is opened.

Schedule – the system provides the user the ability to assign a variable matching schedule to a benefit code group. This group schedule will be applied to all benefits selected for the group and will replace benefit maintenance setups.

This document includes two different [Group Benefit Variable Matching scenarios](#):

- [Benefit Group Matching Scenario](#)
- [Benefit Group Matching Utilizing Shared Maximum Scenario](#)

Shared Maximums

Microsoft Dynamics GP > Tools > Setup > Human Resources > Benefits & Deductions > Retirement Plans > GoTo > Retirement Contribution

The Retirement Contribution Setup window is used to configure the features for shared maximums and catch up provisions for retirement plan deductions.

To open the Retirement Contribution Setup window, within the Navigation Pane select HR & Payroll. In the Content Pane, select Setup. Under the heading Human Resources, select Benefits and Deductions and then click Retirement Plans. Within the Retirements Plans Setup window, click the GoTo button and click Retirement Contribution.

Retirement Contribution Setup

File Edit Tools Help sa Dextordinary Inc. 11/25/2024

Save Clear Delete

Retirement Code Group 401K

Description 401K Group

Shared Maximum \$18,000.00

Catch Up Schedule

Designate Code Group

Deduction Code

401K1
CHD
EPU
INS2
MED
UW

Insert All>>
Insert>
<Remove
<<Remove All

Selected for Group

401K
ROTH

Retirement Code Group – create a code to bundle different deduction codes together that will share a common maximum deduction amount.

Description – enter a description to reference the Retirement Code Group. The field does not affect functionality.

Shared Maximum – enter a maximum dollar amount for the code group. In the illustration above, the amount is set to \$18,000.00. All the codes assigned to the group are subject to the shared maximum as well as the individual maximums defined for the codes themselves. Thus, during the year if an employee contributes to several retirement plans, the system will cease the deductions for those plans once the

employee has contributed \$18,000.00 total. The system will stop the deductions even if the individual limits were not reached because all of the codes together have collectively reached the \$18,000.00.

Catch Up Schedule – Click on the Blue expansion arrow:

Age Range		Max CatchUp
50	59	\$6,500.00
60	63	\$10,000.00
64	99	\$7,500.00
0	0	\$0.00

Enter the age range bands and limits to the amount an employee is able to contribute beyond the normal Shared Maximum, see illustration above. In the illustration, \$6,500.00 will be added to the shared maximum an employee between 50 and 59 could contribute across ALL deduction codes that belong to the code group. Thus, the new limit would be \$24,500.00 for the code group. Specifying an amount in the field does not guarantee that an employee with retirement codes belonging to the group will be allowed to exceed the normal shared limit. An age criterion must be fulfilled (see Catch up Minimum Age).

Catch Up Schedule Age Range – defines the age bands an employee must be in order to be eligible for the catch up limit provision.

The system looks at the birth date of the employee and determines if that employee is

or will turn the appropriate age during the current calendar year. In the above illustration, if an employee is 55 years of age or will turn 55 during the current calendar year the system will consider that employee eligible for the catch up provision.

Although an employee may be eligible for the catch up provision, it does not follow that the system will automatically apply the new limit. The user must specify which employees are utilizing the catch up feature (see Retirement Catch Up).

Designate Code Group

Deduction Code & Selected for Group – The user selects a code from the list of Deduction Codes section and then inserts them into the Selected for Group section. There may be one or more codes selected.

The system prevents the user from assigning a deduction code to more than one group. In the illustration above, the code ROTH could not belong to another code group until it is removed from this 401K group.

Retirement Catch Up

Microsoft Dynamics GP > Cards > Payroll > Employee > GoTo> Payroll > Retirement Catch Up

The Retirement Catch Up window is used to enable the catch up provision for individual employees. The scrolling window displays all the codes groups, the related descriptions and minimum age requirements.

To open the Retirement Catch Up window, within the Navigation Pane select HR & Payroll. In the Content Pane, select Cards. Under the heading Payroll, select Employee and then click the GoTo button and click Retirement Catch Up.

Enable Catch Up	Code Group	Description	Min Age
☒	401K	401k	50
☐			
☐			
☐			
☐			
☐			

Employee ID & Name –fields are display only and default the information from the Employee Maintenance record.

Enable Catch Up – if this checkbox is selected, the system performs a check to make sure the individuals age is eligible for the given code group listed.

Since all code groups are listed, it is possible that an employee can have catch up enabled for a code group that contains deduction codes the employee does not have. Although the payroll process is unaffected, it is important to note the following:

If an employee has enabled the catch up provision for a code group and later obtains deduction codes that are members of that code group, the catch up will apply automatically without user intervention. In effect, the employee has been pre-enabled for a code group that takes effect when the employee is assigned a deduction in the code group.

Retirement Catch Up Mass Update

Microsoft Dynamics GP > Tools > Routines > Payroll > Retirement Catch Up Mass Update

The Retirement Catch Up Mass Update window is used to mass enable the catch up provision for multiple employees. An employee may be enabled for catch up if they meet the catch up minimum age and are assigned to at least one of the deduction codes within a retirement code group.

To open the Retirement Catch Up Mass Update window, within the Navigation Pane select HR & Payroll. In the Content Pane, select Routines. Under the heading Payroll, select Retirement Catch Up Mass Update.

Retirement Catch Up Mass Update - TWO20 (sa)

OK Clear File Print Tools Help Add Note

Retirement Code Group 401K 401k

Catch Up Minimum Age 55

Age As Of Date 12/31/2030

Show ☒ All ☐ Unassigned

☒ Mark All ☐ Unmark All

Enable Catch Up	Employee ID	Employee Name	Birthdate	Age
☒	ACKE0001	Ackerman, Pilar	11/24/1958	72
☐	BARB0001	Barbariol, Angela	1/15/1975	55
☐	LEVY0001	Levy, Steven	5/24/1975	55

Retirement Code Group – Select the Retirement Code Group to enable catch up for employees assigned to a deduction within the group.

Catch Up Minimum Age –displays the age from the Retirement Contribution setup.

Age As of Date – Enter the date used to determine the employees age. For example, if an employee must be 55 by the end of the calendar year to qualify for catch up then select 12/31 of the appropriate year as the date.

Show All – Displays all employees eligible for catch up.

Show Unassigned – Displays only eligible employees who are not assigned to catch up.

Enable Catch Up – Select Mark All or a specific employee to enable catch up for the employee.

Retirement Code Group Report

Selecting the print button on the Retirement Contribution Setup window will generate the Retirement Code Group Report that allows the user to see which codes are contained in the various code groups, along with other detail as depicted below.

System:	04/22/2010	Fabrikam, Inc.	Page:	1
User Date:	04/12/2017	RETIREMENT CODE GROUPS	User ID:	sa
		U.S. Payroll		
Ret Grp	Description	Shared Max	Catch Up Max	Age
401K	Pretax 401K Group	\$16,500.00	\$5,500.00	50
	401K 401(k) Deduction			
	UW United Way			

When a catch up maximum is applied to a code group, the amount of the maximum specified will be added to the maximum defined for the deduction codes as well as the shared maximum. The actual maximum specified in the deduction maintenance records will not be altered but the system will simply allow the employee deduction to exceed the maximum defined for the deduction by the amount of the catch up maximum. This will occur unless the employee has disabled the catch up maximum provision.

Benefit Code Groups Report

Selecting the print button on the Benefit Group Matching Setup window will generate the Benefit Code Groups Report that allows the user to see which codes are contained in the various code groups, along with other detail as depicted below.

The screenshot shows a software window titled "Screen Output - ERP Benefit Code Groups". The window has a menu bar with "File", "Edit", "Tools", "Find", and "Help". Below the menu bar is a toolbar with icons for "Print", "Send To", "Modify", and a zoom dropdown set to "100%". The status bar at the bottom indicates "Completed 1 Page" and "Page 1".

Metadata information is displayed at the top of the report area:

- System: 5/23/2011
- User Date: 4/12/2017
- Fabrikam, Inc.
- BENEFIT CODE GROUPS
- U.S. Payroll
- Page: 1
- User ID: sa

The main data is presented in a table with the following columns: Ben Grp, Description, Shared Max, and Group Match.

Ben Grp	Description	Shared Max	Group Match
RETGRP	Retirement Group	\$15,000.00	X
	401K 401(K)		
	457 457 Plan		

Appendix A:

Payroll Only - Employer Benefit Variable Matching

Benefit Setup Window

Microsoft Dynamics GP > Tools > Setup > Payroll > Benefit

The Enhanced Retirement Plans feature supports variable benefit matching for employers, which may be configured from the Benefit Setup Window.

To open the Benefit Setup window, in the Navigation Pane select HR & Payroll. In the Content Pane, select Setup. Under the heading for Payroll, select Benefit.

The screenshot shows the 'Benefit Setup - TWO20 (sa)' window. The 'Benefit Code' is 401K and the 'Description' is 401(K). The 'Start Date' is 6/18/2023. The 'Method' is set to 'Percent of Deduction'. The 'Benefit Tiers' section shows 'Single' selected, but 'Variable Matching' is checked. The 'Employer Maximum' field is highlighted in yellow and shows 10.00%. The 'Maximum Benefit' section shows 'Pay Period', 'Calendar Year', 'Fiscal Year' (set to \$0.00), and 'Lifetime'. The 'W-2 Box' is 14 and the 'W-2 Label' is 401K. The 'Deductions' list includes 401K, 457, CHD, EPU, and INS1. The 'Selected' list includes 401K. The 'Based on' dropdown is set to 'Deduction'. The 'Frequency' is 'Semimonthly'. The 'Flat Tax Rates' section shows 'Federal' and 'State' rates at 0.00%.

Benefit Tiers

- Percent Field – is disabled and cleared because the amount the employer matches depends upon the Employer Benefit Variable Matching tier.
- Variable Matching checkbox – selecting this checkbox activates variable matching by enabling the Employer Maximum Expansion Button for configuration. Notice that Employer Maximum field is disabled. This is because the maximum depends upon the Employer Benefit Variable Matching tier that is configured. This field, though disabled, displays the maximum according to the tier once configured.

Employer Maximum

- Expansion Button – click to open the Benefit Variable Matching window. Use the Benefit Variable Matching window to configure the custom matching tier.

Variable Matching with Fixed Amounts

As part of the variable matching feature, users may apply their custom variable matching tier to an employee who has a fixed amount deduction in place for his retirement plan. The system processes the matching differently in the background by converting the fixed amount to a percentage that can be used by the variable matching tier. The result is that the variable matching feature is still using a percentage to determine where in the range of the custom tier it falls. This allows for accurate matching for the benefit.

Employer Benefit Variable Matching Window

Microsoft Dynamics GP > Tools > Setup > Payroll > Benefit > Employer Maximum (expansion button)

The Employer Benefit Variable Matching Window is used to set up a matching tier that is dynamic and dependent upon what the employee contributes via his deduction.

To open Employer Benefit Variable Matching window, in the Navigation Pane select HR & Payroll. In the Content Pane, select Setup. Under the heading for Payroll, select Benefit and then select the Employer Maximum (expansion button).

From	To	Percent Benefit Match
0.00%	3.00%	100.00%
3.01%	5.00%	50.00%
5.01%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%

Employee Benefit Maintenance Window

Microsoft Dynamics GP > Cards > Payroll > Benefit

Use the Employee Benefit Maintenance window to assign the benefit code. While it is possible to configure Employer Variable Matching at the employee level, it is not recommended, it may result in employees having different matching rules for the same type of retirement plan. This could have an impact on legal and accounting issues regarding matching regulations.

To open the Employee Benefit Maintenance window, in the Navigation Pane select HR & Payroll. In the Content Pane select Cards. Under the heading for Payroll, select Benefit.

The screenshot shows the 'Employee Benefit Maintenance' window for employee 'Ackerman, Pilar' with benefit code '401K'. The window is divided into several sections: 'Employee Information' (ID, Name, Inactive checkbox), 'Benefit Information' (Code, Description), 'Dates' (Start/End), 'Tax and Matching' (Subject to Taxes, Method, Benefit Tiers, Variable Matching checkbox), 'Frequency and Rates' (Frequency, Flat Tax Rates), 'Based on' (Deduction, All, Selected), 'Deductions' (List of codes with Insert/Remove buttons), 'Employer Maximum' (5.00%), 'Maximum Benefit' (Pay Period, Calendar Year, Fiscal Year, Lifetime), 'W-2 Information' (Box, Label), and a 'Summary' button. The bottom of the window has navigation controls and a dropdown for 'by Employee ID'.

Benefit Tiers

- Percent Field – defaults the percentage from the Benefit Setup window.
- Variable Matching checkbox – defaults from the Benefit Setup window.

Employer Maximum

- Expansion Button – click to open the Benefit Variable Matching window. The information is defaulted from the Benefit Setup window.

Employer Benefit Variable Matching Scenarios

This section includes six different business scenarios. Each scenario has different Match Method and Match Based On options select. These scenarios as explain the calculation process.

Use Single Range match based on Deduction Scenario

Fabrikam, Inc.'s 401K plan states "The more you contribute, the more the company matches!" An employee who contributes up to 2%, the employer matches 25% of the contribution. From 2% to 4%, the employer will match 50%. Between 4% and 6% the employer will match dollar for dollar for a 100% match. For 6% - 10% the employer actually contributes more than the employee does, at 125% match! Anything over 10% the employer is matching at 150%. The whole point of incentive plan is to have higher matches for the whole contribution amount. That way if an employee contributes 11% for example, the whole 11% is matched at 150% instead of breaking the 11% into pieces and matching them each different according to the scale.

This employee contributes 4.5% of gross wages and has a total of \$1,500 in gross wages.

The screenshot shows the 'Deduction Setup - TWO20 (sa)' window. The 'Deduction Code' is '401K' and the 'Description' is '401(k) Deduction'. The 'Deduction Type' is 'Standard' and the 'Garnishment Category' is empty. The 'Start Date' is '6/18/2023' and the 'End Date' is empty. The 'Method' is 'Percent of Gross Wages'. The 'Deduction Tiers' are set to 'Single' with a rate of '4.50%'. The 'Maximum Deduction' table shows values for Pay Period, Calendar Year, Fiscal Year, and Lifetime. The 'Based on Pay Codes' section is set to 'All'. The 'Pay Codes' list includes BONS, COMM, DBL, EXAT, and EXCESS. The 'W-2 Box' is '13' and the 'W-2 Label' is 'D'.

Maximum Deduction	
Pay Period	\$0.00
Calendar Year	\$10,000.00
Fiscal Year	\$0.00
Lifetime	\$0.00

W-2 Information	
W-2 Box	13
W-2 Label	D

Employer Benefit Variable Matching - T...

OK File Tools Help Add Note

Actions File Tools Help

☒ Enable Variable Matching

Benefit Code: 401K
Description: Retirement Plan

Match Method: ☒ Use Single Range ☐ Cumulative Range Sum

Match Based On: Deduction

Employee Deduction

From	To	
0.00%	2.00%	25.00%
2.01%	4.00%	50.00%
4.01%	6.00%	100.00%
6.01%	10.00%	125.00%
10.01%	0.00%	150.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%

The system calculates the employee deduction and employer benefit as:

Employee Deduction Calculation:

$$\underline{4.5\% \text{ multiplied by } \$1,500 \text{ (GW)}} = \$67.50$$

Employee Deduction Amount \$67.50

Employer Benefit Calculation:

$$\underline{4.5\% \text{ matched at } 100.00\% \text{ multiplied by } \$1,500 \text{ (GW)}} = \$67.50$$

Employer Benefit Amount \$67.50

Use Single Range match based on Gross Wages Scenario

Fabrikam, Inc.'s 401K plan opted for a gross wage approach where any contribution between 0 – 6% is matched at 2% of gross wages. Anything between 6% - 10% contribution by the employee, the company then matches 5% of gross wages. If the contribution is beyond 10% then the company matches at 10%.

This employee contributes 7% of gross wages and has a total of \$1,500 in gross wages.

The screenshot shows the 'Deduction Setup - TWO20 (sa)' window. The 'Deduction Code' is 401K and the 'Description' is 401(k) Deduction. The 'Deduction Type' is Standard. The 'Start Date' is 6/18/2023. The 'Frequency' is Semimonthly. The 'Method' is Percent of Gross Wages. The 'Deduction Tiers' are set to Single with a rate of 7.00%. The 'Maximum Deduction' table shows Pay Period at \$0.00, Calendar Year at \$10,000.00, Fiscal Year at \$0.00, and Lifetime at \$0.00. The 'W-2 Box' is 13 and the 'W-2 Label' is D. The 'TSA Sheltered From' section includes checkboxes for Federal Tax, FICA Soc Sec, FICA Medicare, State Tax, and Local Tax, all of which are checked. The 'Based on Pay Codes' section is set to All. The 'Pay Codes' list includes BONS, COMM, DBL, EXAT, and EXCESS. The 'Selected' list is empty. The 'Sequence' button is highlighted.

Maximum Deduction	
Pay Period	\$0.00
Calendar Year	\$10,000.00
Fiscal Year	\$0.00
Lifetime	\$0.00

W-2	
W-2 Box	13
W-2 Label	D

Employer Benefit Variable Matching - T...

☒ OK
 ☐ File
 ☐ Tools
 ☐ Help
 ☐ Add Note

☒ Enable Variable Matching

Benefit Code: 401K
 Description: Retirement Plan

Match Method: ☒ Use Single Range ☐ Cumulative Range Sum

Match Based On: Gross Wage

Employee Deduction

From	To	Percent Benefit Match
0.00%	6.00%	2.00%
6.01%	10.00%	5.00%
10.01%	0.00%	10.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%

The system calculation the employee deduction and employer benefit as:

Employee Deduction Calculation:

$$7\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$105.00$$

Employee Deduction Amount \$105.00

Employer Benefit Calculation:

$$5\% \text{ matched multiplied by } \$1,500 \text{ (GW)} = \$75.00$$

Employer Benefit Amount \$75.00

Use Single Range match based on Fixed Amount Scenario

Fabrikam, Inc. experienced enthusiasm for its retirement plan with many employees contributing more than 6%. The current method of matching every tier has run up the cost of the benefit so beginning next year Fabrikam will change the rules. A match will no longer be cumulative. The employee will still get more for contributing more, but the compounding will be eliminated. The employee gets \$100 plus \$20 extra for each percent thereafter.

This employee contributes 2.5% of gross wages and has a total of \$1,500 in gross wages.

From	To	Fixed Benefit Match
0.00%	1.00%	\$100.00
1.01%	2.00%	\$120.00
2.01%	3.00%	\$140.00
3.01%	4.00%	\$160.00
4.01%	5.00%	\$180.00
5.01%	6.00%	\$200.00
6.01%	0.00%	\$220.00
0.00%	0.00%	\$0.00
0.00%	0.00%	\$0.00
0.00%	0.00%	\$0.00

The system calculation the employee deduction and employer benefit as:

Employee Deduction Calculation:

$$\underline{2.5\% \text{ multiplied by } \$1,500 \text{ (GW)}} = \$37.50$$

Employee Deduction Amount \$37.50

Employer Benefit Calculation:

$$\underline{2.5\% \text{ employee deduction}} = \$140.00$$

Employer Benefit Amount \$140.00

Cumulative Range Sum match based on Deduction Scenario

Fabrikam, Inc.'s 401K plan is set up as the company will match an employee's contribution dollar for dollar up to 3% contribution by the employee. After 3% the employee can contribute more but the company only matches a part of the contribution. Between 3% and 4% the company will match half of the employee's contribution. Between 4% and 6% the company will only match a quarter of the contribution. After 6% the company stops matching all together.

This employee contributes 4.5% and has a total of \$1,500 in gross wages.

Employer Benefit Variable Matching - T...

OK File Tools Help Add Note

Actions File Tools Help

☒ Enable Variable Matching

Benefit Code: 401K
Description: Retirement Plan

Match Method: ☐ Use Single Range ☒ Cumulative Range Sum

Match Based On: Deduction

Employee Deduction

From	To	Percent Benefit Match
0.00%	3.00%	100.00%
3.01%	4.00%	50.00%
4.01%	6.00%	25.00%
6.01%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%

The system calculates the employee deduction and employer benefit as:

Employee Deduction Calculation:

$$4.5\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$67.50$$

Employee Deduction Amount \$67.50

Employer Benefit Calculation:

$$3\% \text{ multiplied by } 100\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$45.00$$

$$+ \quad 1\% \text{ multiplied by } 50\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$7.50$$

$$+ \quad .5\% \text{ multiplied by } 25\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$1.88$$

Employer Benefit Amount \$54.38

Cumulative Range Sum match based on Gross Wage Scenario

Several years later, Fabrikam, Inc. experiences exponential growth. Instead of implementing a profit sharing program, the company decides to modify the employee retirement matching. As a result, Fabrikam decided to reward its employees by using the exact same structure as before with the exception that the matching was stackable. Now employees who contribute large sums to their retirement accounts and cross several tiers are matched on every tier! So someone contributing 16% of their income to their retirement would be matched with 2% + 5% + 10% for a total of a 17% match by the company!

This employee contributes 16% and has a total of \$1,500 in gross wages.

Employer Benefit Variable Matching - T...

OK File Tools Help Add Note

Actions File Tools Help

☒ Enable Variable Matching

Benefit Code: 401K

Description: Retirement Plan

Match Method: ☐ Use Single Range ☒ Cumulative Range Sum

Match Based On: Gross Wage

Employee Deduction

From	To	Percent Benefit Match
0.00%	6.00%	2.00%
6.01%	10.00%	5.00%
10.01%	0.00%	10.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%

The system calculates the employee deduction and employer benefit as:

Employee Deduction Calculation:

$$\underline{16\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$240.00}$$

Employee Deduction Amount \$240.00

Employer Benefit Calculation:

$$0\%-6\% \text{ range} - 2\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$30.00$$

$$+ \quad 6.01\%-10.00\% - 5\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$75.00$$

$$+ \quad \underline{10.01\% - \text{greater} - 10\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$150.00}$$

Employer Benefit Amount \$255.00

Cumulative Range Sum match based on Fixed Amount Scenario

Fabrikam, Inc. is a small company with cash flow issues. Their 401k plan is limited in its ability to match contributions by employees. Therefore the plan states to limit the exposure by allocating a fixed amount for benefits and have implemented a graduated scale. Anyone who contributes to the 401K up to a least 1% gets \$100. Thereafter, each employee gets \$50 for every 1% they contribute.

This employee contributes 2.5% and has a total of \$1,500 in gross wages.

Employer Benefit Variable Matching - T...

OK File Tools Help Add Note

Actions File Tools Help

☒ Enable Variable Matching

Benefit Code: 401K
Description: Retirement Plan

Match Method: ☐ Use Single Range ☒ Cumulative Range Sum
Match Based On: Fixed Amount

Employee Deduction

From	To	Fixed Benefit Match
0.00%	1.00%	\$100.00
1.01%	2.00%	\$50.00
2.01%	3.00%	\$50.00
3.01%	4.00%	\$50.00
4.01%	5.00%	\$50.00
5.01%	6.00%	\$50.00
6.01%	0.00%	\$50.00
0.00%	0.00%	\$0.00
0.00%	0.00%	\$0.00
0.00%	0.00%	\$0.00

The system calculates the employee deduction and employer benefit as:

Employee Deduction Calculation:

$$2.5\% \text{ multiplied by } \$1,500 \text{ (GW)} = \$37.50$$

Employee Deduction Amount \$37.50

Employer Benefit Calculation:

$$0\%-1\% \text{ range} = \$100.00$$

$$+ \quad 1.01\%-2.0\% \text{ range} = \$50.00$$

$$+ \quad 2.01\% - 3.0\% \text{ range} = \$50.00$$

Employer Benefit Amount \$200.00

Group Benefit Variable Matching Scenarios

This section includes two different business scenarios for group matching. These scenarios as explain the calculation process.

Benefit Group Matching Scenario

Pilar Ackerman participates in the 401K plan at Fabrikam, Inc. and she has 6% deducted from her paycheck. She receives a 4% match according to company policy given her level of participation.

Retirement Plans Setup - TWO20 (sa)

Save Clear Delete Reports Cancel Benefits File Tools Help Add Note

Actions Go To File Tools Help

Benefit 401K
Description Retirement Plan
Frequency Semi-monthly
Trustee US Bank
Account Number 234243324

Add A Fund Delete A Fund

Fund	Fund Name	Active
*FUNDA	Stocks	☒
*FUNDB	Bonds	☒
*FUND C	High Risk	☒

Premium Structure: ☒ Fixed ☐ Tiers
Premium Method: ☐ Amount ☒ Percent
Percent: 3.00%
Calendar Year Max Contrib.: \$10,000.00
Fiscal Year Max Contrib.: \$0.00

Employer Match Percent: 4.00%
Employer Maximum Match: 4.00%
Employer Calendar Year Max: \$0.00
Employer Fiscal Year Max: \$0.00

☒ Bonus Elections Active
☒ Loans Allowed
☒ Hardship Withdrawals OK

Minimum Age: 21
Waiting Period (# of Days): 90

Plan Entrance Dates
Date (MM/DD)
January 1
July 1

Last Change: sa 1/24/2018

Pilar is a government employee which enables her to participate in the 457 program as well. She has 1% deducted from her check to participate in that program and receives a 2% match.

Retirement Plans Setup - TWO20 (sa)

Save Clear Delete Reports Cancel Benefits File Tools Help Add Note

Actions Go To File Tools Help

Benefit 457
 Description 457 Plan
 Frequency Semimonthly
 Trustee
 Account Number

Employer Match Percent 2.00%
 Employer Maximum Match 2.00%
 Employer Calendar Year Max \$0.00
 Employer Fiscal Year Max \$0.00

Add A Fund Delete A Fund

Fund	Fund Name	Active

Premium Structure
☒ Fixed ☐ Tiers
 Premium Method
☐ Amount ☒ Percent

Tiers

Percent	1.00%
Calendar Year Max Contrib.	\$0.00
Fiscal Year Max Contrib.	\$0.00

Bonus Elections Active
☐ Loans Allowed
☐ Hardship Withdrawals OK

Minimum Age 30
 Waiting Period (# of Days) 0

Plan Entrance Dates
 Date (MM/DD)

Last Change: sa 1/24/2018

To comply with internal business rules limiting the amount of benefit the company is liable for, Fabrikam, Inc. has grouped these benefits together in a benefit group called "RETGRP" and set the maximum to \$15,000.00.

Benefit Group Matching Setup - TWO...

Save Clear Delete File Print Tools Help Add Note

Actions File Tools Help

Benefit Code Group RETGRP
 Description Retirement Group
 Shared Maximum \$15,000.00

☒ Use Group Matching Schedule

Designate Code:

Benefit Codes:		Selected for Group:
INS	Insert All>	401K
LIFE	Insert>	457
	<Remove	
	<<Remove All	

Last Change: sa 1/24/2018

Normally, company matching would be conducted as per the schedule defined for each benefit. That would yield a 6% total match for the 7% of her check Pilar is contributing. But, Fabrikam, Inc. has decided to apply a different matching schedule for cases where an employee is enrolled in two retirement programs simultaneously.

The user can utilize the Group Benefit Variable Matching option by selecting the Use Group Matching checkbox on Benefit Group Matching Setup window and then select the Schedule button in order to specify their matching ranges on the Group Benefit Variable Matching window.

Under this scenario Pilar actually gets more of a match for her 7% contribution. The schedule dictates she gets a 10% of gross wage match.

Group Benefit Variable Matching - TWO20 (s...

OK File Tools Help Add Note

Actions File Tools Help

Benefit Group: RETGRP

Description: Retirement Group

Match Method: ☒ Use Single Range ☐ Cumulative Range Sum

Match Based On: Gross Wage

Employee Deduction

From	To	Percent Benefit Match
0.00%	1.00%	2.00%
1.01%	7.00%	10.00%
7.01%	10.00%	12.00%
10.01%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%
0.00%	0.00%	0.00%

This latest paycheck was for \$2,600 gross wages, which would dictate a \$260 match for Pilar. This \$260 must now be allocated to the two programs she is participating in. When a benefit group has variable group matching enabled and schedule defined, the amount of the match is prorated across all benefits of the group. How much gets allocated depends on the ratio of the deductions on the paycheck. Thus if Pilar had participated in each program equally on the deduction side, the benefit would have been split 50/50 among the programs on the benefit side.

However in this scenario, Pilar's deductions were 6% for 401K and 1% for 457. This is a total of 7%, so 6/7ths of the benefit will go to the 401K and 1/7th of the benefit will go to the 457. So the \$260 is split \$222.80 for 401K and \$37.20 for 457 when it comes time to allocate the benefits.

Note that it does not matter that the individual matching on those benefits were 4% and 2% respectively. When they belong to a group with variable matching schedule assigned to the group, then the benefit is split according to a ratio derived by looking at how Pilar's deduction percentages are related to each other. (ie... 6/7 and 1/7). As long as the \$260 didn't violate the \$15,000 yearly max for the group, Pilar should get the full benefit according to the proration.

Employee Deduction Calculation:

$$\underline{7\% \text{ multiplied by } \$2,600 \text{ (GW)}} = \$182.00$$

Employee Deduction Amount
\$182.00

Employee Deduction Percentage Calculation:

$$401K (6\%) + 457 (1\%) = \text{Effective Deduction } 7\%$$

Employer Benefit Calculation:

$$\underline{10\% \text{ multiplied by } \$2,600 \text{ (GW)}} = \$260.00$$

Employer Benefit Amount **\$260.00**

Benefit Group Matching Utilizing Shared Maximum Scenario

Using the same details from the scenario above; however, the next \$260 match exceeds the \$15,000 max by \$60, which leaves \$200 to be allocated across the two benefits. Recalculating 6/7 and 1/7 of \$200 will give the proper amount for Pilar's benefit.

Employee Deduction percentage Calculation:

401K (6%) + 457 (1%) = Effective Deduction 7%

Employer Benefit Calculation:

10% multiplied by \$2,600 (GW)	=	\$260.00
+ Calendar Year Benefit Amount	=	\$14,800.00
- <u>Shared Maximum</u>	=	<u>\$15,000.00</u>
Employer Benefit Amount		\$200.00

Employee Deduction Calculation:

7% multiplied by \$2,600 (GW) = \$182.00

Employee Deduction Amount \$182.00

Deactivate Product

There are two ways to deactivate the Enhanced Retirement Plans; disable, inactivate.

Disable

To disable Enhanced Retirement Plans without having to exit Microsoft Dynamics GP, open the Customization Status window. To open this window, select the Microsoft Dynamics GP menu, point to Tools, select Customize and then click Customization Status. Select the product from the list and click Disable. The product can be enabled by closing and reopening Microsoft Dynamics GP.

Inactivate

Enhanced Retirement Plans can be inactivated by company, open the Feature Manager Window, select Active = No on the features list and unmark the company checkbox.

The screenshot shows the 'Integrity Payroll Features' window with the 'Feature Manager' tab active. The window title bar includes 'sa Dextordinary Inc. 11/25/2024'. The menu bar has 'File', 'Edit', 'Tools', and 'Help'. The toolbar contains 'Save', 'Cancel', 'Upgrade Version', 'Get Quote', 'Data Model Install/Update', and 'Event Log'. The main area displays a table of features with columns: Active, Feature, Expires, and Notice. The 'Enhanced Retirement Plans' feature is selected, and its 'Active' status is 'No'. Below the table, the 'Feature Selected' field shows 'Enhanced Retirement Plans'. At the bottom, there is a table with columns: Enable, Company, and Billing Employees. The 'Dextordinary Inc.' row has an unchecked 'Enable' checkbox. The 'Billing Employees' column shows '29' for 'Dextordinary Inc.' and '0' for 'Fabrikam, Inc.'. The 'Mark All' and 'Unmark All' buttons are visible on the right side of the window.

Active	Feature	Expires	Notice
Yes	Employee Accounts and Splits	07/07/2099	Employee Accounts and Splits
Yes	FTE Manager	07/07/2099	FTE Manager
Yes	Comprehensive Leave Manager	07/07/2099	Comprehensive Leave Manager
Yes	Negative Payroll Transactions	07/07/2099	Negative Payroll Transactions
Yes	Overtime Hours Rules	07/07/2099	Overtime Hours Rules
No	Enhanced Retirement Plans	07/07/2099	Enhanced Retirement Plans
Yes	Mid Pay Period Rate Change	07/07/2099	Mid Pay Period Rate Change
Yes	Paycheck 'What If' Calculator	07/07/2099	Paycheck 'What If' Calculator
Yes	Life Insurance Tax Calculator	07/07/2099	Life Insurance Tax Calculator
Yes	Negative Deductions Enhancement	07/07/2099	Negative Deductions Enhancement

Feature Selected: Enhanced Retirement Plans

Enable	Company	Billing Employees
☐	Fabrikam, Inc.	0
☐	Dextordinary Inc.	29
☐		
☐		
☐		

Mark All
Unmark All

Contact Information

Get quick answers to your questions

[Browse our convenient Knowledge Base](#) for up-to-date answers to the most common questions. For additional questions, please contact your authorized Value Added Reseller (VAR) for support on this product (if you have one) or contact Integrity Data by emailing support@integrity-data.com or calling 888.786.6162.

If you have registered your product, Technical Customer Service is available for any customers with a current Enhancement Plan or subscription. Please have your Company or Site Name available. Your first line of support should always be your VAR (if you have one).

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Browse our solutions

The Integrity Data website is a great place to get additional information on products and services. The following information is available on our website:

- Integrity Data's [HR & Payroll software pages](#) include Demos, Features and Benefits, and ROI Calculators
- Visit our [Services page](#) to learn more about our additional customization services

If you would like to discuss your needs with a Sales Account Executive, please call 888.786.6162 or e-mail sales@integrity-data.com.