



# **Sage 300 U.S. Payroll**

## **Q2 2026 Release Notes**

June 2026

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# Product update release notes

**Important!** All customers who update, maintain, and use Sage 300 U.S. Payroll should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

## Product update information

**Product:** Sage 300 U.S. Payroll

**Version:** Product Update Q2 2026

## Software requirements

To use this product update, you must have Sage 300 U.S. Payroll 8.0, which is supported in Sage 300 2026, 2025, 2024, and 2023.

**Note:** Sage 300 2023 will no longer be supported following this tax update. Please reach out to your Business Partner for your upgrade options.

**Note:**

- If Canadian and US Payroll are installed, you must install the same Payroll Tax Update, otherwise you will not be able to login to Sage 300 Web Screens.
- If you are using the Sage HR Integration with Sage 300, you can only use the Sage 300 desktop interface to print checks. The 'Payroll Checks' screen is not available in Web Screens.

## Support and resources

Sage strives to provide you with the best help and support in the industry. If you have a question, we're here to help!

- **Help and documentation:** Many answers to common questions can be found in the help and documentation included with Sage 300. Visit the [Sage 300 Product Documents website](#) for access to more documents.
- **Community Hub:** Visit <https://communityhub.sage.com/us> for blogs, tips, and guidance specific to Sage 300.
- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at <https://us-kb.sage.com/portal/ss/> or contact Customer Support at 800-253-1372 (U.S. and Canada). Please have your Sage Customer Number handy when contacting Support.

# Payroll Tax Updates

The following federal, tax changes are included in this update.

## Federal Legislative Updates

There are no federal legislative updates with this release.

## Arkansas

Arkansas withholding tables and instructions, including rates on supplemental wages, have been updated for January 1, 2026. Refer to the state publication for more details.

## Georgia

Georgia withholding tables and instructions, including rates on supplemental wages, have been updated for May 11, 2026. Refer to the state publication for more details.

## Kentucky

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
KY0184	Elsmere CT Regular IT	1.75%	07/01/2026
KY0256	Grant CO Regular IT	2%	07/01/2026
KY0289	Irvington CT Regular IT	0.25%	01/01/2026
KY0290	Grace Commercial Park TIF TD Regular IT	1%	10/01/2023
KY0291	Falmouth CT Regular IT	1.5%	07/01/2026

## Maryland

To ensure accurate Maryland local tax calculations, employees with a Maryland local tax must also have Maryland State Income Tax (MDSIT) assigned in the employee record. Payroll now enforces this requirement during employee setup.

For existing employee records, review the tax setup to ensure this requirement is met to prevent errors during payroll processing.

For more information, see Sage Knowledgebase article [260414155155137](#).

## Ohio

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
OH1096	Jersey-New Albany JEDD I CT Regular IT	2%	05/01/2026
OH1097	Jersey-New Albany JEDD II CT Regular IT	2%	05/01/2026
OH1098	Jersey-New Albany JEDD III CT Regular IT	2%	05/01/2026
OH1099	Green-Chillicothe JEDD CT Regular IT	2%	01/01/2026
OH1100	Millennial Moments JEDD CT Regular IT	1%	01/01/2024

## Oregon

Effective July 1, 2026, the Eugene Community Safety Payroll Tax exemption will increase in accordance with Oregon state minimum wage.

The minimum rates will increase as follows:

- Standard Minimum Wage: \$15.55 per hour
- Portland Metro Minimum Wage: \$16.80 per hour
- Non-Urban Minimum Wage: \$14.55 per hour

## Pennsylvania

Employees earning less than the annualized standard minimum wage amount remain exempt from withholding. All other covered employees will be withheld at the 0.44% tax rate.

For more information, including details about setting up related local tax codes, see Sage Knowledgebase article: [230425080900006](#).

## Pennsylvania

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
PA0916	Miles TP, Penns Valley SD (NR) LST	\$52	01/01/2026
PA7834	Liberty TP, Montrose SD (NR) Regular IT	1%	04/01/2026
PA7835	Liberty TP, Montrose SD Regular IT	1%	04/01/2026

## Utah

Utah withholding tables and instructions have been updated for 2026. Refer to the state publication for more details.

## West Virginia

West Virginia withholding tables and instructions, including rates on supplemental wages, have been updated for January 1, 2026. Refer to the state publication for more details.

The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
WV0001	Weirton CT Service Fee	\$260	05/17/2026

# Product updates

The following product updates are included with this release.

## Payroll product updates

### U.S. Payroll product updates

The following new features and improvements to payroll are included in this update.

#### **New Treasury Typed Occupation Codes (TTOC) Support for W-2 2026 Forms**

You can now assign Treasury Typed Occupation Codes (TTOC) on the Payroll Employee Supplemental Information screen to meet W-2 Form 2026 reporting requirements. See Knowledgebase article: [260603155330890](https://knowledge.sagepub.com/260603155330890) for more details.

#### **Support for Employer Contributions to Trump Accounts for W-2 2026 Forms**

You can now set up a Benefit earnings code to track and report employer contributions to Trump Accounts, with a new "Employer Contributions to Trump Accounts" W-2 reporting option available in Payroll Earnings and Deductions setup. See Knowledgebase article: [260603155330890](https://knowledge.sagepub.com/260603155330890) for more details.

# My Workforce Forms updates

This update does not include any new features or improvements to My Workforce forms.

To download and install My Workforce Forms, see Sage Knowledgebase article

[250128222256470.](#)

# Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage 300. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Payroll > Government Reports > Federal Tax Filing** or **State Tax Filing**. You will be prompted to register your organization with Sage Payroll Tax Forms and eFiling by Aatrix. After registering, you have the option to enroll your company (or companies) in the eFiling service.

For a detailed overview and a price structure of the Sage Payroll Tax Forms and eFiling by Aatrix options, visit our website here:

<https://partner.aatrix.com/partners/sage300>

# Quarterly Wage on Disk(ette)

If you use Sage 300 U.S. Payroll, note that tax filing for Puerto Rico is not currently supported by Sage Payroll Tax Forms and eFiling by Aatrix. To produce State Unemployment Tax (SUTA) quarterly wage reports for Puerto Rico, use the Quarterly Wage on Disk(ette) feature.

For more information, see the following Sage Knowledgebase articles:

- [Producing Quarterly Wage Reports on Disk\(ette\) or Hard Disk \(Solution ID: 240315223951660\)](#)
- [State-Specific Information for Quarterly Wage on Disk\(ette\) \(Solution ID: 240315225836580\)](#)
- [Entering Employee Supplemental Information \(Solution ID: 223924350032880\)](#)

# Product update installation instructions

Follow the instructions in this section to install, apply, and verify this Product Update.

## Before you start:

- Back up your data.
- Make sure all users have exited the program.
- Verify your service pack or product update level. To verify what service pack or product update you have installed, click the **System Information** option on the **Help** menu in Sage 300.

## Installing the product update

### To install the product update:

1. Right-click the Product Update file to Run as Administrator (or make sure you have administrator rights to run the installation) and launch the installation program.
2. On the Welcome window, click **Next** to continue to the Software License Agreement window.
3. Select the features to install. Click **Next**, then **Install**.
4. On the Setup Complete window, click **Finish** to finish the installation.

## Activating the tax update

### To activate the tax update:

1. Start Sage 300.
2. In the **Administrative Services** folder, select **Data Activation**.
3. Select the current tax update, and then click **Activate**.
4. If you are prompted to convert a previous payroll tax update to the current version, click **Proceed**.

After you complete installation and activation, and after you have made any adjustments described in this document, you can resume processing payroll.

## Verifying the product update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help > System Information**. The tax update version will be listed with a product update number.

## Updating the local tax repository and rates

This section applies only if you use local tax codes in U.S. Payroll.

### To update the local tax repository and rates:

1. After the Product Update is complete, log in to Sage 300.
2. On the Local and Other Custom Taxes window, click the **Install Repository** button to update all of the local tax rates in the system.
3. When asked if you want to continue updating company-level local tax records with information from the local repository, click one of the following:
  - **Yes** to automatically update the company rates for all local taxes.
  - **No** to update local taxes individually (select each tax and click the Update button to apply the rate changes). Doing this enables you to validate rates before and after the changes.
4. Depending on your choice in the previous step, update employee-level local tax records as follows:
  - If you clicked **Yes** in the previous step, when asked if you want to continue updating employee local tax records from the local tax repository, click one of the following:
    - **Yes** to automatically update the employee-level rates for all local taxes.
    - **No** to select each employee or use the Update Taxes tax, then update each tax or employee individually.

## Updating the local tax repository and rates

- If you clicked **No** in the previous step, you must manually update each employee-level tax. This can be done for all employees at once by tax from **U.S. Payroll > Update Taxes**, or by individual employee from **Employee Payroll > Taxes**.

**Important!** This process requires security permissions in Sage 300 to access all employees. Otherwise you may not receive the prompts as described above and employee rates will not be updated.