

# *Agenda for today's Webinar...*

- Updates
- SQL Version Requirement
- PFA Works Timecard Ending
- Dependent Care and TIPs
- ESTA Plans
- New Updater
- 2024 Tax Season Preparations
- Sneek Peek

# Dependent Care and Tips

- Added the W2 type section to the Paytypes
- Payroll calc, W2 and 941 will be updated properly handle the different Paytypes and their calculation.
- Employee will have a flag to indicate if they are married filing single.

# Earned Sick Time Act

- Cogitate Plans to create a new bank calc type that will use the hours posted to PFA to calculate the amount to add.
- Create any reports needed to be submitted to the state.
- Certain policies will need to be enforced when doing the bank calc like any adjustments to hours after the fact will require the calc to be re-ran.

# New Updater

- Update for the clients will allow a client to upgrade to the latest version available for their server version.
- Update for the server can only be started after a supervisor logs in and initiates the server update. Once a server update is performed then all client machines will require an update. (This can take a very long time so let it run do not interrupt it)
- Update only checks once a day and will automatically download missing/updated files from current version.

# 2024 Tax Season Preparations

- The SSA removed the old SSA login to BSO, so if you do not have an ID.ME account, please create one.
  - BSO is the W2 electronic filing site used for e-filing your W2s.
- If you are required to 1099s
  - Make sure you have at least two people who are authorized to access the IRIS taxpayer portal. Both those people will need to have already created their ID.ME account.
  - Remove any former employee from the application and update the application to include the new employee.
  - Verify you have the correct vendor information by using the IRS Tin Verify Matching service.
  - Use Cogitates TIN Verify tool to generate a bulk submission or hand enter your vendors one by one on the IRS Tin Matching site.

# 2024 Tax Season Preparations

- If you are required to file ACA information
  - If you filed using the ACA AIR service last year and passed the communications test, no action is required until the site becomes available to upload your ACA forms.
    - This may be subject to change. Cogitate is closely monitoring the IRS and will provide updates when they become available.
  - As with the 1099s, remove any former employees from the application and add the new employees.
- Cogitate has provided links to help documents from the IRS and SSA. Please visit [www.profundaccounting.com](http://www.profundaccounting.com) and under the support tab there will be an IRS e-file info section.