

Matching Contribution Filter

Calculate Employer Match for 401(k), Roth 401(k), 403(b) Plans
 Handle Percent of Salary and Fixed Amount Employee Deductions
 Calculate match on combined amount of up to four employee deductions

Matching Contribution Filter ensures the correct employer matching amount is calculated for each employee based on up to four employee deductions.

The filter works with both percent of salary and fixed amount employee deductions even when hourly employees work overtime or less than standard hours.

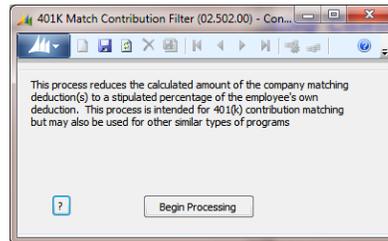
Matching may be limited to employees over a specified age (typically 21) thereby allowing underage employees to make unmatched contributions to the plan.

Matching may also be limited by length of employment thereby allowing new employees to make unmatched contributions to the plan during their initial employment period.

The filter can be run from the SL menu. However, a customization provided for the payroll Calculation (02.500.00) screen will automatically run the filter whenever calculation is performed thereby ensuring the correct match for each employee.

Pay Group	Company Match Deduction Id	EE Pre-Tax Pct Deduction Id	EE Pre-Tax Amt Deduction Id	EE Post-Tax Pct Deduction Id	EE Post-Tax Amt Deduction Id	Percent Match	Zero Match Under Months Employed	Zero Match Under Age
SEMIMO	401K-C	401K	401KA	ROTHP	ROTHA	50.00	12	0
WEEKLY	401K-C	401K	401KA	ROTHP	ROTHA	50.00	12	0

Matching Contribution Filter Setup
 Specify related employee deductions and matching percentage for each pay group.



Calculation
 The Matching Contribution Filter may be run from the SL menu but is more commonly initiated automatically by the Calculation (02.500.00) screen.

Technical Specifications

Product Type

VB Tools Application

Technical Requirements

Standard Dynamics SL environment
 Customization Manager required for some functions

Supported Dynamics SL Versions

Microsoft Dynamics SL 2018
 Microsoft Dynamics SL 2015

Available Versions

Microsoft Dynamics SL 2011 and later

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