



Sage HRMS 2017

Canadian Payroll

January 1, 2018 Release Notes

January 2018

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Last updated: January 4, 2018

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Product Update Release Notes

Important! All customers who update, maintain, and use Sage HRMS Canadian 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 HRMS 2017 Canadian Payroll and Sage Employee Self Service version 2017

Version: Product Update January 1, 2018

If we receive additional payroll tax changes for this period and/or this year, a new update will be made available.

About Product Updates for Sage HRMS

Sage HRMS Payroll product updates are cumulative. This means that supported taxes, rates, and forms, all previous updates for this product and version, and any hot fixes or patches previously released are incorporated into this update.

Sage Employee Self Service product updates include the full product build.

Important Information Regarding Future Updates

The following chart outlines the Sage HRMS product versions supported with Product Updates or Quarterly Tax Updates for each period this year.

Release	Q4 2017	Q1 2018	Q2 2018	Q3 2018
Sage HRMS 2017	Yes	Yes	Yes	Yes

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 HRMS. Visit <http://cdn.na.sage.com/docs/en/customer/hrms/documentation.htm> for more.
- **Sage University:** Learn pro tips for year-end processing in online or classroom courses. Visit <http://SageU.com> and log on or create an account to register for training.
- **Sage City Year-End Center:** Visit <http://sagecity.na.sage.com/p/yearend> for help, guidance, documents, and downloads specific to Sage HRMS Payroll and Year End 2017.
- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at <https://support.na.sage.com> or contact Customer Support at 800-829-0170 (U.S. and Canada). Please have your Sage Customer Number handy when contacting Support.

Payroll Tax Updates

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

You may need to adjust your employee records to reflect these tax changes.

Federal Legislative Updates

This section lists federal legislative updates available with this release.

Note: Pre-printed T4 forms obtained from the CRA are no longer supported. You can continue to print these forms on plain paper.

EI Maximum Insurable Earnings and Premium Rates for 2018

The Employment Insurance premium rates and maximum insurable earnings have been released for 2018. The annual maximum insurable earnings for 2018 is set to \$51,700.

The premium rates are:

- 1.66% for residents of provinces without a provincial plan (all of Canada except Québec)
- 1.3% for residents of Québec

The annual maximum contributions for the general rate are:

- Employee contributions - \$858.22
- Employer contributions - \$1,201.51

The annual maximum contributions for Québec are:

- Employee contributions - \$672.10
- Employer contributions - \$940.94

Pension Plan Rates and Maximum Pensionable Earnings for 2018

The Canada Revenue Agency announced that the maximum pensionable earnings under the Canada Pension Plan (CPP) for 2018 will be \$55,900. Contributors are not required or permitted to make additional contributions to the CPP based on earnings exceeding this amount. Additionally, for 2018:

- The basic exemption amount remains unchanged at \$3,500.
- The maximum contributory earnings increase to \$52,400.
- The employee and employer contribution rates remain unchanged at 4.95%.
- The maximum employee and employer contribution to the plan is \$2,593.80 each.

Note: The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2018.

Federal Indexation for 2018

The federal indexation factor effective January 1, 2018 is 1.5%. This factor will be applied in the same format as it has been in the past few years and the indexation excludes pension, tuition, and education amounts. Note the exclusion of these three credits from indexation does not apply to the provinces of Alberta and Ontario. All credits in Alberta and Ontario are subject to indexation.

Provincial and Territorial Legislative Updates

This section lists provincial and territorial legislative updates available with this release. If a province or territory is not listed in this section, there are currently no tax updates or product modifications for that province or territory.

To confirm the amounts and to receive the forms for 2018, contact your tax services office or visit the government websites:

- CRA: <http://www.cra-arc.gc.ca/>
- Ministère du Revenu: <http://www.revenu.gouv.qc.ca/fr/default.aspx>

WCB Maximum Assessable Earnings for 2018

The 2018 Workers Compensation Board Maximum Assessable Earnings are:

	2018	2017
Alberta	98,700	98,700
British Columbia	82,700	81,900
Manitoba	127,000	127,000
New Brunswick	63,600	62,700
Newfoundland and Labrador	64,375	63,420

	2018	2017
Northwest Territories	90,600	90,600
Nova Scotia	59,800	59,300
Nunavut	90,600	90,600
Ontario	90,300	88,500
Prince Edward Island	53,400	52,800
Québec	74,000	72,500
Saskatchewan	82,627	76,086
Yukon	86,971	85,601

Personal Tax Credits for 2018

Effective January 1, 2018, the provincial and territorial personal tax credits that employees can claim have changed. These changes are reflected in the new 2018 provincial and territorial TD1 forms, and the Québec TP-1015.3-V form. The basic personal amounts have changed as listed below.

	2018	2017
Federal	11,809	11,635
Alberta	18,915	18,690
British Columbia	10,412	10,208
Manitoba	9,382	9,271
New Brunswick	10,043	9,895
Newfoundland and Labrador	9,247	8,978
Northwest Territories	14,492	14,278
Nova Scotia	Use CRA worksheet TD1NS-WS .	8,481
Nunavut	13,325	13,128
Ontario	10,354	10,171
Prince Edward Island	8,160	8,000

	2018	2017
Québec	15,012	11,635
Saskatchewan	16,065	16,065
Yukon	11,809	11,635

Provincial and Territorial Indexation for 2018

Effective January 1, 2018, the following provinces and territories have released updated indexing factors:

	2018	2017
Alberta	1.2%	1.3%
British Columbia	2%	1.8%
Manitoba	1.2%	1.5%
New Brunswick	1.5%	1.4%
Newfoundland and Labrador	3%	2%
Northwest Territories	1.5%	1.4%
Nova Scotia	n/a	n/a
Nunavut	1.5%	1.4%
Ontario	1.8%	1.6%
Prince Edward Island	n/a	n/a
Québec	0.82%	0.74%
Saskatchewan	n/a	1.4%
Yukon	1.5%	1.4%

Provincial and Territorial Tax Brackets for 2018

Provincial/territorial tax brackets are indexed and have changed for 2018, for the following provinces and territories:

- Alberta
- British Columbia

- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nunavut
- Ontario
- Québec
- Yukon

To confirm the amounts, contact your tax services office or visit the government websites.

British Columbia

British Columbia provincial tax reduction factor S increased. To confirm the amounts, contact your tax services office or visit the government websites.

Ontario

Ontario provincial surtax amounts are updated. Provincial tax reduction factor S increased. To confirm the amounts, contact your tax services office or visit the government websites.

Québec

Note: Pre-printed Relevé 1 forms obtained from Revenu Québec are no longer supported. You can continue to print these forms on plain paper.

- The maximum pensionable earnings amount for the Québec Pension Plan for 2018 is \$55,900. Additionally:
 - The maximum contributory earnings for QPP increases to \$52,400.
 - The QPP rate remains unchanged at 5.4%.
 - The maximum employee and employer contributions for QPP are \$2,829.60 each.
- The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2018.
- The Québec Parental Insurance Plan (QPIP) rates have been updated for 2018 as follows:

- Maximum insurable earnings: \$74,000
- Employee premium rate: 0.548%
- Employee maximum contributions: \$405.52
- Employer premium rate: 0.767%
- Employer maximum contributions: \$567.58

Product Updates

The following product updates are included with this release.

Payroll Product Updates

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

Record of Employment

Record of Employment (ROE) files include expected recall dates only if **Y - Expected date of recall** is entered for box 14.

Payroll Earnings and Deductions Employment Codes

On the **Payroll Earnings and Deductions** window, a new **T4 - Seasonal Agricultural Workers Program** option is available in the **T4/T4A Reporting** field. If you select this option, employment code 15 is entered in box 29 on the employee's T4.

HR Product Updates

The following new features and improvements are included with this update to Sage HRMS.

Updated MSXML Version

With this release, we updated the version of MSXML in the program and as referenced during the Sage HRMS installation process.

Sage Employee Self Service Product Updates

The following new features and improvements are included with this update to Sage Employee Self Service.

Archive Messages Feature

Previously, some customers received a System Out of Memory error message when they tried to log in to Sage Employee Self Service if there were more than 10,000 notifications in the system. We resolved the

problem by adding a new **Archive Messages** feature. You can archive messages and notifications using the following processes:

- In the Message Center section of the **System Setup** page, you can select to display notifications from a specific date, archive messages, and delete archived messages prior to a specific date.
- If you select to archive messages, when a Manager or Administrator is in the **Message Center**, they have the option to **Archive** (instead of delete) their notifications.
- You can view archived messages from the **Message Center > Related Links** panel > **Archived Messages** link.

Form W-2 for 2017

With this release, we updated the Form W-2 for 2017 in Sage Employee Self Service. The only change was to update the year as it displays on the form.

Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage HRMS. 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.

Note: You must register your organization with Sage Payroll Tax Forms and eFiling by Aatrix each year.

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/sagehrms>

Preparing for Year-End Processing

Before you start processing your 2018 payroll, visit the Sage City Year-End Center, where you can get fast answers from Sage support, peers, and product experts at the busiest time of year. You'll find helpful articles, discussion forums, and other links and resources to help your year-end processing go smoothly.

To get started, visit <http://sagecity.na.sage.com/p/yearend> and select Sage HRMS.

The Year-End Center provides you with information on the following topics:

- Using the Update TD1 Claim function
- Printing and filing T4s and Releve 1s
- Information about processing year-end 2017 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- Preparing for your first payroll of 2018

Product Update Installation Instructions

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

Before you start:

- Back up your data.
- Make sure all users have exited the program.

Downloading the Product Update

To download the update:

1. Visit the Sage Knowledgebase at <https://support.na.sage.com>, click **Log on**, and then log on to the site.
2. In the Support by product section, click **Select your product**, and then click **more products**.
3. Under Sage HRMS, click your product and version.
4. In the Latest updates section, click an update to download.
5. In the article, click **Download Now** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

Installing the Product Update

To install the Product Update:

Note: You should launch the product update on the server where Sage HRMS is installed.

1. To launch the installation program, right-click the Product Update file and run as administrator, or as the current user with administrator rights.
 - If applicable, make sure the **Protect my computer and data from unauthorized program activity** check box is *not* selected.
 - If there is no option to run as administrator, log on as an administrator, and then double-click the Product Update file.

Tip: Depending on your security system, you may need to right-click on the installation file and select Unblock.

2. After the InstallShield Wizard determines requirements, click **Next** to resume installing the Product Update.
3. Click **Finish** to finish the installation.
4. Click **Update**.
5. Click **Yes**. The system starts the installation.
6. Follow the instructions on the windows that follow, and then click **Finish**.
7. Open the Sage HRMS Client. A message prompts you to continue.

Updating Sage HRMS Client Files

To update Sage HRMS Client files:

1. Right-click on the Sage HRMS Client program and select **Run as administrator** to initiate the file update process.
2. Click **OK** to proceed and update your files.

A message displays that Sage HRMS could not detect the current version of one or more Payroll modules.

- If you have administrator privileges, click **Yes** to install the Payroll modules now.
- If you do *not* have administrator privileges, click **No**, and then contact your system administrator to proceed with the installation.

When installation of the Payroll modules is complete, you may be prompted to restart Sage HRMS.

Verifying the Product Update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help > About Sage HRMS** and verifying that the version number corresponds with the version of the update .exe file.

You can also verify the latest tax update is applied to your system by selecting **Payroll > Process Payroll > Calculate Payroll** and the **Tax Version** listed on the window should display the date: January 1, 2018.

Tip: Now is a good time to update your Sage HRMS Payroll sample data. After installing the Product Update, the next time you log in to your Sample Data, you will be prompted to update files again. Click **OK** to proceed and update your sample data files.

Sage Employee Self Service Update Installation Instructions

After you have downloaded the Sage Employee Self Service update from the Sage Knowledgebase, follow these instructions to install the update and to resume your payroll processing.

Before you start:

- Verify that Sage HRMS has been installed and is working correctly.
- Verify that you have Administrator access (Local Administrator access is preferred) and permissions to log on as a service, launch processes, and access Sage HRMS data.
- If you are using Sage Employee Self Service and/or Open Enrollment, make sure all enrollment periods are closed, and that all users have exited and logged off from Sage HRMS and Sage Employee Self Service.
- When the update is complete, you will be prompted to restart your system. Before you begin installing the update, make any necessary preparations for this required restart.

Downloading the Update

1. Visit the Sage Knowledgebase at <https://support.na.sage.com>, click **Log on**, and then log on to the site.
2. In the Support by product section, click **Select your product**, and then click **more products**.
3. Under Sage HRMS, click your product and version.
4. In the Latest updates section, click an update to download.
5. In the article, click **Download Now** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

Important! During this installation process you must enter your Sage Employee Self Service username, organization name, serial number, and install code. You can find this information in System Maintenance under **Start > All Programs > Sage Employee Self Service > System Maintenance**.

Once you start the installation, your customer information clears from System Maintenance, so please copy or save a screen shot of your company's product information to reference when prompted. Best practice is to collect this information before you start the update.

Installing the Sage Employee Self Service Update

1. **Using your external backup procedures, back up the Sage HRMS and Sage Employee Self Service databases to a media device that is external to your product servers:**
 - a. Log on to the Sage Employee Self Service server and select **Programs > Employee Self Service > System Maintenance** to open the Sage Employee Self Service System Maintenance window.
 - b. On the Configuration and Settings tab, in the Employee Self Service section, select the **Locked** check box, and then click **Save**.
 - c. On the SQL Maintenance tab, verify the Backup File Path is correct, and then click **Backup**.
 - d. Prepare to update Sage Employee Self Service by closing all Windows applications.
 - e. Run the setup.exe file provided with the installation package with Administrative privileges (right-click the file and select **Run as Administrator**).

Tip: Depending on your security system, you may need to right-click on the installation file and select Unblock.

2. The installation program detects that a previous version of Sage Employee Self Service has been installed. Click **Next**, and then follow the prompts on the InstallShield Wizard.
3. On the Ready to Install the Program window, click **Install** to proceed with the installation.
4. The system displays Installation windows indicating the progress of the installation. When the InstallShield Wizard Completed window appears, click **Finish**.

Note: One installation window prompts you to enter your customer information (username, organization name, product serial number, and install code). After you start the update process, your customer information clears from System Maintenance. Best practice is to collect this information before you start the update.

5. When the update is complete, click **Yes** to restart your system.
6. After your Sage Employee Self Service server restarts, from the **Start** menu, select **All Programs > Sage Employee Self Service > System Maintenance** to open the System Maintenance page. Verify that all the information is correct.
7. On the **Configuration and Settings** tab, clear the **Locked** check box.
8. Exit System Maintenance.
9. Log on to Sage Employee Self Service as the MASTER user to complete the process.

The update is now complete and you are ready to start using Sage Employee Self Service.