Sage HRMS 2017

Canadian Payroll
July 1, 2017 Release Notes

June 2017
## Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Update Release Notes</td>
<td>2</td>
</tr>
<tr>
<td>Product Update Information</td>
<td>2</td>
</tr>
<tr>
<td>About Product Updates for Sage HRMS</td>
<td>2</td>
</tr>
<tr>
<td>Important Information Regarding Future Updates</td>
<td>2</td>
</tr>
<tr>
<td>Support and Resources</td>
<td>2</td>
</tr>
<tr>
<td>Payroll Tax Updates</td>
<td>4</td>
</tr>
<tr>
<td>Provincial and Territorial Legislative Updates</td>
<td>4</td>
</tr>
<tr>
<td>Prince Edward Island</td>
<td>4</td>
</tr>
<tr>
<td>Saskatchewan</td>
<td>4</td>
</tr>
<tr>
<td>Product Updates</td>
<td>5</td>
</tr>
<tr>
<td>Payroll Product Updates</td>
<td>5</td>
</tr>
<tr>
<td>HR Product Updates</td>
<td>5</td>
</tr>
<tr>
<td>Sage Employee Self Service Product Updates</td>
<td>5</td>
</tr>
<tr>
<td>Sage Payroll Tax Forms and eFiling by Aatrix</td>
<td>6</td>
</tr>
<tr>
<td>Product Update Installation Instructions</td>
<td>7</td>
</tr>
<tr>
<td>Downloading the Product Update</td>
<td>7</td>
</tr>
<tr>
<td>Installing the Product Update</td>
<td>7</td>
</tr>
<tr>
<td>Updating Sage HRMS Client Files</td>
<td>8</td>
</tr>
<tr>
<td>Verifying the Product Update</td>
<td>8</td>
</tr>
</tbody>
</table>
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
Version: Product Update July 1, 2017

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.

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.

<table>
<thead>
<tr>
<th>Release</th>
<th>Q1 2017</th>
<th>Q2 2017</th>
<th>Q3 2017</th>
<th>Q4 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sage HRMS 2015</td>
<td>Yes</td>
<td>Last Update</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Sage HRMS 2016</td>
<td>Yes</td>
<td>Yes</td>
<td>Last Update</td>
<td>-</td>
</tr>
<tr>
<td>Sage HRMS 2017</td>
<td>-</td>
<td>First Update</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

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](http://cdn.na.sage.com/docs/en/customer/hrms/documentation.htm) for more.

**Sage City:** Visit [https://sagecity.na.sage.com](https://sagecity.na.sage.com) for blogs, tips, and guidance specific to Sage HRMS.

**Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at [https://support.na.sage.com](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 provincial and territorial tax changes are included in this update.

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. For details about each update, review the CRA July 1, 2017 government publication or visit the CRA website.

Prince Edward Island

Effective for the 2017 tax year, the basic personal amount has increased. You must manually specify the prorated basic personal amount of $8,320 on the Employees window.

Saskatchewan

Effective July 1, 2017, tax rates have decreased.
Product Updates

The following product updates are included with this release.

Payroll Product Updates

This update does not include any new features or improvements to payroll.

HR Product Updates

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

Turnover Statistics Report

With this release, we corrected the Turnover Statistics report and regardless of the criteria settings, the report now shows only the current active employees in the Current Period Count. (17161)

Sage Employee Self Service Product Updates

This update does not include any new features or improvements to Sage Employee Self Service.
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
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.
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.
The InstallShield Wizard appears.

2. After the 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. Launch the Sage HRMS Client 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: June 30, 2017.

**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.