Sage HRMS 2017

U.S. Payroll
Q1 2019 Release Notes

March 2019

Contents

Product Update Release Notes

> **Important!** All customers who update, maintain, and use Sage HRMS 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 HRMS 2017 U.S. Payroll

Version: Product Update Q1 2019

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.

> **Note:** Sage HRMS 2017 is the only product version that is currently supported. Product Updates and Quarterly Tax Updates are not available for earlier versions of Sage HRMS.

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 City:** Visit 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 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, state, and local tax changes are included in this update.

Federal Legislative Updates

There are no federal legislative updates with this release.

State and Local Legislative Updates

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

> **Note:** Sage HRMS U.S. Payroll includes some system-supported State Disability Insurance (SDI) codes, which are updated automatically (for example, with rate changes) when you install product updates. To use these codes, your SDI codes must match the system-supported codes.
>
> If you use custom tax codes to capture SDI taxes, note the following:
>
> - If your codes match the system-supported tax codes, you should review the tax code setup before processing payroll.
> - If your codes do not match the system-supported tax codes, you can switch to using the system-supported codes. To do this, you must deactivate your custom tax codes, and then set up the system-supported tax codes.
> - Regardless of whether or not your codes match the system-supported tax codes, you must follow your existing procedures for reporting and filing SDI taxes as custom taxes.
>
> Information about changes to specific system-supported SDI codes is included in the sections for the related states.

Alabama

Effective December 31, 2018, the following local tax has been expired:

Code	Description
AL0030	Fort Deposit CT Regular IT

Indiana

For quarterly reports, you are now required to report additional information for employees. For each employee:

- On the **Employee Supplemental Information** window, specify a code in the **Occupational Code** field.
- If an employee is a part time worker, select the **Part-time Worker** option on the **Pay** tab of the **Employee Payroll** window.

Maryland

Maryland withholding tables and instructions have been updated for 2019. Refer to the state publication for more details.

Washington

A new Washington Paid Family and Medical Leave plan will be effective January 1, 2020. However, premiums are effective January 1, 2019.

For more information, including details about setting up deduction codes, see Sage Knowledgebase article 95277.

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.

Displaying attachments in ESS

When an attachment file is selected on the **Employee Attachments** detail page, you can now select the new **Display in Employee Self Service** check box to have that attachment display in ESS. The table on the **Employee Attachments** summary page now has the **Displayed in Employee Self Service** column to show either **Yes** or **No** for each attachment.

Labeling reports in process maps

When a report is added to the Payroll Process map, it now includes the word "Report" at the end of the title.

Sage Employee Self Service Product Updates

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

Organization chart

Employees can now view an enhanced organization chart by selecting **Employment > Organization Chart**. The chart shows their supervisor, manager, and direct reports.

Profile picture

On their **Personal Profile** page, employees can now upload their profile picture.

Company Phone List

You can now click an email address in the **Company Phone List** to send an email to that person.

The **Company Phone List** can include an employee's personal information (alternative email address, home and cell phone number, page number, and fax number from their **Personal Profile** and **Phone** pages) if the employee chooses to display it and if enabled by the system administrator for the employer.

The **Related Links** area of the **Company Phone List** now has a link to the Organization Chart.

Attachments

If enabled by the system administrator for the employer, employees can now access the new **Attachments** page (using **Employee > Personal > Attachments**) to see a list of attachments from Sage HRMS and then preview them.

Mobile access to My Menus

If the system administrator creates links for **My Menus** on the **Create Custom Menu** page and sets the security to **View**, employees will now be able to view the **My Menus** selection on the mobile page of ESS.

Time off requests

When a manager receives an email with a time off request (or a change to a time off request), the Subject line now shows the name of the employee making the request. The email also includes a calendar attachment that the manager can click to add the time off event to their calendar. If the manager approves the request, the employee also gets an email message with a calendar attachment for their calendar

Managers will now be able to see employee's time off even if that employee has not created a logon in ESS.

Two factor authentication

On the **Logon Setup** page, the system administrator can now select the **Enable Two Factor Authentication** check box. Employees will then need to answer their security question correctly to log into ESS.

Reversed transactions

Previously, if a check was reversed, it still appeared in an employee's Pay History. The **System Setup** page now contains the **Display Reversed Transactions in Pay History** item. If the system administrator selects **No**, the original and reversed checks in an employee's Pay History are hidden. If the system administrator selects **Yes**, the original and the reversed checks appear together in an employee's Pay History.

Mail relay

On the **System Setup** page, the system administrator can now select the **Mail Relay** check box to have the email address entered for **System E-mails Sent From** used for the mail relay.

Messages

In the **Sage 100 Payroll Setup** window, if you click the **Employee Tax Info** button but there is a Sage 100 Payroll in process, a warning message displays. You can still save the tax changes.

If your integrated product (such as Sage 100) has an expired subscription, an error message displays and you cannot access that integrated product.

Open Enrollment

The Benefit Administrator can now delete an Open Enrollment that has a status of **Updated**.

My Workforce Analyzer Updates

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

Sage 100 Payroll Link Updates

This update does not include any new features or improvements to Sage 100 Payroll Link.

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.

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**.
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: March 31, 2019.

> **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.

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 HRMS.

2. On the Local/Other Tax Codes window, click the **Install Repository** button to update all of the local tax rates in the system.

3. When you receive the prompt "Install Repository completed. Do you want to continue updating company level local tax records with information from the local repository?":

   - Click **Yes** to automatically update the company rates for all local taxes, or

   - Click **No** if you prefer to select each local tax individually and click the Update button for each one in order to apply the rate changes. This gives you the opportunity to validate rates before and after the changes.

   > **Note:** If you click **No**, you will be required to 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**.

4. If you click **Yes**, after the process completes a message displays: "Updating company level local tax records completed. Do you want to continue updating employee local tax records from the local tax repository?".

   - Click **Yes** to automatically update the employee-level rates for all local taxes, or

   - Click **No** if you want to select each employee or use the Update Taxes tax, then update each tax or employee individually.

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