Sage HRMS 2017

U.S. Payroll
Q2 2017 Release Notes

June 2017

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 2016 U.S. Payroll

Version: Product Update Q2 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.

Release	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Sage HRMS 2015	Yes	Last Update	-	-
Sage HRMS 2016	Yes	Yes	Last Update	-
Sage HRMS 2017	-	First Update	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 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.

Kentucky

- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
KY0045	McCreary CO Regular IT	1.5%	4/1/2017
KY0130	Owensboro CT Regular IT	1.78%	7/1/2017
KY0256	Grant CO Regular IT	2%	4/1/2017

- The following local taxes have updated rates in the supported tax tables:

Code	Description	Rate	Wage Base Limit	Effective Date
KY0028	Augusta CT Regular IT	1.25%	$72,000	7/1/2016
KY0093	Wilder CT Regular IT	2.25%	$127,200	7/1/2017

Ohio

- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
OH0088	Sabina CT Regular IT	1.50%	7/1/2017
OH0161	Uhrichsville CT Regular IT	2%	7/1/2017
OH0196	Macedonia CT Regular IT	2.25%	7/1/2017
OH0345	Reynoldsburg CT (Lic) Regular IT	2.50%	7/1/2017
OH0428	Indian Hill VI Regular IT	0.55%	1/1/2016
OH0462	Reynoldsburg CT (Fra) Regular IT	2.50%	7/1/2017
OH0696	Springfield CT Regular IT	2.40%	7/1/2017
OH0840	Reynoldsburg CT (Fai) Regular IT	2.50%	7/1/2017
OH0957	Kirkersville VI Regular IT	1%	7/1/2017

- Effective May 2, 2017, the following local Ohio tax has been expired:

Code	Description
OH0259	Brady Lake VI Regular IT

West Virginia

The following local tax has been added in the supported tax tables:

Code	Description	Rate	Effective Date
WV0009	Madison CT Service Fee	$1.25 / week	1/1/2017

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)

VETS 4212 Reporting Changes

With this release, we updated the **VETS 4212 Detail List** and **VETS 4212 Summary List** reports (Reports > EEO Reports) to remove the Active, LOA, and Terminated check boxes from the **Standard Criteria** tab. Now you can generate the reports with accurate values, regardless of the employee status. (17107)

As part of the report updates, we updated the **Military** tab of the employee record (Employees > View/Edit Employee > HR Status detail page) to follow current VETS 4212 reporting requirements. We removed the existing check boxes (Disabled Veteran, Armed Forces Service Medal Veteran, and Active Duty Wartime or Campaign Badge Veteran) and replace them with a new general check box, **Protected Veteran**. After installing this update, if at least one of the former check boxes was selected, the new Protected Veteran check box will be selected.

And finally, we updated the formats of the following reports to include the new Protected Veteran field (and removed the former fields):

- **VETS 4212 Detail List**
- **VETS 4212 Summary List**
- **Employee Profile Report**

Custom State Codes after Upgrade

Previously, some customers experienced a problem with custom codes they created for the State field for international employees. After applying an update and performing reserialization, changing the product registration, or changing the Reginfo table, sometimes the custom State codes were lost. With this release, we corrected the issue and the custom codes remain available, including after the steps aforementioned.

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 <u>Log on</u>, 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.

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.

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.