



# Sage HRMS

U.S. Payroll

Q2 2019 Release Notes

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# 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 and Sage Employee Self Service version 2017

**Version:** Product Update Q2 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.

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

**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.

## District of Columbia

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

Code	Description	Rate	Effective Date
DC0001	Universal Paid Leave Employer Tax	0.62%	4/1/2019

## Kentucky

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

Code	Description	Rate	Effective Date
KY0002	Simpson CO Regular IT	1%	7/1/2019
KY0010	Cumberland CO Regular IT	1.75%	4/1/2019
KY0116	Russell CO Regular IT	0.75%	7/1/2019
KY0221	West Liberty CT Regular IT	1%	4/1/2019
KY0231	Vine Grove CT Regular IT	2%	4/1/2019

## Ohio

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

Code	Description	Rate	Effective Date
OH0195	Mogadore VI (Sum) Regular IT	2.5%	7/1/2019
OH0207	Navarre VI Regular IT	1.75%	7/1/2019
OH0254	Mogadore VI (Por) Regular IT	2.5%	7/1/2019
OH0412	Springdale CT Regular IT	2%	7/1/2019
OH0428	Indian Hill VI Regular IT	0.525%	1/1/2018
OH0471	Gahanna CT Regular IT	2.5%	7/1/2019
OH0769	Bratenahl VI Regular IT	2%	6/1/2019
OH0926	Bethel VI Regular IT	0.5%	7/1/2019
OH0995	Mount Blanchard VI Regular IT	1%	1/1/2019

## Pennsylvania

Local taxes for the city of Philadelphia have updated rates. You must manually update these local taxes. For more information, see [Knowledgebase article 98582](#).

# 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.

### Fix for W-2 Reporting for Employees Who Work in New York City

For employees who work in New York City but do not live there, the correct code—NYCNR—now appears in box 20 on the W-2 for the employee.

### Fix for North Carolina Income Tax Amounts

For North Carolina income tax supplemental rate, tax amounts are now rounded to whole-dollar amounts.

### Fix for Employees Who Work or Live in Philadelphia

For employees who live or work in Philadelphia, the relevant Philadelphia rate for withholding tax is now used. Previously, in some cases an incorrect rate could be used (for example, if an employee works in Philadelphia but lives in a different Pennsylvania jurisdiction with a higher rate for withholding tax, the higher rate was used).

## HR product updates

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

### EEO-1 for multiple employers

Changes were made to accommodate multiple establishments in the EEO-1 file.

- On the **HR Setup** page for each employer: On the **EEO-1** tab for **Type of Report**, if you select **Headquarters**, it will be a Type 3 report. If you select **Establishment**, you can select the **50 or More Employees** check box if applicable (creating a Type 4 report); otherwise it will be a Type 8 report.
- On the EEO-1 Headcount Summary report: On the **Standard Criteria** tab for this report, you can select **Multiple** for **Employer**, and then select them from the list of available employers. You then select the employer from the **Reporting Establishment** list on the **Specific Criteria** tab. If an employee is associated with multiple companies, when you click **Print**, **Preview**, or **Export**, the **Employer Selection window** appears so you can select the employer that the employee works for most of the time. (An employee can only be included on the EEO-1 report for one employer.)

### Example in online help

In the online help for savings benefit plans, an example was added about using a decimal when the **Employer Contribution Type** is **Percent**.

### Multi-page custom detail

If you select a multi-page custom detail and try to delete a page, you no longer receive an error.

### Custom menu

If you create a custom menu under Connected Services, the entire list of menu items will now display.

### Employee Self Service access

When users access Employee Self Service from the **Self Service** link in HRMS, they are not asked their security questions (for two-factor authentication).

### Time Off accruals

The Accrue Time process now correctly accrues time for a FMLA Rolling 12 Month plan.

## Links to instructional videos

You can now click an icon to access relevant instructional videos from the following HRMS pages:

- Benefit Type Codes
- Dependent Relationship Codes
- Benefit Rate Tables
- Setup Insurance Plans
- Setup Savings Plans
- Job Codes
- Salary Grade Codes
- Step Rate Codes
- Group Security
- User Security
- Reports Menu
- Employee Selection
- Assign Taxes to Employees
- Employee Earnings Distribution
- Reverse Transaction
- Gross up Calculator
- Update Earnings/Deductions
- Employee Supplemental Info
- Delete Inactive Records
- Update Taxes
- Timecards

## Sage Employee Self Service product updates

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

### Time off calendar

Managers can now access the Time Off Calendar even when no employees have requested time off.

## Profile picture

In all operating configurations, employees can now add a profile picture without getting an error message.

## Sage 100 Payroll Link Updates

The following fix is included with this update to Sage Employee Self Service.

### Modified Audit Report

Although the correct values were used in the transfer, the Modified Audit Report previously showed some Sage 100 values in the HRMS column when the organization or department was changed. The report now shows the appropriate HRMS value.

# 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: June 30, 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.

# 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.