Sage HRMS 2015
U.S. Payroll

Q4 2015 SR1 Release Notes

January 2016
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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 2015 U.S. Payroll

Version: Product Update Q4 2015 SR1

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></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Sage HRMS 2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final Update</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
<tr>
<td>Sage HRMS 2015</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Sage HRMS 2016</td>
<td>–</td>
<td>First Update</td>
<td>Yes</td>
<td>Yes</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.
• **Sage University:** Learn pro tips for year-end processing in online or classroom courses. Visit [http://SageU.com](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](http://sagecity.na.sage.com/p/yearend) for help, guidance, documents, and downloads specific to Sage HRMS Payroll and Year End 2015.

• **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.

• **Tax forms:** Because all printed forms have variations, Sage HRMS Payroll only supports forms printed by Sage Checks and Forms. Call Sage Checks and Forms at 800-617-3224 or order online at [www.SageChecks.com](http://www.SageChecks.com).

  **Tip:** For information about ordering W-2 forms, see the article [Which forms should I order for year-end?](http://www.SageChecks.com) on the Sage Support website.
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 the state and local 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.

Connecticut

Connecticut withholding tables and instructions have been updated for 2016. Refer to the state publication for more details.

District of Columbia

The District of Columbia Office of Tax and Revenue has released 2016 withholding tables and instructions. Refer to the district publication for more details.

Hawaii

The Unemployment Insurance wage base limit increases to $42,200 for 2016.

Idaho

The Unemployment Insurance wage base limit increases to $37,200 for 2016.
**Illinois**

The Illinois Department of Revenue has released 2016 withholding tables and instructions. Refer to the state publication for more details.

**Indiana**

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>IN0001</td>
<td>Morgan 55 CO Regular (NR) IT</td>
<td>0.502%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0006</td>
<td>Washington 88 CO Regular (NR) IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0014</td>
<td>Tipton 80 CO Regular (NR) IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0024</td>
<td>Rush 70 CO Regular (NR) IT</td>
<td>0.67%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0031</td>
<td>Pike 63 CO Regular (NR) IT</td>
<td>0.75%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0032</td>
<td>Perry 62 CO Regular (NR) IT</td>
<td>1.2475%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0060</td>
<td>Henry 33 CO Regular (NR) IT</td>
<td>0.5625%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0067</td>
<td>Gibson 26 CO Regular (NR) IT</td>
<td>0.55%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0070</td>
<td>Fountain 23 CO Regular (NR) IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0075</td>
<td>Delaware 18 CO Regular (NR) IT</td>
<td>0.8625%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0081</td>
<td>Clinton 12 CO Regular (NR) IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0093</td>
<td>Whitley 92 CO Regular IT</td>
<td>1.4829%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0104</td>
<td>Union 81 CO Regular IT</td>
<td>1.75%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0113</td>
<td>Shelby 73 CO Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0115</td>
<td>Rush 70 CO Regular IT</td>
<td>2.1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0119</td>
<td>Pulaski 66 CO Regular IT</td>
<td>3.38%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0122</td>
<td>Pike 63 CO Regular IT</td>
<td>0.75%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Rate</td>
<td>Effective Date</td>
</tr>
<tr>
<td>-------</td>
<td>--------------------------------------</td>
<td>-------</td>
<td>----------------</td>
</tr>
<tr>
<td>IN0123</td>
<td>Perry 62 CO Regular IT</td>
<td>1.81%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0127</td>
<td>Ohio 58 CO Regular IT</td>
<td>1.25%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0148</td>
<td>Jasper 37 CO Regular IT</td>
<td>2.864%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0152</td>
<td>Henry 33 CO Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0159</td>
<td>Gibson 26 CO Regular IT</td>
<td>0.7%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0161</td>
<td>Franklin 24 CO Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0162</td>
<td>Fountain 23 CO Regular IT</td>
<td>1.55%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>IN0167</td>
<td>Delaware 18 CO Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>

**Maryland**

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>MD3189</td>
<td>Anne Arundel, Maryland Regular IT</td>
<td>2.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>MD3210</td>
<td>Worcester, Maryland Regular IT</td>
<td>1.75%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>

**Massachusetts**

The Massachusetts Department of Revenue has released 2016 withholding tables and instructions. Refer to the state publication for more details.

**Minnesota**

Minnesota withholding tables and instructions have been updated for 2016. Refer to the state publication for more details.
Missouri

The Missouri Department of Revenue has released 2016 withholding tables and instructions. Refer to the state publication for more details.

New Mexico

New Mexico withholding tables and instructions have been updated for 2016. Refer to the state publication for more details.

New York

- The New York Department of Taxation and Finance has released 2016 withholding tables and instructions. Refer to the state publication for more details.
- City of Yonkers Income Tax (NYCIT) has been updated for 2016. Refer to the state publication for more details.

North Carolina

The North Carolina Department of Revenue has released 2016 withholding tables and instructions. Refer to the state publication for more details.

North Dakota

North Dakota withholding tables and instructions have been updated for 2016. Refer to the state publication for more details.

Ohio

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

Oklahoma withholding tables and instructions have been updated for 2016. Refer to the state publication for more details.

### Oregon

Oregon Department of Revenue has released 2016 withholding tables and instructions. Refer to the state publication for more details.

### Pennsylvania

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA0560</td>
<td>Guilford TP, Waynesboro SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA0561</td>
<td>Guilford TP, Chambersburg SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA0578</td>
<td>New Alexandria BO, Derry SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA0714</td>
<td>Summit TP, Fort Leboeuf SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA0715</td>
<td>Springfield TP, Northwestern SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA0726</td>
<td>Girard TP, Girard SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Rate</td>
<td>Effective Date</td>
</tr>
<tr>
<td>--------</td>
<td>--------------------------------------------------</td>
<td>--------</td>
<td>----------------</td>
</tr>
<tr>
<td>PA0761</td>
<td>South Middleton TP, S Middleton SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA0836</td>
<td>Bald Eagle TP, Keystone Central SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA0941</td>
<td>Franklin TP, Lehighton SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA1161</td>
<td>Aliquippa CT, Aliquippa SD (NR) LST</td>
<td>$104.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA1174</td>
<td>Rayburn TP, Armstrong SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA1245</td>
<td>Penn TP, Selinsgrove SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA1883</td>
<td>Howe TP, Newport SD (NR) LST</td>
<td>$52.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA2072</td>
<td>New Beaver BO, Mohawk SD (NR) LST</td>
<td>$40.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA2328</td>
<td>Johnstown CT, Greater Johnstown SD (NR) LST</td>
<td>$156.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA2701</td>
<td>Bensalem TP, Bensalem SD (NR) Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA2702</td>
<td>Bensalem TP, Bensalem SD Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA4321</td>
<td>Jeannette CT, Jeannette SD (NR) Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA4322</td>
<td>Jeannette CT, Jeannette SD Regular IT</td>
<td>1.85%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA4505</td>
<td>Greenville BO, Greenville SD (NR) Regular IT</td>
<td>1.046%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA4506</td>
<td>Greenville BO, Greenville SD Regular IT</td>
<td>1.125%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA4515</td>
<td>Farrell CT, Farrell SD (NR) Regular IT</td>
<td>1.8%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA4516</td>
<td>Farrell CT, Farrell SD Regular IT</td>
<td>2.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA5469</td>
<td>Johnstown CT, Greater Johnstown SD (NR) Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Rate</td>
<td>Effective Date</td>
</tr>
<tr>
<td>-------</td>
<td>--------------------------------------------------</td>
<td>-------</td>
<td>----------------</td>
</tr>
<tr>
<td>PA5685</td>
<td>Altoona CT, Altoona SD (NR) Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA5686</td>
<td>Altoona CT, Altoona SD Regular IT</td>
<td>1.6%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7053</td>
<td>Rankin BO, Woodland Hills SD (NR) Regular IT</td>
<td>1.3%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7054</td>
<td>Rankin BO, Woodland Hills SD Regular IT</td>
<td>1.4%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7611</td>
<td>Braddock BO, Woodland Hills SD (NR) Regular IT</td>
<td>1.15%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7612</td>
<td>Braddock BO, Woodland Hills SD Regular IT</td>
<td>1.4%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7816</td>
<td>Jeannette CT, Hempfield SD (NR) Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7817</td>
<td>Jeannette CT, Hempfield SD Regular IT</td>
<td>1.85%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7819</td>
<td>Jeannette CT, Penn-Trafford SD (NR) Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7820</td>
<td>Jeannette CT, Penn-Trafford SD Regular IT</td>
<td>1.85%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>

**Rhode Island**

Rhode Island withholding tables and instructions have been updated for 2016. Refer to the state publication for more details.

**Vermont**

Vermont withholding tables and instructions have been updated for 2016. Refer to the state publication for more details.

**West Virginia**

The following local tax has an updated rate in the supported tax tables:
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>WV0007</td>
<td>Morgantown CT Service Fee</td>
<td>$156.00</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>
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.

Form W-2 Changes

We've made the following changes related to W-2 reporting:

- If an employee has earnings that qualify as pension or retirement plan earnings, the Retirement Plan box will be checked on the W-2 form for that employee, even if you have not specified that pension plan information applies to the employee. For information about pension and retirement plan earnings that qualify, see Knowledgebase article 72244.

- On the Employee tab of the Local and Other Custom Taxes window, the following choices in the W2 Reporting field are new or have changed:
  - Other Information Box. If this is selected, information for the tax is now reported in box 14 on the W-2 form.
  - Suppress W2 Reporting. This is a new item. If this is selected, information for the tax is not reported on the W-2 form.

- On the W-2 Tax Filing window, a new Sort by Active Employees option allows you to sort employees by status on Aatrix W-2 Processing windows. If you select the Sort by Active Employees option, employees are listed in the Group ID column on the W-2/1099 Preparer window in Aatrix with a prefix of A or T, indicating whether they are active or terminated employees. This prefix allows you to sort the Group ID column.

- The process for reporting New Jersey taxes has changed. You no longer need to select the New Jersey Local Taxes option on the W-2 Tax Filing window. Instead, on the Local and Other Custom Taxes window, a new NJ Local Tax field has been added, which you use to specify the tax type (NJSUTA, NJSDI, NJFLI, NJWD, NJHC). For more information about reporting New Jersey taxes, see Knowledgebase article 72273.
Specify Service Class Codes

On the **EFT Options** window, you can now change the service class code.

**W-2s on Paper Window**

With this release, the **W-2s on Paper** window has been renamed to **W-2 Forms**. All functionality remains the same.

**My Workforce Analyzer Updates**

The following new features and improvements are included with this update to My Workforce Analyzer.

**General Updates to My Workforce Analyzer**

Based on changes from the IRS and feedback from customers, this release includes legislative updates, minor enhancements, and minor fixes to the workforce analyzer engine.

**Tip:** For a checklist and overview of the year-end process using My Workforce Analyzer and Sage Payroll Tax Forms and eFiling by Aatrix, review the [My Workforce Analyzer 2015 Year-End Processing Guide](#).

**Important Manual Adjustments for Terminated Employees**

If you terminated an employee and continued to offer benefits through to the end of month, My Workforce Analyzer should report an offer of healthcare coverage code for that month on line 14 of Form 1095-C (Employer Provided Health Insurance Offer and Coverage). The program currently uses the termination date to determine coverage and reports code 1H (no offer of coverage) for the month of termination.

We are preparing a correction for this issue and will deliver it as soon as possible, but if you must file your forms before we deliver the fix, you must manually adjust the forms before filing.
Important! If you terminated an employee in 2015, but your offer of healthcare coverage continued through to the end of the month (or subsequent months), follow these steps:

1. After preparing your forms for 2015, select the form set in the Forms > Forms panel, and click Edit. The forms editor opens.
2. Select the 1095-C tab, then using the right-panel search, find the terminated employee.
3. Select the Part II subtab, review Line 14 Offer of Coverage.
4. For months that the employee was terminated but continued to receive an offer of coverage from the employer, change the code from 1H to the applicable Offer of Coverage code.
5. Click Save in the forms editor, and repeat these steps for each applicable terminated employee.

For more information about Offer of Coverage codes, view My Workforce Analyzer online help and the IRS instructions for Forms 1094-C and 1095-C.

Affordable Care Act on Sage City

Staying on top of the Affordable Care Act is critical—and challenging—particularly when it comes to your obligations under the law. With all the delays, legislative changes, and shifting regulatory interpretations over the past few years, you may be feeling a little overwhelmed now that 2016 is here.

To assist you, we’ve set up an Affordable Care Act center on Sage City that includes many assets you may find useful in navigating the changes (please note, some assets require an active Sage Business Care plan to access). Visit http://SageCity.na.Sage.com/ACA/ for more information.

Sage HRMS Product Updates

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

Beneficiaries in the Audit Trail

With this release, we corrected an issue where enabling the audit trail on Beneficiary Enrollments, Employee Dependents, and Dependent Benefits would prevent changes to beneficiary information from being saved. The audit trail now works as expected. (16827)
Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage HRMS Payroll. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a small fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Federal Tax Filing** or **State Tax Filing** from **Payroll > Government Reports** after installing this update. 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:

Preparing for Year-End Processing

Before you start processing your 2017 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.

Sage City Year-End Center

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:

- Printing and filing your W-2s
- Entering employee supplemental information
- Information about processing year-end 2015 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix.
- Preparing for your first payroll of 2017

Year-End Processing Guide

Review the Sage HRMS 2015 Year-End Processing Guide for an overview and checklist to help you close out the payroll year, prepare and file tax forms, and prepare for the new payroll year.
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.
- Download the Product Update from the Sage Customer Portal.

Downloading the Product Update

To download the update:

1. Visit the Sage Knowledgebase at https://support.na.sage.com, and 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 verify the version number corresponds with 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 31, 2016.

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 into 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.