Sage HRMS 2015
U.S. Payroll

Q4 2015 Release Notes

December 2015
Sage Employee Self Service Update Installation Instructions .................25

  Downloading the Update ........................................................................................................ 25

  Installing the Sage Employee Self Service Update ............................................................... 26
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

Version: Product Update Q4 2015

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>Final Update</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?](https://support.na.sage.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

This section lists the Federal legislative updates available with this release.

Social Security Wage Base Changes for 2016

The Social Security Administration released the Social Security taxable wage base for 2016. Based on the increase in average wages, the maximum amount of earnings subject to the Social Security tax (taxable maximum) remains at $118,500.

Federal Withholding Tax Changes for 2016

The IRS released new withholding and allowance amount tables for wages paid on or after January 1, 2016.

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.

State Disability Insurance Codes Added to System Tax Tables

The system-supported tax tables now support the following State Disability Insurance (SDI) taxes for reporting and filing with Sage Payroll Tax Forms and eFiling by Aatrix:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>NJSDI</td>
<td>New Jersey State Disability Insurance</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>RISDI</td>
<td>Rhode Island State Disability Insurance</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PRSDI</td>
<td>Puerto Rico State Disability Insurance</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>
Important! For this tax year (2015) you must follow your existing procedures for reporting and filing SDI taxes as custom taxes.

Effective January 1, 2016, your SDI codes must match the system-supported codes. If you are currently using custom tax codes to capture SDI taxes and your codes match the system-supported tax codes (for example, NJSDI is your custom tax code), review the tax code setup before processing your first payroll of 2016.

If you are using custom tax codes that do not match the system-supported tax codes (for example, NJDIS is your custom tax code), you must deactivate your custom tax codes, set up the system-supported tax codes, and begin using the new tax codes for your first payroll in 2016.

For information about the California State Disability Insurance (CASDI) tax, which has been supported since Q3 2013, see the section for California tax changes.

Alaska

The Unemployment Insurance wage base limit increases to $39,700 for 2016.

California

- The California EDD has released 2016 withholding schedules. Refer to the state publication for more details.

- Effective for wages paid on or after January 1, 2016, the California EDD has released the 2016 state disability insurance tax (CASDI) information. The withholding rate for 2016 is 0.9% (no change from
2015). The taxable wage limit is $106,742 for each employee per calendar year. The maximum to withhold for each employee is $960.68.

- 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>CA0001</td>
<td>San Francisco CT Regular IT</td>
<td>0.75%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>

**Colorado**

The Unemployment Insurance wage base limit increases to $12,200 for 2016.

**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>IN0059</td>
<td>Howard 34 CO Regular (NR) IT</td>
<td>0.5625%</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>IN0065</td>
<td>Greene 28 CO Regular (NR) IT</td>
<td>0.5%</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>IN0088</td>
<td>Blackford 05 CO Regular (NR) IT</td>
<td>0.5%</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>IN0105</td>
<td>Tipton 80 Regular IT</td>
<td>1.98%</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>IN0118</td>
<td>Putnam 67 CO Regular IT</td>
<td>1.75%</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>IN0151</td>
<td>Howard 34 CO Regular IT</td>
<td>1.65%</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>IN0153</td>
<td>Hendricks 32 CO Regular IT</td>
<td>1.5%</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>IN0157</td>
<td>Greene 28 CO Regular IT</td>
<td>1.25%</td>
<td>10/1/2015</td>
</tr>
<tr>
<td>IN0180</td>
<td>Blackford 05 CO Regular IT</td>
<td>1.5%</td>
<td>10/1/2015</td>
</tr>
</tbody>
</table>

**Iowa**

The Unemployment Insurance wage base limit increases to $28,300 for 2016.
Kansas

The Unemployment Insurance wage base limit increases to $14,000 for 2016.

Kentucky

- The Unemployment Insurance wage base limit increases to $10,200 for 2016.

- The Kentucky Department of Revenue has posted 2016 withholding tables and a new computer formula on its website. In 2016, the standard deduction will increase from $2,440 to $2,460. Refer to the state publication for more details.

- Effective January 1, 2016, the maximum wage limit for Boone county occupational taxes imposed on persons working in the county (Boone CO Regular IT - KY0027) increases to $58,727 (maximum payment of $469.82).

- Effective January 1, 2016, the Bardstown, Kentucky city tax (Bardstown CT Regular IT - KY0001) has been updated to remove the wage cap. The tax rate remains the same (0.5%).

- The following local taxes have either been added or 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>KY0097</td>
<td>Villa Hills CT Regular IT</td>
<td>1.5%</td>
<td>1/1/2015</td>
</tr>
<tr>
<td>KY0219</td>
<td>Morgan CO Regular IT</td>
<td>1.5%</td>
<td>11/1/2015</td>
</tr>
<tr>
<td>KY0252</td>
<td>Hopkins CO Regular IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>

Louisiana

The QWR-LA Report Authority has changed the requirements for employee supplemental information for the Louisiana Unemployment Tax (LASUTA). Effective January 1, 2016, you must specify information for each employee in the following fields on the Employee Supplemental Information window to comply with Aatrix Reporting:

- Occupational Code
- Hourly Wages
Maine

Maine Revenue Services has released 2016 withholding tables and instructions. Refer to the state publication for more details.

Minnesota

The Unemployment Insurance wage base limit increases to $31,000 for 2016.

Montana

The Unemployment Insurance wage base limit increases to $30,500 for 2016.

Nevada

The Unemployment Insurance wage base limit increases to $28,200 for 2016.

New Jersey

- The Unemployment Insurance wage base limit increases to $32,600 for 2016.
- The New Jersey Department of Labor has posted the employee withholding rates for UI, DI, WKF, and FLI for 2016. The withholding rates for UI and WKF remain unchanged for 2016. The DI rate for 2016 decreases to .20% and the FLI rate decreases to .08% for 2016. The wage base increases to $32,600 for 2016.

New Mexico

The Unemployment Insurance wage base limit increases to $24,100 for 2016.

New York

The Unemployment Insurance wage base limit increases to $10,700 for 2016.
North Carolina

The Unemployment Insurance wage base limit increases to $22,300 for 2016.

North Dakota

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

Ohio

- The following local taxes have either been added or 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>OH0176</td>
<td>Baltic VI Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0232</td>
<td>Chillicothe CT Regular IT</td>
<td>2%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0248</td>
<td>Lewisburg VI Regular IT</td>
<td>1.75%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0299</td>
<td>Brookville VI Regular IT</td>
<td>2%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0339</td>
<td>Lakeview VI Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0369</td>
<td>Danville VI Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0385</td>
<td>Logan CT Regular IT</td>
<td>2%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0475</td>
<td>Washington Courthouse CT Regular IT</td>
<td>1.95%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0508</td>
<td>Salem CT Regular IT</td>
<td>1.25%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0544</td>
<td>Athens CT Regular IT</td>
<td>1.75%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0756</td>
<td>Cleveland Heights CT Regular IT</td>
<td>2.25%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0820</td>
<td>Waynesville VI Regular IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0911</td>
<td>Wayne VI Regular IT</td>
<td>0.75%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>
Oklahoma

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH0919</td>
<td>Edon Northwest 8603 SD Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0920</td>
<td>Northeastern 1203 SD Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0921</td>
<td>Zane Trace 7107 SD Regular IT</td>
<td>0.75%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0922</td>
<td>Ashley VI Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0923</td>
<td>Milford JEDD V CT Regular IT</td>
<td>1%</td>
<td>11/1/2015</td>
</tr>
<tr>
<td>OH0924</td>
<td>Ashtabula TP JEDD CT Regular IT</td>
<td>1.8%</td>
<td>1/1/2013</td>
</tr>
<tr>
<td>OH0925</td>
<td>Saybrook TP JEDD CT Regular IT</td>
<td>1.8%</td>
<td>1/1/2013</td>
</tr>
</tbody>
</table>

- The following local taxes have been expired:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH0014</td>
<td>Sebring 5008 SD Regular IT</td>
<td>12/31/2015</td>
</tr>
<tr>
<td>OH0129</td>
<td>Alvordton VI Regular IT</td>
<td>8/31/2007</td>
</tr>
</tbody>
</table>

Oklahoma

The Unemployment Insurance wage base limit increases to $17,500 for 2016.

Oregon

- The Unemployment Insurance wage base limit increases to $36,900 for 2016.

- The following local taxes have either been added or 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>OR0005</td>
<td>Tri-Met Transit District Excise Tax</td>
<td>0.7337%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OR0006</td>
<td>Lane County Transit District Excise Tax</td>
<td>0.71%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>
Pennsylvania

The Unemployment Insurance wage base limit increases to $9,500 for 2016.

Rhode Island

The Unemployment Insurance wage base limit increases to $22,000 for 2016.

Utah

The Unemployment Insurance wage base limit increases to $32,200 for 2016.

Vermont

- The Unemployment Insurance wage base limit increases to $16,800 for 2016.
- You must specify information for each employee in the Hourly Wages field on the Employee Supplemental Information window. This hourly wage information is now included when you use Aatrix reporting.

Washington

The Unemployment Insurance wage base limit increases to $44,000 for 2016.

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>WV0003</td>
<td>Huntington CT Service Fee</td>
<td>$5.00</td>
<td>10/1/2015</td>
</tr>
</tbody>
</table>
**Wyoming**

The Unemployment Insurance wage base limit increases to $25,500 for 2016.
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 Sorting in Sage Payroll Tax Forms and eFiling by Aatrix

If you change the Sort By setting on the W-2s on Paper window, your settings are saved and available in the Sage Payroll Tax Forms and eFiling by Aatrix W-2 processing windows. To sort the column in the Aatrix W-2 grid, right-click the column header.

Print/eFile Button on W-2s on Paper window

The Print button on the W-2s on Paper window has been replaced with a Print/eFile button. This change is to clarify the purpose of the button, as it opens Sage Payroll Tax Forms and eFiling by Aatrix for W-2 processing.

My Workforce Analyzer Updates

Now you can conveniently abide by Affordable Care Act reporting requirements and make decisions with confidence. My Workforce Analyzer helps you manage employer-sponsored healthcare, stay compliant with government regulations, and create and distribute Federal Forms 1095-C and 1094-C. The following new features and improvements are included with this update to My Workforce Analyzer.

Filing ACA Forms with Sage Payroll Tax Forms and eFiling by Aatrix

This release includes the new Sage Payroll Tax Forms and eFiling by Aatrix integration, which provides you with an online interface to print all forms, view and save PDF copies, and eFile forms. This replaces the Print function on the Forms tab and Forms panel in previous releases.
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.

Importing Details to Generated Forms

New to this release, you can use an import function in the Forms panel to add Employee Part II and Part III data to previously generated ACA forms. You no longer have to regenerate the forms to import more information.

Selecting a Measurement Period for Dashboards

With this release, My Workforce Analyzer includes the Last Day of the Measurement Period drop-down selection on the Analysis tab, a setting you must use before launching the online dashboards and analysis. Select the current period (default) or the prior period to view information related to your last measurement period to help you determine who was qualified as a full-time employee for the current stability period.

Support for Aggregated Groups (ALE)

The Aggregated Group column is added to the 1094-C window to allow you to indicate the correct setting for the (d) Aggregated Group Indicator column in Part III of the 1094-C form. Additionally, the Part IV tab is added to the window in My Workforce Analyzer to allow you to enter information for the corresponding part of the form.

Part-Time Employees in ACA Forms

My Workforce Analyzer now completes Part III of the 1095-C forms for employees (full-time and part-time) with active healthcare benefits from Sage HRMS. Part-time employees are included in filing only if the employer provides self-insured coverage and the employee has active healthcare benefits during the calendar year (form year). You can search for the excluded employees (including applicable part-time employees) when editing the forms in My Workforce Analyzer using the search filters.
General Updates to My Workforce Analyzer

Based on feedback and clarification provided by the IRS, this quarterly release includes updates to the ACA federal Forms 1095-C and 1094-C. The forms are completed using data from Sage HRMS following legislative guidelines.

Not using My Workforce Analyzer? Visit MyWorkforceAnalyzer.com for more information. To sign up for My Workforce Analyzer, call Sage Sales at 866-271-6050, Monday to Friday, 8:30 a.m. to 5:30 p.m. ET.

Sage HRMS Product Updates

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

Updates to VETS 4212

The Veterans Employment tab (Setup > Employees > HR Setup) has been updated with this release to include the following new fields: Company No, NAICS Code, Duns No, EIN Number. These fields are required to complete the VETS 4212 reports.

Sage 100 Linked Job Codes

Previously, some customers using Sage 100 with Sage HRMS found that the Labor Codes may not have been able to transfer the full code description between programs. This issue has been fixed with this release. (16739)

Employee Find Calendar Control

When using the Employee Find advanced settings (More Options), the Last Hire Date calendar control has been updated to correctly default to today’s date. (16751)

Sage Employee Self Service Product Updates

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

Prior to this release, when a user would create a new logon for Sage Employee Self Service using MS Windows authentication and the username was greater than 25 characters, the logon could not be created. We corrected this with this release by expanding the logon username character limit to 100 characters. (16746)
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:

https://partner.aatrix.com/index.php/sagehrms
Preparing for Year-End Processing

Before you start processing your 2016 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 2016

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, click the orange Login button, and log on to the site.
2. Select Sage HRMS under My Products in the left menu bar.
3. Select your product and version under Browse Products in the left menu bar.
4. Click the Download software tab (in the center of the screen), then scroll down to the Product updates section.
6. 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.
Updating Sage HRMS Client Files

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 1, 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.
Sage Employee Self Service Update
Installation Instructions

After you have downloaded the Sage Employee Self Service update from the Customer Portal, 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 the 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 before beginning the backup and upgrade.
- When the upgrade is complete, you will be prompted to restart your system. Before you begin the upgrade, make any necessary preparations for this required restart.

Downloading the Update

1. Visit the Sage Knowledgebase at: https://support.na.sage.com and select the orange Login link to log on to the site.
2. Select Sage HRMS under My Products in the left menu bar.
3. Select your product and version under Browse Products in the left menu bar.
4. Click the Download software tab (in the center of the screen), then scroll down to the Product updates section.
6. 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 Sage HRMS and Sage Employee Self Service 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 upgrade 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).

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 upgrade 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 setup.

The upgrade is now complete and you are ready to start using Sage Employee Self Service.