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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 2016 U.S. Payroll and Sage Employee Self Service version 2016

**Version:** Product Update Q1 2016

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>Release</th>
<th>Q1 2016</th>
<th>Q2 2016</th>
<th>Q3 2016</th>
<th>Q4 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sage HRMS 2015</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Sage HRMS 2016</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 City:** Visit [http://sagecity.na.sage.com](http://sagecity.na.sage.com) for blogs, tips, and guidance specific to Sage HRMS Payroll.
• **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.
Payroll Tax Updates

The following federal, state, and local tax changes are included in this update.

Federal Legislative Updates

This section lists Federal legislative updates available with this release.

Form 941 for 2016

Form 941 is updated by the IRS for tax year 2016 with no physical formatting changes.

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.

Kentucky

The following local tax has been added 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>KY0253</td>
<td>Henderson CO Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>

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>OH0910</td>
<td>Holland-Springfield TP JEDZ CT Regular IT</td>
<td>1.5%</td>
<td>1/1/2015</td>
</tr>
<tr>
<td>OH0928</td>
<td>Mount Cory VI Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>OH0929</td>
<td>Vanlue VI Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>
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>PA0148</td>
<td>Triumph TP, Warren SD (NR) LST</td>
<td>$5.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA0794</td>
<td>Rome TP, Titusville SD (NR) LST</td>
<td>$20.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA1179</td>
<td>Manorville BO, Armstrong SD (NR) LST</td>
<td>0</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA1529</td>
<td>Mt Joy TP, Littlestown SD (NR) LST</td>
<td>$10.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA1530</td>
<td>Mt Joy TP, Gettysburg SD (NR) LST</td>
<td>$10.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA2553</td>
<td>Castle Shannon BO, Bethel Park SD (NR) LST</td>
<td>$47.00</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA2917</td>
<td>Clinton TP, Forest City SD (NR) Regular IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA2936</td>
<td>Washington CT, Washington SD Regular IT</td>
<td>2.135%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA2989</td>
<td>Houston BO, Chartiers-Houston SD (NR) Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA3009</td>
<td>E Bethlehem TP, Bethlehem-Center SD (NR) Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA3511</td>
<td>Keating TP, Austin SD (NR) Regular IT</td>
<td>1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA3920</td>
<td>Carbondale CT, Carbondale SD Regular IT</td>
<td>2.3%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA4565</td>
<td>New Castle CT, New Castle SD (NR) Regular IT</td>
<td>2%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA4566</td>
<td>New Castle CT, New Castle SD Regular IT</td>
<td>2.1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7056</td>
<td>Prospect BO, Slippery Rock SD Regular IT</td>
<td>1.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7274</td>
<td>Kingston BO, Wyaming Vly West SD Regular IT</td>
<td>2.1%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7668</td>
<td>Allentown CT, Allentown SD Regular IT</td>
<td>1.65%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7764</td>
<td>Clinton TP, Western Wayne SD (NR) Regular IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
<tr>
<td>PA7765</td>
<td>Clinton TP, Western Wayne SD Regular IT</td>
<td>0.5%</td>
<td>1/1/2016</td>
</tr>
</tbody>
</table>
Tennessee

The Unemployment Insurance wage base limit decreases to $8,000 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>WV0002</td>
<td>Charleston CT Service Fee</td>
<td>$2.50 / week</td>
<td>1/3/2016</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.

Withholding Cap for Tax Bracket Table Calculation Method

On the Local and Other Custom Taxes window, if you specify Tax Bracket Table as the employee calculation method (on the Basic Info tab), you can now specify an annual maximum withholding amount (on the Employee tab).

Sage HRMS Product Updates

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

User Access to Sage HRMS

Previously, some customers reported that after upgrading some users could not log in to Sage HRMS. This was due to the user ID exceeding the maximum length (999 characters) in the Users database table. We added a message to alert you to contact Customer Support for assistance if it happens again. (16843)

User Security Group Access to Payroll

Previously, some customers experienced a problem where some users in User Security Groups other than Master were unable to access Payroll windows in Sage HRMS. This issue has been corrected. (16842)
Sage Employee Self Service Product Updates

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

Email Notifications Compliance

We updated all email notifications in Sage Employee Self Service and the system now masks all social security number (and social insurance number for Canadian customers) fields so they will no longer display in emails. (16874)

Approving Time Off Requests

Prior to this update, sometimes some managers could not approve employee requests for Time Off. With this release, we corrected the issue. (16873)

Approvers for Time Off Requests

With this release, we enhanced the program to send email notifications to users assigned Temporary Approver for Time Off requests from employees. The original approver will continue to receive notifications when a temporary approver is assigned. (IdeaScale ID 414)

Active Directory (ADS) on a Non-Domain Join Workstation

Previously, some customers with Sage Employee Self Service were unable to use the Windows Active Directory features if they used a non-domain join workstation. With this release we have enhanced the program to work with this configuration. (16769)

My Workforce Analyzer Updates

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

Previously, only users in the Master User Security Group could access My Workforce Analyzer. With this update, a new user security setting was added to the User Security setup window so that any user could be provided with access. Upon installing this update, all users in the Master User Security Group will automatically continue to have access to MWA. However, all other existing users and new users
added to the system will default without access.

To add access, first verify the Group Security is set to show My Workforce Analyzer in the Connected Services menu (Setup > System > Group Security).

Next, open User Security for the user who needs to use My Workforce Analyzer (Setup > System > User Security), and select Yes next to Allow Access to MWA.

**Warning!** Best practice is to monitor access to My Workforce Analyzer carefully, because one user’s changes can overwrite those of another. The last person to save changes overwrites any other simultaneous edits to data in My Workforce Analyzer.
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 Knowledgebase.

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.
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: March 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.
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 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.
- 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.
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 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 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**).

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.**
Installing the Sage Employee Self Service Update

**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.