



Sage HRMS

Canadian Payroll

January 1, 2020 Release Notes

January 2020

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Product update release notes

Important! All customers who update, maintain, and use Sage HRMS Canadian 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 Canadian Payroll and Sage Employee Self Service

Version: Product Update January 1, 2020

If we receive additional payroll tax changes for this period and/or this year, a new update will be made available.

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 2015 and 2016 are no longer supported. Product Updates and Quarterly Tax Updates are not available for these older 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 University:** Learn pro tips for year-end processing in online or classroom courses. Visit <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> for help, guidance, documents, and downloads specific to Sage HRMS Payroll and Year End 2019.
- **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, provincial, and territorial tax changes are included in this update.

You may need to adjust your employee records to reflect these tax changes.

Federal Legislative Updates

This section lists federal legislative updates available with this release.

Note: Pre-printed T4 forms obtained from the CRA are no longer supported. You can print these forms on plain paper only.

Note: Boxes 68 and 70 have been removed from the 2019 T4 form effective for January 1, 2020. To give you flexibility when working with information for previous years, Sage HRMS Canadian Payroll still supports boxes 68 and 70. Do not enter amounts for these boxes for 2020 or later, because this may cause your tax submission to be rejected.

EI Maximum Insurable Earnings and Premium Rates for 2020

The Employment Insurance premium rates and maximum insurable earnings have been released for 2020. The annual maximum insurable earnings for 2020 is set to \$54,200.

The premium rates are:

- 1.58% for residents of provinces without a provincial plan (all of Canada except Québec)
- 1.2% for residents of Québec

The annual maximum contributions for the general rate are:

- Employee contributions - \$856.36
- Employer contributions - \$1,198.90

The annual maximum contributions for Québec are:

- Employee contributions - \$650.40
- Employer contributions - \$910.56

Pension Plan Rates and Maximum Pensionable Earnings for 2020

The Canada Revenue Agency announced that the maximum pensionable earnings under the Canada Pension Plan (CPP) for 2020 will be \$58,700. Contributors are not required or permitted to make additional contributions to the CPP based on earnings exceeding this amount. Additionally, for 2020:

- The basic exemption amount remains unchanged at \$3,500.
- The maximum contributory earnings increase to \$55,200.
- The employee and employer contribution rates increase to 5.25%.
- The maximum employee and employer contribution to the plan is \$2,898.00 each.

Note: The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2020.

Federal Indexation for 2020

The federal indexation factor effective January 1, 2020 is 1.9%.

Provincial and Territorial Legislative Updates

This section lists provincial and territorial legislative updates available with this release. If a province or territory is not listed in this section, there are currently no tax updates or product modifications for that province or territory.

To confirm the amounts and to receive the forms for 2020, contact your tax services office or visit the government websites:

- CRA: <http://www.cra-arc.gc.ca/>
- Revenu Québec: <https://www.revenuquebec.ca/fr/>

WCB Maximum Assessable Earnings for 2020

The 2020 Workers Compensation Board Maximum Assessable Earnings are:

	2020	2019
Alberta	98,700	98,700
British Columbia	87,100	84,800
Manitoba	127,000	127,000
New Brunswick	66,200	64,800

	2020	2019
Newfoundland and Labrador	66,980	65,600
Northwest Territories	94,500	92,400
Nova Scotia	62,000	60,900
Nunavut	94,500	92,400
Ontario	95,400	92,600
Prince Edward Island	55,300	55,000
Québec	78,500	76,500
Saskatchewan	88,906	88,314
Yukon	90,750	89,145

Personal Tax Credits for 2020

Effective January 1, 2020, the provincial and territorial personal tax credits that employees can claim have changed. These changes are reflected in the new 2020 provincial and territorial TD1 forms, and the Québec TP-1015.3-V form. The basic personal amounts have changed as listed below.

Note:

The federal basic personal amount varies depending on an individual's annual net income:

- For individuals with annual net income up to \$150,473, the amount is \$13,229.
- For individuals with annual net income greater than \$150,473, the amount is \$12,298.

The higher amount for individuals with annual net income up to \$150,473 was added recently, and the 2020 TD1 form has not yet been updated. It shows only \$12,298.

For employees with annual net income up to \$150,473, you may want to use the new amount of \$13,229 for calculating the employee's TD1 Total Claim amount and update Sage 300. Alternatively, you can wait until CRA releases a revised TD1 form later this year.

For employees with annual net income greater than \$150,473, you may want to continue using a basic personal amount of \$12,298 until CRA releases a revised TD1 form later this year.

For more information, see [2020 TD1 Information](#) or contact CRA at 1-800-959-5525.

	2020	2019
Federal	Depends on an individual's annual net income. See the note above this table.	12,069
Alberta	19,369	19,369
British Columbia	10,949	10,682
Manitoba	9,838	9,626
New Brunswick	10,459	10,264
Newfoundland and Labrador	9,498	9,414
Northwest Territories	15,093	14,811
Nova Scotia	Use CRA worksheet TD1NS-WS	Use CRA worksheet TD1NS-WS
Nunavut	16,304	13,618
Ontario	10,783	10,582
Prince Edward Island	10,000	9,160
Québec	15,532	15,269
Saskatchewan	16,065	16,065
Yukon	12,298	12,069

Provincial and Territorial Indexation for 2020

Effective January 1, 2020, the following provinces and territories have released updated indexing factors:

	2020	2019
Alberta	0%	2.4%
British Columbia	2.5%	2.6%

	2020	2019
Manitoba	2.2%	2.6%
New Brunswick	1.9%	2.2%
Newfoundland and Labrador	0.9%	1.8%
Northwest Territories	1.9%	2.2%
Nova Scotia	n/a	n/a
Nunavut	1.9%	2.2%
Ontario	1.9%	2.2%
Prince Edward Island	0%	n/a
Québec	1.72%	1.71%
Saskatchewan	0%	n/a
Yukon	1.9%	2.2%

Provincial and Territorial Tax Brackets for 2020

Provincial/territorial tax brackets are indexed and have changed for 2020, for the following provinces and territories:

- British Columbia
- Newfoundland and Labrador
- Ontario

To confirm the amounts, contact your tax services office or visit the government websites.

Québec

- The maximum pensionable earnings amount for the Québec Pension Plan for 2020 is \$58,700. Additionally:
 - The maximum contributory earnings for QPP increases to \$55,200.
 - The QPP rate increases to 5.7%.
 - The maximum employee and employer contributions for QPP are \$3,146.40 each.

- The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2020.
- The Québec Parental Insurance Plan (QPIP) rates have been updated for 2020 as follows:
 - Maximum insurable earnings: \$78,500
 - Employee premium rate: 0.494%
 - Employee maximum contributions: \$387.79
 - Employer premium rate: 0.692%
 - Employer maximum contributions: \$543.22

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 Reported Tips

We have fixed a problem that could cause Reported Tips earned by an employee to be included in the employee's Current Earnings and YTD Earnings after calculating and printing payroll checks. This problem occurred if the **Tip Disbursement** option is not selected for the earning type you use for Reported Tips.

Fix for Pre-Cheque Register Report

The Pre-Cheque Register Report now displays EI period hours and EI insurable hours correctly.

HR product updates

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

Users list

When using Windows Authentication and there are already over 100 users set up, the list now contains all users names and you can successfully add a new user.

Numeric employee IDs

If you select to have numeric employee IDs in HR Settings and some existing employee IDs contain alpha characters, the system now displays a message saying it cannot convert employee IDs to numeric IDs (instead of automatically converting the IDs to zeros). You can locate the employees who have IDs with alpha characters, change their employee numbers to numeric characters, and then return to HR Settings to select numeric IDs.

Class status

When you close a class, employees in that class who have a status of **Failed**, **No Show**, or **Wait List** no longer have their status changed to **Completed**.

Color change

Due to customer feedback, the "Brilliant Green" color was changed to the previous green color.

Sage Employee Self Service product updates

The following fixes are included with this update to Sage Employee Self Service.

Course requests

Instead of seeing an error, the Administrator can see a notification when an employee submits a course request that requires approval.

Benefits

The employee's **Current Benefit** page for a plan no longer shows dependents who are no longer covered by that plan.

Preparing for Year-End Processing

Before you start processing your 2020 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.

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:

- Using the Update TD1 Claim function
- Printing and filing T4s and Releve 1s
- Preparing for your first payroll of 2020

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: January 1, 2020.

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.

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.