Sage HRMS 2017

U.S. Payroll
Q2 2018 Release Notes

June 2018

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Product Update Release Notes

> **Important!** All customers who update, maintain, and use Sage HRMS U.S. Payroll should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

Product Update Information

Product: Sage HRMS 2017 U.S. Payroll

Version: Product Update Q2 2018

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.

> **Note:** Sage HRMS 2017 is the only product version that is currently supported. Product Updates or Quarterly Tax Updates are not available for earlier versions of Sage HRMS.

Support and Resources

Sage strives to provide you with the best help and support in the industry. If you have a question, we're here to help!

- **Help and documentation:** Many answers to common questions can be found in the help and documentation included with Sage HRMS. Visit http://cdn.na.sage.com/docs/en/customer/hrms/documentation.htm for more.
- **Sage City:** Visit https://sagecity.na.sage.com for blogs, tips, and guidance specific to Sage HRMS.
- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at https://support.na.sage.com or contact Customer Support at 800-829-0170 (U.S. and Canada). Please have your Sage Customer Number handy when contacting Support.

Payroll Tax Updates

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

Federal Legislative Updates

There are no federal legislative updates with this release.

State and Local Legislative Updates

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

> **Note:** Sage HRMS U.S. Payroll includes some system-supported State Disability Insurance (SDI) codes, which are updated automatically (for example, with rate changes) when you install product updates. To use these codes, your SDI codes must match the system-supported codes.
>
> If you use custom tax codes to capture SDI taxes, note the following:
>
> - If your codes match the system-supported tax codes, you should review the tax code setup before processing payroll.
> - If your codes do not match the system-supported tax codes, you can switch to using the system-supported codes. To do this, you must deactivate your custom tax codes, and then set up the system-supported tax codes.
> - Regardless of whether or not your codes match the system-supported tax codes, you must follow your existing procedures for reporting and filing SDI taxes as custom taxes.
>
> Information about changes to specific system-supported SDI codes is included in the sections for the related states.

Colorado

Colorado withholding tables and instructions have been updated, effective April 1, 2018. Refer to the state publication for more details.

Idaho

Idaho withholding tables and instructions have been updated, effective January 1, 2018. Refer to the state publication for more details.

Kentucky

- Kentucky withholding tables and instructions have been updated, effective January 1, 2018. Refer to the state publication for more details.

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

Code	Description	Rate	Effective Date
KY0051	Guthrie CT Regular IT	2%	4/1/2018
KY0261	Williamstown Ark Encounter TIF TD Regular IT	2%	12/3/2012

Missouri

Missouri withholding tables and instructions have been updated for 2018. The updates are effective January 1, 2018. Refer to the state publication for more details.

New Mexico

New Mexico withholding tables and instructions have been updated, effective January 1, 2018. Refer to the state publication for more details.

Ohio

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

Code	Description	Rate	Effective Date
OH0213	Canton CT Regular IT	2.5%	7/1/2018
OH0257	Hiram VI Regular IT	2.25%	7/1/2018
OH0382	Bellevue CT Regular IT	2%	7/1/2018
OH0765	Brooklyn Heights VI Regular IT	2.5%	7/1/2018

Oregon

On the **Local/Other Tax Codes** window, you can set up a custom tax code for the Oregon Statewide Transit Tax (tax code ORSTT). For more information, see Knowledgebase article 91567.

Utah

Utah withholding tables and instructions have been updated, effective May 1, 2018. Refer to the state publication for more details.

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.

Calculations for Employees Who are Paid Hourly Overtime

We have fixed a problem that could cause earnings, deductions, or taxes to be calculated incorrectly for employees who are paid hourly overtime. This problem occurred because the calculations excluded overtime hours.

Manager field

On the Class/Schd tab of the Employee Payroll window, the **Supervisor** field has been renamed, and is now the **Manager** field.

HR Product Updates

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

Aatrix Registration Remains if Enterprise Setup is Changed

If you change Enterprise Setup, the system does not unregister Aatrix.

Name Fields Expanded in the View/Edit Employee Pages Header

The display area of an employee's name on the View/Edit Employee pages has been expanded to show more characters of the employee's first, middle, and last names.

New Option for showing Insurance and Savings Benefit Plans Types

A new option called "Employee Benefit Plans Default" has been added to the User Preferences. It will allow each user to select the type of plans that will display when you open the Insurance and Savings Benefits employee pages. The default is Show All Benefit Plans.

Ability to Rename Pager Field

You now have the ability to rename the Pager field on the Demographics page. This new field is called "Rename Pager Field To" and is located in Enterprise Setup (System > Setup > Enterprise Setup).

New names for Supervisor and Secondary Supervisor

The field names of Supervisor and Secondary Supervisor have been changed to Manager and Supervisor respectively throughout the product.

Import Calculation Process Updates Email Addresses

When the following fields are mass updated, the corresponding email address will be updated as well:

- Supervisor Id - now field name is Manager Id
- Secondary Supervisor Id - now field name is Supervisor Id

Secure Queries Sorted by Title and Created By

You now have the ability to sort Secure Queries by Query Title and Created By. A new checkbox called "Only My Queries" has been added at the top right to display the queries created by the person logged on.

HR-Only Installations Have Option to prompt for change to Payroll status

For HR-only installations, there is a new field in HR Setup (Setup > Employees) called Display Payroll Status Message. The default is set to Yes. A message will now display asking if the payroll status should also be updated when terminating an employee.

Fields Added to Secure Query

The following fields are now available for selection in Employee Secure Query.

Field Name	Field Description
_PROTVET	Protected Veteran (Yes/No)
_REHIRE	Rehire Employee Description (Yes/No)
_SEASONAL	Seasonal Worker Description (Yes/No)
_SMOKER	Smoker Description (Yes/No)
P_VACDATE	Time Off: Service Date
P_INTPHONE	Use International Phone Number (Y/N)

New tab for Dependent Court Order Insurance

There is a new tab on the Insurance Benefits Employee Detail page (Employees > View/Edit Employees > Insurance Benefits > Covered Dependents > More). The dependent information will now appear on the Coverage tab and the new tab is called Court Order. On this new tab, you will be able to enter details regarding the court order such as the Court Order Number, Coverage Dates, Comments, and Court Details.

You will also receive a message if you try to delete the dependent's insurance and there is a court order.

Job History Record Created When Change to Payroll Status field

A change to the Payroll Status field on the Current Pay tab will now display the option to create a job history record.

User Names in the User Security window

In User Security (Setup > System), if you are using Windows Authentication, you will now be able to type the first few characters in the Username field and it will limit the search of the Username or Name to match the entry.

Employee Count Limit

If you are close to or have reached the employee limit, a message appears when trying to process the following tasks: Add New Hire, Rehire Employee, Changing the Employee Status to Active or Leave of Absence on the Current Job page, or Adding a New Student. The message has been changed to provide more information.

Mass Update Pay Rate Process Using a Date in the Custom Criteria Expression

The Original Hire date is no longer saved in the custom criteria expression when doing the Mass Update Pay Rate process.

Job Codes 'Next' Button

The Next button will be enabled on the 'More' page when in Job Codes (Setup > Employees > Jobs > Codes).

Employee Attachments Report

You can now preview or print the Employee Attachments report without any issues (Reports > Employees > Personal Information Reports).

Non-employee file removed from Sage HRMS Link

The Job Definition file has been removed from Sage HRMS Link. This was not an employee related file.

Sage Employee Self Service Product Updates

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

Deleting a Life Event Process With Pending Entries

Additional information has been added to the instructions for the situation of attempting to delete a Life Event with pending entries.

Verbiage Updated on Life Event pages

The verbiage on some of the Life Events pages has been updated to be more consistent with what is being stated on that page.

Pending Time Off requests will move to new manager

If an employee's manager changes, any pending Time Off requests will move to the new manager.

Enrollment Detail Report in alphabetical order

The Enrollment Detail report now displays employees in alphabetical order.

Manager's Time Off Calendar

The Manager's view of the Time Off calendar has been updated. Now a manager will be able to view the requested time off for their direct reports by month or year. An individual calendar day will show the employee's name highlighted in the appropriate color based on status. If you hover on the employee, it will provide more details regarding the transaction. When the time has been taken, the name will have a strikethrough and appear with no color on the calendar.

Warning Messages to Employee If Dependent's SSN is Missing

When an employee is selecting benefits and including a dependent, a warning message will now display if that dependent's Social Security Number is missing.

SSN / SIN Format

You will now see the format of how the Social Security Number (SSN) or the Social Insurance Number (SIN) should be entered into the field.

Logon Setup

A new "Unlock users Automatically After" field has been added to the Logon Setup page. If the employee locks themselves out, the system will reset after the number of minutes entered in this field. If you leave this field blank, it will work as it does today. This will not reset employees that have been manually locked out of the system from the Logon Maintenance page.

Current Benefit page shows Dependents or Beneficiaries

On the Current Benefits page, the individual plans will now expand to show dependents [D] or beneficiaries [B] included on that plan.

Current Benefit page displays Coverage

On the Current Benefit page, the amount of Coverage will display for that benefit if applicable.

Notifications Sent Only When Employee Changes Made

The system will no longer send a bogus notification to a particular role when an employee opens or closes a Related Links section of that page and does not make a change.

Current Benefits Display on Multiple Pages

The current benefits will now display multiple pages if necessary for the employee.

Employee Login Display Status

All Login records will display the appropriate Login status.

Managers Length of Service for Employees with Adjusted Seniority Date of February 29

An employee with an Adjusted Seniority Date of February 29 will now display as expected when their manager selects Length of Service.

Sage 100 Payroll Link Updates

The following new features and improvements to Sage 100 Payroll Link are included with this update.

Employee Pay History

If you use Sage 100 2018, you can display an employee's Pay History in Sage Employee Self Service. You will find this new feature in the Sage 100 Payroll Link under Transfer. There is a new tab called Pay History. There is an option to select all pay history items or to select to transfer by check date range.

An Audit report is also available that shows pay stubs grouped by check date that did not transfer and provides you with any other additional information.

Whether you have Paperless Office set up in Sage 100 determines how the pay history appears to the employee.

Allow External Access flag in Sage 100

You will receive a message if the Allow External Access flag in Sage 100 is not turned on.

Sage Payroll Tax Forms and eFiling by Aatrix

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

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Payroll** > **Government Reports** > **Federal Tax Filing** or **State Tax Filing**. You will be prompted to register your organization with Sage Payroll Tax Forms and eFiling by Aatrix. After registering, you have the option to enroll your company (or companies) in the eFiling service.

> **Note:** You must register your organization with Sage Payroll Tax Forms and eFiling by Aatrix each year.

For a detailed overview and a price structure of the Sage Payroll Tax Forms and eFiling by Aatrix options, visit our website here:

https://partner.aatrix.com/partners/sagehrms

Product Update Installation Instructions

Follow the instructions in this section to download, install, apply, and verify this Product Update.

Before you start:

- Back up your data.
- Make sure all users have exited the program.

Downloading the Product Update

To download the update:

1. Visit the Sage Knowledgebase at https://support.na.sage.com, click <u>Log on</u>, and then log on to the site.
2. In the Support by product section, click **Select your product**, and then click **more products**.
3. Under Sage HRMS, click your product and version.
4. In the Latest updates section, click an update to download.
5. In the article, click **Download Now** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

Installing the Product Update

To install the Product Update:

> **Note:** You should launch the product update on the server where Sage HRMS is installed.

1. To launch the installation program, right-click the Product Update file and run as administrator, or as the current user with administrator rights.

    - If applicable, make sure the **Protect my computer and data from unauthorized program activity** check box is *not* selected.
    - If there is no option to run as administrator, log on as an administrator, and then double-click the Product Update file.

> **Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.

2. After the InstallShield Wizard determines requirements, click **Next** to resume installing the Product Update.

3. Click **Finish** to finish the installation.

4. Click **Update**.

5. Click **Yes**. The system starts the installation.

6. Follow the instructions on the windows that follow, and then click **Finish**.

7. Open the Sage HRMS Client. A message prompts you to continue.

Updating Sage HRMS Client Files

To update Sage HRMS Client files:

1. Right-click on the Sage HRMS Client program and select **Run as administrator** to initiate the file update process.

2. Click **OK** to proceed and update your files.

   A message displays that Sage HRMS could not detect the current version of one or more Payroll modules.

   - If you have administrator privileges, click **Yes** to install the Payroll modules now.

   - If you do *not* have administrator privileges, click **No**, and then contact your system administrator to proceed with the installation.

When installation of the Payroll modules is complete, you may be prompted to restart Sage HRMS.

Verifying the Product Update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help** > **About Sage HRMS** and verifying that the version number corresponds with the version of the update .exe file.

You can also verify the latest tax update is applied to your system by selecting **Payroll** > **Process Payroll** > **Calculate Payroll** and the **Tax Version** listed on the window should display the date: June 30, 2018.

> **Tip:** Now is a good time to update your Sage HRMS Payroll sample data. After installing the Product Update, the next time you log in to your Sample Data, you will be prompted to update files again. Click **OK** to proceed and update your sample data files.

Updating the Local Tax Repository and Rates

This section applies only if you use local tax codes in U.S. Payroll.

To update the local tax repository and rates:

1. After the Product Update is complete, log in to Sage HRMS.

2. On the Local/Other Tax Codes window, click the **Install Repository** button to update all of the local tax rates in the system.

3. When you receive the prompt "Install Repository completed. Do you want to continue updating company level local tax records with information from the local repository?":

   - Click **Yes** to automatically update the company rates for all local taxes, or

   - Click **No** if you prefer to select each local tax individually and click the Update button for each one in order to apply the rate changes. This gives you the opportunity to validate rates before and after the changes.

   > **Note:** If you click **No**, you will be required to manually update each employee-level tax. This can be done for all employees at once by tax from **U.S. Payroll** > **Update Taxes**, or by individual employee from **Employee Payroll** > **Taxes**.

4. If you click **Yes**, after the process completes a message displays: "Updating company level local tax records completed. Do you want to continue updating employee local tax records from the local tax repository?".

   - Click **Yes** to automatically update the employee-level rates for all local taxes, or

   - Click **No** if you want to select each employee or use the Update Taxes tax, then update each tax or employee individually.

> **Important!** This process requires security permissions in Sage HRMS to access all employees. Otherwise you may not receive the prompts as described above and employee rates will not be updated.