



Sage HRMS 2017

U.S. Payroll

Q3 2017 Release Notes

September 2017

This is a publication of Sage Software, Inc.

© 2017 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.

Last updated: October 20, 2017

Contents

- Product Update Release Notes 3**
 - Product Update Information 3
 - About Product Updates for Sage HRMS 3
 - Important Information Regarding Future Updates 3
 - Support and Resources 3

- Product Update Release Notes 5**
 - Product Update Information 5
 - About This Update 5
 - Support and Resources 6

- Payroll Tax Updates 7**
 - Federal Legislative Updates 7
 - State and Local Legislative Updates 7
 - Idaho 7
 - Illinois 8
 - Kansas 8
 - Kentucky 8
 - Maine 8
 - New York 8
 - Ohio 8
 - Pennsylvania 9

- Product Updates 10**
 - Payroll Product Updates 10
 - HR Product Updates 10
 - Sage 100 Advanced Link Updates 11
 - Sage Employee Self Service Product Updates 11

Sage Payroll Tax Forms and eFiling by Aatrix	13
Upgrade Instructions for Sage 100 Payroll Link	14
Configuring the New Link	14
Review Code Mapping	15
Product Update Installation Instructions	16
Downloading the Product Update	16
Installing the Product Update	16
Updating Sage HRMS Client Files	17
Verifying the Product Update	17
Updating the Local Tax Repository and Rates	18
Sage Employee Self Service Update Installation Instructions	19
Downloading the Update	19
Installing the Sage Employee Self Service Update	20

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 and Sage Employee Self Service version 2017

Version: Product Update Q3 2017

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.

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.

Release	Q1 2017	Q2 2017	Q3 2017	Q4 2017
Sage HRMS 2015	Yes	Last Update	-	-
Sage HRMS 2016	Yes	Yes	Last Update	-
Sage HRMS 2017	-	First Update	Yes	Yes

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.

Product Update Release Notes

Important! All customers who update, maintain, and use Sage HRMS and Sage 100 Payroll should read these release notes to obtain valuable information about changes to the software.

Product Update Information

Product: Sage HRMS 2017

Version: Product Update Q3 2017

About This Update

This document describes enhancements and modifications to Sage 100 Standard Link and Sage 100 Payroll Link, the applications to integrate Sage 100 Payroll and Sage HRMS.

You need the following to install this update:

- The **Q3 2017 SR1 Product Update download**. The download is available on the Sage Knowledgebase at <https://support.na.sage.com> under Article ID **86934**.
- Sage 100 and Sage HRMS must be installed and set up.

Tip: Refer to the [Sage 100 Documentation](#) and [Sage HRMS Documentation](#) websites for instructions to set up and use each program.

Before You Update

- Complete all payroll processing and print all payroll checks in Sage 100 Payroll.
- Complete all Time Off absence transactions in Sage HRMS Time Off (if applicable).
- Run the **Sage HRMS to Sage 100** transfer process in Sage 100 Standard Link.
- Run the **Sage 100 Payroll to Sage HRMS Attendance** transfer process in Sage 100 Standard Link.
- You must log on as a user with administrative privileges to install the update.

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://help-hrms.na.sage.com/en-us/2017> and <http://cdn.na.sage.com/docs/en/customer/hrms/documentation.htm> for more.
- **Sage City:** Visit <http://sagecity.na.sage.com/> for blogs, tips, and guidance for your Sage programs.
- **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 from the U.S. Please have your Customer ID ready 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.

Idaho

Idaho withholding tables and instructions have been updated, effective January 1, 2017. Refer to the state publication for more details.

Illinois

Illinois withholding tables and instructions have been updated, effective July 1, 2017. Refer to the state publication for more details.

Kansas

Kansas withholding tables and instructions have been updated, effective January 1, 2017. Refer to the state publication for more details.

Kentucky

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

Code	Description	Rate	Effective Date
KY0042	Henderson CT Regular IT	1.29%	7/1/2017
KY0192	Danville CT Regular IT	1.9%	10/1/2017
KY0257	Brodhead CT Regular IT	1%	7/1/2017

Maine

Maine withholding tables and instructions have been updated for the 2017 tax year. Refer to the state publication for more details.

New York

New York withholding tables and instructions have been updated, effective July 1, 2017. 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
OH0374	Mingo Junction VI Regular IT	2%	1/1/2017

Code	Description	Rate	Effective Date
OH0788	Macedonia Northfield Ctr JEDD CT Regular IT	2.25%	7/1/2017
OH0901	Rush TP-Uhrichsville JEDD CT Regular IT	2%	7/1/2017

Pennsylvania

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

Code	Description	Rate	Effective Date
PA1151	Georgetown BO, South Side SD (NR) LST	\$52	10/1/2017
PA1306	Delaware TP, Warrior Run SD (NR) LST	0	10/1/2017
PA3524	Genesee TP, Northern Potter SD Regular IT	1%	10/1/2017
PA3959	Rayne TP, Marion Center SD (NR) Regular IT	0.5%	10/1/2017
PA4835	Millbourne BO, Upper Darby SD (NR) Regular IT	0	10/1/2017
PA4836	Millbourne BO, Upper Darby SD Regular IT	0	10/1/2017
PA5469	Johnstown CT, Greater Johnstown SD (NR) Regular IT	1%	10/1/2017
PA5470	Johnstown CT, Greater Johnstown SD Regular IT	1.5%	10/1/2017
PA7093	Philadelphia CT, Philadelphia City SD (NR) Regular IT	3.4654%	10/1/2017
PA7094	Philadelphia CT, Philadelphia City SD Regular IT	3.8907%	10/1/2017
PA7595	Butler CT, Butler SD (NR) Regular IT	1%	10/1/2017

Product Updates

The following product updates are included with this release.

Payroll Product Updates

This update does not include any new features or improvements to payroll.

HR Product Updates

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

New HR Forms by Sage Payroll Tax Forms and eFiling by Aatrix

With this release, we're delivering HR Forms, a new forms and reporting module by Sage Payroll Tax Forms and eFiling by Aatrix. HR Forms provides over 70 customizable human resources management forms. You can add logos and custom company headers, and set automatic alerts for things like benefit eligibility or COBRA compliance deadlines.

The forms can be assembled into packets including an HR manual, new hire, probation-end, and termination documents. This solution removes a great deal of liability attached to timely compliance for many human resources tasks.

To access the forms, you must have an active account with Sage Payroll Tax Forms and eFiling by Aatrix, and you must have both Sage HRMS and Payroll installed. When you're ready, go to the **Reports** menu, and select **Employees > HR Forms**. The Aatrix window opens with your HR Forms account.

Salary Analysis by Org Report

We updated the Salary Analysis by Org report so that it now correctly groups employees by Division and Department, and it displays the average annual salaries, sum of annual salaries, and employee counts.

Salary As Of Report

We updated the Salary As Of report so it now provides correct amounts for the Total Annual Salary, Average Annual Salary, and Total Employees fields, regardless if employees have job history.

Compensation Reports Updates

Previously, the **Review Due** and **Salary Analysis by Job Title** compensation reports calculated the incorrect Average Annual Salary, Sum of Annual Salaries, and Employee Count. We fixed the issue and the reports show correct totals.

Sage 100 Advanced Link Updates

Employees with Different Work and Residence States

Previously, if an employee lived in one state and worked in another, the information may not have transferred to Sage 100 from Sage HRMS when using the Sage 100 Advanced Link tool. Customers would get an error message when processing payroll in Sage 100. With this release, we fixed the issue and the employee's work and residence states transfer as expected.

Employee Pay Rate Rounding

Previously, some customers experienced a problem with hourly pay rate rounding in Sage 100 when the pay rate had 3 decimal places in Sage HRMS. Instead of transferring the precise pay rate, the numbers would round to two decimal places. With this update, we fixed the issue and now the pay rate (up to 3 decimal places) transfers to Sage 100 Payroll.

Sage Employee Self Service Product Updates

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

Enrollment Plan Exception Reporting

We updated the Exception report to help you identify when an enrollment plan in Sage Employee Self Service does not exist in Sage HRMS. We also added a warning message in Sage HRMS to help prevent users from deleting enrollment plans that may be in use in Sage Employee Self Service.

Phone Extension Fix

Previously, some customers were not able to edit the Ext (extension) field on the Phone page. We fixed the issue and now you can enter and edit all 6 characters in this field. (16909)

Admin Roles

Previously, some customers were not able to log in to Sage ESS after assigning an Admin role and if the Sage HRMS and ESS database backups were out of sync. We fixed this problem with this release. (17316)

Phone Numbers with No Format

Previously, if the Phone Number Format is set to **No Format** in Enterprise Setup in Sage HRMS, and if the phone number was entered with decimal delimiters (.), when an employee changed the phone number in Sage Employee Self Service, the number was subsequently deleted from Sage HRMS. This issue has been fixed with this release.

Sage ESS Mobile Updates

With this release, we corrected some minor typos that show on the Sage ESS Mobile app. (17298)

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>

Upgrade Instructions for Sage 100 Payroll Link

You need the following to install the new Sage 100 Payroll Link (upgrade):

- The **Q3 2017 SR1 Product Update download**. The download is available on the Sage Knowledgebase at <https://support.na.sage.com> under Article ID [86934](#).
- Sage 100 2018 and Sage HRMS 2017 must be installed and set up.

Tip: Refer to the [Sage 100 Documentation](#) and [Sage HRMS Documentation](#) websites for instructions to set up and use each program.

Program Compatibility

Sage 100 Payroll and Sage HRMS can be integrated to transfer employee records, employee information, and time off absence transactions between the two programs. Below is a list of software versions and compatibility.

Sage 100 Version	Sage HRMS Version	Application for Integration
Sage 100 2018	Sage HRMS 2017	Sage 100 Payroll Link
Sage 100 2017 or older	Sage HRMS 2017 or older	Sage 100 Standard Link
Sage 100 2018	Sage HRMS 2016 or older	Not Compatible

Note: When you enter the Serial Number and Installation Code in **Sage HRMS > Register Sage HRMS**, the system automatically detects your currently installed version of Sage 100 and installs the appropriate link.

Configuring the New Link

Since you are upgrading from Sage 100 Standard Link to the new Sage 100 Payroll Link, before you can use the new link, you must:

1. Configure user roles in Sage 100
2. Enter user credentials in Sage HRMS
3. Set Group Security in Sage HRMS
4. Configure Sage 100 Payroll Link to point to your Sage 100 2018 database.

Important! Review the help topic, [Setting Up Sage 100 Payroll Link](#), for detailed instructions for each of these steps.

Review Code Mapping

During the upgrade process, your previous settings from the former Sage 100 Standard Link are transferred to the new Sage 100 Payroll Link. However, the new link requires that at least one Organization Code and Department must be mapped. Additionally, some of the automatically mapped fields and information has changed. And finally, we added a few new fields.

We strongly recommend that you use the Report Options to review the mapped and unmapped codes on each window in Sage 100 Payroll Link. Then, review the **Sage 100 Payroll Setup** window in Sage HRMS for each employee. By reviewing this information and making necessary updates, you can prevent transfer errors when you're ready to use the program.

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.

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. 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: September 30, 2017.

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.

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**).
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.