



Sage HRMS 2017

U.S. Payroll

Q3 2018 Release Notes

September 2018

This is a publication of Sage Software, Inc.

© 2018 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: September 17, 2018

Contents

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

- Payroll Tax Updates 5**
 - Federal Legislative Updates 5
 - State and Local Legislative Updates 5
 - Alabama 5
 - California 6
 - Illinois 6
 - Kentucky 6
 - New Jersey 6
 - New York 6
 - Ohio 7
 - Pennsylvania 7

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

- Sage Payroll Tax Forms and eFiling by Aatrix 12**

- Product Update Installation Instructions 13**
 - Downloading the Product Update 13
 - Installing the Product Update 13
 - Updating Sage HRMS Client Files 14

Contents

Verifying the Product Update 14
Updating the Local Tax Repository and Rates 15

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.

Action Required

If you have not already entered your Sage customer account number on the About Sage HRMS page, the first person who logs in to Sage HRMS after this product update is installed will be required to enter your Sage customer account number.

Product Update Information

Product: Sage HRMS 2017 U.S. Payroll

Version: Product Update Q3 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.

Alabama

The following local tax has been added in the supported tax tables:

Code	Description	Rate	Effective Date
AL0034	Irondale CT Regular IT	1%	8/1/2018

California

The following local tax has an updated rate in the supported tax tables:

Code	Description	Rate	Effective Date
CA0001	San Francisco CT Payroll Expense Tax	0.38%	7/1/2018

Illinois

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

Kentucky

The following local tax has an updated rate in the supported tax tables:

Code	Description	Rate	Effective Date
KY0103	Stanford CT Regular IT	1.15%	7/1/2018

New Jersey

- New Jersey withholding tables and instructions have been updated, effective September 1, 2018. Refer to the state publication for more details.
- The following local tax has an updated rate in the supported tax tables:

Code	Description	Rate	Effective Date
NJ0002	New York-New Jersey Waterfront Payroll Tax	1.84%	7/1/2018

New York

The following local tax has an updated rate in the supported tax tables:

Code	Description	Rate	Effective Date
NY0008	New York-New Jersey Waterfront Payroll Tax	1.84%	7/1/2018

Ohio

The following local taxes have been added in the supported tax tables:

Code	Description	Rate	Effective Date
OH0923	Milford JEDD V CT Regular IT	1%	7/1/2018
OH0975	Amelia VI Regular IT	1%	7/1/2018
OH0976	Chesterville VI Regular IT	1%	7/1/2018
OH0977	Jackson CT Regular IT	1%	7/1/2018
OH0980	Payne VI Regular IT	1%	9/1/2018
OH0981	Jackson-Canton FP JEDD CT Regular IT	2%	3/10/2017
OH0982	Jackson-Canton SM JEDD CT Regular IT	2%	12/1/2016
OH0983	Jackson-Canton TWR JEDD CT Regular IT	2%	8/23/2011

Pennsylvania

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

Code	Description	Rate	Effective Date
PA0022	Richlandtown BO, Quakertown SD (NR) LST	\$52	1/1/2018
PA1513	Portersville BO, Slippery Rock SD (NR) LST	\$52	1/1/2018
PA2375	Falls TP, Pennsbury SD (NR) LST	\$52	1/1/2018
PA2993	Hanover TP, Burgettstown SD (NR) Regular IT	1%	1/1/2018
PA3562	Upper Mt Bethel TP, Bangor SD Regular IT	1.325%	1/1/2018
PA3735	Juniata Terrace BO, Mifflin SD (NR) Regular IT	0.5%	1/1/2018
PA4297	Murrysville BO, Franklin Regional SD (NR) Regular IT	0	9/30/2018
PA4323	Irwin BO, Norwin SD (NR) Regular IT	0.5%	1/1/2018
PA4865	Chester CT, Chester-Upland SD (NR) Regular IT	1%	1/1/2018
PA5431	Summerhill BO, Forest Hills SD (NR) Regular IT	1%	1/1/2018

Code	Description	Rate	Effective Date
PA5441	Sankertown BO, Penn Cambria SD (NR) Regular IT	1%	1/1/2018
PA5465	Lorain BO, Ferndale SD (NR) Regular IT	1%	1/1/2018
PA5473	Hastings BO, Cambria Hts SD (NR) Regular IT	1%	1/1/2018
PA5491	Ebensburg BO, Central Cambria SD (NR) Regular IT	1%	1/1/2018
PA5493	E Taylor TP, Conemaugh Valley SD (NR) Regular IT	1%	1/1/2018
PA5501	Dale BO, Ferndale SD (NR) Regular IT	1%	1/1/2018
PA5509	Cresson BO, Penn Cambria SD (NR) Regular IT	0.5%	1/1/2018
PA5511	Conemaugh TP, Conemaugh Valley SD (NR) Regular IT	1%	1/1/2018
PA5525	Brownstown BO, Ferndale SD (NR) Regular IT	1%	1/1/2018
PA5875	Manns Choice BO, Bedford SD (NR) Regular IT	1.5%	1/1/2018
PA5939	Patterson TP, Blackhawk SD (NR) Regular IT	0.5%	1/1/2018
PA5941	Patterson Heights BO, Blackhawk SD (NR) Regular IT	0.5%	1/1/2018
PA5943	Ohioville BO, Western Beaver SD (NR) Regular IT	1%	1/1/2018
PA5961	Industry BO, Western Beaver SD (NR) Regular IT	1%	1/1/2018
PA6017	Baden BO, Ambridge SD (NR) Regular IT	0.5%	1/1/2018
PA6063	Manorville BO, Armstrong SD (NR) Regular IT	1%	1/1/2018
PA6087	Ford City BO, Armstrong SD (NR) Regular IT	1%	1/1/2018
PA6239	New Berlin BO, Mifflinburg SD (NR) Regular IT	0	1/1/2018
PA7053	Rankin BO, Woodland Hills SD (NR) Regular IT	1.1%	1/1/2018
PA7054	Rankin BO, Woodland Hills SD Regular IT	1.2%	1/1/2018
PA7093	Philadelphia CT, Philadelphia City SD (NR) Regular IT	3.4567%	7/1/2018
PA7094	Philadelphia CT, Philadelphia City SD Regular IT	3.8809%	7/1/2018
PA7441	Elizabeth TP, Elizabeth Forward SD (NR) Regular IT	0	1/1/2018
PA7597	Buffalo TP, Freeport SD (NR) Regular IT	1%	1/1/2018
PA7940	Lower Allen TP, Mechanicsburg SD Regular IT	1.8%	1/1/2018

Code	Description	Rate	Effective Date
PA7941	Lower Allen TP, Mechanicsburg SD (NR) Regular IT	1%	1/1/2018
PA7942	Lower Allen TP, Mechanicsburg SD (NR) LST	\$52	1/1/2018

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

Code	Description
PA2147	Shippensburg BO, Shippensburg SD (Fra) (NR) LST
PA2225	Shippensburg BO, Shippensburg SD (Cum) (NR) LST
PA2591	Shippensburg BO, Shippensburg SD (Fra) (NR) Regular IT
PA2592	Shippensburg BO, Shippensburg SD (Fra) Regular IT
PA4897	Shippensburg BO, Shippensburg SD (Cum) (NR) Regular IT
PA4898	Shippensburg BO, Shippensburg SD (Cum) Regular IT

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.

Employee Earnings Distribution

The Employee Earnings Distribution hours are now correct on the Timecard and the Timecard Report.

HR Product Updates

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

VETS 4212 Form

Dates on the VETS-4212 form have been updated for 2018 reporting.

Application Server Configuration when using Aatrix forms

If you use Aatrix to submit forms, you must set up Windows security on the application server. The typical location for this on the application server is: C:\ProgramData\Sage\SageHRMSServer\Payroll\Aatrix.

Allow access to the "Aatrix" folder for only users who are submitting Aatrix forms.

Group Security to respect OSHA, OHS, and Workers Compensation

Group Security will now respect the access level of Employee OSHA, Employee OHS, and Employee Workers Compensation pages.

Send Button

The Send button no longer appears in Employee Standard Reports.

Training Reports Filter by Employee

All of the Employee Training Reports can now run by selecting one employee.

Sage Employee Self Service Product Updates

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

Time Off Calendar

The Time Off Calendar can now be used in Internet Explorer.

Option to Show Employer Contribution

The option to show or hide employer contributions now works.

Sage 100 Payroll Link Updates

This update does not include any new features or improvements to Sage 100 Payroll Link.

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.

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 **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.

Note: If you have not already entered your Sage customer account number on the About Sage HRMS page, the first person who logs in to Sage HRMS after this product update is installed will be required to enter your Sage customer account number.

You can review or change your customer account number in **Help > About 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, 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.