



# Sage HRMS

U.S. Payroll

Q4 2019 Release Notes

December 2019

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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 U.S. Payroll and Sage Employee Self Service

**Version:** Product Update Q4 2019

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.
- **Tax forms:** Because all printed forms have variations, Sage HRMS Payroll only supports forms printed by Sage Checks and Forms. Call Sage Checks and Forms at 800-617-3224 or order online at [www.SageChecks.com](http://www.SageChecks.com).

**Tip:** For information about ordering W-2 forms, see Knowledgebase article 40182: [Which forms should I order for year-end?](#)

# Payroll Tax Updates

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

## Federal Legislative Updates

### Federal Withholding Tax Changes for 2020

The IRS released new withholding and allowance amount tables for wages paid on or after January 1, 2020.

### Social Security Wage Base Changes for 2020

For 2020, the maximum amount of earnings subject to the Social Security tax (taxable maximum) is \$137,700.

## 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.

## Alaska

The Unemployment Insurance wage base limit changes to \$41,500 for 2020.

## Arkansas

The Unemployment Insurance wage base limit changes to \$7,000 for 2020.

## California

- California withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.
- State disability insurance tax (CASDI) information is updated for 2020. Effective for wages paid on or after January 1, 2020:
  - The withholding rate is 1%.
  - The taxable wage limit is \$122,909 for each employee per calendar year.

## Colorado

The Unemployment Insurance wage base limit changes to \$13,600 for 2020.

## Illinois

The Unemployment Insurance wage base limit changes to \$12,740 for 2020.

## Indiana

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

| Code   | Description                    | Rate    | Effective Date |
|--------|--------------------------------|---------|----------------|
| IN0002 | Whitley 92 CO Regular (NR) IT  | 1.6829% | 10/1/2019      |
| IN0017 | Sullivan 77 CO Regular (NR) IT | 1.7%    | 10/1/2019      |
| IN0027 | Putnam 67 CO Regular (NR) IT   | 2.1%    | 10/1/2019      |
| IN0034 | Owen 60 CO Regular (NR) IT     | 1.4%    | 10/1/2019      |

| Code   | Description                     | Rate    | Effective Date |
|--------|---------------------------------|---------|----------------|
| IN0036 | Ohio 58 CO Regular (NR) IT      | 1.5%    | 10/1/2019      |
| IN0052 | Johnson 41 CO Regular (NR) IT   | 1.2%    | 10/1/2019      |
| IN0061 | Hendricks 32 CO Regular (NR) IT | 1.7%    | 10/1/2019      |
| IN0063 | Hancock 30 CO Regular (NR) IT   | 1.94%   | 10/1/2019      |
| IN0065 | Greene 28 CO Regular (NR) IT    | 1.95%   | 10/1/2019      |
| IN0072 | Fayette 21 CO Regular (NR) IT   | 2.57%   | 10/1/2019      |
| IN0074 | Dubois 19 CO Regular (NR) IT    | 1.2%    | 10/1/2019      |
| IN0081 | Clinton 12 CO Regular (NR) IT   | 2.45%   | 10/1/2019      |
| IN0082 | Clay 11 CO Regular (NR) IT      | 2.35%   | 10/1/2019      |
| IN0093 | Whitley 92 CO Regular IT        | 1.6829% | 10/1/2019      |
| IN0108 | Sullivan 77 CO Regular IT       | 1.7%    | 10/1/2019      |
| IN0118 | Putnam 67 CO Regular IT         | 2.1%    | 10/1/2019      |
| IN0125 | Owen 60 CO Regular IT           | 1.4%    | 10/1/2019      |
| IN0127 | Ohio 58 CO Regular IT           | 1.5%    | 10/1/2019      |
| IN0144 | Johnson 41 CO Regular IT        | 1.2%    | 10/1/2019      |
| IN0153 | Hendricks 32 CO Regular IT      | 1.7%    | 10/1/2019      |
| IN0155 | Hancock 30 CO Regular IT        | 1.94%   | 10/1/2019      |
| IN0157 | Greene 28 CO Regular IT         | 1.95%   | 10/1/2019      |
| IN0164 | Fayette 21 CO Regular IT        | 2.57%   | 10/1/2019      |
| IN0166 | Dubois 19 CO Regular IT         | 1.2%    | 10/1/2019      |
| IN0173 | Clinton 12 CO Regular IT        | 2.45%   | 10/1/2019      |
| IN0174 | Clay 11 CO Regular IT           | 2.35%   | 10/1/2019      |

## Iowa

- The Unemployment Insurance wage base limit changes to \$31,600 for 2020.
- Iowa withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Kentucky

- Kentucky withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.
- The following local taxes have been added in the supported tax tables:

| Code   | Description                | Rate | Effective Date |
|--------|----------------------------|------|----------------|
| KY0262 | Crab Orchard CT Regular IT | 1%   | 8/1/2019       |
| KY0263 | Smiths Grove CT Regular IT | 1%   | 1/1/2020       |

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

| Code   | Description                    | Rate  | Effective Date |
|--------|--------------------------------|-------|----------------|
| KY0035 | Pendleton CO Regular IT        | 1%    | 1/1/2020       |
| KY0042 | Henderson CT Regular IT        | 1.49% | 1/1/2020       |
| KY0044 | Daviess CO Regular IT          | 0.7%  | 1/1/2020       |
| KY0060 | Mt Sterling CT Regular IT      | 2%    | 1/1/2020       |
| KY0127 | Paintsville CT Regular IT      | 1.25% | 4/1/2017       |
| KY0150 | Ludlow CT Regular IT           | 2%    | 1/1/2020       |
| KY0155 | Lebanon Junction CT Regular IT | 1.5%  | 1/1/2020       |
| KY0169 | Hancock CO Regular IT          | 1.6%  | 1/1/2020       |
| KY0210 | Benton CT Regular IT           | 0.6%  | 1/1/2020       |

- Wage base limits have been updated for the following local taxes:

| Code   | Description                    | Wage Base Limit | Effective Date |
|--------|--------------------------------|-----------------|----------------|
| KY0009 | Highland Heights CT Regular IT | \$137,700       | 1/1/2020       |

| Code   | Description                   | Wage Base Limit | Effective Date |
|--------|-------------------------------|-----------------|----------------|
| KY0013 | Newport CT Regular IT         | \$137,700       | 1/1/2020       |
| KY0020 | Florence CT Regular IT        | \$137,700       | 1/1/2020       |
| KY0022 | Crestview Hills CT Regular IT | \$137,700       | 1/1/2020       |
| KY0023 | Covington CT Regular IT       | \$137,700       | 1/1/2020       |
| KY0024 | Cold Spring CT Regular IT     | \$137,700       | 1/1/2020       |
| KY0027 | Boone CO Regular IT           | \$63,136        | 1/1/2020       |
| KY0029 | Alexandria CT Regular IT      | \$137,700       | 1/1/2020       |
| KY0093 | Wilder CT Regular IT          | \$137,700       | 1/1/2020       |
| KY0161 | Jackson CT Regular IT         | \$137,700       | 1/1/2020       |
| KY0178 | Fort Wright CT Regular IT     | \$137,700       | 1/1/2020       |
| KY0188 | Edmonton CT Regular IT        | \$137,700       | 1/1/2020       |

## Massachusetts

For the Massachusetts Paid Family and Medical Leave plan, the wage base limit changes to \$137,700 for 2020.

For more information, including details about setting up deduction codes, see Sage Knowledgebase article [95277](#).

## Minnesota

The Unemployment Insurance wage base limit changes to \$35,000 for 2020.

## Missouri

The Unemployment Insurance wage base limit changes to \$11,500 for 2020.

## Montana

The Unemployment Insurance wage base limit changes to \$34,100 for 2020.

## Nebraska

Nebraska withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.

## Nevada

The Unemployment Insurance wage base limit changes to \$32,500 for 2020.

## New Jersey

State disability insurance tax information is updated for 2020. Effective for wages paid on or after January 1, 2020:

- For employees:
  - The Disability Insurance rate is 0.26%.
  - The Family Leave Insurance rate is 0.16%
  - The taxable wage limit is \$134,900 for each employee per calendar year.
- For employers:
  - The Disability Insurance rate is set by the state for each employer individually.
  - The taxable wage limit is \$35,300 for each employee per calendar year.

For more information about setting up state disability insurance tax for 2020, see Sage Knowledgebase article [102273](#).

## New Mexico

The Unemployment Insurance wage base limit changes to \$25,800 for 2020.

## New York

- The Unemployment Insurance wage base limit changes to \$11,600 for 2020.
- New York withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.
- City of Yonkers Income Tax and instructions have been updated for 2020. Refer to the state publication for more details.

## North Carolina

The Unemployment Insurance wage base limit changes to \$25,200 for 2020.

## Ohio

- The Unemployment Insurance wage base limit changes to \$9,000 for 2020.
- Ohio withholding tables and instructions have been updated for 2020. Refer to the state publication for more details.
- The following local taxes have been added in the supported tax tables:

| Code   | Description                            | Rate | Effective Date |
|--------|--|------|----------------|
| OH1001 | Clinton-Massie 1402 SD Regular IT      | 0.5% | 1/1/2020       |
| OH1002 | Pleasant 5103 SD Regular IT            | 1%   | 1/1/2020       |
| OH1003 | River Valley 5105 SD Regular IT        | 1%   | 1/1/2020       |
| OH1004 | Northridge 4509 SD Regular IT          | 0.5% | 1/1/2020       |
| OH1005 | Alexander 0501 SD Regular IT           | 1%   | 1/1/2020       |
| OH1006 | Jackson-Canton CD JEDD CT Regular IT   | 2.5% | 1/1/2020       |
| OH1007 | McAlisters JEDD VI CT Regular IT       | 1%   | 1/1/2020       |
| OH1008 | Amanda-Clearcreek 2301 SD Regular IT   | 2%   | 1/1/2020       |
| OH1009 | Madison TP JEDD CT Regular IT          | 2.5% | 6/30/2010      |
| OH1010 | Etna-Reynoldsburg JEDD 4 CT Regular IT | 2%   | 8/30/2019      |
| OH1011 | Alexandria VI Regular IT               | 1%   | 1/1/2020       |

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

| Code   | Description                | Rate  | Effective Date |
|--------|----------------------------|-------|----------------|
| OH0036 | Ross 0908 SD Regular IT    | 1.25% | 1/1/2020       |
| OH0186 | Tallmadge CT Regular IT    | 2.25% | 1/1/2020       |
| OH0214 | Canal Fulton VI Regular IT | 2%    | 1/1/2020       |
| OH0215 | Brewster VI Regular IT     | 2%    | 1/1/2020       |

| Code   | Description                                | Rate  | Effective Date |
|--------|--|-------|----------------|
| OH0218 | Sidney CT Regular IT                       | 1.65% | 1/1/2020       |
| OH0263 | Circleville CT Regular IT                  | 2.5%  | 1/1/2020       |
| OH0510 | Lisbon VI Regular IT                       | 2%    | 1/1/2020       |
| OH0512 | East Palestine VI Regular IT               | 1.5%  | 1/1/2020       |
| OH0603 | Mount Gilead 5903 SD Regular IT            | 1.5%  | 1/1/2020       |
| OH0617 | Riverside 4604 SD Regular IT               | 1.5%  | 1/1/2020       |
| OH0645 | Evergreen 2602 SD Regular IT               | 1.5%  | 1/1/2020       |
| OH0649 | Hicksville 2004 SD Regular IT              | 1.5%  | 1/1/2020       |
| OH0651 | Central 2002 SD Regular IT                 | 1.25% | 1/1/2020       |
| OH0779 | Union CT Regular IT                        | 1.5%  | 1/1/2020       |
| OH0848 | Tri-Way 8509 SD Regular IT                 | 1.75% | 1/1/2020       |
| OH0946 | Circleville-Pickaway TP JEDD CT Regular IT | 2.5%  | 1/1/2020       |

- Wage base limits have been updated for the following local taxes:

| Code   | Description                               | Wage Base Limit | Effective Date |
|--------|---|-----------------|----------------|
| OH0891 | Green TP JEDD II CT Regular IT            | \$111,075       | 1/1/2020       |
| OH0892 | Green TP Western Ridge JEDD CT Regular IT | \$117,260       | 1/1/2020       |
| OH0948 | Harrison Greene JEDD IV CT Regular IT     | \$107,923       | 1/1/2020       |
| OH0971 | UDF-North Bend JEDD V CT Regular IT       | \$104,039       | 1/1/2020       |

- The following local tax has an updated description:

| Code   | Description                       |
|--------|-----------------------------------|
| OH0837 | Miami Crossing JEDD CT Regular IT |

- Effective December 31, 2019, the following local tax has been expired:

| Code   | Description           |
|--------|-----------------------|
| OH0830 | Mifflin VI Regular IT |

## Oklahoma

The Unemployment Insurance wage base limit changes to \$18,700 for 2020.

## Oregon

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

| Code   | Description                             | Rate    | Effective Date |
|--------|---|---------|----------------|
| OR0005 | Tri-Met Transit District Excise Tax     | 0.7737% | 1/1/2020       |
| OR0006 | Lane County Transit District Excise Tax | 0.75%   | 1/1/2020       |

## Rhode Island

- The Unemployment Insurance wage base limit changes to \$24,000 for 2020.
- State disability insurance tax (RISDI) information is updated for 2020. Effective for wages paid on or after January 1, 2020:
  - The withholding rate is 1.3%.
  - The taxable wage limit is \$72,300 for each employee per calendar year.

## Utah

The Unemployment Insurance wage base limit changes to \$36,600 for 2020.

## Vermont

The Unemployment Insurance wage base limit changes to \$16,100 for 2020.

## Washington

- The Unemployment Insurance wage base limit changes to \$52,700 for 2020.
- For the Washington Paid Family and Medical Leave plan, the wage base limit changes to \$137,700 for 2020.

For more information, including details about setting up deduction codes, see Sage Knowledgebase article [95277](#).

## West Virginia

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

| Code   | Description             | Rate  | Effective Date |
|--------|-------------------------|-------|----------------|
| WV0009 | Madison CT Service Fee  | \$156 | 1/1/2020       |
| WV0011 | Wheeling CT Service Fee | \$104 | 1/1/2020       |

## Wyoming

The Unemployment Insurance wage base limit changes to \$26,400 for 2020.

# 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.

### New Fields for Form W-4 for 2020

To support changes to form W-4 for 2020, we've updated the Employee Payroll Tax Info window. In the Additional Tax Information table:

- New statuses are available in the Filing Status field
- The following fields have been added:
  - W-4 Line 3 Dependent Amount
  - W-4 Line 4a Other Income Amount
  - W-4 Line 4b Deductions Amount

## HR product updates

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

### Security

Field-level security for the new **EEO-1 Pay Band** and **EEO-1 Total Hours** fields (on the **Current Pay** page) was added to the **EEO** group.

### 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.

## Sage 100 Payroll Link Updates

The following fixes are included with this update to Sage 100 Payroll Link.

### Job Category

The link now transfers the EEO-1 Job Category. If you use Job Validation, the link respects the value in HRMS as the appropriate EEO-1 Job Category.

## Location change

If you change the Sage 100 Payroll location, a message displays to let you know that you must restart the Sage 100 Payroll Link for the change to apply.

## Label change

To be consistent with Sage 100 Payroll, the **Profit Sharing** field label changed to **Retirement Plan** in Sage 100 Payroll Setup and the Modified Employees report.

# 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>

## Supported W-2 Forms

For information about ordering W-2 forms, see the article [Which forms should I order for year-end?](#) on the Sage Support website.

# 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:

- Printing and filing W-2s
- Entering employee supplemental information
- Information about processing year-end 2019 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- 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.

# 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**).

**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.