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Product Update Release Notes

Important! All customers who update, maintain, and use Sage Abra Suite or Sage Employee Self Service should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

Product Update Information

Product: Sage Abra Suite 9.2 and Sage Employee Self Service version 9.2
Version: Product Update Q4 2016

About Product Updates for Sage Abra Suite

Sage Abra Suite 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.

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 Abra Suite.

- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at [https://support.na.sage.com](https://support.na.sage.com) or contact Customer Support at 800-829-0170. Please have your Sage Customer Number handy when contacting Support.

- **Tax forms:** Because all printed forms have variations, Sage Abra Suite 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).
Payroll Tax Updates

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

Federal Legislative Updates

This section lists federal legislative updates available with this release.

Important Reminder about 2016 Federal Filing Deadlines

The due date for filing 2016 Forms W-2 and W-3 with the SSA is **January 31, 2017**, whether you file using paper forms or electronically.

Note the following IRS deadlines for Affordable Care Act forms:

- **February 28, 2017**— If filing by mail, Forms 1094-B and 1095-B, or 1094-C and 1095-C are due.
- **March 2, 2017**— Forms 1095-B or 1095-C must be furnished to employees (this date was extended from the original January 31, 2017 deadline).
- **March 31, 2017**— If filing electronically, Forms 1094-B and 1095-B, or 1094-C and 1095-C are due.

**Important!** If you use Sage Payroll Tax Forms and eFiling by Aatrix, review the eFile due dates on the Aatrix website: [https://efile.aatrix.com/pages/public/FilingDeadlinesPublic.aspx](https://efile.aatrix.com/pages/public/FilingDeadlinesPublic.aspx)

Social Security Wage Base Changes for 2017

The Social Security Administration released the Social Security taxable wage base for 2017. Based on the increase in average wages, the maximum amount of earnings subject to the Social Security tax (taxable maximum) increases to $127,200.

Federal Withholding Tax Changes for 2017

The IRS released new withholding and allowance amount tables for wages paid on or after January 1, 2017.

Retirement Plan Changes

Effective January 1, 2017, limits for benefits and contributions to qualified retirement plans have changed. For more information, see IRS Notice 2016-62.
Railroad Employment Tax Changes

Effective January 1, 2017, maximum taxable railroad earnings have changed as follows:

- Tier I earnings limit: $127,200
- Tier II earnings limit: $94,500
- HI earnings limit: no limit

Federal Levy Deductions for 2017

Effective January 1, 2017, federal levy deduction amounts have changed as follows:

- Head of Household standard deduction amount: $9,350.
- Single standard deduction amount: $6,350.
- Married standard deduction amount: $12,700.
- Other standard deduction amount: $6,350.

Forms

The following forms have been updated for 2017:

- 1099
- W-2
- 940

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.

State W-2 Electronic Filing Due Dates

The electronic filing due date for state W-2 forms has changed for many states. Refer to state publications for details.

California

- California withholding tables and instructions have been updated for 2017. Refer to the state publication for more details.
State disability insurance tax (CASDI) information is updated for 2017. Effective for wages paid on or after January 1, 2017:

- The withholding rate is .9%.
- The taxable wage limit is $110,902 for each employee per calendar year.
- The maximum to withhold for each employee is $998.12.

**Note:** California is subject to credit reduction for 2016, so the federal unemployment tax (FUTA) rate for California employers is increased by 1.8% (maximum $126 increase per employee).

**Colorado**

The Unemployment Insurance wage base limit increases to $12,500 for 2017.

**Hawaii**

- The Unemployment Insurance wage base limit increases to $44,000 for 2017.
- State disability insurance tax information is updated for 2017. Effective for wages paid on or after January 1, 2017:
  - The maximum weekly wage base is $1023.31.
  - The maximum weekly deduction from employee wages is $5.12.

**Idaho**

The Unemployment Insurance wage base limit increases to $37,800 for 2017.

**Indiana**

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>INBQ</td>
<td>Monroe County Income Tax</td>
<td>1.345%</td>
<td>10/1/2016</td>
</tr>
<tr>
<td>INSC</td>
<td>Monroe County N/R Income Tax</td>
<td>0.33625%</td>
<td>10/1/2016</td>
</tr>
<tr>
<td>INAP</td>
<td>Parke County Income Tax</td>
<td>2.65%</td>
<td>10/1/2016</td>
</tr>
<tr>
<td>INDN</td>
<td>Posey County Income Tax</td>
<td>1.25%</td>
<td>10/1/2016</td>
</tr>
</tbody>
</table>
Iowa

- The Unemployment Insurance wage base limit increases to $29,300 for 2017.
- If you have 50 or more employees, you must electronically file Forms W-2 and 1099 with the Iowa Department of Revenue. For more information, see Iowa Department of Revenue Publication 44-082.

  Also, you must file an annual reconciliation by January 31, 2017.

Kentucky

- Kentucky withholding tables and instructions have been updated for 2017. Refer to the state publication for more details.
- Effective January 1, 2017, the maximum wage limit for Boone county occupational taxes imposed on persons working in the county (KYC Boone County License Fee and KYM Boone County License Fee) is $59,217 (maximum payment of $473.74).

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>KYA5</td>
<td>Bardstown License Fee</td>
<td>1%</td>
<td>1/1/2017</td>
</tr>
</tbody>
</table>

- Effective January 1, 2017, license fees for the following local taxes have been updated because these taxes use the Social Security wage limit, which has been updated to $127,200, as a cap for their license fees:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>KYHI</td>
<td>Alexandria City License Fee</td>
</tr>
<tr>
<td>KYDA</td>
<td>Coldspring License Fee</td>
</tr>
<tr>
<td>KYE</td>
<td>Covington License Fee</td>
</tr>
<tr>
<td>KYBU</td>
<td>Crestview Hills License Fee</td>
</tr>
<tr>
<td>KYDW</td>
<td>Edmonton License Fee</td>
</tr>
<tr>
<td>KYF</td>
<td>Florence License Fee</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>KYW</td>
<td>Fort Wright License Fee</td>
</tr>
<tr>
<td>KYCV</td>
<td>Franklin License Fee</td>
</tr>
<tr>
<td>KYCO</td>
<td>Jackson License Fee</td>
</tr>
<tr>
<td>KYG</td>
<td>Kenton County License Fee</td>
</tr>
<tr>
<td>KYAI</td>
<td>Newport License Fee</td>
</tr>
<tr>
<td>KY(6)</td>
<td>Simpson County License Fee</td>
</tr>
</tbody>
</table>

**Minnesota**
- The Unemployment Insurance wage base limit increases to $32,000 for 2017.
- Minnesota withholding tables and instructions have been updated for 2017. Refer to the state publication for more details.

**Missouri**
New electronic filing requirements are supported, including changes to the format of employer account numbers.

**Montana**
The Unemployment Insurance wage base limit increases to $31,400 for 2017.

**Nebraska**
Nebraska withholding tables and instructions have been updated for 2017. Refer to the state publication for more details.

**Nevada**
The Unemployment Insurance wage base limit increases to $29,500 for 2017.
New Jersey

- The Unemployment Insurance wage base limit increases to $33,500 for 2017.
- State disability insurance tax (NJSDI) information is updated for 2017. Effective for wages paid on or after January 1, 2017:
  - The WKF rate is 0.000425.
  - The DI rate is 0.002400.
  - The FLI rate is 0.001000.
  - The taxable wage limit is $33,500 for each employee per calendar year.

New Mexico

- The Unemployment Insurance wage base limit increases to $24,300 for 2017.
- New Mexico withholding tables and instructions have been updated for 2017. Refer to the state publication for more details.

New York

- The Unemployment Insurance wage base limit increases to $10,900 for 2017.
- New York withholding tables and instructions have been updated for 2017. Refer to the state publication for more details.
- City of Yonkers Income Tax (NYYCIT) has been updated for 2017. Refer to the state publication for more details.

North Carolina

- The Unemployment Insurance wage base limit increases to $23,100 for 2017.
- North Carolina withholding tables and instructions have been updated for 2017. Refer to the state publication for more details.
- Electronic filing of annual reconciliation form NC-3 is not supported. Use the paper form instead.

Note: The North Carolina Department of Revenue has confirmed that they will accept paper filing of Form NC-3 without penalty.
A reminder that with the Q3 2016 product and tax update, the process to report Ohio school district tax IDs changed. Effective January 1, 2016, school district local tax IDs for taxes withheld for Ohio school districts must be entered in box 20 on W-2 forms. Previously, the W-2 wizard in Sage Abra Suite would prompt you to select the Ohio school districts, but this feature has been removed because the school district codes must now be assigned to each tax manually.

**Important!** You must manually update each school district local tax code that you use. Otherwise, the tax codes will not appear correctly on W-2 forms. Review the [Q3 2016 release notes](http://cdn.na.sage.com/docs/en/customer/hrms/documentation.htm) (Ohio section) for instructions. Prior tax update release notes are available to download from the product documents website here:


- W-2 forms have been updated as follows:
  - School district taxes are now reported with the 4-digit school district number.
  - On the 4-up form, box 20 now includes the correct number of characters.
- The RITA file for electronic filing supports multiple RS records for all local taxes.
- The CCA file for electronic filing includes codes and other information about all local taxes (CCA, RITA, and others).

- Effective December 31, 2016, the following local Ohio tax has been expired:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH#O</td>
<td>Amanda-Clearcreek SD Local Tax</td>
</tr>
</tbody>
</table>

- Effective January 1, 2017, the wage base limits have been updated for the following local taxes:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Wage Base Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH8W</td>
<td>Green TP JEDD II Local Tax</td>
<td>$104,464</td>
</tr>
<tr>
<td>OH8X</td>
<td>Green TP Western Ridge JEDD</td>
<td>$110,282</td>
</tr>
</tbody>
</table>

- Effective October 1, 2016, the following Ohio locality will report to CCA:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OHUX</td>
<td>Montpelier Local Tax</td>
</tr>
</tbody>
</table>

- Effective January 1, 2017, the following Ohio localities will report to RITA:
<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>OHET</td>
<td>Madison N/R Local Tax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OH4E</td>
<td>Madison N/R Local Tax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OHEX</td>
<td>Northfield Local Tax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OH17</td>
<td>Northfield N/R Local Tax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OHOV</td>
<td>Norwalk Local Tax</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OH21</td>
<td>Norwalk N/R Local Tax</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>OH5T</td>
<td>New Franklin (Sum) Local Tax</td>
<td>2%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHID</td>
<td>Warren N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHZ1</td>
<td>Warren N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHFR</td>
<td>Minerva Local Tax</td>
<td>1.75%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHMT</td>
<td>Massillon Local Tax</td>
<td>2%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHZQ</td>
<td>Massillon N/R Local Tax</td>
<td>2%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHTE</td>
<td>Brewster N/R Local Tax</td>
<td>1.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHU</td>
<td>Dayton N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHYU</td>
<td>Dayton N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHFQ</td>
<td>Centerville N/R Local Tax</td>
<td>2.25%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OH*J</td>
<td>Centerville N/R Local Tax</td>
<td>2.25%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHPA</td>
<td>Wilmington N/R Local Tax</td>
<td>1.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHC*</td>
<td>Wilmington N/R Local Tax</td>
<td>1.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHKY</td>
<td>Athens N/R Local Tax</td>
<td>1.85%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHLG</td>
<td>Ashland N/R Local Tax</td>
<td>2%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHLG</td>
<td>Ashland N/R Local Tax</td>
<td>2%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHCS</td>
<td>Anna LSD Local Tax</td>
<td>1.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>Code</td>
<td>Description</td>
<td>Rate</td>
<td>Effective Date</td>
</tr>
<tr>
<td>-------</td>
<td>------------------------------------</td>
<td>------</td>
<td>----------------</td>
</tr>
<tr>
<td>OHL</td>
<td>Anna N/R Local Tax</td>
<td>2%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHHH</td>
<td>Seven Hills N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OH4M</td>
<td>Seven Hills N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHGJ</td>
<td>Cuyahoga Heights Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OH4I</td>
<td>Cuyahoga Heights N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OH56</td>
<td>Cleveland N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OH6N</td>
<td>Cleveland N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHF</td>
<td>Cleveland N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHV</td>
<td>Cleveland N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHVH</td>
<td>Cleveland N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHYQ</td>
<td>Cleveland N/R Local Tax</td>
<td>2.5%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHGI</td>
<td>Chagrin Falls N/R Local Tax</td>
<td>1.85%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OH2K</td>
<td>Chagrin Falls N/R Local Tax</td>
<td>1.85%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHU6</td>
<td>Toledo Exp Airport JEDD Tax</td>
<td>1%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHV3</td>
<td>Lyons N/R Local Tax</td>
<td>1%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHV4</td>
<td>Circleville-Pkway TP JEDD N/R</td>
<td>2%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>OHV5</td>
<td>Marengo N/R Local Tax</td>
<td>1%</td>
<td>1/1/2017</td>
</tr>
</tbody>
</table>

**Oklahoma**

- The Unemployment Insurance wage base limit increases to $17,700 for 2017.
- The Oklahoma Tax Commission now requires employers to file annual withholding reconciliation information as part of their W-2.

**Important!** You must enter your employer account number (in the **State Reporting ID** field on the **Tax Codes** window) in the correct format: WTH-99999999-01.

**Oregon**

- The Unemployment Insurance wage base limit increases to $38,400 for 2017.
The following local taxes have updated rates in the supported tax tables:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Rate</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORWC</td>
<td>Oregon Workers Compensation</td>
<td>2.8 cents per hour</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>ORA</td>
<td>Tri-County Met Dist Tax</td>
<td>0.7437%</td>
<td>1/1/2017</td>
</tr>
<tr>
<td>ORB</td>
<td>Lane County Trans Dist Excise</td>
<td>0.72%</td>
<td>1/1/2017</td>
</tr>
</tbody>
</table>

Pennsylvania
The Unemployment Insurance wage base limit increases to $9,750 for 2017.

Rhode Island
- Unemployment Insurance wage base limits increase for 2017, as follows:
  - Regular: $22,400
  - Negative balance employers: $23,900
- State disability insurance tax (RISDI) information is updated for 2017. Effective for wages paid on or after January 1, 2017:
  - The withholding rate is 1.2%.
  - The taxable wage limit is $68,100 for each employee per calendar year.

South Carolina
South Carolina withholding tables and instructions have been updated for 2017. Refer to the state publication for more details.

Utah
The Unemployment Insurance wage base limit increases to $33,100 for 2017.

Vermont
The Unemployment Insurance wage base limit increases to $17,300 for 2017.
Virgin Islands

**Note:** Virgin Islands is subject to credit reduction for 2016, so the federal unemployment tax (FUTA) rate for Virgin Islands employers is increased by 1.8% (maximum $126 increase per employee).

Washington

The Unemployment Insurance wage base limit increases to $45,000 for 2017.

Wyoming

The Unemployment Insurance wage base limit decreases to $25,400 for 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

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

Sage Employee Self Service Product Updates

This update does not include any new features or improvements to Sage Employee Self Service.

My Workforce Analyzer Updates

The following new features and improvements are included with this update to My Workforce Analyzer.

Editing Last Year’s ACA Forms

With this release, we added a warning message to My Workforce Analyzer that appears when you attempt to edit forms for a prior year. This warning is to prevent you from editing forms that were previously eFiled using Sage Payroll Tax Forms and eFiling by Aatrix, as any edits to historical forms within My Workforce Analyzer cannot transfer to eFiled forms in Aatrix. To edit previously filed forms in Aatrix, click the View Drafts and Histories button.

Form 1094-C Updates for 2016

The IRS released updates for the 1094-C (Transmittal of Employer Provided Health Insurance Offer and Coverage Information Returns) for 2016, and the system was updated to include the following changes:

- Part II, Line 22 Certifications of Eligibility check box B label changed to **Reserved**.
- Part III, column B label changed to **Section 4980H Full-Time Employee Count for ALE Member**.
- Part II, Line 22 check boxes C and D have been moved leftward on the form.
Form 1095-C Updates for 2016

The IRS released updates for the 1095-C (Employer Provided Health Insurance Offer and Coverage) for 2016. The system was updated to include the following changes:

- Part II, Plan Start Month is a new optional field for 2016.
- Part II, line 15 label changed to Employee Required Contribution (see instructions).
- Part II, line 16 label changed to Section 4980H Safe Harbor and Other Relief (enter code, if applicable).
- Part II, Line 14, Series 1 (Offer of Coverage) code changes include:
  - Added code 1J. Minimum essential coverage providing minimum value offered to employee and at least minimum essential coverage conditionally offered to spouse; minimum essential coverage not offered to dependent(s).
  - Added code 1K. Minimum essential coverage providing minimum value offered to employee; at least minimum essential coverage offered to dependents; and at least minimum essential coverage conditionally offered to spouse. (See Conditional offer of spousal coverage, above, for an additional description of conditional offers.)
  - 1I code is now reserved and cannot be selected for 2016 forms. This code is still valid for 2015 forms.

Tip: Review the IRS instructions for 2016, and the help glossary for more information about Series 1, Offer of Coverage codes on Form 1095-C.

Export and Import Feature to Support Mass Form Changes

With this release we added new functionality to support mass updates to ACA forms. You can use the Export and Import feature, a button on the My Workforce Analyzer > Forms (tab) > Forms panel, to edit Part II and Part III information in the generated form sets.

Use the Export function to create a .CSV file with all of the information (1095-C Part II Employee Offer and Coverage information, or Part III Covered Individuals) currently in the forms. Next, use Microsoft Excel, for example, to edit the information (for all employees or groups of employees) at once in a spreadsheet. Finally, use the Import function to pull the updated information into the forms set.
Safe Harbor Maximum Contribution Percentage Change

The Internal Revenue Service issued Revenue Procedure 2016-24 to index the contribution percentages in 2017 for purposes of determining the affordability of an employer’s plan under the Affordable Care Act. My Workforce Analyzer has been updated to calculate affordability with the percentage appropriate for each year.

The maximum contribution percentage was 9.56% in 2015, and 9.66% in 2016. For plan years beginning in 2017, employer-sponsored coverage will be considered affordable if the employee’s required contribution for self-only coverage does not exceed 9.69% of the employee’s household income for the year, for purposes of both the pay or play rules and premium tax credit eligibility.

Tip: For more information about maximum contributions, see the help glossary.

Employment Status Menus

We changed the name of the Employment Status drop-down menus to Employee Status in two desktop windows: Setup > Employee ACA Settings (Filters), and Forms > 1095-C (Filters). We also changed the selections available in these menus. You can now use the menus to filter the information by All, Active, Dependent (COBRA), LOA, Not Employee, and Terminated employees.

Form 1094-C Minimum Essential Coverage Setting

With this release, we fixed the issue where the selection on the Setup > Employer/Benefits window wasn’t updating the actual 1094-C forms. The setting, We provide healthcare benefits providing minimum essential coverage with minimum value, now correctly updates the 1094-C, Part III, Line 23 (ME coverage offered).

Viewing Employers in Online Dashboards and Analysis

You can now select to view one, many, or all employers in the online dashboards and analysis tools. If you select multiple employers, the system analyzes and shows the combined information. The new employer selection list is on the (desktop) My Workforce Analyzer > Analysis window.

Select the Safe Harbor Method Analyzed

You can now select which safe harbor method you want to view calculated in the Analysis > Affordability report. You select the method for analysis on the My Workforce Analyzer > Setup > Employer/Benefits window. When you select different safe harbor methods here, it impacts only the Affordability report page,
and it gives you the opportunity to compare what is determined affordable under each method for each employee.

**Affordability Analysis Details**

We added more detail to the **Analysis > Affordability** report so you can see how each safe harbor method compares the cost of your company’s lowest employee-only (minimum value) healthcare plan for each employee. We also changed the calculations so they no longer predict affordability for future dates or time frames for which there is no payroll history.

To view the affordability details, click on any employee row on the **Affordability** page and that employee’s detail window opens.

**Tip:** See **Reviewing affordability information** in help for more information about the affordability analysis. Click 📚 How is my workforce analyzed? at the bottom of the help topic for detailed examples of the calculations for each safe harbor method.

**Variable Hour Employees on the Hours of Service Detail**

You can now view variable hour employees on the **Hours of service detail** report (Analysis > Monitoring > Monitoring hours of service panel). Click the **View details** button at the bottom of the panel to open the **Hours of service** detail report, and variable hour employees are now identified with a “Yes” under the **Variable** column.
Preparing for Year-End Processing

Before you start processing your 2017 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 & Sage Abra Suite.

The Year-End Center provides you with information on the following topics:

- Printing and filing W-2s
- Entering employee supplemental information
- Frequently asked questions for year-end processes
- Preparing for your first payroll of 2017
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.
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.

If the steps above were not performed on the server, copy the unzipped folder to the server before proceeding.

Installing the Product Update

To install the Product Update:

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. Back up your data. This ensures that you have a backup of the new version of the software.

### Updating Sage Abra Suite Client Files

**To update Sage Abra Suite Client files:**

1. Launch the Sage Abra Suite Client to initiate the file update process.
2. Click **OK** to proceed and update your files.

After you complete installation and activation, and after you have made any adjustments described in this document, you can resume processing payroll.

### Verifying the Product Update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help > About Sage Abra Suite**. The version for this update is 09.2067.
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 Abra Suite 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 Abra Suite 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 Abra Suite 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](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**.
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 Abra Suite 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.