



Sage HRMS

Canadian Payroll

January 1, 2021 Release Notes

January 2021

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Product update release notes

Important! All customers who update, maintain, and use Sage HRMS Canadian 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 Canadian Payroll and Sage Employee Self Service

Version: Product Update January 1, 2021

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.

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 the **Product Documents** website at <http://cdn.na.sage.com/docs/en/customer/hrms/documentation.htm> for access to more documents.
- **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 2020.
- **Customer Support:** For support resources, visit the [Sage City Customer Resources page](#), select your country, and then select your product.

Payroll Tax Updates

The following federal, provincial, and territorial tax changes are included in this update.

You may need to adjust your employee records to reflect these tax changes.

Federal Legislative Updates

This section lists federal legislative updates available with this release.

Note: Pre-printed T4 forms obtained from the CRA are not supported. You can print on plain paper only.

EI Maximum Insurable Earnings and Premium Rates for 2021

For Employment Insurance, the annual maximum insurable earnings for 2021 is \$56,300.

The premium rates are:

- 1.58% for residents of provinces without a provincial plan (all of Canada except Québec)
- 1.18% for residents of Québec

The annual maximum contributions for the general rate are:

- Employee contributions - \$889.54
- Employer contributions - \$1,245.36

The annual maximum contributions for Québec are:

- Employee contributions - \$664.34
- Employer contributions - \$930.06

Pension Plan Rates and Maximum Pensionable Earnings for 2021

The maximum pensionable earnings under the Canada Pension Plan (CPP) for 2021 is \$61,600.

Additionally, for 2021:

- The basic exemption amount remains unchanged at \$3,500.
- The maximum contributory earnings increase to \$58,100.
- The employee and employer contribution rates increase to 5.45%.
- The maximum employee and employer contribution to the plan is \$3,166.45 each.

Note: The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2021.

Federal Indexation for 2021

The federal indexation factor effective January 1, 2021 is 1%.

Provincial and Territorial Legislative Updates

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

To confirm the amounts and to receive the forms for 2021, contact your tax services office or visit the government websites:

- CRA: <http://www.cra-arc.gc.ca/>
- Revenu Québec: <https://www.revenuquebec.ca/fr/>

WCB Maximum Assessable Earnings for 2021

The 2021 Workers Compensation Board Maximum Assessable Earnings are:

	2021	2020
Alberta	98,700	98,700
British Columbia	\$100,000	87,100
Manitoba	\$127,000	127,000
New Brunswick	\$67,100	66,200
Newfoundland and Labrador	\$67,985	66,980
Northwest Territories	\$97,300	94,500
Nova Scotia	\$64,500	62,000
Nunavut	\$97,300	94,500
Ontario	\$102,800	95,400
Prince Edward Island	\$55,300	55,300

	2021	2020
Québec	\$83,500	78,500
Saskatchewan	\$91,100	88,906
Yukon	\$91,930	90,750

Personal Tax Credits for 2021

Effective January 1, 2021, the provincial and territorial personal tax credits that employees can claim have changed. These changes are reflected in the new 2021 provincial and territorial TD1 forms, and the Québec TP-1015.3-V form. The basic personal amounts have changed as listed below.

	2021	2020
Federal	Use CRA worksheet TD1-WS	Use CRA worksheet TD1-WS
Alberta	19,369	19,369
British Columbia	11,070	10,949
Manitoba	9,936	9,838
New Brunswick	10,459	10,459
Newfoundland and Labrador	9,498	9,498
Northwest Territories	15,243	15,093
Nova Scotia	Use CRA worksheet TD1NS-WS	Use CRA worksheet TD1NS-WS
Nunavut	16,467	16,304
Ontario	10,880	10,783
Prince Edward Island	10,500	10,000
Québec	15,728	15,532
Saskatchewan	16,225	16,065
Yukon	13,808	12,298

Provincial and Territorial Indexation for 2021

Effective January 1, 2021, the following provinces and territories have released updated indexing factors:

	2021	2020
Alberta	0%	0%
British Columbia	1.1%	2.5%
Manitoba	1%	2.2%
New Brunswick	1%	1.9%
Newfoundland and Labrador	0.4%	0.9%
Northwest Territories	1%	1.9%
Nova Scotia	n/a	n/a
Nunavut	1%	1.9%
Ontario	0.9%	1.9%
Prince Edward Island	n/a	0%
Québec	1.26%	1.72%
Saskatchewan	1%	0%
Yukon	1%	1.9%

Provincial and Territorial Tax Brackets for 2021

Provincial/territorial tax brackets are indexed and have changed for 2021, for the following provinces and territories:

- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nunavut
- Ontario
- Québec
- Saskatchewan
- Yukon

To confirm the amounts, contact your tax services office or visit the government websites.

Québec

- The maximum pensionable earnings amount for the Québec Pension Plan for 2021 is \$61,600. Additionally:
 - The maximum contributory earnings for QPP increases to \$58,100.
 - The QPP rate increases to 5.9%.
 - The maximum employee and employer contributions for QPP are \$3,427.90 each.
- The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2021.
- The Québec Parental Insurance Plan (QPIP) rates have been updated for 2021 as follows:
 - Maximum insurable earnings: \$83,500
 - Employee premium rate: 0.494%
 - Employee maximum contributions: \$412.49
 - Employer premium rate: 0.692%
 - Employer maximum contributions: \$577.82

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.

Reporting for COVID-19 pay periods

Employment income for the COVID-19 pay periods defined by the CRA for tax year 2020 is reported in the correct boxes (57-60) on T4 forms.

Sage HRMS product updates

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

OrgPlus and OrgPlus RealTime

Because Insperity will stop supporting the OrgPlus desktop version at the end of 2020, references to this product within Sage HRMS were replaced with OrgPlus RealTime (Insperity's web version).

- On the **Register Sage HRMS** page, select the **OrgPlus RealTime** check box and click **OK** to add the **OrgPlus RealTime** link under **Connected Services > Integrations**. When you click that link, the **Insperity OrgPlus RealTime** logon window opens.
- On the **Customize Sage HRMS Menu** page, select **Process** for **Activity**, select **Create OrgPlus RealTime File** in the list, and then click **OK**. You can then select **Employees > Processes > Create OrgPlus RealTime File** to open the **Create OrgPlus RealTime File** page.

Saving Benefits page

The information shown in the table on the employee's **Saving Benefits** page now shows the percent and amount of the employer contribution. Also, some of the column labels were updated and shortened. The new and changed columns are:

- Emp %
- Emp Amt
- Emp Contrib
- Employer %
- Employer Amt
- Employer Contrib

Class enrollment message

You now see a message if you try to add an employee to a class that they are already enrolled in.

Employee payroll configuration profiles

You can now export and import employee payroll configuration profiles. The **Employee Configuration** page (opened by selecting **Setup > Codes > Payroll > Database Setup > Employee Configuration**) now contains the **Export** and **Import** buttons. You can select a profile, click **Export**, make changes in the file (such as the profile ID), and then click **Import** to import it into the current company or another company. This method saves time if you need to set up several similar profiles.

When adding an employee configuration profile, the default for the **Transfer Default Hours?** column on the **Earning** tab is now set to **No** (instead of **Yes**). This setting is helpful if your company has many earnings codes. (This change does not effect existing employee profiles.)

Compatibility with the Sage 300 2021

A standalone installation of Sage HRMS works successfully with Sage 300 2021 to update HRMS Payroll and ESS pay history.

Important! Because Sage 300 2021 uses Crystal Reports runtime 26, programs (including Sage HRMS) with an earlier version of Crystal Reports runtime usually cannot be installed on the same machine. If you need both programs on the same machine, follow the steps in [Sage Knowledgebase article 108329](#).

Additional features for the subscription version of Sage HRMS

Attachments for many employee pages

You can now add attachments to the following employee pages:

- Termination
- LOA **
- Events * **
- Wellness *
- Absence Transactions * **
- OSHA **
- OHS **
- Workers Compensation **
- Skills * **
- Education * **
- Previous Employer **

These pages now have an **Attachments** tab with a table showing information about the attachments. The method to add, view, modify, and delete attachments is the same as for other attachments.

If Employee Self Service is installed, the **Employee Attachments** detail page for certain pages (marked with an * in the list above) have the **Display in Employee Self Service** check box; select this check box to enable the employee to view that attachment in Employee Self Service.

The summary tables on certain pages (marked with a ** in the list above) have a new **Attachments** column that displays **Yes** if that item has attachments.

Global attachments

You can now attach the same file (such as an employee handbook) to a group of employees by selecting **Employees > Processes > Global Attachments**. The table on the new **Global Attachments** page shows information about the attachments and whether they are shared with all employees or just selected employees.

When you click **Add**, the new **Global Attachments** detail page opens. It looks similar to other attachment detail pages but enables you to specify the employer and statuses of employees to share the attachment. You can also select certain employees to share the attachment. If Employee Self Service is installed, you can select the **Display in Employee Self Service** check box to enable the employees to view that attachment in Employee Self Service.

Secure Query Reports

The new **Secure Query Reports** tile in the **My Shortcuts** area of your home page enables you to easily view your frequently-visited reports. Click the tile to see a table of the reports that you selected for easy access and then click the preview icon to view the report. To add reports to the table, click the **+** (Add icon), move the reports from the **Available** list on the left to the **Selected** list, change the order in the **Selected** list (if needed) by clicking the up or down arrow, and then click **OK**.

Sage Employee Self Service product updates

The following fixes are included with this update to Sage Employee Self Service.

Birth date

If you set **Date of Birth** as one of your logon setup criteria, you can now type the date on the **Change or Reset Password** page and the **First-Time User Register Here** page; you no longer have to scroll through the calendar. You cannot type an invalid date.

Time off dates

If the **End Date** was not entered for an absence transaction for an employee in HRMS, a **To Date** is no longer displayed on the manager's **Time Off Calendar** in Employee Self Service.

Canadian postal code

When a Canadian employee enters their postal code on their **Address** page, it is now formatted correctly (with a space after the first three characters). This eliminates the need to fix any incorrectly formatted postal codes from within HRMS.

Preparing for Year-End Processing

Before you start processing your 2021 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:

- Using the Update TD1 Claim function
- Printing and filing T4s and Releve 1s
- Preparing for your first payroll of 2021

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 Support Resources** page at <https://www.sagecity.com/global-resources>.
2. Select your **Country or Region** from the drop-down list.
3. Select **Sage HRMS** from the **Products** drop-down list.
4. In the **Solve** tile, click the **Search Sage Knowledgebase** link.
5. Click **Sign In**, and then sign into the site.
6. In the Support by product section, click **Select your product**, and then click **more products**.
7. Under Sage HRMS, click your product and version.
8. In the **Latest updates** section, click an update to download.
9. 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, 2021.

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.

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 Support Resources** page at <https://www.sagecity.com/global-resources>.
2. Select your **Country or Region** from the drop-down list.
3. Select **Sage HRMS** from the **Products** drop-down list.
4. In the **Solve** tile, click the **Search Sage Knowledgebase** link.
5. Click **Sign In**, and then sign into the site.
6. In the Support by product section, click **Select your product**, and then click **more products**.
7. Under Sage HRMS, click your product and version.
8. In the **Latest updates** section, click an update to download.
9. 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.