



# Sage HRMS

## January 1, 2022 Release Notes

December 2021

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# Product update release notes

**Important!** All customers who update, maintain, and use Sage HRMS or Sage HRMS 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 HRMS and Sage HRMS Employee Self Service

**Version:** Product Update January 1, 2022

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 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 HRMS 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 [Sage HRMS Product Documents website](#) 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 2021.
- **Customer Support:** For support resources, visit the [Sage City Customer Resources page](#), select your country, and then select your product.

# Canadian 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 2022

For Employment Insurance, the annual maximum insurable earnings for 2022 is \$60,300.

The premium rates are:

- 1.58% for residents of provinces without a provincial plan (all of Canada except Québec)
- 1.2% for residents of Québec

The annual maximum contributions for the general rate are:

- Employee contributions - \$952.74
- Employer contributions - \$1,333.84

The annual maximum contributions for Québec are:

- Employee contributions - \$723.60
- Employer contributions - \$1,013.04

## Pension Plan Rates and Maximum Pensionable Earnings for 2022

The maximum pensionable earnings under the Canada Pension Plan (CPP) for 2022 is \$64,900. Additionally, for 2022:

- The basic exemption amount remains unchanged at \$3,500.
- The maximum contributory earnings increase to \$61,400.
- The employee and employer contribution rates increase to 5.7%.
- The maximum employee and employer contribution to the plan is \$3,499.80 each.

**Note:** The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2022.

## Federal Indexation for 2022

The federal indexation factor effective January 1, 2022 is 2.4%.

## Provincial and Territorial Legislative Updates

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

To confirm the amounts and to receive the forms for 2022, 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 2022

The 2022 Workers Compensation Board Maximum Assessable Earnings are:

	2022	2021
Alberta	\$98,700	\$98,700
British Columbia	\$108,400	\$100,000
Manitoba	\$150,000	\$127,000
New Brunswick	\$69,200	\$67,100
Newfoundland and Labrador	\$69,005	\$67,985
Northwest Territories	\$102,200	\$97,300
Nova Scotia	\$69,000	\$64,500
Nunavut	\$102,200	\$97,300
Ontario	\$100,422	\$102,800
Prince Edward Island	\$58,300	\$55,300
Québec	\$88,000	\$83,500

	2022	2021
Saskatchewan	\$94,440	\$91,100
Yukon	\$94,320	\$91,930

## Personal Tax Credits for 2022

Effective January 1, 2022, the provincial and territorial personal tax credits that employees can claim have changed. These changes are reflected in the new 2022 provincial and territorial TD1 forms, and the Québec TP-1015.3-V form. The basic personal amounts have changed as listed below.

	2022	2021
Federal	\$14,398	Use CRA worksheet <a href="#">TD1-WS</a>
Alberta	\$19,369	\$19,369
British Columbia	\$11,302	\$11,070
Manitoba	\$10,145	\$9,936
New Brunswick	\$10,817	\$10,564
Newfoundland and Labrador	\$9,803	\$9,535
Northwest Territories	\$15,609	\$15,243
Nova Scotia	Use CRA worksheet <a href="#">TD1NS-WS</a>	Use CRA worksheet <a href="#">TD1NS-WS</a>
Nunavut	\$16,862	\$16,467
Ontario	\$11,141	\$10,880
Prince Edward Island	\$11,250	\$10,500
Québec	\$16,143	\$15,728
Saskatchewan	\$16,615	\$16,225
Yukon	\$14,398	\$13,808

## Provincial and Territorial Indexation for 2022

Effective January 1, 2022, the following provinces and territories have released updated indexing factors:

	2022	2021
Alberta	0%	0%
British Columbia	2.1%	1.1%
Manitoba	2.1%	1%
New Brunswick	2.4%	1%
Newfoundland and Labrador	2.8%	0.4%
Northwest Territories	2.4%	1%
Nova Scotia	n/a	n/a
Nunavut	2.4%	1%
Ontario	2.4%	0.9%
Prince Edward Island	n/a	n/a
Québec	2.64%	1.26%
Saskatchewan	2.4%	1%
Yukon	2.4%	1%

## Provincial and Territorial Tax Brackets for 2022

Provincial/territorial tax brackets are indexed and have changed for 2022, 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 2022 is \$64,900. Additionally:
  - The maximum contributory earnings for QPP increases to \$61,400.
  - The QPP rate increases to 6.15%.
  - The maximum employee and employer contributions for QPP are \$3,776.10 each.
- The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2022.
- The Québec Parental Insurance Plan (QPIP) rates have been updated for 2022 as follows:
  - Maximum insurable earnings: \$88,000
  - Employee premium rate: 0.494%
  - Employee maximum contributions: \$434.72
  - Employer premium rate: 0.692%
  - Employer maximum contributions: \$608.96

# 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.

### Add Comments for Employees

The Employee Payroll window has a new **Comments** tab where you can enter comments for employees. You can include these comments on the Employee Information Report.

You can enter a follow-up date for each comment. To set up your system so default follow-up dates are automatically entered, specify a number of days in the **Default Number of Days for Follow Up on Employee Comments** field on the Payroll Options window.

### Save settings for calculating payroll

On the Calculate Payroll window, you can now save your settings so they will be used by default the next time you open the window. Saved settings are personal to each Sage 300 user, so each user can save different defaults.

To save your settings, right-click on the Calculate Payroll window to bring up the menu. Click on **Save Settings as Default** on the **Settings** menu. (You can also clear your saved settings, by clicking **Clear Saved Settings** on the same menu.)

### Streamlined process for getting to Pre-Cheque Payroll Register after calculating payroll

After calculating payroll, an improved "processing completed" message appears, which allows you to open the Pre-Cheque Payroll Register window directly, instead of having to open the window from the desktop. The improved message also allows you to print a report of processing exceptions (if there were any).

### Fix for Employee Activity and Transaction History

We have fixed two similar problems that occurred for employees with certain specific employee numbers. For these employees:

- On the Employee Activity window, cheque information is now displayed on the Cheques tab.
- On the Transaction History window, Finders work correctly in the tables on the Earnings/Deductions tab and the Taxes tab.

## Report "Other Information" earnings separately on T4A forms

On T4A forms, each of the supported types of "Other Information" earning is now reported in its own box.

By default, all existing "Other Information" earnings are set up to be reported in box **028 - Other Information**. If you have "Other Information" earnings that should be reported in other boxes, you must set up these earnings by specifying the correct box in a new **Box** field on the Earning/Deduction Codes window. (The new field appears only if you select **T4A - Other Information** in the **T4/T4A Reporting** field.)

## Generate more ROE per day

You can now generate more than 850 Records of Employment in a single day. (Previously, the limit was 100).

**Note:** The first 100 ROE files are numbered 00 to 99. Subsequent ROE files include letters: A0, A1 and so on up to ZZ.

## Fix for Earnings and Hours report

If you print the Earnings and Hours report in French and you sort the report by Class, the report includes all the information that it should.

## Fix for Relevé 1 forms

We have fixed a problem that caused incorrect information to be reported in boxes P and Q on Relevé 1 forms.

## Sage HRMS product updates

### Employee Benefits

Fixed an issue where the Employee Insurance Benefits UI would hang or crash when adding or deleting benefits for certain employees. This issue would occur for employees that had dependents or beneficiaries assigned and the employee was transferred to another company with Cross Employer Transfer.

### Calculate Payroll

Fixed an issue where the system could crash after calculating payroll if the machine's date format is set to yyyy-MM-dd.

## Attendance Summary

Fixed an issue where Attendance Summary UI could give a Runtime Error when clicking on the + sign to select a plan.

## Salary As of Report

Fixed an issue where "Salary As of Report" would crash HRMS if a job code is not selected on the **Specific Criteria** tab.

# Sage HRMS Employee Self Service product updates

This update is for the Subscription version of Employee Self Service. There are no updates for perpetual products.

## Master User role changes

The master user role pages have been completely redesigned to improve usability and provide consistency with the other roles in the Sage HRMS Employee Self Service product.

## Modern and improved Mobile experience

The interface for "ESS Mobility" (Mobile version of the Sage HRMS Employee Self Service application) has been completely redesigned to improve usability and provide consistency with other modern Sage Mobile products.

## Improvements to the user experience

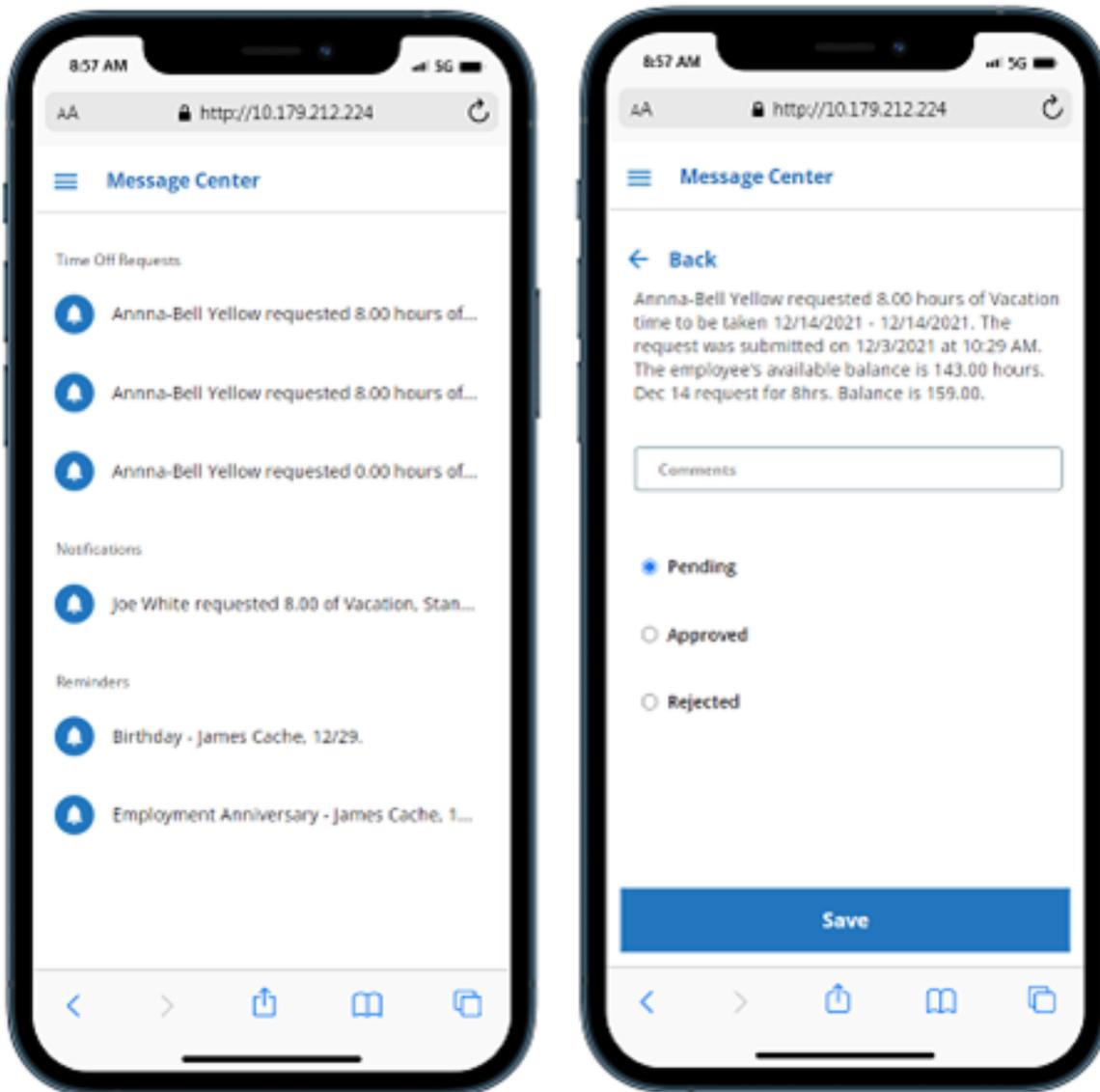
- Required fields are indicated with an asterisk (\*).
- Buttons are enabled when all required fields have been filled.
- Error messages are displayed under the appropriate field.

## Responsive Design

The pages in ESS Mobility are responsive to the user's smart device

## Message Center

After logging in, the Message Center will be displayed. Managers will be able to approve or reject Time Off Requests.



## Hamburger icon

The hamburger  is visible at the top left. When selected, it will open into a side menu.

## Log off

“Log off” is now located on the top right of the menu.

## Time Off

Time Off Balance is now displayed in the dropdown list for each plan.

The screenshot shows a mobile application interface for requesting time off. At the top, the status bar displays 9:10 AM, 5G signal, and battery level. The browser address bar shows the URL http://10.179.212.224. The page title is "Time Off".

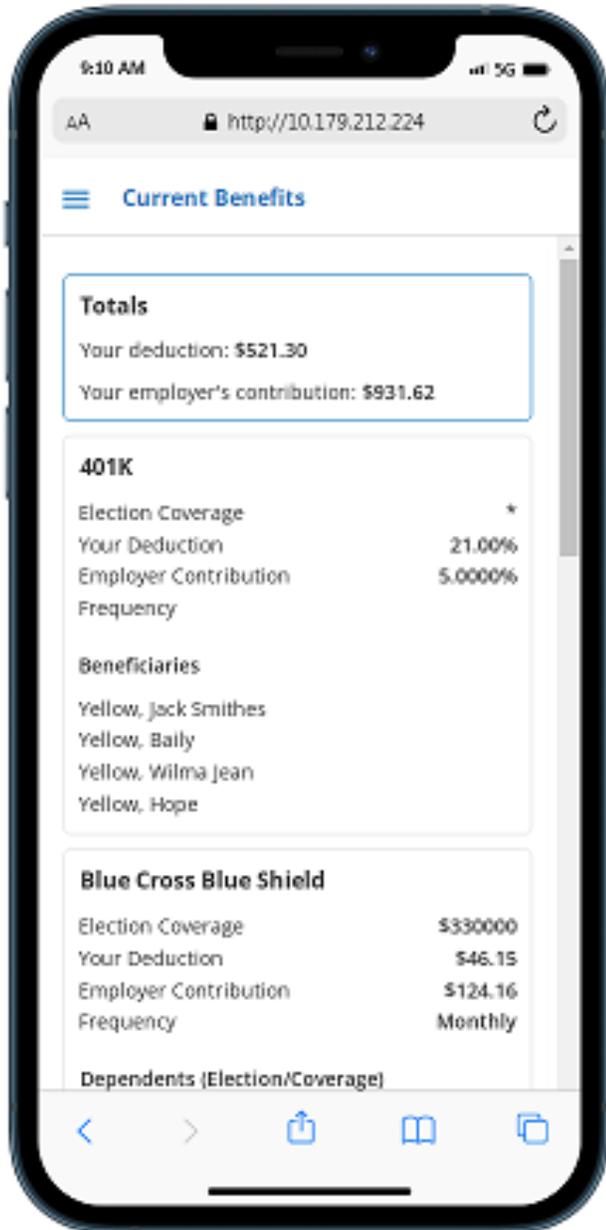
The form contains the following fields:

- Plan\***: A dropdown menu with three options: "Vacation - (Balance: 161.00)", "Sick - (Balance: 160.00)", and "Vacation - (Balance: 161.00)". The second option is currently selected.
- Last Day Off\***: A text input field containing "12/23/2021".
- Total Hours\***: A text input field containing "8.00".
- Start Time**: A dropdown menu.
- End Time**: A dropdown menu.
- Comments**: A text input field.

A blue "Submit" button is located at the bottom of the form. The mobile navigation bar at the very bottom shows standard iOS navigation icons: back, forward, home, and search.

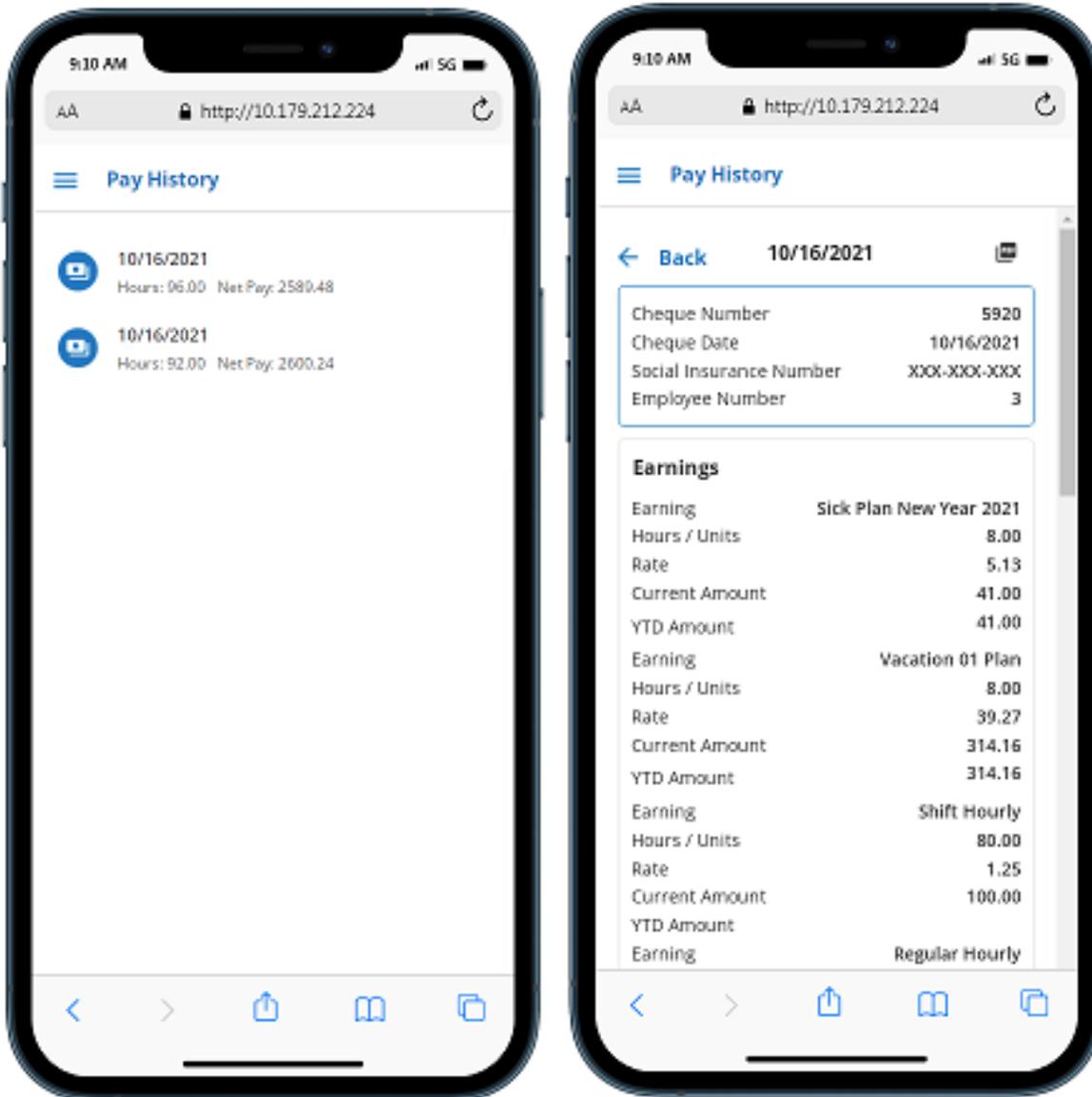
## Current Benefits

Improved layout design with the employee's Total amounts at the top of the page.



## Pay History

Improved layout design with the employee's check information at the top of the page.

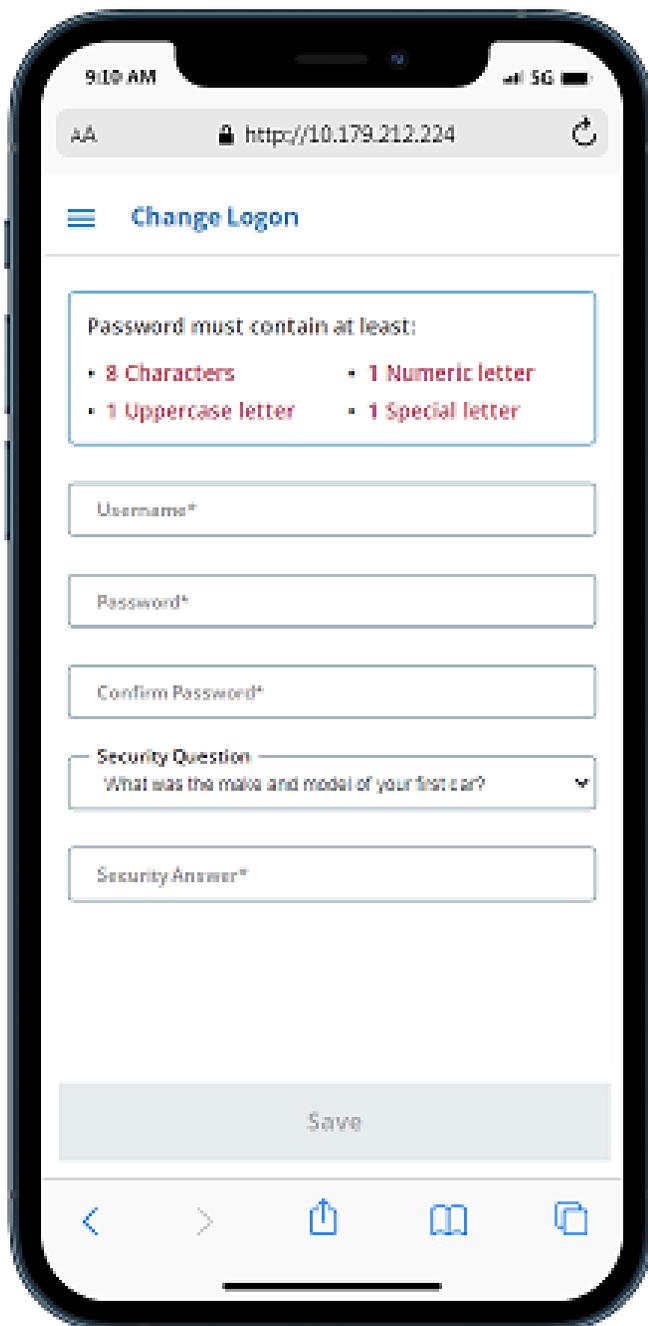


## Change Logon page

The Change Logon page is now available in the mobile version.

Password requirements setup by the admin are displayed at the top of the page in red text.

When your password meets a requirement, the text for the requirement will turn from red to black.



The screenshot shows a mobile browser interface for the 'Change Logon' page. At the top, the status bar shows 9:10 AM, 5G signal, and battery level. The browser address bar displays 'http://10.179.212.224'. The page title is 'Change Logon'. A blue-bordered box contains the text 'Password must contain at least:' followed by four requirements: '8 Characters', '1 Numeric letter', '1 Uppercase letter', and '1 Special letter'. Below this are five form fields: 'Username\*', 'Password\*', 'Confirm Password\*', 'Security Question' (with a dropdown menu showing 'What was the make and model of your first car?'), and 'Security Answer\*'. A 'Save' button is located at the bottom of the form area. The mobile navigation bar at the very bottom shows back, forward, share, book, and tabs icons.

# Preparing for Year-End Processing

Before you start processing your 2022 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 Relevé 1s
- Preparing for your first payroll of 2022

# Sage HRMS 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, 2022.

**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 HRMS Employee Self Service update installation instructions

**Note:** This modernization release of Sage HRMS Employee Self Service is only for customers on the subscription version of Sage HRMS. If you are not on subscription, please contact either your Sage Business Partner or Sage Account Manager for information on your options for moving to subscription.

After you have downloaded the Sage HRMS Employee Self Service update from the Sage Knowledgebase, follow these instructions to install the update.

## 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 HRMS 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 HRMS 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 HRMS 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 we recommend that you 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 HRMS Employee Self Service update

1. Using your external backup procedures, back up the Sage HRMS and Sage HRMS Employee Self Service databases to a media device that is external to your product servers:
  - a. Log on to the Sage HRMS Employee Self Service server and select **Programs > Employee Self Service > System Maintenance** to open the Sage HRMS 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 HRMS 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 HRMS 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 HRMS 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 HRMS Employee Self Service as the MASTER user to complete the process.

The update is now complete and you are ready to start using Sage HRMS Employee Self Service.