



Sage HRMS

January 1, 2023 Release Notes

December 2022

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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, 2023

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 2022.
- **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 2023

For Employment Insurance, the annual maximum insurable earnings for 2023 is \$61,500.

The premium rates are:

- 1.63% for residents of provinces without a provincial plan (all of Canada except Québec)
- 1.27% for residents of Québec

The annual maximum contributions for the general rate are:

- Employee contributions - \$1,002.45
- Employer contributions - \$1,403.43

The annual maximum contributions for Québec are:

- Employee contributions - \$781.05
- Employer contributions - \$1,093.47

Pension Plan Rates and Maximum Pensionable Earnings for 2023

The maximum pensionable earnings under the Canada Pension Plan (CPP) for 2023 is \$66,600. Additionally, for 2023:

- The basic exemption amount remains unchanged at \$3,500.
- The maximum contributory earnings increase to \$63,100.
- The employee and employer contribution rates increase to 5.95%.
- The maximum employee and employer contribution to the plan is \$3,754.45 each.

Note: The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2023.

Federal Indexation for 2023

The federal indexation factor effective January 1, 2023 is 6.30%.

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 2023, 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 2023

The 2023 Workers Compensation Board Maximum Assessable Earnings are:

	2023	2022
Alberta	\$102,100	\$98,700
British Columbia	\$112,800	\$108,400
Manitoba	\$153,380	\$150,000
New Brunswick	\$74,800	\$69,200
Newfoundland and Labrador	\$72,870	\$69,005
Northwest Territories	\$107,400	\$102,200
Nova Scotia	\$69,800	\$69,000
Nunavut	\$107,400	\$102,200
Ontario	\$110,000	\$100,422
Prince Edward Island	\$65,000	\$58,300
Québec	\$91,000	\$88,000

	2023	2022
Saskatchewan	\$94,440	\$94,440
Yukon	\$98,093	\$94,320

Personal Tax Credits for 2023

Effective January 1, 2023, the provincial and territorial personal tax credits that employees can claim have changed. These changes are reflected in the new 2023 provincial and territorial TD1 forms, and the Québec TP-1015.3-V form. The basic personal amounts have changed as listed below.

	2023	2022
Federal	\$15,000	\$14,398
Alberta	\$21,003	\$19,369
British Columbia	\$11,981	\$11,302
Manitoba	\$10,855	\$10,145
New Brunswick	\$12,458	\$10,817
Newfoundland and Labrador	\$10,382	\$9,803
Northwest Territories	\$16,593	\$15,609
Nova Scotia	Use CRA worksheet TD1NS-WS	Use CRA worksheet TD1NS-WS
Nunavut	\$17,925	\$16,862
Ontario	\$11,865	\$11,141
Prince Edward Island	\$12,000	\$11,250
Québec	\$17,183	\$16,143
Saskatchewan	\$17,661	\$16,615
Yukon	\$15,000	\$14,398

Provincial and Territorial Indexation for 2023

Effective January 1, 2023, the following provinces and territories have released updated indexing factors:

	2023	2022
Alberta	6%	0%
British Columbia	6%	2.1%
Manitoba	7%	2.1%
New Brunswick	6.3%	2.4%
Newfoundland and Labrador	5.9%	2.8%
Northwest Territories	6.3%	2.4%
Nova Scotia	n/a	n/a
Nunavut	6.3%	2.4%
Ontario	6.5%	2.4%
Prince Edward Island	n/a	n/a
Québec	n/a	2.64%
Saskatchewan	6.3%	2.4%
Yukon	6.3%	2.4%

Provincial and Territorial Tax Brackets for 2023

Provincial/territorial tax brackets are indexed and have changed for 2023, for the following provinces and territories:

- Alberta
- 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 2023 is \$66,600. Additionally:
 - The maximum contributory earnings for QPP increases to \$63,100.
 - The QPP rate increases to 6.40%.
 - The maximum employee and employer contributions for QPP are \$4,038.40 each.
- The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2023.
- The Québec Parental Insurance Plan (QPIP) rates have been updated for 2023 as follows:
 - Maximum insurable earnings: \$91,000
 - Employee premium rate: 0.494%
 - Employee maximum contributions: \$449.54
 - Employer premium rate: 0.692%
 - Employer maximum contributions: \$629.72

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.

IN-412.A and IN-412.A-V

The documents, Information for Users of RL-Slip Software, IN-412.A (French) and IN-412.A-V (English), is available in the ..[program directory]\Docs\73A\ENG folder.

Sage HRMS product updates

The following changes to Sage HRMS are included with this update.

Duplicate SSN Report buttons are cut off

Fixed an issue on the Duplicate SSN Report where the Print and Cancel buttons were not showing on the UI.

Carryover amount showing zero after process time off is run

Fixed an issue where carryover and accrued values on the **Employee Attendance Summary** page were not being updated correctly from Payroll. This would happen when **Process Time Off** was run for Time Off Plans that were set to Use Payroll Accruals.

Sage HRMS Employee Self Service product updates

The following new features and improvements included in this release of Sage HRMS Employee Self Service are for the premium version only of Sage HRMS.

Sage HRMS Employee Self Service - Provide the ability to see all enrollments that are available to approve

Added the ability to select multiple Employers tied to an Open Enrollment period. This feature will allow the Benefit Admin to Approve all employees with a Pending Open Enrollment status from all selected companies. There is also the ability to "Select All" or "Deselect All" Employers. Previously you could only do this for one company at a time.

Sage HRMS Employee Self Service - Provide the ability to see all Life Events that are available to approve

Added the ability to select multiple Employers when approving life events. By default, all employers will be selected and there is now a "Select All" and "Deselect All" option to select all or deselect all employer selections. Previously you could only do this for one company at a time.

Sage HRMS Employee Self Service - Provide the ability hide Gender and Gender Identity

Administrators now have the ability to show or hide "Gender" and Gender Identity" fields on the Personal Profile page. These settings are in the Employer Setup page. The new settings are "Display Gender Field" and "Display Gender Identity Field". Select "Yes" to allow employees to see the field. Select "No" if you do not want the employee to see the field.

Sage HRMS Employee Self Service - Provide the ability to add attachments in Time Off

Employees can now add attachments when requesting time off. Assigned Approvers can view the attachment and approve or reject the request. While approving the request through the manager Time Off page, the manager can update the Attachment codes for the attachments added by the employee for the request.

Benefit Codes with spaces are not displaying correctly in Sage HRMS Employee Self Service

An issue where plan information would not expand on the Current Benefits page when there is a space in the benefit code has been resolved.

After upgrade to Q3 Sage ESS still display widgets when set to No Access for employee and manager

Fixed an issue where the home page widgets were showing when the administrator did not allow any page access for employees. All widgets now also respect the security set by administrator for the menu items.

The following fix is included with this update to Sage HRMS Employee Self Service.

Benefit Admins cannot save Life Events with a Waiver Required when upgrading to Q3

Fixed an issue where the Benefit Admin was not able to save a Life Event when a Waiver was required on a pending benefit.

Preparing for Year-End Processing

Before you start processing your 2023 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 2023

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 **Knowledgebase** tile, click the **Search Sage Knowledgebase** link.
5. Click **Log in**, and then log into the site.
6. In the **Latest update** section, click an update to download.
7. In the article, click **Download** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

Installing the product update

Note: You should launch the product update on the server where Sage HRMS is installed.

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.

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 matches 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, 2023.

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: Some features in this release of Sage HRMS Employee Self Service are for the premium version of Sage HRMS only. If you are not on the premium version of Sage HRMS and would like to learn about options for moving to the premium version, please contact your Sage Business Partner or Sage Account Manager.

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 **Knowledgebase** tile, click the **Search Sage Knowledgebase** link.
5. Click **Log in**, and then log into the site.
6. In the **Latest update** section, click an update to download.
7. In the article, click **Download** 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.