



Sage HRMS

Q1 2024 Release Notes

March 2024

This is a publication of Sage Software, Inc.

© 2024 The Sage Group plc or its licensors. All rights reserved. Sage, Sage logos, and Sage product and service names mentioned herein are the trademarks of The Sage Group plc or its licensors. All other trademarks are the property of their respective owners.

Last updated: March 20, 2024

Contents

- Product update release notes** 1
 - Product update information 1
 - About product updates for Sage HRMS 1
 - Support and resources 1

- U.S. Payroll Tax Updates** 2
 - Federal Legislative Updates 2
 - State and Local Legislative Updates 2
 - Iowa 3
 - Kentucky 3
 - Maryland 3
 - North Dakota 4
 - Ohio 4
 - Pennsylvania 4

- Product updates** 7
 - Payroll product updates 7
 - U.S. Payroll Product Updates 7
 - Premium version of Sage HRMS product updates 7
 - Existing version of Sage HRMS and ESS product updates 14
 - My Workforce Analyzer updates 17
 - Sage 100 Payroll Link updates 17

- How to choose the right product update** 18

- Sage Payroll Tax Forms and eFiling by Aatrix** 19

- Premium web version of Sage HRMS with Sage ESS update installation instructions** 20
 - Downloading the update 20
 - Installing the Sage HRMS Employee Self Service update 21

Contents

Sage HRMS update installation instructions	23
Downloading the product update	23
Installing the product update	23
Updating Sage HRMS client files	24
Verifying the product update	24
Updating the local tax repository and rates	25

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 Q1 2024

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.
- **Community Hub:** Visit <https://communityhub.sage.com/us> for blogs, tips, and guidance specific to Sage HRMS.
- **Customer Support:** For support resources, visit the [Sage Support Resource Centre](#) page.

U.S. Payroll Tax Updates

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

Federal Legislative Updates

There are no federal legislative updates with this release.

State and Local Legislative Updates

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

Note: Sage HRMS U.S. Payroll includes some system-supported State Disability Insurance (SDI) codes, which are updated automatically (for example, with rate changes) when you install product updates. To use these codes, your SDI codes must match the system-supported codes.

If you use custom tax codes to capture SDI taxes, note the following:

- If your codes match the system-supported tax codes, you should review the tax code setup before processing payroll.
- If your codes do not match the system-supported tax codes, you can switch to using the system-supported codes. To do this, you must deactivate your custom tax codes, and then set up the system-supported tax codes.
- Regardless of whether or not your codes match the system-supported tax codes, you must follow your existing procedures for reporting and filing SDI taxes as custom taxes.

Information about changes to specific system-supported SDI codes is included in the sections for the related states.

Iowa

- Effective January 1, 2024, the IA W-4 only allows for withholding amounts on Line 6.
- The Iowa State Income Tax (IASIT) now has a new field (**Allowances IA W-4 2024 or later**), which allows the entry of the 2024 allowance amount.
- Exemptions have been updated to **Exemptions IA W-4 prior to 2024**.

Kentucky

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

Code	Description	Rate	Effective Date
KY0284	Hardin County Industrial TD Regular IT	1%	01/01/2024
KY0285	Buckhorn CT Regular IT	1%	01/01/2024

Maryland

- Maryland withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- There may be local income bracket changes. For example, Frederick Co:
 - 0.0225 for taxpayers who have a net taxable income between \$1 and not exceeding \$25,000.
 - 0.0275 for taxpayers who have a net taxable income between \$25,001 and not exceeding \$50,000.
 - 0.0296 for taxpayers who have a net taxable income between \$50,001 and not exceeding \$150,000.
 - 0.0320 for taxpayers who have a net taxable income of \$150,001 or more.

For more information, see Knowledgebase article: [How to handle withholding for Maryland counties with local tax brackets \(Solution ID: 240311184255530\)](#).

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

Code	Description	Rate	Effective Date
MD3189	Anne Arundel, Maryland Regular IT	2.7%	01/01/2024
MD3194	Cecil, Maryland Regular IT	2.75%	01/01/2024
MD3197	Frederick, Maryland Regular IT	2.25%	01/01/2024

North Dakota

North Dakota withholding tables and instructions have been updated for 2024. Refer to the state publication for more details

Ohio

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

Code	Description	Rate	Effective Date
OH0942	Lebanon-Turtle Creek TP JEDD CT Regular IT	1.5%	01/01/2024
OH0968	Washingtonville VI Regular IT	1%	04/01/2024
OH1066	Marengo-Bennington TP JEDD CT Regular IT	1%	01/01/2024

Pennsylvania

- Effective January 1, 2024, under Act 34 of 2023 (HB 1300), amounts paid or incurred by an employer for dependent care assistance provided to an employee are now excluded from the employee's Pennsylvania Personal Income Tax obligation.
- For 2024, stop withholding tax on dependent care benefits (up to \$5,000). For more information, visit:
<https://www.revenue.pa.gov/TaxTypes/EmployerWithholding/Pages/Dependent-Care-Assistance.aspx>.

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

Code	Description	Rate	Effective Date
PA4905	Newville BO, Big Spring SD (NR) Regular IT	2.5%	01/01/2024
PA4906	Newville BO, Big Spring SD Regular IT	3.15%	01/01/2024
PA6021	Aliquippa CT, Aliquippa SD (NR) Regular IT	1.2%	01/01/2024
PA6022	Aliquippa CT, Aliquippa SD Regular IT	1.2 %	01/01/2024
PA6175	Narberth BO, Lower Merion SD (NR) Regular IT	0.75%	02/01/2024
PA6176	Narberth BO, Lower Merion SD Regular IT	0.75%	02/01/2024
PA6527	Jackson TP, Southern Tioga SD (NR) Regular IT	0%	01/01/2024
PA6528	Jackson TP, Southern Tioga SD Regular IT	1.2%	01/01/2024
PA7319	Homestead BO, Steel Valley SD (NR) Regular IT	1%	01/01/2024
PA7333	Hazleton CT, Hazleton SD (NR) Regular IT	1.5%	01/01/2024
PA7334	Hazleton CT, Hazleton SD Regular IT	2.125%	01/01/2024
PA7630	Bethel Park BO, Bethel Park SD Regular IT	1.5%	01/01/2024
PA7828	Lansdowne BO, William Penn SD (NR) Regular IT	1%	01/01/2024
PA7829	Lansdowne BO, William Penn SD Regular IT	1%	01/01/2024
PA0302	Cressona BO, Blue Mountain SD (NR) LST	\$52	01/01/2024
PA2488	Homestead BO, Steel Valley SD (NR) LST	\$52	01/01/2024

Code	Description	Rate	Effective Date
PA1573	Harrisville BO, Slippery Rock SD (NR) LST	\$52	01/01/2024

Product updates

The following product updates are included with this release.

Payroll product updates

U.S. Payroll Product Updates

- We have also added a new option (**Form W-2-Exempt Overtime Pay**), for selection at the **Report as** field in the **Earnings and Deductions** window.
 - This applies to **Alabama only** and will allow the reporting of an exempt overtime pay to the Alabama Department of Revenue.
 - For more information, see Knowledgebase article: [Alabama Overtime Pay Exemption \(Solution ID: 231211185204510\)](#).

Premium version of Sage HRMS product updates

Premium product updates include new features and enhancements for both the desktop version and the web version of Sage HRMS. If you have also purchased Sage HRMS Employee Self Service, updates for the premium version of ESS will also be included. Please review the table below to learn more about these changes.

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Sage HRMS New Payroll and System Manager Versions Learn more	Yes		
Sage HRMS Ally Beta Learn more	Yes		
HRMS Download Announcements Learn more	Yes		

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
California Pay Data Reporting Requirements Learn more	Yes		
User Preferences Payroll Employer Default Learn more	Yes		
HRMS Data Access OLEDB Provider missing in Crystal Report 2020 Learn more	Yes		
Sage Resource Centre Learn more	Yes		
Sage 100 Payroll Setup UI Updates Learn more	Yes	Yes	
E-Verify Information Screen for Admins Learn more		Yes	
E-Verify ESS Employee page Learn more			Yes
W-4 Form added to Employee Self Service Learn more			Yes
W-4 Form Reporting for ESS Administrators Learn more			Yes
Expired Benefits Included in Waived Benefits in Life Events Issue Resolved			Yes

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Learn more			
View Builder Error Resolved Learn more			Yes

Sage HRMS New Payroll and System Manager Versions

Sage HRMS Payroll has been upgraded to Sage 300 2024 Payroll 8.0 and Sage 300 System Manager 2024. The following Payroll Modules in the desktop version of Sage HRMS have been upgraded with this update:

- The payroll module has been updated from version 7.3 to 8.0.
- The following Sage 300 ERP modules have also been updated:
 - Bank
 - General Ledger
 - System Manager
- The Payroll Link has been updated as well.

The new System Manager Module introduces a Security Enhancement from Sage 300.

Security Enhancement Changes

- The Sage 300 2024 security enhancement eliminates certain binary ISM files in the Sage 300 Shared Data folder which contains Sage 300 user and database credentials as well as organization profiles. This content has been moved to SQL Server in the form of SQL logins and new “Vault” and “Store” databases.
- Following the initial install/upgrade of the Sage HRMS Client, an administrative user will be prompted to enter the names of the Vault and Store databases.
- Security policies are now enforced with MS SQL Server and local machine policies.
- The password rules in Sage 300 have been tightened to ensure that all logins adhere to minimum complexity requirements.
- The Payroll Administrator (Sage 300) will no longer allow a default password = ‘Admin’.

- The user is prompted to change the default password for the Payroll Administrator (Sage 300) during the Sage HRMS Client Upgrade to meet the new password complexity rules if it is **not complex enough**.
- Password Complexity Rules dictate that a password must have a minimum length of 8 characters, with a minimum of 1 lower-case character, 1 upper-case character, 1 numeric character, and 1 special character.
- The Minimum password length is set to 8 characters by default.

Note: Sage HRMS security users including the Master user are not required to change their password to access HRMS.

Sage HRMS Client Upgrade Changes

- In addition to the existing recommendation of backing up all HRMS and Payroll databases before upgrading, it is also recommended to back up your SITE and USER folders in the Shared Data folder. Starting with Q1 2024, you should also include backing up the two new “Vault” and “Store” databases.
- During the Sage HRMS Client Upgrade, there may now be a forced restart of the Client and the windows server machine.
- If this is necessary, the user is presented with a new message stating that: “Sage HRMS Client needs to restart. Save all your files before continuing.”
- After the Sage HRMS Client Upgrade resumes, the administrative user will be prompted to:
 - Enter the names of the Vault and Store databases.
 - Change the default password for the Payroll Administrator (Sage 300) to meet the new password complexity rules.

Sage HRMS Ally Beta

As part of Sage’s commitment to bringing AI enhancements to our products, this release will feature the Beta version of Sage HRMS Ally.

Sage HRMS Ally is an AI chatbot integrated into the premium version of Sage HRMS. This tool allows users to ask questions about the Sage HRMS desktop product directly from the product interface and produces a summarized description of User Guides and the Sage HRMS Help documentation, allowing for quick and seamless customer assistance.

Please be advised that Sage HRMS Ally is in Beta. While efforts are continuously being made to ensure accuracy, there may be instances where the responses may be incomplete or may contain unrelated HRMS product information.

HRMS Download Announcements

We have added a new "Announcement" section on the Home page of the desktop version. This section will be visible only to users in the Master Group. Going forward we will be able to push in product announcements any time, which may also contain clickable links.

For example:

- We may push an announcement letting you know when a new product will be available.
- We may push announcements for new product updates with download links specific to your installed products.

Note: After you install Q1 2024, you will not notice anything until we decide to push an announcement to you. Look for new in product announcements in the future.

California Pay Data Reporting Requirements Update

The EEO tab of the Current Pay page has been updated to support the "Remote Worker" requirement for the California Pay Data Reporting requirements for 2024. This new EEO field will be set to 'No' by default. Users can also use a .csv file to import the employee's "Remote Worker" status by navigating to the Processes > Import Work Location Data. For more information, see Knowledgebase article: [California Pay Data Reporting \(Solution ID: 240320140556127\)](#).

User Preferences Payroll Employer Default Issue Resolved

An issue was identified that resulted in the system failing to display the correct Employer by default when a user selected a default Payroll Employer in the User Preferences menu. This has been resolved and the selected US Payroll Employer now displays if one has been selected.

HRMS Data Access OLEDB Provider missing in Crystal Report 2020

Fixed an issue where the HRMS Data Access OLEDB Provider was missing in an HR Only install.

Sage Resource Centre

The link for the Sage HRMS Knowledgebase will now open the Sage Resource Centre when selected from the Home page in the desktop version of Sage HRMS.

Sage 100 Payroll Setup UI Updates

Addressed an issue where an error occurred on the Sage 100 Setup page during a New Hire process. An error was generated when the Employee Tax Info button was clicked and the employee was missing some required fields. The Employee Tax Info button will be disabled until all of the required fields for the employee have been populated. The Invalid Employee report will now display all of the missing required fields.

E-Verify Information Screen for Admins

A new page has been added to the web version of Sage HRMS to support the management of the E-Verify Case submission process. HR Administrators can enter the respective E-Verify Case Number and submission details such as the E-Verify Response and Result of the case.

In addition to a new page to collect E-Verify Case Information, there are two additional tabs which will allow HR Administrators to also add notes and attach relevant files specific to an employee's E-Verify case. If you are using Sage Employee Self Service, you have the option of sharing these notes and attachments with the designated employee.

E-Verify ESS Employee page

A new read only page has been added to the Employee menu in ESS to provide information related to the employee's E-Verify Case. The employee's E-Verify page will only be displayed if the Admin has created a E-Verify Case record for the employee. The E-Verify page also includes a Notes tab and an Attachments tab. Employees can view E-Verify specific notes and Attachments if marked as visible in ESS by the Admin.

The employee's E-Verify page can also be hidden by the Master user in the employee's menu if desired by setting the Page Access in ESS to 'No Access.'

W-4 Form has been added to the Employee menu in Employee Self Service

A new page has been added to the Employee menu in ESS to allow employees to submit a new version of the Federal W-4 Tax Withholding form. The Employee W-4 Form is set to 'View' access by default and must be changed to 'Approve' to permit employees access to create and submit a W-4 Form for approval. After setting the page to the access type of 'Approve,' you must also choose the role of the person who must approve or reject the changes made to the W-4 Form. The W-4 Form follows the Notification workflow in ESS. The Approval request includes an attachment icon to view an image of the W-4 Form to review before Approving or Rejecting the form.

W-4 Form Reporting for ESS Administrators

A new report menu and report has been added to ESS to provide Administrators with information on W-4 forms. Administrators can search by status, user, and/or submission date to generate a record of submitted W-4's, and create a report containing the image of each included W-4 for review or administrative purposes.

Life Event Issue

Fixed an issue that caused all expired benefits with a status of "waived" to display in an employee's Life Events Benefit Summary when making benefit plan updates during a Life Event enrollment. Expired benefits with a status of "waived" are no longer displayed in the summary.

View Builder Error Resolved

Addressed an issue where an error occurred when selecting a View with the data source of Personnel.

Existing version of Sage HRMS and ESS product updates

This update includes changes to the existing version of both Sage HRMS and Sage HRMS Employee Self Service.

Product Updates	Existing HRMS	Existing ESS
Sage HRMS New Payroll and System Manager Versions Learn more	Yes	
California Pay Data Reporting Requirements Learn more	Yes	
User Preferences Payroll Employer Default Learn more	Yes	
Sage HRMS Data Access OLEDB Provider missing in Crystal Report 2020 Learn more	Yes	
Sage Resource Centre Learn more	Yes	
Sage 100 Payroll Setup UI Updates Learn more	Yes	
Expired Benefits Included in Waived Benefits in Life Events Issue Resolved Learn more		Yes

Sage HRMS New Payroll and System Manager Versions

Sage HRMS Payroll has been upgraded to Sage 300 2024 Payroll 8.0 and Sage 300 System Manager 2024. The following Payroll Modules in the desktop version of Sage HRMS have been upgraded with this update:

- The payroll module has been updated from version 7.3 to 8.0.
- The following Sage 300 ERP modules have also been updated:
 - Bank
 - General Ledger
 - System Manager
- The Payroll Link has been updated as well.

The new System Manager Module introduces a Security Enhancement from Sage 300.

Security Enhancement Changes

- The Sage 300 2024 security enhancement eliminates certain binary ISM files in the Sage 300 Shared Data folder which contains Sage 300 user and database credentials as well as organization profiles. This content has been moved to SQL Server in the form of SQL logins and new “Vault” and “Store” databases.
- Following the initial install/upgrade of the Sage HRMS Client, an administrative user will be prompted to enter the names of the Vault and Store databases.
- Security policies are now enforced with MS SQL Server and local machine policies.
- The password rules in Sage 300 have been tightened to ensure that all logins adhere to minimum complexity requirements.
- The Payroll Administrator (Sage 300) will no longer allow a default password = ‘Admin’.
- The user is prompted to change the default password for the Payroll Administrator (Sage 300) during the Sage HRMS Client Upgrade to meet the new password complexity rules if it is **not complex enough**.
- Password Complexity Rules dictate that a password must have a minimum length of 8 characters, with a minimum of 1 lower-case character, 1 upper-case character, 1 numeric character, and 1 special character.
- The Minimum password length is set to 8 characters by default.

Note: Sage HRMS security users including the Master user are not required to change their password to access HRMS.

Sage HRMS Client Upgrade Changes

- In addition to the existing recommendation of backing up all HRMS and Payroll databases before upgrading, it is also recommended to back up your SITE and USER folders in the Shared Data folder. Starting with Q1 2024, you should also include backing up the two new “Vault” and “Store” databases.
- During the Sage HRMS Client Upgrade, there may now be a forced restart of the Client and the windows server machine.
- If this is necessary, the user is presented with a new message stating that: “Sage HRMS Client needs to restart. Save all your files before continuing.”
- After the Sage HRMS Client Upgrade resumes, the administrative user will be prompted to:
 - Enter the names of the Vault and Store databases.
 - Change the default password for the Payroll Administrator (Sage 300) to meet the new password complexity rules.

California Pay Data Reporting Requirements

The EEO tab of the Current Pay page has been updated to support the "Remote Worker" requirement for the California Pay Data Reporting requirements for 2024. This new EEO field will be set to 'No' by default. Users can also use a .csv file to import the employee's "Remote Worker" status by navigating to the Processes > Import Work Location Data. For more information, see Knowledgebase article: [California Pay Data Reporting \(Solution ID: 240320140556127\)](#).

User Preferences Payroll Employer Default

An issue was identified that resulted in the system failing to display the correct Employer by default when a user selected a default Payroll Employer in the User Preferences menu. This has been resolved and the selected US Payroll Employer now displays if one has been selected.

HRMS Data Access OLEDB Provider missing in Crystal Report 2020

Fixed an issue where the HRMS Data Access OLEDB Provider was missing in an HR Only install.

Sage Resource Centre

The link for the Sage HRMS Knowledgebase will now open the Sage Resource Centre when selected from the Home page in the desktop version of Sage HRMS.

Sage 100 Payroll Setup UI Updates

Addressed an issue where an error occurred on the Sage 100 Setup page during a New Hire process. An error was generated when the Employee Tax Info button was clicked and the employee was missing some required fields. The Employee Tax Info button will be disabled until all of the required fields for the employee have been populated. The Invalid Employee report will now display all of the missing required fields.

Life Event Issue

Fixed an issue that caused all expired benefits with a status of "waived" to display in an employee's Life Events Benefit Summary when making benefit plan updates during a Life Event enrollment. Expired benefits with a status of "waived" are no longer displayed in the summary.

My Workforce Analyzer updates

This update does not include any new features or improvements to My Workforce Analyzer.

Sage 100 Payroll Link updates

This update does not include any new features or improvements to Sage 100 Payroll Link.

How to choose the right product update

Please review the chart below to help determine which download .exe you need to install.

If you have this product:	You should Install:	Quarterly Version
Premium desktop version of Sage HRMS	SageAbraSQLHRMS10_706942.exe	10.70.69.42- 2024 Q1
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.101301_premium_web_HRMS_ESS.exe	21.10.13.01 - 2024 Q1
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10_706942.exe	10.70.69.42 - 2024 Q1
Existing version of Sage HRMS Employee Self Service	SageHRMSESS10_706001.exe	10.70.60.01 - 2024 Q1

Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage HRMS. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Payroll > Government Reports > Federal Tax Filing** or **State Tax Filing**. You will be prompted to register your organization with Sage Payroll Tax Forms and eFiling by Aatrix. After registering, you have the option to enroll your company (or companies) in the eFiling service.

For a detailed overview and a price structure of the Sage Payroll Tax Forms and eFiling by Aatrix options, visit our website here:

<https://partner.aatrix.com/partners/sagehrms>

Premium web version of Sage HRMS with Sage ESS update installation instructions

After you have downloaded the premium version of 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 HRMS Download Portal](#).
2. Click the appropriate download and log in if required.
3. 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.

Sage HRMS update installation instructions

Follow the instructions in this section to download, install, apply, and verify the Product Update for all desktop versions of Sage HRMS.

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 HRMS Download Portal](#).
2. Click the appropriate download and log in if required.
3. 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: March 21, 2024.

Tip: Now is a good time to update your Sage HRMS Payroll sample data. After installing the Product Update, the next time you log in to your Sample Data, you will be prompted to update files again. Click **OK** to proceed and update your sample data files.

Updating the local tax repository and rates

This section applies only if you use local tax codes in U.S. Payroll.

To update the local tax repository and rates:

1. After the Product Update is complete, log in to Sage HRMS.
2. On the Local/Other Tax Codes window, click the **Install Repository** button to update all of the local tax rates in the system.
3. When asked if you want to continue updating company-level local tax records with information from the local repository, click one of the following:
 - **Yes** to automatically update the company rates for all local taxes.
 - **No** to update local taxes individually (select each tax and click the Update button to apply the rate changes). Doing this enables you to validate rates before and after the changes.
4. Depending on your choice in the previous step, update employee-level local tax records as follows:
 - If you clicked **Yes** in the previous step, when asked if you want to continue updating employee local tax records from the local tax repository, click one of the following:
 - **Yes** to automatically update the employee-level rates for all local taxes.
 - **No** to select each employee or use the Update Taxes tax, then update each tax or employee individually.
 - If you clicked **No** in the previous step, you must manually update each employee-level tax. This can be done for all employees at once by tax from **U.S. Payroll > Update Taxes**, or by individual employee from **Employee Payroll > Taxes**.

Important! This process requires security permissions in Sage HRMS to access all employees. Otherwise you may not receive the prompts as described above and employee rates will not be updated.