Sage HRMS

Q1 2025 Release Notes

March 2025

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Contents

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 2025

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.

> **Important!** With every release, we test 2 versions back of Sage HRMS. For this release, you should be on Q4 2024 or later to upgrade to Q1 2025.

Software requirements

> See Sage Knowledgebase article 225924250083549 for the current hardware and software requirements for all versions of Sage HRMS and Sage HRMS Employee Self Service.

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.

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.

Alabama

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

Code	Description	Rate	Effective Date
AL0016	Opelika CT Regular IT	1%	04/01/2025

Louisiana

- Louisiana withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.
- Effective January 1, 2025, Louisiana Department of Revenue has updated the Form R-1300, Employee Withholding Exemption Certificate (Form L-4). Employers should obtain new Forms L-4 from their employees to be used with the updated withholding tables.
- In the Filing Status field on the Payroll Employees Tax Info window, the following new filing statuses are available for the Louisiana State Income Tax (LASIT).
    - Single or married filing separately
    - Married filing jointly, qualifying surviving spouse, or head of household
    - L-4 form 2024 or earlier - Single
    - L-4 form 2024 or earlier - Married

Massachusetts

Massachusetts withholding tables and instructions have been updated for 2025. 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
OH1078	Hanging Rock VI Regular IT	1%	02/01/2025

Pennsylvania

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

Code	Description	Rate	Effective Date
PA0567	West Leechburg BO, Leechburg SD (NR) LST	$52	01/01/2025

West Virginia

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

Code	Description	Rate	Effective Date
WV0014	Glen Dale CT Service Fee	$52	01/01/2025

Product updates

The following product updates are included with this release.

Payroll product updates

U.S. Payroll product updates

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

Canadian Payroll product updates

The following new features and improvements to payroll are included in this update.

Electronic Filing for T4s and T4As

- Fixed a problem to ensure the RepID field is treated as optional when filing electronic T4 and T4A. For more details, see Sage Knowledgebase article 250116182501847.

Printing Employee T4s

Fixed a problem that occurred when printing T4s using the Form, Employees - Plain Paper, the second page of the employees T4 may print blank if the employee has more than six Other Information boxes.

Temporary Relevé 1 for 2025

- You can now print version 2025-01 of the temporary RL-1 slip for employers who cease to operate their business or make payments of source deductions and employer contributions during the year 2025. To do this, specify 2025 in the Payment Year field in the Relevé 1s window.

2024 T4 and RL-1 forms

- Fixed a problem where RL-1 forms were printing zeroes for non-Quebec employees.
- Fixed a problem where a reverse payroll cheque would cause incorrect amounts on the T4 box 26 CPP/QPP Pensionable Earnings.
- Fixed a problem where Transaction History entries to CPP or CPP2 Pensionable Earnings may not be reflected correctly in T4 box 26 CPP/QPP Pensionable Earnings.
- Fixed a problem for incorrect amounts on T4 and RL-1 forms.
- For more details, see Sage Knowledgebase article 250225011418603.

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
Add New Hire page layout change Learn more	Yes		
Termination Date field added to Employee Find Learn more	Yes	Yes	
HRMS Desktop Default Resolution Update Learn more	Yes		
Sage 100 Direct Deposit added to the web version **of Sage HRMS** Learn more	Yes	Yes	

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Employee Direct Deposit page available in ESS when using Sage 100 Payroll Link Learn more			Yes
W-2 Enhancement - Standalone US Learn more			Yes
T-4 Enhancement - Standalone Canada Learn more			Yes
SMTP Modern Authentication Support Learn more			Yes
Custom Security Question Defect Correction in ESS Learn more			Yes
Company Phone List Changes Learn more			Yes
Pay History Performance Improvements for Mobile App Learn more			Yes

Add New Hire page layout change

Based upon customer feedback, we have repositioned the Employer Name field to be above the SSN/SIN field on the Add New Hire page. You can now tab from the Employer Name field to the SSN/SIN in order. The formatting of the SSN/SIN number is automatically set based upon your Employer selection.

Termination Date field added to Employee Find

The Termination Date field has been added to the **Employee Find** search in both the desktop and web version of Sage HRMS. The Termination Date field has been added by default and is the last column in the results table. You can rearrange the column order to display the Termination Date in a different position by using the Personalize feature on the Employee Find. The Termination Date column can be resorted by clicking the column header.

The Termination Date field is also now available as a search option on the Employee Find. You can search by a date range or leave the date fields blank to return all records with a Termination Date that also meet your other search options

HRMS Desktop Default Resolution Update

Users now have the ability to resize the desktop product resolution. After logging into the desktop version of Sage HRMS, you can adjust the size of the product by dragging the sides or corners of the desktop out to increase the width and height or in to decrease the width and height. These changes are saved by user.

To restore the desktop to the default resolution, select the **Restore Default Resolution** button on the **User Preferences** page.

Sage 100 Direct Deposit added to the web version of Sage HRMS

The Sage 100 Direct Deposit page has been added to the web version of Sage HRMS. This enhancement allows Sage 100 HR Administrators to manage employee direct deposit records in the web version of Sage HRMS and transfer these changes back to the Sage 100 Payroll product.

To support the Sage 100 Direct Deposit page in the web version of Sage HRMS, we have made changes to the Sage 100 Payroll Link. The following two new fields have been added to the Employer Setup page in the web version.

- Direct Deposit
- Resync Direct Deposit from Sage 100

Direct Deposit must be enabled in the web version of the Sage 100 Payroll Link for each company wanting to use the direct deposit feature. The Direct Deposit field is also displayed as a read - only check box on the Employer Setup page in the desktop version the Sage 100 Payroll Link. Once Direct Deposit has been enabled in the web version, the Direct Deposit check box field will show as selected and disabled in the desktop version.

When Direct Deposit is turned on in the web version Sage 100 Payroll Link, a process called "Transfer Direct Deposit Info To HRMS" is submitted to the Process Scheduler in web version of Sage HRMS. This process transfers the initial direct deposit records from Sage 100 Payroll to Sage HRMS. You can check the status of this process by going to the Process Log section of the Process Management page.

After this initial data transfer from Sage 100 Payroll, changes to Direct Deposit information can only be transferred to Sage 100 Payroll using the Employee Transfer in the Sage 100 Payroll Link. Sage HRMS is the system of record and all updates to the employee Direct Deposit information should be completed in Sage HRMS.

> **Important!** Direct Deposit is only available in the web version of Sage HRMS and can only be configured in the web version of the Sage 100 Payroll Link.

Configuration Steps

To start using the Direct Deposit page in the web version of Sage HRMS, you must complete the following steps.

1. Configure the Direct Deposit settings for each employer in the Sage 100 Payroll product.
    a. Payroll Setup menu > Payroll Options > Direct Deposit tab, select the Require Direct Deposit check box.
2. Set the Direct Deposit field to Yes in the Sage 100 Payroll Link (web version of Sage HRMS)
    a. HRMS HR Admin menu > Connected Services > Sage 100 Payroll Link > Setup > Employer Setup page, change the Direct Deposit drop-down to Yes
3. Set the employee's Direct Deposit field to Yes on the Sage 100 Payroll Setup page in Sage HRMS
    a. HRMS HR Admin menu > Job and Pay > Sage 100 Payroll Setup page, select an employee and change the Direct Deposit drop-down to Yes

Using Sage 100 Direct Deposit

The Direct Deposit page is available on the Jobs and Pay menu in the web version of Sage HRMS. HRMS HR Administrators can add, edit, delete and/or change the deposit (priority) order on the Direct Deposit page for each employee participating in Direct Deposit. For instructions on each of these actions, see the respective topic summary below.

Before you start

The Direct Deposit page behaves differently compared to other HR Administrator pages in the premium web version of Sage HRMS. Before adding or modifying an employee's Direct Deposit accounts make sure you are familiar with the differences noted below:

- Changes to Direct Deposit records must be saved on both the detail page and the summary page (saved twice).
- Changes are not saved until you click the Save button on the summary page.
- Navigating away from the Direct Deposit page before saving your changes will result in losing your changes.
- You cannot delete an unsaved direct deposit change. You must select the Discard Changes button to discard the change.
- Modifying the Bank Account, Routing Number or Account type of an existing Direct Deposit record will result in resetting the Pre-Note sent status of that record to No and requiring a Pre-Note be sent to the bank again.
- You will see a warning message on the page if there are outstanding requests by the employee to update the Direct Deposit record. These changes should be approved or denied before editing a Direct Deposit record on the HR Admin screen.
- Direct Deposit changes in the Sage HRMS system must be transferred back to Sage 100 Payroll using the Sage 100 Transfer process before they will be reflected in that system.
- Approved Direct Deposit changes are not immediately available to your payroll department until your administrator transmits this information back to them.
- The system allows you to submit Direct Deposit records even if the total percentage of gross or net amounts are greater than 100%. These may be rejected by the bank however.

After logging into the web version of Sage HRMS, select Direct Deposit from the Jobs and Pay menu. Search and select an employee from the Employee Find whose Direct Deposit records you want to manage.

To add a Direct Deposit record:

Enter each of the accounts that the employee wants to use for direct deposit.

1. On the **Direct Deposit** page, click New.
2. On the **Direct Deposit** detail page, enter or select the following information:
   a. **Bank Account Number:** Enter the employee's bank account number to use for direct deposit.
   b. **Routing Number:** Enter the routing number to be used for the bank account.
   c. **Account Type:** Select the bank account type.
   - Select Checking to deposit to a checking account.
   - Select Savings to deposit to a savings account.

   d. **Bank Description:** Enter a description of the bank account.
   e. **Distribution Method:** Select the distribution method.
   - Select Percent of Net Amount to distribute the net pay using a percentage of the net pay amount.
   - Select Percent of Gross to distribute the net pay using a percentage of the gross pay.
   - Select Fixed Amount to distribute a fixed amount.

   f. **Distribution Percent/ Amount:** Enter the percentage or fixed amount to be distributed to the bank account.
   g. **Pre-Note Sent:** Select an option based on whether a pre-note has been sent to this bank for approval.
   - Select Yes if a pre-note has been sent.
   - Select No if a pre-note has not been sent.
   - Select Approved if a pre-note has been approved.

   h. **Pre-Note Date:** Enter the date that the pre-note was sent or approved. This field is available only if Yes or Approved is selected in the Pre-Note Sent field.
   i. Select the **Save** button

You will be redirected to the summary page. Your changes are not saved until you click the Save button on this page

Once all of your updates to the Direct Deposit record have been made and you are ready to submit, click the **Save** button on the summary page.

> **Note:** If the above Direct Deposit settings have not been configured in either Sage 100 Payroll or the web version of Sage HRMS, a message stating that the employer/ee is not set up for Direct Deposits is displayed on the Direct Deposit page.

To edit a Direct Deposit record:

1. On the **Direct Deposit** page, select the **Edit** icon on the record you want to edit.
2. On the **Direct Deposit** detail page, make changes to the Direct Deposit information.
3. If you make any changes to the fields below, a pop-up message is displayed. It lets you know that this change will reset the Pre-Note Sent field to No and clear the PreNote Date. You must then resend the Pre-Note.

- Bank Account Number
- Routing Number
- Account Type

4. Click **Save**.
5. You are redirected to the Direct Deposit summary page. An information message appears stating that there are unsaved changes.
6. Click **Save**.

> **Note:** Editing direct deposit records follows the same rules as adding a new record. You must click save on both screens to submit your changes. You cannot make changes to the direct deposit records if there are pending changes.

To remove a Direct Deposit record:

Depending on the status of the direct deposit record, you may not be able to remove it.

1. On the **Direct Deposit** page, select the **Delete** icon on the record you want to remove.
2. Hover over the delete icon to see if one of the tool tip messages below is displayed if you cannot click the icon:

3. Cannot delete a direct deposit record if the year-to-date deposited amount is greater than zero.
4. To delete this row, select Discard Changes.
5. If you can click on the **Delete** icon, click OK when asked if you want to delete the direct deposit record.
6. Click **Save**.
7. If you are done removing direct deposit records, click **Save** again.

Note: You cannot delete a direct deposit record if it has not been saved.

To change the order of direct deposit records

You can establish the deposit priority order of your Direct Deposit records by dragging and dropping them in the desired order.

1. If you do not have any pending changes on the Direct Deposit page, following the instructions below.
2. With your mouse pointer, select the first record you want to move and drag and drop the record to the desired position in the table order.
3. Repeat the drag and drop process until you have all of the direct deposit records in the desired priority order.
4. Click **Save**.
5. If you are done making changes to the employee's direct deposit records, click **Save** again.

Important! Once you are done making changes to the direct deposit records for all employees, remember to run the Employee Transfer process in Sage 100 Payroll Link.

Employee Direct Deposit page available in ESS when using Sage 100 Payroll Link

The Employee Direct Deposit page has been added to the Sage Employee Self Service for customers using Sage 100 Payroll Link.

To use the Employee Direct Deposit page in Sage Employee Self Service, Direct Deposit must already be configured for the Sage 100 Payroll Link. The steps to configure Direct Deposit are included in the above section -"Sage 100 Direct Deposit added to the web version of Sage HRMS."

In order to allow Employees to submit changes for approval, the Direct Deposit page must be set to “Approve” on the Page Setup tab of the Employer Setup page in ESS. You must also assign either an ESS HR Admin or Benefit Admin as the “Approval” role. Set the page to “View” if you want employees to be able to see their current Direct Deposit record.

Employees can access the Direct Deposit page from the Employment menu in Sage HRMS Employee Self Service. If this page is set for "Approval," there will be a message at the top of the page informing employees that changes will require approval. Employee changes are not immediately available until approved.

Employees can add, edit, delete and/or change the deposit (priority) order on the Direct Deposit page. Employees can edit any of the fields below on the Direct Deposit detail page for any given record:

- Bank Account Number
- Routing Number
- Account Type
- Bank Description
- Distribution Method
- Distribution Percent/ Amount

After adding or editing a Direct Deposit record, the employee is redirected to the summary page. Once there is an unsaved record, the following message displays:

"There are unsaved changes to this Direct Deposit record. You must select the Save button to save these changes and submit them to your administrator for approval."

Employees can continue to add , edit, delete and drag and drop rows until they are done making changes to their direct deposit information. Once complete, they must click the Save button on the summary page.

All changes must be saved on both the detail page and the summary page. Once the employee's changes are saved, the Direct Deposit screens are locked for editing until the administrator approves or rejects the pending changes.

Message Center Notifications

System Administrators will receive a notification in their Message Center when an employee submits their direct deposit changes for approval.

1. Logon to Sage HRMS Employee Self Service as the Administrator assigned to approve employee direct deposit requests.
2. Select the Message Center icon in the title bar to open the Message Center.
3. Expand the**Approval Required**section and review the notification message.
4. Select the **Attachment** icon to view the entire Direct Deposit record.

- To view an individual direct deposit record, select the **View** icon on the record you want to review.

5. After reviewing the employee's changes, you can click the back to list arrow (to the left of the page title) to return to the Message Center.
6. If you want to enter a note regarding the request, click the **Note** icon and enter the text of the note.
7. Click the **Apply** button to send the approved/rejected data to Sage Employee Self Service and send a notification to the employee of the status change.

> **Note:** Administrators are encouraged to validate that the employee's direct deposit amount allocation does not exceed 100%, as the Sage Payroll 100 system does not systematically enforce that standard.

W-2 Enhancement - StandAlone

The W-2 form is now available in the premium version of Sage HRMS Employee Self Service for HR Only & Sage 300 StandAlone customers. Customers must install the Q1 2025 release of the premium version of Sage HRMS and Sage Employee Self Service to see the form.

To support this form in an HR Only & Sage 300 StandAlone install, we have added a new page called - "Sage 300 Database Setup" to the Administrator's System Settings menu. The fields below must be populated to connect ESS to the Payroll Databases:

The program displays the Payroll Database ID based upon the Employer Code you entered on the Employer Setup page in Sage HRMS.

- Payroll Server Name: Enter the name of the your Payroll Server
- Payroll Database Name: Enter the name of your Payroll Database
- SQL User Name: Enter the User Name you use to access the SQL Server
- SQL User Password: Enter the Password you use to access the SQL Server

Select the Test Connection button to verify the information you entered is correct and the connection is successful. Add this information for each company that plans to provide the W-2 form to their employees.

The Page Access for the “W-2 History” page is set to “View” by default. Employees can access this page by selecting “W-2 History” from the Employment menu. This version of the form is for "informational use only” and should not be considered the official copy of the W-2 form.

W-2 History information is stored in the US Payroll table - ‘UTW2PH.’ This table is updated when you run the Reports >Payroll >Government Reports >W-2 Form.

T-4 Enhancement - StandAlone

The T-4 form is now available in the premium version of Sage HRMS Employee Self Service for HR Only & Sage 300 StandAlone customers. Customers must install the Q1 2025 release of the premium version of Sage HRMS and Sage Employee Self Service to see the form.

To support this form in an HR Only & Sage 300 StandAlone install, we have added a new page called - "Sage 300 Database Setup" to the Administrator's System Settings menu. The fields below must be populated to connect ESS to the Payroll Databases:

The program displays the Payroll Database ID based upon the Employer Code you entered on the Employer Setup page in Sage HRMS.

- Payroll Server Name: Enter the name of the your Payroll Server
- Payroll Database Name: Enter the name of your Payroll Database
- SQL User Name: Enter the User Name you use to access the SQL Server
- SQL User Password: Enter the Password you use to access the SQL Server

Select the Test Connection button to verify the information you entered is correct and the connection is successful. Add this information for each company that plans to provide the T-4 form to their employees.

The Page Access for the “T-4 History” page is set to “View” by default. Employees can access this page by selecting “T-4 History” from the Employment menu. This version of the form is for "informational use only” and should not be considered the official copy of the T-4 form.

T-4 History information is stored in the Canadian Payroll table – ‘CTT4PH.’ This table is updated when you run the Reports >Canadian Payroll >Government Reports >T4s and select the ‘Employee – Plain Paper’ form.

SMTP Modern Authentication Support

Starting with the Q1 2025 Sage ESS Release, you can now use a third-party SMTP service on any supported Windows Server to send emails in Sage Employee Self Service. Since Microsoft has deprecated the built-in SMTP feature in Windows Server 2025, you must however use an alternative email solution to send emails, such as a third-party SMTP service, when installing ESS on Windows Server 2025.

If your current installation of ESS is on a windows server version prior to 2025, you can continue use the current built-in SMTP method to send emails in ESS. This approach requires installing the SMTP Server and if necessary the Web Server (IIS) service.

The Sage HRMS Employee Self Service System Maintenance utility has been updated to support third-party SMTP services. The fields below have been added to the **Email** section of the **Configuration and Settings** tab. If the third-party SMTP service provider you are using requires authentication, select the Require Authentication checkbox. You may also be required to provide a User Name and Password to authenticate. Enter your account’s SMTP User Name and SMTP Password in the appropriate fields below and save your changes.

- Require Authentication
- User Name
- Password

In addition to the above changes, the SMTP Server is no longer required to install Sage Employee Self Service. On the Email Configuration window of the ESS InstallShield Wizard, you do not need to select the Enable Emails (SMTP) checkbox to install Sage Employee Self Service. SMTP is only required if your windows server version is prior to 2025 and you plan to use the built-in SMTP feature.

Custom Security Question Defect Correction in ESS

Fixed a defect in Sage HRMS Employee Self Service where individual custom security questions were overwriting system custom security questions.

Company Phone List Changes

We have added the employee's preferred name (field) to the Name search on the Company Phone List page in Sage Employee Self Service. You can now search for an employee by their first name, last name or preferred name. The search results now also display the employee's preferred name in parenthesis after the employee's first name.

We have also fixed an issue where inactive Department Codes were included in the Department dropdown on the Company Phone List page when the ESS System Setting - Search Phone List By was set to Department. The Company Phone List page now respects the Enterprise Setup - 'Show Inactive Codes' setting in Sage HRMS. Inactive Departments will only be displayed in the Department dropdown on Company Phone List page when the 'Show Inactive Codes' setting is set to Yes in Sage HRMS.

Pay History Performance Improvements for Sage HRMS Mobile App

We have enhanced the method used to get Pay History records in the Sage HRMS Mobile app. This has resolved the issue that caused the application to perform poorly or stop responding when employees accessed the Pay History page in the Sage HRMS Mobile app.

Your employer must be on the premium version of Sage HRMS Employee Self Service and have installed the Q1 2025 release for this change to take affect.

You do not need to download a new version of the Sage HRMS Mobile app to experience this improvement.

Non-Premium version of Sage HRMS and ESS product updates

This update includes changes to the non-premium version of Sage HRMS. There are no updates to the non-premium version of Sage HRMS Employee Self Service.

Product Updates	Non-Premium HRMS	Non-Premium ESS
Add New Hire page layout change Learn more	Yes	N/A
Termination Date field added to Employee Find Learn more	Yes	N/A
HRMS Desktop Default Resolution Update Learn more	Yes	N/A

Add New Hire page layout change

Based upon customer feedback, we have repositioned the Employer Name field to be above the SSN/SIN field on the Add New Hire page. You can now tab from the Employer Name field to the SSN/SIN in order. The formatting of the SSN/SIN number is automatically set based upon your Employer selection.

Termination Date field added to Employee Find

The Termination Date field has been added to the **Employee Find** search in both the desktop and web version of Sage HRMS. The Termination Date field has been added by default and is the last column in the results table. You can rearrange the column order to display the Termination Date in a different position by using the Personalize feature on the Employee Find. The Termination Date column can be resorted by clicking the column header.

The Termination Date field is also now available as a search option on the Employee Find. You can search by a date range or leave the date fields blank to return all records with a Termination Date that also meet your other search options

HRMS Desktop Default Resolution Update

Users now have the ability to resize the desktop product resolution. After logging into the desktop version of Sage HRMS, you can adjust the size of the product by dragging the sides or corners of the desktop out to increase the width and height or in to decrease the width and height. These changes are saved by user.

To restore the desktop to the default resolution, select the **Restore Default Resolution** button on the **User Preferences** page.

My Workforce Analyzer updates

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

Sage 100 Payroll Link updates

The following new features and improvements to Sage 100 Payroll Link are included with this update.

Sage 100 Payroll Link Support Direct Deposit

The Sage 100 Payroll Link now supports transferring Direct Deposit information from Sage HRMS to Sage 100 Payroll. Customers must be on the Q1 2025 release of the premium web version of Sage HRMS and are also using the Sage 100 Payroll Link in the web version.

This new feature allows Sage HRMS HR Administrators to manage employee direct deposit records in the premium web version of Sage HRMS and use the Sage 100 Payroll Link to transfer Employee information to Sage 100 Payroll. For more information, see the Premium version of Sage HRMS product updates section above in this document.

How to choose the right product update

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

Unlock the full potential of your premium Sage HRMS product by downloading the premium web version of Sage HRMS from the Sage HRMS Download Portal. Enjoy familiar features along with new enhancements that simplify your tasks and allow you to work from any location. Don't miss out on this premium opportunity!

If you have this product:	You should Install:	Quarterly Version
Premium desktop version of Sage HRMS	SageAbraSQLHRMS10.70.74.14.exe	10.70.74.14 - 2025 Q1
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.101801_premium_web_HRMS_ESS.exe	21.10.18.01 - 2025 Q1
Non-Premium desktop version of Sage HRMS	SageAbraSQLHRMS10.70.74.14.exe	10.70.74.14 - 2025 Q1
Non-Premium version of Sage HRMS Employee Self Service	N\A	N\A

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 installation instructions

This section includes instructions for installing the premium web version of Sage HRMS for customers who have not purchased Sage HRMS Employee Self Service.

Note: You must install the latest quarterly update of the premium version of Sage HRMS before installing the premium web version of Sage HRMS.

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

Before you start:

- Refer to Chapters 1 and 2 in the Sage Employee Self Service Installation and Setup Guide for Pre-installation Setup and System Configuration requirements.
- See Sage Knowledgebase article 225924250083549 for System Recommendations for the premium web version of Sage HRMS.
- 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.
- 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 link and log in if required.
3. In the article, click **Download** to download the product update.

Installing the premium web version of Sage HRMS update

1. Using your external backup procedures, back up the Sage HRMS databases to a media device that is external to your product servers:
   a. Prepare to install premium web version of Sage HRMS by closing all Windows applications.
   b. Run the setup.exe file provided with the installation package with Administrative privileges (right-click the file and select **Run as Administrator**).
   c. **Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.
2. The premium web version of Sage HRMS Setup prepares the InstallShield Wizard.
3. The Welcome to the InstallShield Wizard for Sage HRMS is displayed. Click **Next**, and then follow the prompts on the InstallShield Wizard.
4. In the License Agreement window, read the License Agreement, accept the terms of the license agreement, and click **Next**.
5. In the Customer Information window, enter your User Name and Organization. Uncheck the Install Sage HRMS Employee Self Service checkbox if you are not installing ESS and then click **Next**.
6. In the Destination Folder window, select the path and directory where you want the premium web version of Sage HRMS and its components installed. This must be a local drive. Click **Next**.
7. In the Sage HRMS SQL Server Setup window, specify the server configuration for the Sage HRMS database. Enter the Server Name, Username, Password, and Database. Click **Next**.
8. In the Sage HRMS Web Alias window, the Name/Alias is initially set to "selfservice," but you can change it. The Name/Alias is used to access the premium web version of Sage HRMS from a web browser. Click **Next**.
9. In the Email Configuration window, you must select Enable Emails (SMTP) to install the premium web version of Sage HRMS. Click **Next**.
10. In the SQL Server Setup window, specify your version of SQL Server (the default database embedded with Sage Employee Self Service). Enter the Server Name, Username, Password, and Database. You must provide a SQL Server logon that uses or emulates your SA (System Administrator) permissions. Click **Next**.

11. On the Ready to Install the Program window, click **Install** to proceed with the installation.
12. The system displays Installation windows indicating the progress of the installation. When the InstallShield Wizard Completed window appears, click **Finish**.
13. When the update is complete, click **Yes** to restart your system.
14. After your Sage HRMS server restarts, go to the **Start** menu and select **All Programs** >Sage HRMS (Web Version)> **System Maintenance** to open the System Maintenance utility. Verify that all the information on the **Configuration and Settings** tab is correct.
15. On the **Configuration and Settings** tab, click the **Generate Master Password**button and copy the password provided to log into the premium web version of Sage HRMS as the Master user.
16. Click Save.
17. Exit the System Maintenance utility.
18. In your browser, navigate to the web alias you entered in Step 8 during the install.
19. Log into the web version Sage HRMS as the MASTER user to complete the install process.

The update is now complete and you are ready to start using the premium web version of Sage HRMS.

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 link and log in if required.
3. In the article, click **Download** to download the product update.

> **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.

Non-premium version of 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.

Sage HRMS update installation instructions

> **Important!** Starting with Sage HRMS Q1 2024, Sage HRMS Integrated now uses enhanced security features. User security policies are now enforced by Windows Account Policies on the machine running MS SQL Server. If you are unfamiliar with these changes, please review the information below before proceeding.

Upgrade Prerequisites

- Back up your databases.
- Back up your Site folder and User folder within the Shared Data folder.
- Create a backup copy of all of your payroll customized reports and check forms before upgrading.
- Review your Local Security Policies on your SQL Server machine and set the Minimum Password age to 0.
- Verify that you are upgrading from a supported version of the Payroll Modules.
- Verify you have access to the Sage HRMS Client using the Master user account information before upgrading.
- Review the sharing settings on the SageHRMSServer folder.
- Verify the SQL account to be used during the installation has full DB Create (administrative) credentials.

Enhanced Security Features

The following changes were made to support these features:

- 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.”

- The Sage HRMS Client wizard will create two new MS SQL databases (Vault and Store) during the upgrade.
- The user will be 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 security policy will be set to 8 characters.

After upgrading

- Use the Database Connection Tool to ensure all connections are valid.
- Verify the ADMIN user can successfully access the Database Setup tool using their new complex password
- Restore your custom payroll report folders:
    - The report .DLL’s have been updated to a newer version and must be copied to your customized payroll report folders.
    - The updated .DLL’s are located on the Sage HRMS Client machine at the following path: C:\Program Files (x86)\Sage\Sage Accpac\ - UP80A or CP80A.
    - Copy only the .DLL’s used for each of your customized payroll reports.
- The following Sage 300 payroll modules have also been updated:
    - Bank
    - General Ledger
    - System Manager

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 link and log in if required.
3. In the article, click **Download** to download the product update.

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 20, 2025.

> **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.

Premium web version of Sage 100 Payroll Link Configuration

Upgrade Instructions

You must first upgrade the desktop version and the premium web version of Sage HRMS to the latest version and follow the steps below.

1. Configure a security group and user to access Sage 100 Payroll Link and the Sage 100 Payroll Setup (employee detail) page in the desktop version of Sage HRMS. This security user should be considered the "HRMS User" when configuring the user account for the premium web version of Sage HRMS.
2. Configure Sage 100 Payroll Location using the System Maintenance tool.
   a. From the Start menu, select All Programs > Sage HRMS (Web Version) > System Maintenance.
   b. Select the Sage 100 Setup tab. Click the ellipses button and browse to the location where Sage 100 is installed. This is a required step even if the Sage 100 Payroll Location has already been saved in previous configurations or installs.
3. Configure the HRMS User account in the web.
   a. Logon to the premium web version of Sage HRMS as the Master user.
   b. From the menu, select Roles and Logon > Logon Maintenance.
   c. On the Logon Maintenance page, search for the employee who will be using the Sage 100 Payroll Link.
   d. Click Go.

e. In the search results table, select the employee's name.

f. Click the HRMS User dropdown and select the security user that has been setup with access to Sage 100 Payroll Link and Sage 100 Payroll Setup (employee detail) page.

g. Click Save.

4. Launch the desktop version of Sage 100 Payroll Link before accessing the web version of the Sage Payroll Link. This is a mandatory step to copy the mappings to the web.

    a. Logon to the premium desktop version of Sage HRMS as the Sage 100 Payroll Link security user (HRMS User).

    b. Select Connected Services > Integrations > Sage 100 Payroll Link.

    c. Once the Sage 100 Payroll Link loads, your mappings are transferred and you can close the desktop version of Sage 100 Payroll LinkSage 100 Payroll Link.

Using the premium web version of Sage 100 Payroll Link

After completing the above configuration steps, the web version of Sage 100 Payroll Link is ready to use.

System Recommendations for Sage HRMS and Sage HRMS Employee Self Service

There are no changes to the System Recommendations for all versions of Sage HRMS and Sage HRMS Employee Self Service. See Sage Knowledgebase article 225924250083549 for the current hardware and software recommendations for Sage HRMS and Sage HRMS Employee Self Service.