



# Sage HRMS

## Q2 2021 Release Notes

June 2021

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# Product update release notes

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

**Version:** Product Update Q2 2021

## 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 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 City:** Visit <https://sagecity.na.sage.com> for blogs, tips, and guidance specific to Sage HRMS.
- **Customer Support:** For support resources, visit the [Sage City Customer Resources page](#), select your country, and then select your product.

# Canadian Payroll Tax Updates

This update does not include any Canadian federal, provincial, or territorial tax changes. However, you should be aware of the following change to the taxes for New Brunswick.

## New Brunswick

The tax rate for the first tax bracket decreased effective January 1, 2021. Because employees were taxed at a higher rate for the first six months of the year, a prorated tax rate applies for the remaining six months. You can download a hot fix with the tax rate fix from [Knowledgebase article 111416](#).

# 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.

## Kentucky

- The following local tax has an updated rate in the supported tax tables:

| Code   | Description           | Rate  | Effective Date |
|--------|-----------------------|-------|----------------|
| KY0171 | Glasgow CT Regular IT | 1.75% | 7/1/2021       |

- The Unemployment Insurance wage base limit changes to \$10,800 for 2021.

## Ohio

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

| Code   | Description                    | Rate | Effective Date |
|--------|--------------------------------|------|----------------|
| OH0055 | Cridersville VI Regular IT     | 1.5% | 7/1/2021       |
| OH0171 | Midvale VI Regular IT          | 1.5% | 7/1/2021       |
| OH1028 | Evans Farm JEDD CT Regular IT  | 1%   | 7/27/2020      |
| OH1029 | Milford JEDD VII CT Regular IT | 1%   | 2/1/2021       |

## Oregon

On the Local/Other Tax Codes window, tax bracket details are not included for the taxes listed in the table below. If you have employees who are subject to these taxes, you must manually calculate the amount that each employee owes and then use a custom tax to record the amount. For detailed instructions, see Sage Knowledgebase article [111399](#).

| Code   | Description  |
|--------|--|
| OR0011 | Multnomah CO Regular (NR) IT (Filing single)                 |
| OR0012 | Multnomah CO Regular IT (Filing single)                      |
| OR0013 | Multnomah CO Regular (NR) IT (Filing jointly)                |
| OR0014 | Multnomah CO Regular IT (Filing jointly)                     |
| OR0016 | Metro RD Supportive Housing Services (NR) IT (Filing single) |
| OR0017 | Metro RD Supportive Housing Services IT (Filing single)      |

| Code   | Description  |
|--------|--|
| OR0018 | Metro RD Supportive Housing Services (Filing jointly)      |
| OR0019 | Metro RD Supportive Housing Services (NR) (Filing jointly) |

## West Virginia

The following local tax has an updated rate in the supported tax tables:

| Code   | Description               | Rate  | Effective Date |
|--------|---------------------------|-------|----------------|
| WV0010 | Montgomery CT Service Fee | \$104 | 7/1/2021       |

# Product updates

This update includes changes for U.S. Payroll, Sage HRMS, and Sage Employee Self Service.

It does not include changes for Sage 100 Payroll Link or My Workforce Analyzer.

## U.S. Payroll product updates

The following new features and improvements to U.S. payroll are included with this update.

### Specify more employee information for Wyoming quarterly unemployment reports

On the Payroll Employee Supplemental Information window, if the Report Authority ID is for Wyoming quarterly unemployment reports, you can specify the following information for employees:

- Whether employees are corporate officers
- Industry code
- Wage type

### Paychecks for California show available COVID-19 sick leave

For employees who are eligible for California 2021 COVID-19 Supplemental Paid Sick Leave, paychecks always show how many hours of such sick leave the employee has available, even if they have zero hours available.

## Sage HRMS product updates

### Note about EEO-1 Reporting

If your company must submit 2019 and 2020 EEO-1 Component 1 data (which has the same requirements as 2018), you must provide the required information to the Equal Employment Opportunity Commission (EEOC) by July 19, 2021. If you have installed the Q1 2021 update or the Q2 2021 update, you can use HRMS to generate the data file to upload to the EEOC portal. See the following EEOC website for more information:

<https://eeocdata.org/EEO1/howto/index>

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

## I-9 Verification Status

On the **Employment Eligibility** tab of the employee's **HR Status** page, the **I-9 Verification Status** now includes the **Destroyed** option to indicate that the I-9 verification information has been destroyed.

## Address labels

The **Address 1**, **Address 2**, and **Address 3** labels were added on the **First Contact** and **Second Contact** tabs of the employee's **Emergency Contacts** page as well as the employee's **Dependent and Beneficiaries** page.

## Conditions tab

On the employee's **Wellness** page, the labels and layout of the chronic conditions, major allergies, and wellness programs were changed on the **Conditions** tab.

## Previous Employer dates

On the employee's **Previous Employer** details page, the **From** and **To** dates are now required.

**Note:** During the data upgrade, if the **From** date is blank, the **To** date is used. If the **To** date is blank, the **From** date is used. If both the **From** and **To** dates are blank, they remain blank and must be corrected manually in HRMS.

## Employee Notes date

On the employee's **Employee Notes** details page, the **Follow-up date** is now required.

**Note:** During the data upgrade, if the **Follow-up** date is blank, the **Date** of the note is used.

## New hire steps with attachments

If you customize steps for the **Record New Hire** task to include the **Employee Attachments** step, when you go through the steps to add a new hire, you no longer get an error when you add an attachment and then try to view it.

## Dependent expiration dates

If the coverage for a dependent in an employee's benefit expired, the expiration date is recorded for that dependent. If the benefit plan expires, that dependent's expiration date is no longer revised.

# Sage Employee Self Service product updates

The following new features and improvements to Sage Employee Self Service are included with this update.

## Address labels

The **Address 1**, **Address 2**, and **Address 3** labels were added on the **First Contact** and **Second Contact** sections of the employee's **Emergency Contacts** page as well as the employee's **Dependent and Beneficiaries** page.

## Menu selection error messages

When there are many employee attachments in Sage HRMS, employees no longer receive an error message when they select the following items in the Employee Self Service menu:

- Time Off
- Events
- Education
- Skills

## Punctuation in names

Previously, if the employee's last name in HRMS included punctuation (such as "Smith, Jr."), that employee would see an error when they attempted to view their pay stubs in Employee Self Service. Now, the employee's last name, first name, and middle name can include punctuation.

# Additional features for the subscription version of Sage Employee Self Service

## Passive enrollment in benefit plans

During an open enrollment, your company can now enable employees to continue their current benefits for the next benefit period instead of requiring them to pick each benefit election again. When setting up an open enrollment, your administrator can now enable this "passive enrollment" for an employer on the **Employer** page of the **Open Enrollment** setup wizard.

When employees go through the open enrollment process, they have three choices: continue their current benefits, make selections for all of their benefit plans, or make changes to only their savings plans. Even if they choose to continue their current benefits, they will see their benefit elections and costs on the **Benefit Summary** page and can make changes if they want.

# 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>

# Product update installation instructions

Follow the instructions in this section to download, install, apply, and verify this Product Update.

## Before you start:

- Back up your data.
- Make sure all users have exited the program.

## Downloading the product update

### To download the update:

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

# Installing the product update

## To install the product update:

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

1. To launch the installation program, right-click the Product Update file and run as administrator, or as the current user with administrator rights.
  - If applicable, make sure the **Protect my computer and data from unauthorized program activity** check box is *not* selected.
  - If there is no option to run as administrator, log on as an administrator, and then double-click the Product Update file.

**Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.

2. After the InstallShield Wizard determines requirements, click **Next** to resume installing the Product Update.
3. Click **Finish** to finish the installation.
4. Click **Update**.
5. Click **Yes**. The system starts the installation.
6. Follow the instructions on the windows that follow, and then click **Finish**.
7. Open the Sage HRMS Client. A message prompts you to continue.

## Updating Sage HRMS client files

### To update Sage HRMS client files:

1. Right-click on the Sage HRMS Client program and select **Run as administrator** to initiate the file update process.
2. Click **OK** to proceed and update your files.

A message displays that Sage HRMS could not detect the current version of one or more Payroll modules.

- If you have administrator privileges, click **Yes** to install the Payroll modules now.
- If you do **not** have administrator privileges, click **No**, and then contact your system administrator to proceed with the installation.

When installation of the Payroll modules is complete, you may be prompted to restart Sage HRMS.

## Verifying the product update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help > About Sage HRMS** and verifying that the version number corresponds with the version of the update .exe file.

You can also verify the latest tax update is applied to your system by selecting **Payroll > Process Payroll > Calculate Payroll** and the **Tax Version** listed on the window should display the date: June 30, 2021.

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

# 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 you receive the prompt "Install Repository completed. Do you want to continue updating company level local tax records with information from the local repository?":
  - Click **Yes** to automatically update the company rates for all local taxes, or
  - Click **No** if you prefer to select each local tax individually and click the Update button for each one in order to apply the rate changes. This gives you the opportunity to validate rates before and after the changes.

**Note:** If you click **No**, you will be required to 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**.

4. If you click **Yes**, after the process completes a message displays: "Updating company level local tax records completed. Do you want to continue updating employee local tax records from the local tax repository?".
  - Click **Yes** to automatically update the employee-level rates for all local taxes, or
  - Click **No** if you want to select each employee or use the Update Taxes tax, then update each tax or employee individually.

**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.

# Sage Employee Self Service update installation instructions

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

## Before you start:

- Verify that Sage HRMS has been installed and is working correctly.
- Verify that you have Administrator access (Local Administrator access is preferred) and permissions to log on as a service, launch processes, and access Sage HRMS data.
- If you are using Sage Employee Self Service and/or Open Enrollment, make sure all enrollment periods are closed, and that all users have exited and logged off from Sage HRMS and Sage Employee Self Service.
- When the update is complete, you will be prompted to restart your system. Before you begin installing the update, make any necessary preparations for this required restart.

## Downloading the update

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

**Important!** During this installation process, you must enter your Sage Employee Self Service username, organization name, serial number, and install code. You can find this information in System Maintenance under **Start > All Programs > Sage Employee Self Service > System Maintenance**.

Once you start the installation, your customer information clears from System Maintenance, so 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 Employee Self Service update

1. Using your external backup procedures, back up the Sage HRMS and Sage Employee Self Service databases to a media device that is external to your product servers:
  - a. Log on to the Sage Employee Self Service server and select **Programs > Employee Self Service > System Maintenance** to open the Sage Employee Self Service System Maintenance window.
  - b. On the Configuration and Settings tab, in the Employee Self Service section, select the **Locked** check box, and then click **Save**.
  - c. On the SQL Maintenance tab, verify the Backup File Path is correct, and then click **Backup**.
  - d. Prepare to update Sage Employee Self Service by closing all Windows applications.
  - e. Run the setup.exe file provided with the installation package with Administrative privileges (right-click the file and select **Run as Administrator**).

**Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.

2. The installation program detects that a previous version of Sage Employee Self Service has been installed. Click **Next**, and then follow the prompts on the InstallShield Wizard.
3. On the Ready to Install the Program window, click **Install** to proceed with the installation.
4. The system displays Installation windows indicating the progress of the installation. When the InstallShield Wizard Completed window appears, click **Finish**.

**Note:** One installation window prompts you to enter your customer information (username, organization name, product serial number, and install code). After you start the update process, your customer information clears from System Maintenance. Best practice is to collect this information before you start the update.

5. When the update is complete, click **Yes** to restart your system.
6. After your Sage Employee Self Service server restarts, from the **Start** menu, select **All Programs > Sage Employee Self Service > System Maintenance** to open the System Maintenance page. Verify that all the information is correct.
7. On the **Configuration and Settings** tab, clear the **Locked** check box.

8. Exit System Maintenance.

9. Log on to Sage Employee Self Service as the MASTER user to complete the process.

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