



Sage HRMS

Q2 2024 Release Notes

June 2024

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Product update release notes

Important! All customers who update, maintain, and use Sage HRMS or Sage HRMS Employee Self Service should read these release notes to obtain valuable information about changes to the software program and payroll legislative database.

Product update information

Product: Sage HRMS and Sage HRMS Employee Self Service

Version: Product Update Q2 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.

Software requirements

Important! As of Q3 2024, Sage HRMS will no longer support Microsoft SQL Server Management Studio 2014. Microsoft will end support of this version of SQL Server on July 9th, 2024.

See Sage Knowledgebase article [225924250083549](https://support.sage.com/knowledgebase/articles/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.

Canadian Payroll Tax Updates

The following federal, provincial, and territorial tax changes are included in this update.

You may need to adjust your employee records to reflect these tax changes.

Provincial and Territorial Legislative Updates

There are no updates to the Payroll Deductions Formulas guide, that are effective July 1st, 2024.

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 & Canadian 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.

Idaho

- Idaho withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

Georgia

- Georgia withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.

Illinois

Chicago Paid Leave and Paid Sick and Safe Leave

- Effective July 1, 2024, the new paid sick leave accrual rate will be 1 hour for every 35 hours worked.

Kentucky

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

Code	Description	Rate	Effective Date
KY0140	Middlesboro CT Regular IT	2.45%	04/01/2024

New Jersey

- New York-New Jersey Waterfront Payroll Tax Changes Due to New Jersey Withdrawal from Waterfront Commission.
- New Jersey has withdrawn from the Waterfront Commission Compact.

For more information, <https://www.nj.gov/njsp/division/port-security/index.shtml>.

Ohio

- Ohio withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- Those who work in Mingo Junction and had tax withheld above 1% must request a refund by filing a 10A application for municipal income tax refund form with RITA.
 - For more information see, <https://www.timesleaderonline.com/news/local-news/2024/05/mayor-the-village-of-mingo-junction-collected-from-the-expired->

[income-tax-levy/](#).

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

Code	Description	Rate	Effective Date
OH0342	Bellefontaine CT Regular IT	1.6 %	07/01/2024
OH0374	Mingo Junction VI Regular IT	1%	01/01/2023
OH1067	Violet TP-Lancaster JEDD CT Regular IT	2.3%	01/01/2024
OH1068	Blanchester VI Regular IT	1%	07/01/2024
OH1069	College Corner VI Regular IT	1%	07/01/2024
OH1070	Glenmont VI Regular IT	1%	07/01/2024
OH1071	Holmesville VI Regular IT	1%	07/01/2024

Oregon

Effective July 1, 2024, the Eugene Community Safety Payroll Tax exemption will increase accordingly with Oregon state minimum wage.

The minimum rates will increase as follows:

- Standard Minimum Wage: \$14.70 per hour
- Portland Metro Minimum Wage: \$15.95 per hour
- Non-Urban Minimum Wage: \$13.70 per hour

For more information, including details about setting up related local tax codes, see Sage Knowledgebase article: [\(220924960111399\)](#).

Pennsylvania

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

Code	Description	Rate	Effective Date
PA4193	Waynesboro BO, Waynesboro SD (NR)	1%	01/01/2024

Code	Description	Rate	Effective Date
	Regular IT		
PA4235	Antrim TP, Greencastle-Antrim SD (NR) Regular IT	0%	01/01/2024
PA7495	Duquesne CT, Duquesne SD (NR) Regular IT	1%	01/01/2024
PA7496	Duquesne CT, Duquesne SD Regular IT	1%	01/01/2024
PA6378	Upper Augusta TP, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6384	Sunbury CT, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6386	Snydertown BO, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6394	Rockefeller TP, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6400	Point TP, Shikellamy SD Regular IT	1.45%	07/01/2024
PA6402	Northumberland BO, Shikellamy SD Regular IT	1.45%	07/01/2024

Virginia

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

Vermont

Effective July 1, 2024, Vermont legislature will impose a new payroll tax called the Child Care Contribution. For more information, see Knowledgebase article: [The Vermont Child Care Contribution Effective 1st July, 2024 \(240606174850653\)](#).

Product updates

The following product updates are included with this release.

Payroll product updates

US Payroll Product Updates

- We have fixed the following issues:
 - The **Calculate Payroll Screen** no longer closes without completing successfully when there are Common Deduction Limits that have been reached.
 - **Alabama or Oregon State Income Tax** may not be calculated correctly if there are earning codes that are State taxable and non-taxable. Support Ticket: 8010047600.
- The North Carolina Department of Commerce will begin collecting the SOC Codes for quarterly reports.
 - You can add the SOC Code on the Employee Supplemental Information window, in the Occupational Code field.

Canadian Payroll Product Updates

- We have fixed the following issues:
 - The **Calculate Payroll Screen** no longer closes without completing successfully when there are Common Deduction Limits that have been reached.
 - **Employees Dental Benefits** no longer revert to the defaults after upgrading from Payroll 7.3 to Payroll 8.0.

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
Code tables added to the web version of Sage HRMS Learn more		Yes	
Modernize existing Home page in web version of Sage HRMS Learn more		Yes	
Sage Resource Links & Sage Support available from all web pages Learn more		Yes	
iRecruit SSO Support in ESS Learn more			Yes
Company Phone List Enhancement to show Extensions only Learn more			Yes
Dependent Date of Birth added to Provider Detail Report Learn more			Yes
User Preferences Payroll Employer error rollback Learn more	Yes		
BenefitMall Sync removed from the desktop Learn more	Yes		
Employee Note Unique ID Missing Issue Resolved Learn more		Yes	
E-Verify Duplicate GUID Issue Resolved		Yes	

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Learn more			

Code Tables added to the web version

This release features the addition of several Code Tables that can be managed in the web version of Sage HRMS. A new menu item labeled Setup is now available in the menu. Under this menu header is an option to navigate to the Code Table setup menu. The web version of the Code Tables provides the same functionality as the desktop version only with some added usability improvements noted below.

This menu features all currently available Code Tables, and consolidates some of the Employee Code Tables together into a single screen for easier navigation. This means that if a Code Table such as the 'Attachment' Code Table is available for both Employees and Canadian Employees, it will only appear on the menu once. In addition, we have added a search feature allowing you to search by Code Table name. When you begin typing the name, the matching results will be highlighted in orange on the menu.

The page for all two and three column code tables works the same as the desktop version - you can add, edit, delete and copy codes. Code Table pages also provide a new search option. You can now find a specific code quicker by searching rather than scrolling through a long list of codes. Once on an individual Code Table page, you can now easily return to the Code Table menu, by click on the Code Tables tab at the top of the page.

We have also updated security handling to ensure users only see the Codes that they have access to, and to ensure that Code Tables only appear once in the menu structure, eliminating unnecessary rework. Security is still configured in the desktop version of Sage HRMS however.

Due to the large number of Code Tables available, the implementation of Code Tables to the web version will occur over multiple releases. The following Code Tables are available in this release:

Employees

Employee Notes

- Author Codes
- Type Codes

EEO

- Classification Codes
- EEO-4 Job Function Codes
- Ethnic ID Codes
- Job Group Codes

Code Tables

- Attachment
- Employee Type
- Event
- FMLA Event Reason
- I-9 Form Codes
- Language
- Organization
- Rating
- Reason
- Shift Differential
- Skill
- Union

Jobs

- Family Codes
- Pay Equity Job Group Codes

- Salary Grades
- Step Rates

OSHA

- Body Part Codes
- Injury Codes
- Injury Location Codes

Canadian Employees

Employment Equity

- Aboriginal Codes
- Census Metro Area Codes
- Employment Category Codes
- Industrial Sector Codes
- NOC Occupational Group Codes
- Occupational Group Codes
- Visible Minority Codes

OHS

- Body Part Codes
- Injury Codes
- Injury Location Codes

Code Tables

- Consent Type
- Disability

Jobs

- Classification Codes

Modernize existing Home page in web version of Sage HRMS

This release features a modernization update to the Sage HRMS Home Screen, featuring new tools and information for managing and growing your business.

My Shortcuts

A My Shortcuts tile has been added to the home page, which displays frequently used pages. It also includes any custom links created by the user in the desktop version of Sage HRMS.

Additional Information

The Sage HRMS Home page now contains a footer with links to social media. These links default to the Sage social media accounts, but respect any updates made to the social media links in the desktop version of Sage HRMS.

More information about additional Sage tools, products and support sites have been added to the home page as well for easy access.

Sage Resources Links & Sage Support available on all web pages

In addition to an updated look, all Sage Resources are now available by selecting the Sage icon at the top of the page from any screen within HRMS, allowing users to access documentation, community resources, help and other tools without having to return to the home page.

iRecruit SSO Support in ESS

Sage HRMS Employee Self Service now supports SSO authentication for the iRecruit application. The System Maintenance utility has been updated to support this integration. Users must enter a valid iRecruit API Key in the iRecruit Setup section of the Integration tab. ESS users who are also Administrators or Recruiters in iRecruit, must enter an email address associated with their iRecruit account in either the Personal (email) field or the Alternate Email field on the Personal Profile page in ESS. The next time this user logs onto Sage ESS on a computer browser or on a mobile device, the iRecruit page(s) will be available under the My Menus section of the ESS employee menu. When the user selects an iRecruit page, ESS will open iRecruit in a new browser window or tab using single sign-on authentication.

User Preferences Payroll Employer Error Rollback

This fix has been rolled back to the previous quarter. Sage HRMS desktop users must Log Off to see their changes to the Payroll Employer defaults set on the User Preferences page.

BenefitMall Sync has been removed from the desktop

BenefitMall Sync is no longer supported in the desktop version of Sage HRMS and has been removed from the menu.

Company Phone List Enhancement to show Extensions only

The Company Phone List in Sage HRMS Employee Self Service will now display the employee's Business Extension whenever this field is populated on the employee's demographic record. Previously, the Extension did not display unless the employee also had a Business phone number.

Dependent Date of Birth to added to Provider Detail Report

The Dependent's Date of Birth has been added to the Provider Detail Report in Sage HRMS Employee Self Service.

Employee Note Unique ID Missing Issue Resolved

Employee Notes were being added without a unique ID in the database. This issue has been fixed.

E-Verify Duplicate GUID Issue Resolved

Duplicate GUIDs were being created when a Note was added to an employee's E-Verify record. The Admin can now navigate the employee's notes records using the Next and Previous arrows without getting an error.

Non-Premium (Existing) version of Sage HRMS and ESS product updates

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

Product Updates	Non-Premium (Existing) HRMS	Non-Premium (Existing) ESS
User Preferences Payroll Employer error rollback Learn more	Yes	N/A
BenefitMall Sync has been removed from the desktop Learn more	Yes	N/A

User Preferences Payroll Employer Error Rollback

This fix has been rolled back to the previous quarter. Sage HRMS desktop users must Log Off to see their changes to the Payroll Employer defaults set on the User Preferences page.

BenefitMall Sync has been removed from the desktop

BenefitMall Sync is no longer supported in the desktop version of Sage HRMS and has been removed from the menu.

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 Required Field Validation Issue fix

Fixed an issue where some fields were incorrectly showing up on the Invalid Employees Report when transferring employees from Sage 100 to HRMS.

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	SageAbraSQLHRMS10.70.70.15.exe	10.70.70.15-2024 Q2
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.101401_premium_web_HRMS_ESS.exe	21.10.14.01 - 2024 Q2
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10.70.70.15.exe	10.70.70.15-2024 Q2
Existing version of Sage HRMS Employee Self Service	N/A	N/A

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_706412.exe	10.70.64.12 - 2023 Q2
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.100901_premium_web_HRMS_ESS.exe	21.10.09.01 - 2023 Q2
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10_706412.exe	10.70.64.12 - 2023 Q2

If you have this product:	You should Install:	Quarterly Version
Existing version of Sage HRMS Employee Self Service	There is no Sage HRMS Employee Self Service update.	No changes in Q2

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>

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 upgrading from Sage HRMS Integration Q4SR 2023 (or earlier), review the information below before proceeding. If you are upgrading from Q1 2024, proceed to the "Before you start" section.

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 payroll module has been updated from version 7.3 to 8.0.
- 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: June 20, 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.