Sage HRMS

Q3 2021 Release Notes

September 2021

Contents

Contents

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 Q3 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.

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.

Idaho

Effective January 1, 2021:

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

- The supplemental withholding rate changes to 6.5%.

Kansas

Kansas withholding tables and instructions have been updated, effective January 1, 2021. Refer to the state publication for more details.

Kentucky

- The following local taxes have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
KY0107	Shively CT Regular IT	2%	7/1/2021
KY0178	Fort Wright CT Regular IT	0.99%	7/1/2021

- The wage base limit has been removed for the following local tax:

Code	Description	Effective Date
KY0012	Park Hills CT Regular IT	7/1/2021

New Jersey

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

Code	Description	Rate	Effective Date
NJ0002	New York-New Jersey Waterfront Payroll Tax	1.6%	7/1/2021

New York

- Effective July 1, 2021:

  - New York withholding tables and instructions have been updated. Refer to the state publication for more details.

  - Supplemental withholding rates change as follows:

    - New York: 13.78%

    - City of Yonkers resident: 2.30815%

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

Code	Description	Rate	Effective Date
NY0008	New York-New Jersey Waterfront Payroll Tax	1.6%	7/1/2021

Ohio

- Ohio withholding tables and instructions have been updated, effective September 1, 2021. Refer to the state publication for more details.

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

Code	Description	Rate	Effective Date
OH0973	Turtlecreek-Monroe Raceway JEDD CT Regular IT	2%	1/1/2020
OH1030	West Millgrove VI Regular IT	1%	1/1/2020
OH1031	Lytle Five Points JEDD CT Regular IT	1.5%	1/15/2006
OH1032	Yorkshire VI Regular IT	1%	7/1/2021
OH1033	Jefferson TP-Whitehall JEDD CT Regular IT	2.5%	1/1/2021

Pennsylvania

- Effective June 30, 2021, the following local taxes have been expired:

Code	Description
PA0040	Washington TP, Dover SD (NR) LST
PA2731	Washington TP, Dover SD (NR) Regular IT
PA2732	Washington TP, Dover SD Regular IT

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

Code	Description	Rate	Effective Date
PA0271	Benson BO, Conemaugh SD (NR) LST	$5	1/1/2021
PA0291	Mechanicsville BO, Pottsville SD (NR) LST	$52	1/1/2021
PA1350	Duboistown BO, S Williamsport SD (NR) LST	$52	1/1/2021

Code	Description	Rate	Effective Date
PA5483	Franklin BO, Conemaugh Valley SD (NR) Regular IT	1%	7/1/2021
PA5484	Franklin BO, Conemaugh Valley SD Regular IT	1.1%	7/1/2021
PA7093	Philadelphia CT, Philadelphia City SD (NR) Regular IT	3.4481%	7/1/2021
PA7094	Philadelphia CT, Philadelphia City SD Regular IT	3.8398%	7/1/2021
PA7612	Braddock BO, Woodland Hills SD Regular IT	1.5%	7/1/2021
PA7943	Washington TP, Northern York SD Regular IT	1.25%	7/1/2021
PA7944	Washington TP, Northern York SD (NR) Regular IT	1%	7/1/2021
PA7945	Washington TP, Northern York SD (NR) LST	0	7/1/2021

Product updates

The following product updates are included with this release.

U.S. Payroll product updates

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

Fix for Accrual and Current Balance reports for Leap Years

You can now print Accrual and Current Balance reports with an Accrual Carryover Date of February 29.

Sage HRMS product updates

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

Vets 4212 Form

The Vets 4212 Form was updated to show the current year.

Global attachments

When there are a large number of attachments, the Global Attachments process no longer has an error.

Audit Trail

When the Audit Trail is enabled for the Employee Benefit file, but not the Dependent Benefits file, you no longer get an error when changing covered dependent information on an employee insurance plan.

Benefit plans

When a benefit plan is set up to be automatically added to eligible employees and has a number for **Min Days Employed**, that number is used when applicable to set the start date of that benefit plan for eligible employees.

Additional feature for the subscription version of Sage HRMS

The Sage HRMS Logon window now displays "Subscription" before the version number.

Sage Employee Self Service product updates

There are no new features or improvements to Sage Employee Self Service, so there is no Sage Employee Self Service update for Q3 2021. The Q2 2021 Sage Employee Self Service update is compatible with both the Q2 2021 and Q3 2021 version of Sage HRMS.

Sage 100 Payroll Link updates

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

My Workforce Analyzer updates

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

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

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.

> **Note:** If you have not already entered your Sage customer account number on the About Sage HRMS page, the first person who logs in to Sage HRMS after this product update is installed will be required to enter your Sage customer account number.
>
> You can review or change your customer account number in **Help** > **About 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: September 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.