



Sage HRMS

Q4 2024 Release Notes

December 2024

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Last updated: December 20, 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 Q4 2024

If we receive additional payroll tax changes for this period and/or this year, a new update will be made available.

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 Q2 2024 or later to upgrade to Q4 2024.

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 University:** Learn pro tips for year-end processing in online or classroom courses. Visit <http://SageU.com> and log on or create an account to register for training.
- **Community Hub Year-end Center:** Visit <https://communityhub.sage.com/p/yearend> for help, guidance, documents, and downloads specific to Sage HRMS Payroll and Year end 2024.
- **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.
- **Tax forms:** Because all printed forms have variations, Sage HRMS Payroll only supports forms printed by Sage Checks and Forms. Call Sage Checks and Forms at 800-617-3224 or order online at www.SageChecks.com.

Tip: For information about ordering W-2 forms, see Sage Knowledgebase article: [Which forms should I order for year-end? \(Solution ID: 223924750040182\)](#).

Introducing the brand new Sage HRMS Mobile App

Coming Soon To Your App Store

We are excited to announce the upcoming launch of our brand new mobile application, designed to make managing your employee information and time off easier and more convenient than ever before!

The Sage HRMS Mobile application will be available soon on the Google Play and Apple App stores. Please monitor the [Sage HRMS Community Hub](#) for release updates.

Refer to page 24 to learn more about the "[Sage HRMS Mobile App \(Coming Soon\)](#)" ([page 24](#)).

Tip: More information, including a [Quick Start Guide](#) and [Frequently Asked Questions](#) document will be available in the Sage HRMS Knowledgebase.

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.

Federal Legislative Updates

This section lists federal legislative updates available with this release.

Note: Pre-printed T4 forms obtained from the CRA are not supported. You can print on plain paper only.

EI Maximum Insurable Earnings and Premium Rates for 2025

For Employment Insurance, the annual maximum insurable earnings for 2025 is \$65,700.

The premium rates are:

- 1.64% for residents of provinces without a provincial plan (all of Canada except Québec)
- 1.31% for residents of Québec
- 2.296% for non Québec employers
- 1.834% for Québec employers

The annual maximum contributions for the general rate are:

- Employee contributions - \$1,077.48
- Employer contributions - \$1,508.47

The annual maximum contributions for Québec are:

- Employee contributions - \$860.67
- Employer contributions - \$1,204.94

Canada Pension Plan (CPP) Rates and Maximum Pensionable Earnings for 2025

The maximum pensionable earnings under the Canada Pension Plan (CPP) for 2025 is \$71,300. Additionally, for 2025:

- The basic exemption amount remains unchanged at \$3,500.
- The maximum contributory earnings increase to \$67,800.
- The employee and employer contribution rates remain unchanged at 5.95%.
- The maximum employee and employer contribution to the plan increases to \$4,034.10 each.

Additional Canada Pension Plan (CPP2) Rates and Maximum Pensionable Earnings for 2025

The maximum pensionable earnings under the additional Canada Pension Plan (CPP2) for 2025 is \$71,300 - \$81,200. Additionally, for 2025:

- The maximum contributory earnings is \$9,900.
- The employee and employer contribution rate is 4%.
- The maximum employee and employer contribution is \$396.00.

Note: The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2025.

Federal Indexation for 2025

The federal indexation factor effective January 1, 2025 is 2.70%.

Provincial and Territorial Legislative Updates

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

To confirm the amounts and to receive the forms for 2025, contact your tax services office or visit the government websites:

- CRA: <http://www.cra-arc.gc.ca/>
- Revenu Québec: <https://www.revenuquebec.ca/fr/>

WCB Maximum Assessable Earnings for 2025

The 2025 Workers Compensation Board Maximum Assessable Earnings are:

| | 2025 | 2024 |
|---------------------------|-----------|-----------|
| Alberta | \$106,400 | \$104,600 |
| British Columbia | \$121,500 | \$116,700 |
| Manitoba | \$167,050 | \$160,510 |
| New Brunswick | \$84,200 | \$76,900 |
| Newfoundland and Labrador | \$79,345 | \$76,955 |
| Northwest Territories | \$112,600 | \$110,600 |
| Nova Scotia | \$76,300 | \$72,500 |
| Nunavut | \$113,900 | \$110,600 |
| Ontario | \$117,000 | \$112,500 |
| Prince Edward Island | \$82,900 | \$78,400 |
| Québec | \$98,000 | \$94,000 |
| Saskatchewan | \$104,531 | \$99,945 |
| Yukon | \$104,975 | \$102,017 |

Personal Tax Credits for 2025

Effective January 1, 2025, the provincial and territorial personal tax credits that employees can claim have changed. These changes are reflected in the new 2025 provincial and territorial TD1 forms, and the Québec TP-1015.3-V form. The basic personal amounts have changed as listed below.

| | 2025 | 2024 |
|---------|----------|----------|
| Federal | \$16,129 | \$15,705 |
| Alberta | \$22,323 | \$21,885 |
| British | \$12,932 | \$12,580 |

| | 2025 | 2024 |
|---------------------------|------------------|------------------|
| Columbia | | |
| Manitoba | \$15,969 | \$15,780 |
| New Brunswick | \$13,396 | \$13,044 |
| Newfoundland and Labrador | \$11,067 | \$10,818 |
| Northwest Territories | \$17,842 | \$17,373 |
| Nova Scotia | \$11,744 (BPANS) | \$11,481 (BPANS) |
| Nunavut | \$19,274 | \$18,767 |
| Ontario | \$12,747 | \$12,399 |
| Prince Edward Island | \$14,250 | \$13,500 |
| Québec | \$18,571 | \$17,183 |
| Saskatchewan | \$18,991 | \$18,491 |
| Yukon | \$16,129 (BPAYT) | \$15,705 (BPAYT) |

Provincial and Territorial Indexation for 2025

Effective January 1, 2025, the following provinces and territories have released updated indexing factors:

| | 2025 | 2024 |
|---------------------------|-------|-------|
| Alberta | 2.00% | 4.20% |
| British Columbia | 2.80% | 5.00% |
| Manitoba | 1.20% | 5.20% |
| New Brunswick | 2.70% | 4.70% |
| Newfoundland and Labrador | 2.30% | 4.20% |
| Northwest Territories | 2.70% | 4.70% |
| Nova Scotia | 3.10% | n/a |

| | 2025 | 2024 |
|----------------------|-------|-------|
| Nunavut | 2.70% | 4.70% |
| Ontario | 2.80% | 4.50% |
| Prince Edward Island | n/a | n/a |
| Québec | 2.85% | 4.70% |
| Saskatchewan | 2.70% | 4.70% |
| Yukon | 2.70% | 4.70% |

Québec

- The maximum pensionable earnings amount for the Québec Pension Plan (QPP) for 2025 is \$71,300. Additionally:
 - The maximum contributory earnings for QPP increases to \$67,800.
 - The QPP rate remains the same at 6.40%.
 - The maximum employee and employer contributions for QPP are \$4,339.20 each.
 - The basic exemption amount is \$3,500.
- The maximum pensionable earnings amount for the additional Québec Pension Plan (QPP2) for 2025 is \$71,300 - \$81,200. Additionally:
 - The maximum contributory earnings for QPP2 is \$9,900.
 - The employee and employer contribution rate for QPP2 is 4.00%.
 - The maximum employee and employer contribution for QPP2 is \$396.00.
- The CPP/QPP and EI Balancing report (Reports > Canadian Payroll > Government Reports > T4s) has been updated with rates and amounts for 2025.
- The Québec Parental Insurance Plan (QPIP) rates have been updated for 2025 as follows:
 - Maximum insurable earnings: \$98,000
 - Employee premium rate: 0.494%
 - Employee maximum contributions: \$484.12

- Employer premium rate: 0.692%
- Employer maximum contributions: \$678.16

U.S. Payroll Tax Updates

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

Federal Legislative Updates

Federal Withholding Tax Changes for 2025

The IRS released draft withholding and allowance amount tables for wages paid on or after January 1, 2025.

Social Security Wage Base

Maximum earnings subject to Social Security (OASDI) tax will increase to \$176,100 in 2025.

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.

Alabama

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

| Code | Description | Rate | Effective Date |
|--------|------------------------|------|----------------|
| AL0034 | Irondale CT Regular IT | 0.5% | 10/01/2024 |

California

- California withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.
- State disability insurance tax (CASDI) information is updated for 2025. Effective for wages paid on or after January 1, 2025:
 - The withholding rate is 1.2%

Colorado

- The Unemployment Insurance wage baselimit changes to \$27,200 for 2025.
- For the Colorado Paid Family and Medical Leave plan, the wage base limit changes to \$176,100 for 2025.

- For more information, including details about setting up payroll codes, see Sage Knowledgebase article [225924650095277](#).

Connecticut

- The Unemployment Insurance wage baseline changes to \$26,100 for 2025.
- For the Connecticut Paid Family and Medical Leave plan, the wage base limit changes to \$176,100 for 2025.
 - For more information, including details about setting up payroll codes, see Sage Knowledgebase article [220924660108247](#).

Delaware

- The Unemployment Insurance wage baselimit changes to \$12,500 for 2025.
- A new Delaware Paid Family and Medical Leave plan will be effective January 1, 2025.
 - For more details about setting up related local tax codes, see Knowledgebase article [241122171138383](#).

Indiana

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

| Code | Description | Rate | Effective Date |
|--------|-------------------------------|-------|----------------|
| IN0060 | Henry 33 CO Regular (NR) IT | 2.02% | 10/01/2024 |
| IN0068 | Fulton 25 CO Regular (NR) IT | 2.88% | 10/01/2024 |
| IN0072 | Fayette 21 CO Regular (NR) IT | 2.82% | 10/01/2024 |
| IN0077 | Decatur 16 CO Regular (NR) IT | 2.45% | 10/01/2024 |

| Code | Description | Rate | Effective Date |
|--------|--------------------------|-------|----------------|
| IN0152 | Henry 33 CO Regular IT | 2.02% | 10/01/2024 |
| IN0160 | Fulton 25 CO Regular IT | 2.88% | 10/01/2024 |
| IN0164 | Fayette 21 CO Regular IT | 2.82% | 10/01/2024 |
| IN0169 | Decatur 16 CO Regular IT | 2.45% | 10/01/2024 |

Illinois

- The Unemployment Insurance wage baseline changes to \$13,916 for 2025.

Iowa

- The Unemployment Insurance wage baselimit changes to \$39,500 for 2025.
- Effective January 1, 2025, there are new Iowa W-4 form requirements. In the Filing Status field on the Payroll Employees Tax Info window, the following new filing statuses are available for the Iowa State Income Tax (IASIT):
 - Other, or Married Filing Jointly with Spouse Having Earned Income
 - Married Filing Jointly with Spouse Having No Earned Income, or Qualified Surviving Spouse
 - Head of Household
 - W-4 form 2023 or earlier - Single
 - W-4 form 2023 or earlier - Married

Kentucky

Kentucky withholding tables and instructions have been updated for 2025. 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 |
|--------|-----------------------|-------|----------------|
| KY0096 | Warsaw CT Regular IT | 1.75% | 07/01/2025 |
| KY0161 | Jackson CT Regular IT | 1.5% | 01/01/2025 |

Wage base limits have been updated for the following local taxes:

| Code | Description | Wage base limit | Effective Date |
|--------|--------------------------------------|-----------------|----------------|
| KY0009 | Highland Heights CT Regular IT | \$176,100 | 01/01/2025 |
| KY0013 | Newport CT Regular IT | \$176,100 | 01/01/2025 |
| KY0016 | Kenton CO Regular IT | \$176,100 | 01/01/2025 |
| KY0020 | Florence CT Regular IT | \$176,100 | 01/01/2025 |
| KY0022 | Crestview Hills CT Regular IT | \$176,100 | 01/01/2025 |
| KY0023 | Covington CT Regular IT | \$176,100 | 01/01/2025 |
| KY0024 | Cold Spring CT Regular IT | \$176,100 | 01/01/2025 |
| KY0025 | Campbell CO Regular IT | \$176,100 | 01/01/2025 |
| KY0027 | Boone CO Regular IT | \$77,400 | 01/01/2025 |
| KY0029 | Alexandria CT Regular IT | \$176,100 | 01/01/2025 |
| KY0093 | Wilder CT Regular IT | \$176,100 | 01/01/2025 |
| KY0178 | Fort Wright CT Regular IT | \$176,100 | 01/01/2025 |
| KY0188 | Edmonton CT Regular IT | \$176,100 | 01/01/2025 |
| KY0204 | Breathitt CO Regular IT | \$176,100 | 01/01/2025 |
| KY0276 | Union CT Regular IT | \$176,100 | 01/01/2025 |
| KY0279 | Campbell CO Mental Health Regular IT | \$176,100 | 01/01/2025 |
| KY0161 | Jackson CT Regular IT | \$176,100 | 01/01/2025 |

Maine

- Maine withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.
- A new Maine Paid Family and Medical Leave plan will be effective January 1, 2025.
 - For more details about setting up related local tax codes, see Knowledgebase article [241122171043773](#).

Massachusetts

- For the Massachusetts Paid Family and Medical Leave plan, the wage base limit changes to \$176,100 for 2025.
 - For more information, including details about setting up payroll codes, see Sage Knowledgebase article [225924650095277](#).

Michigan

- Michigan withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.

Missouri

- Missouri withholding tables and instructions, including rates on supplemental wages, have been updated for 2025. Refer to the state publication for more details.
- The Unemployment Insurance wage baseline changes to \$9,500 for 2025.

Montana

- The Unemployment Insurance wage baseline changes to \$45,100 for 2025.

Nebraska

- Nebraska withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.

New Jersey

- The Disability and Family Leave plan has been updated for 2025. Effective for wages paid on or after January 1, 2025:
 - The Disability and Family Leave plan wage base limit changes to \$165,400 for 2025.
 - The new Disability Insurance rate is 0.23%
 - The new Family Leave Insurance rate is 0.33%
 - For more information see Knowledgebase articles [220924660108199](#) and [22092460102273](#).

New Mexico

- New Mexico withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.

New York

- The Unemployment Insurance wage base limit changes to \$12,800 for 2025.
- There are changes in the New York Paid Family Leave for 2025. Refer to the state publication for more details.
 - For more information, see Sage Knowledgebase article [225924450088150](#).

Nevada

- The Unemployment Insurance wage baselimit changes to \$41,800 for 2025.

Ohio

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

| Code | Description | Rate | Effective Date |
|--------|--|-------|----------------|
| OH0073 | Ridgeway VI (Log) Regular IT | 1% | 07/01/2024 |
| OH0074 | Ridgeway VI (Har) Regular IT | 1% | 07/01/2024 |
| OH0134 | Rittman CT Regular IT | 1.5% | 01/01/2025 |
| OH0236 | Mansfield CT Regular IT | 2.25% | 01/01/2025 |
| OH1072 | Zanesville-Perry TP JEDD CT Regular IT | 1.9% | 01/01/2024 |
| OH1073 | Orange TP JEDD CT Regular IT | 2.5% | 10/01/2024 |
| OH0946 | Circleville-Pickaway TP JEDD CT Regular IT | 2% | 01/01/2025 |
| OH1075 | Bainbridge TP-Aurora JEDD CT Regular IT | 2% | 01/01/2025 |
| OH1049 | Valley View JEDD CT Regular IT | 1.25% | 01/01/2025 |
| OH0031 | Brimfield Tallmadge JEDD CT Regular IT | 2% | 01/01/2025 |
| OH0263 | Circleville CT Regular IT | 2% | 01/01/2025 |
| OH0310 | Coldwater VI Regular IT | 1.5% | 01/01/2025 |
| OH0374 | Mingo Junction VI Regular IT | 2% | 01/01/2025 |
| OH0444 | Jamestown VI Regular IT | 1% | 01/01/2025 |
| OH0560 | Bluffton VI Regular IT | 1.65% | 01/01/2025 |
| OH0603 | Mount Gilead 5903 SD Regular IT | 0.75% | 01/01/2025 |
| OH0796 | Brimfield-Kent JEDD CT Regular IT | 2% | 01/01/2025 |
| OH1074 | Rushville VI Regular IT | 1% | 01/01/2025 |

Wage base limits have been updated for the following local taxes:

| Code | Description | Wage base | Effective |
|------|-------------|-----------|-----------|
|------|-------------|-----------|-----------|

| | | limit | Date |
|--------|---|-----------|------------|
| OH0891 | Green TP JEDD II CT Regular IT | \$136,396 | 01/01/2025 |
| OH0892 | Green TP Western Ridge JEDD CT Regular IT | \$143,991 | 01/01/2025 |
| OH0893 | Mercy West JEDD III CT Regular IT | \$106,189 | 01/01/2025 |
| OH0948 | Harrison Greene JEDD IV CT Regular IT | \$132,525 | 01/01/2025 |
| OH0971 | UDF-North Bend JEDD V CT Regular IT | \$127,757 | 01/01/2025 |
| OH1007 | McAlisters JEDD VI CT Regular IT | \$124,884 | 01/01/2025 |
| OH0891 | Green TP JEDD II CT Regular IT | \$136,396 | 01/01/2025 |
| OH0892 | Green TP Western Ridge JEDD CT Regular IT | \$143,991 | 01/01/2025 |

Effective December 31, 2024, the following local tax has been expired:

| Code | Description |
|--------|-----------------------------------|
| OH1001 | Clinton-Massie 1402 SD Regular IT |
| OH1005 | Alexander 0501 SD Regular IT |

Effective January, 1 2025, the following local tax has a description change:

| Code | Description |
|--------|---------------------------------------|
| OH1017 | Jackson-Canton TOC JEDD CT Regular IT |

Oklahoma

- The Unemployment Insurance wage baseline changes to \$28,200 for 2025.

Oregon

- The Unemployment Insurance wage baseline changes to \$54,300 for 2025.

- The paid Family Leave plan wage base limit changes to \$176,100 for 2025.
 - For more information see Knowledgebase article [221924660117849](#).

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

| Code | Description | Rate | Effective Date |
|--------|---|----------|----------------|
| OR0005 | Tri-Met Transit District Excise Tax | 0.82347% | 01/01/2025 |
| OR0006 | Lane County Transit District Excise Tax | 0.8% | 01/01/2025 |

Pennsylvania

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

| Code | Description | Rate | Effective Date |
|--------|---|---------|----------------|
| PA7457 | Easttown TP, Tredyffrin-Easttown SD (NR) Regular IT | 0.5% | 01/01/2025 |
| PA7458 | Easttown TP, Tredyffrin-Easttown SD Regular IT | 0.5% | 01/01/2025 |
| PA0149 | Tidioute BO, Warren SD (NR) LST | \$52.00 | 01/01/2025 |
| PA0720 | McKean TP, General McLane SD (NR) LST | \$52.00 | 01/01/2025 |
| PA1507 | Rice TP, Crestwood SD (NR) LST | \$52.00 | 01/01/2025 |
| PA1626 | Clearfield TP, Butler SD (NR) LST | \$52.00 | 01/01/2025 |

South Carolina

- South Carolina withholding tables and instructions, including rates on supplemental wages, have been updated for 2025. Refer to the state publication for more details.

Utah

- The Unemployment Insurance wage base limit changes to \$48,900 for 2025.

Vermont

The Unemployment Insurance wage base limit changes to \$14,800 for 2025.

Washington

- The Unemployment Insurance wage base limit changes to \$72,800 for 2025.
- Effective January 1, 2025, there are changes to the payroll expense tax for businesses that operate in Seattle.
 - For more information, see Sage Knowledgebase [220924660108679](#).
- The Washington Paid Family Leave wage base changes to \$176,100 in 2025.
 - For more information, see Sage Knowledgebase [225924650095277](#).

West Virginia

- West Virginia withholding tables and instructions, including rates on supplemental wages, have been updated for 2025. Refer to the state publication for more details.

Wyoming

- The Unemployment Insurance wage base limit changes to \$32,400 for 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

Payroll Earnings and Deduction

We have made the following changes to the T4 slip:

Box 38 - Security options benefits - Before June 25, 2024

If an employee received a taxable benefit under a corporation's agreement to issue its eligible shares or units of mutual fund trusts to the employee.

- **before June 25, 2024**, using Box 38 and Box 14.
- **on or after June 25, 2024**, do not use Box 38 to report the value of the taxable benefit received in this period, use Box 90 and Box 14.

Box 39 - Security options deduction - 110(1)(d) - Before June 25, 2024

If your employee is eligible for the option benefit deduction under 110(1)(d), report:

- **before June 25, 2024**, 1/2 of the value of the taxable benefit received from qualified securities in this period using Box 39.
- **on or after June 25, 2024**, do not use Box 39 to report the deduction associated with the taxable benefit received in this period, use Box 91.

Note: If you report an amount in Box 39, you have to report the total value of the security options benefit received using Box 38.

Box 41 - Security options deduction - 110(1)(d.1)

If your employee is eligible for the option benefit deduction under 110(1)(d.1), report:

- **before June 25, 2024**, 1/2 of the value of the taxable benefit received from qualified securities in this period using Box 41.
- **on or after June 25, 2024**, do not use Box 41 to report the deduction associated with the taxable benefit received in this period, use Box 92.

Note: If you report an amount in Box 41, you have to report the total value of the security options benefit received using Box 38.

Box 90 - Security options benefits - on or after June 25, 2024

If an employee received a taxable benefit under a corporation's agreement to issue its eligible shares or units of mutual fund trusts to the employee.

Box 91 - Security options deduction - 110(1)(d) - On or after June 25, 2024

If your employee is eligible for the option benefit deduction under 110(1)(d).

Box 92 - Security options deduction - 110(1)(d.1) - On or after June 25, 2024

If your employee is eligible for the option benefit deduction under 110(1)(d.1)

Box 94 - Indian (Exempt Income) RPP Contribution

If your employee is a registered or entitled to be registered under the Indian Act code 94, report only RPP contributions in this box.

Box 95 - Indian (Exempt Income) Union Dues

If your employee is a registered or entitled to be registered under the Indian Act code 95, report only union dues in this box.

To ensure correct amounts go to the right Boxes in T4, go Payroll Employee - Pay tab and update the **Starts** and **Ends** dates.

Example:

For an employee with Earnings/Deductions associated with Box 38, 39 or 41, set the **Ends** date to 6/24/2024..

For an employee with Earnings/Deductions associated with Box 90, 91 or 92, set the **Starts** date to 6/25/2024.

You can also use the Update Earn/Ded for All Employees screen to update the Starts and Ends dates for multiple employees.

T619 Electronic Transmittal for 2025

The T619 has been updated for tax year 2025. To accommodate these changes, new fields have been added to the T4s Electronic Filing and T4As Electronic Filing screens - Transmitter Info II tab.

The new fields are:

- Transmitter Account Number
- Rep ID
- Submission Reference ID

The Transmitter Account Number will have the following options available:

- BN9 account
- BN15 account
- Trust account
- NR4 account

Note: These fields are masked and must adhere to the format specified by Canada Revenue Agency (CRA).

Sage HRMS Mobile App (Coming Soon)

Introducing the latest member of the Sage HRMS premium product family - Sage HRMS Mobile App

The Sage HRMS Mobile application will be available soon on the Google Play and Apple App stores. Please monitor the [Sage HRMS Community Hub](#) for release updates.

The initial release of the Sage HRMS Mobile App focuses on the **employee experience** by providing key screens employees can access anytime, anywhere.

- Employees can manage their personal profile, view and download pay advices, review their current benefits and make time off requests directly from their supported mobile device.
- Managers can Approve or Reject time off requests conveniently from their device as well using the Sage HRMS Mobile App.

The Sage HRMS Mobile App respects the System Settings in Sage HRMS Employee Self Service. Use the tabs on the Employer Setup page to review these settings to ensure your employees can manage their information remotely on their supported device.

Personal Profile

Easily manage your personal profile details directly from the Sage HRMS Mobile App. Update personal information such as name, address, phone number, email, and emergency contacts using the app.

Time Off

Submit time off requests directly from the app. Review your available balance and accrual amount for each of your time off plans. Monitor the status of your requests and receive notifications on approvals or denials.

As a Manager, you can approve or reject time off requests directly from the app under the Time Off Requests section in your Message Center. Managers can also see when their direct reports have overlapping time off requests.

Current Benefits

View a detailed overview of your current benefits, including health insurance, retirement plans, and more. Access detailed information about each benefit such as your contribution amount or percent, employer contribution amount or percent and your Dependents and Beneficiaries on each plan.

Pay History

Review and download your pay advices directly from the app. Easily access your earnings, deductions, and tax information. If your Sage HRMS Employee Self Service system settings allow, you can also view your pay stubs from previous pay periods directly on the Sage HRMS Mobile app. When you select the **Download Pay Advice** button, your pay check image is displayed and available to download on your device.

Note: Pay History can only be accessed if Sage HRMS Payroll is installed.

Message Center

The Message Center displays messages directed to you and depending on your user role, may also include reminders, notifications about an action you need to take, or verification that an action was taken. These messages may include any of the following:

- **Notifications:** Notifications include information about actions taken on your requests, such as an approval of a time off request.
- **Time Off Requests (managers only):** Requests for time off by your direct reports that you need to approve or reject.
- **Reminders (managers only):** Information about upcoming events, such as a work anniversary for one of your direct reports.

Other features supported in the Sage HRMS Mobile app:

You can sign in to the Sage HRMS Mobile app using your device's biometric feature.

You can also turn on your device's Dark Mode and the app will respect this setting and display the screens in Dark Mode.

Product Requirements

The premium version of Sage HRMS Employee Self Service is required to use the new Sage HRMS Mobile app. The app is designed to work with the latest premium versions of the Sage products below:

- Sage HRMS Integrated with Payroll & Sage HRMS Employee Self Service
- Sage HRMS HR Only & Sage HRMS Employee Self Service

Note: Pay History is currently not supported with the Sage HRMS HR Only install.

Preparing your Sage HRMS Employee Self Service Server

Preparing your Sage HRMS Employee Self Service Server to support the Sage HRMS Mobile app may require a few extra steps. The Sage HRMS Employee Self Service web server must support SSL and be accessible outside your Firewall. Follow the guidelines below to ensure your employees can access and take advantage of the new Sage HRMS Mobile app:

- You must have a premium subscription of Sage HRMS and Sage HRMS Employee Self Service and be on the **Q4 2024** Release or later version
- Your Sage HRMS Employee Self Service URL address must be publicly accessible outside of your firewall
- The Sage HRMS Employee Self Service **AbraAWCAppPool** must be set to use the Integrated Pipeline Mode in IIS
- Your web server must be configured to use "**HTTPS**" by installing an SSL certificate from a trusted certificate authority
- Your IT Administrator needs to configure your Sage HRMS Employee Self Service web server to enable HTTPS by specifying the SSL certificate
- We recommend reviewing the Authentication Method setup and System Settings in Sage HRMS Employee Self Service. The Sage HRMS Mobile app supports the same protocols.

Device Compatibility

The Sage HRMS Mobile app works on Android devices which operate on an Android version supported by Android (Google).

The Sage HRMS Mobile app also works on Apple iPhones that run a supported Apple iOS version.

Download

When the Sage HRMS Mobile app release has been announced, download the Sage HRMS Mobile App from the Google Store or the Apple App Store.

To connect to the Sage HRMS Mobile app

Before your employees can access the app, you will need to provide the web server name or IP address of your Employee Self Service web server to your employees. This is the URL employees should use when prompted to enter their company's HRMS web server information during their initial setup of the application. For example, the following format should be used:

https://<ServerName>/<SiteName>/

Employee Self Service Accounts

Employees with an active Employee Self Service Account can download and install the app and Login (immediately) if your Employee Self Service system is configured and meets the requirements mentioned above. You must have also provided the IP Address your employees must enter to access Employee Self Service from their mobile device.

New Employees will need to create an Employee Self Service account before accessing the app:

- New accounts can be created by clicking the First-Time User Register Here link on the Login page of your Employee Self Service site using any supported browser.
- The First-Time User Register Here link is also available on the Login page of the Sage HRMS Mobile App.
 - Please note that creating a new account by clicking this link in the app will display a message informing the user that they are about to leave the Sage

HRMS Mobile app. The default browser on the employee's mobile device will then redirect users to the browser version of Employee Self Service to complete this action.

- Users will then need to login to the mobile app with their new account.

Employees with an existing Employee Self Service account that need password assistance:

- Employees who need to update their username or password can select the Username and Password Help link on the Login page of your Employee Self Service site using any supported browser.
- The Username and Password Help link is also available on the Login page of the Sage HRMS Mobile App. Employees will also be prompted with a message and then be redirected to the browser version of Employee Self Service to make changes to their account. Once their changes have been saved, they must follow the same process by logging off the browser version and returning to the Login page of the Sage HRMS Mobile App on their supported device.

Log in to the Sage HRMS Mobile app

Follow these steps to access the app, log in and view information.

1. Launch the **Sage HRMS** app on your device
2. Click on the Terms of Use link and click on the warning message
3. Review the Terms of Use page in your device's browser
4. Switch back to the mobile app and tap the button
5. Click Continue and then Accept on the "Accept Terms of Use?" message
6. Enter the HRMS Web Server address provided by your company on the HRMS Server screen. The following format should be used: **https://<ServerName>/<SiteName>/**
7. Click Continue to authenticate the Server address and connect to your Sage HRMS Instance
8. Enter your account information such as your Username and Password or your Windows Account information on the Sage HRMS Mobile app logon screen
9. Click Sign In

Tip: For more information about the Sage HRMS Mobile app, see Knowledgebase article [241211231424390](#).

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 |
|---|--------------|------------------|-------------|
| Employee Number Updates (Menu Availability) Learn more | Yes | | |
| License Limit Alert Field Update Learn more | Yes | | |
| Earning/Deduction Description Length Error During Publish Checks Learn more | Yes | | |
| Tasks & Processes Megamenu Learn more | | Yes | |
| Cross Employer Transfer Task - Add to Employee Tasks Learn more | | Yes | |
| Process Taken Time Off added to Process Scheduler Learn more | | Yes | |
| Sage ESS Benefit Letters Enhancement Learn more | | | Yes |
| Open Enrollment Question Radio button option truncating Answer Learn more | | | Yes |
| W-2 ESS Enhancement | | | Yes |

| Product Updates | Premium HRMS | Premium Web HRMS | Premium ESS |
|---|--------------|------------------|-------------|
| Learn more | | | |
| T- 4 ESS Enhancement Learn more | | | Yes |

Employee Number Updates (Menu Availability)

We have made changes to not show the Change Employee ID menu item on HR Only installs that have the following options enabled:

- Sage 100 Payroll Link
- HR Actions Administrator URL
- HR Actions Employee URL
- Time Management URL

In addition, this change will force the desktop version of Sage HRMS to reserialize after enabling or disabling the above options. This process will rebuild the menu structure subsequently to hide or show the 'Change Employee ID' menu.

Note: The Change Employee ID task is not available when Sage HRMS Payroll (U.S. or Canadian) is installed on your system.

License Limit Alert Field Update

We have enhanced the License Limit Alert feature on the About Sage HRMS page. The License Limit Alert field, which controls when a warning is displayed regarding your license limit, is now mandatory and accepts only numeric values. This improvement ensures you will be notified before reaching your license limit, allowing you to continue hiring new employees without interruption due to employee count.

Earning/Deduction Description Length Error During Publish Checks

When the length of an Earning or Deduction description was greater than 53 characters, an error was displaying when publishing a check to ESS. We have increased the length of the description field(codedesc) in the check detail table(bpspcdet) to resolve this issue.

Tasks & Processes Megamenu

We've redesigned the Administrator's menu in the web version of Sage HRMS to simplify the menu, making it more intuitive and easier to quickly locate and access key Employee Tasks and Processes. This enhancement removes the following items from the current navigation menu on the left and replaces them with one new menu item labeled - "Tasks and Processes."

- Employee Tasks
- Time Off Task
- Processes

Selecting the Tasks and Processes menu will open a secondary menu with a list of product modules included with your Sage HRMS product. For example, the current Tasks and Processes menu will display Employees and Time Off. When other modules such as Training are implemented, they will also appear on this menu.

The new menu structure also provides a search feature which allows you to find a specific task or process by searching for the name of the page. When you begin typing the name, the matching results will be highlighted in orange on the page.

In addition, once on a specific task or process, you can return to the menu by clicking the tab to expand the menu again without having to select Tasks and Processes again from the left-hand menu.

Cross Employer Transfer Task - Added to Employee Tasks

The Cross Employer Transfer task has been added to the web version of Sage HRMS. The Cross Employer Transfer action copies employee information required for processing and reporting from the current employer to the selected employer. All employee information remains in the existing employer's records for future reference. HR Admins can schedule each

step of the Cross Employer Transfer to be completed in the web version of Sage HRMS or send a reminder to a specific employee.

Process Taken Time Off added to Process Scheduler

The Process Taken Time Off feature previously only available in ESS has been added to the Process Scheduler in the web version of Sage HRMS. To use the Process Scheduler to run the Process Taken Time Off process, ESS must be installed. In addition, the HR Admin must have access to companies that have enabled 'Update Taken Time Off' in Sage Employee Self Service and have setup one or more Time Off Plans for this process.

The Process Scheduler can automate running Process Taken Time Off by creating different schedules that can run once, daily, weekly, or monthly. For example, you can set a schedule that runs every Friday at a specific time to update employee Time Off balances weekly in HRMS.

Note: ESS Admins can still run Process Taken Time Off manually in ESS.

Sage ESS Benefit Letters Enhancement

The Maintain Benefit Letters functionality has been enhanced to allow Administrators to mass delete Benefit Letters. The search results now display a 'Benefit Letter Count' column indicating the number of Benefit Letters each employee has that meets the search criteria used. The ESS Benefit Admin can now select one or more these employees who may have multiple Benefit Letters and delete all of the selected records at one time. Use checkbox associated with the record or records you want to delete and click the Delete Selected button. Click OK on the message if you want to delete all selected Benefit Letters. Additionally, you can also select the checkbox in the table header of the search results to select all of the Benefit Letters in the table.

ESS Benefit Admins can also still manage letters at an individual employee level. To view all the Benefit Letters for an individual employee, click the "Attachment" icon at the end of that row. If your search criteria included only benefit letters that were generated during a specific date range, select the Display All Benefit Letters button to see all of the employee's Benefit Letters regardless of the creation date.

Open Enrollment Question Radio button option truncating Answer

We have increased the field length of the radio button description field in the Open Enrollment question template. Now when radio buttons are used to display questions in Open Enrollment, the text will display in a horizontal line.

W-2 ESS Enhancement

The W-2 form is now available on the W-2 History page in ESS under the Employment menu. This version of the form is "informational use only" and should not be considered the official copy of your W-2 form. All data on the W-2 form comes directly from the employee's Payroll records. Moving forward, the W-2 History page will also include the employee's form from the previous year or years.

For more information on viewing the W-2 form, please see Sage Knowledgebase article [241213225335363](#).

T-4 ESS Enhancement

The T-4 form is now available on the T-4 History page in ESS. This version of the form is for "informational use only" and should not be considered the official copy of your T-4 form. All data on the T-4 form comes directly from the employee's Payroll records. Moving forward, the T-4 History page will also include the employee's form from the previous year or years.

For more information on viewing the T-4 form, please see Sage Knowledgebase article [241213225544000](#).

Note: Whether the W-2 History or the T-4 History pages display is dependent on the Access level set by company on the Page Setup tab of Employer Setup. The W-2 History page displays for US companies, and the T-4 History page displays for Canadian companies.

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 |
|--|------------------|-----------------|
| Employee Number Updates (Menu Availability) Learn more | Yes | N/A |
| License Limit Alert Field Update Learn more | Yes | N/A |
| Earning/Deduction Description Length Learn more | Yes | N/A |

Employee Number Updates (Menu Availability)

We have made changes to not show the Change Employee ID menu item on HR Only installs that have the following options enabled:

- Sage 100 Payroll Link
- HR Actions Administrator URL
- HR Actions Employee URL
- Time Management URL

In addition, this change will force the desktop version of Sage HRMS to reserialize after enabling or disabling the above options. This process will rebuild the menu structure subsequently to hide or show the 'Change Employee ID' menu. The menu in the premium web version of Sage HRMS will update the next time the HR Administrator logs in.

Note: The Change Employee ID task is not available when Sage HRMS Payroll (U.S. or Canadian) is installed on your system.

License Limit Alert Field Update

We have enhanced the License Limit Alert feature on the About Sage HRMS page. The License Limit Alert field, which controls when a warning is displayed regarding your license limit, is now mandatory and accepts only numeric values. This improvement ensures you will be notified before reaching your license limit, allowing you to continue hiring new employees without interruption due to employee count.

Earning/Deduction Description Length

When the length of an Earning or Deduction description was greater than 53 characters, an error was displaying when publishing a check to ESS. We have increased the length of the description field(codedesc) in the check detail table(bpspcdet) to resolve this issue.

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 | SageAbraSQLHRMS10.70.72.09.exe | 10.70.72.09 - 2024 Q4 |
| Premium web version of Sage HRMS* *Includes Employee Self Service if purchased | SageHRMS21.101601_premium_web_HRMS_ESS.exe | 21.10.16.01 - 2024 Q4 |
| | | |
| Non-Premium desktop version of Sage HRMS | SageAbraSQLHRMS10.70.72.09.exe | 10.70.72.09 - 2024 Q4 |
| 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>

Supported W-2 Forms

For information about ordering W-2 forms, see the Sage Knowledgebase article [Which forms should I order for year-end? \(solution ID 223924750040182\)](#) on the Sage Support website.

Preparing for Year-end Processing

Before you start processing your 2025 payroll, visit the Community Hub Year-end Center, where you can get fast answers from Sage support, peers, and product experts at the busiest time of year. You'll find helpful articles, discussion forums, and other links and resources to help your year-end processing go smoothly.

To get started, visit <https://communityhub.sage.com/p/yearend>, select your region, and then select Sage HRMS.

The Year-End Center provides you with information on the following topics:

- Using the Update TD1 Claim function
- Printing and filing T4s and Relevé 1s
- Printing and filing W-2 forms
- Entering employee supplemental information
- Information about processing year-end 2024 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- Preparing for your first payroll of 2025

Existing 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: December 12, 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.

Premium web version of Sage HRMS Setup and Configuration

This section includes instructions for setting up the premium web version of Sage HRMS.

After installing the premium web version of Sage HRMS, the following steps must be completed to see the HRMS menu items.

1. From the Start menu on the server where the web version of Sage HRMS is installed, select All Programs > Sage HRMS (Web Version)> System Maintenance to open the System Maintenance utility.
2. On the **Configuration and Settings** tab, click the **Generate Master Password** button and copy the password provided to log into Sage HRMS (Web Version) as the Master user.
3. Click Save.
4. Exit the System Maintenance utility.
5. In your browser, navigate to the Sage HRMS Web Alias you entered in Step 8 of the install.
 - a. For example: `http://{servername}/selfservice/`
6. Log into the web version Sage HRMS using the Master username and the password you copied from step 2 above.
7. Click Sign In.
8. Select System Admin > Roles and Logon > Logon Setup.
9. On the Logon Setup page for Initial Logon Fields, select the check boxes for one or more fields (such as Last Name or Email Address).
10. In the Employee Status area, select the check boxes for one or more employee statuses for employees who are allowed to create a logon, change their password, and log on to the system.
11. In the Password Properties area and Logon Properties area, specify the properties.
12. In the Logon Reset Message area, enter a custom message that your employees will see when they cannot successfully log on and they click the Username and Password Help link on the Sage HRMS logon page.

13. At the bottom of the Logon Setup page, select five security questions to present to a user when they attempt to create a new logon.
14. Click Save.
15. Select System Admin> Roles and Logon > Change Password.
16. On the Change Password page for Password, type new password for your master user, following the requirements shown on the page.
17. For Confirm Password, type the new password again to confirm.
18. Click Save.
19. Select System Admin> Roles and Logon > Logon Maintenance.
20. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
21. In the search results table, click the employee's name.
22. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
23. Click Save.
24. Repeat steps 14 -18 for each user that requires access to the web version of Sage HRMS.
25. System Setup
 - a. Select System Admin> select System Settings > System Setup.
 - b. On the System Setup page, enter or select the appropriate setting for each item in the following areas of the page:
 - Message Center
 - Display Notifications Since
 - Archive Messages
 - Deleted Archive Messages Prior To
 - Email Notification
 - Include Custom Message
 - Technical Administration

- Technical Admin Email Address
- System Emails Sent From
- Mail Relay

First-Time User Register Here

A User account is required to access to the web version of Sage HRMS.

1. On the Logon page, click **First-Time User Register Here**
2. On the Create New Logon page:
3. Enter the requested information.
4. If included by your administrator, select a Security Question, and then type the Security Answer.
5. Click Next.
6. On the second Create New Logon page:
 - a. Enter the Username that you want to use.
 - b. Enter your Password again to confirm it.
 - c. Enter the Password that you want to use.
 - d. Click Save.
7. You are now logged into the premium web version of Sage HRMS and should see the HRMS menu items.

Premium version of Sage HRMS Employee Self Service Setup and Configuration

This section includes instructions for setting up the premium web version of Sage HRMS to work with ESS.

After installing the premium version of Sage Employee Self Service, the following steps must be completed to see the HRMS menu items.

1. Log into the premium web version of Sage Employee Self Service as the Master user.
2. Select System Admin > Roles and Logon > Logon Maintenance.
3. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
4. In the search results table, click the employee's name.
5. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
6. Click Save.
7. Repeat steps 3 - 7 for each user that requires access to the web version of Sage HRMS.
8. Verify the settings on the System Setup page
 - a. Select System Admin > select System Settings > System Setup.
 - b. The following settings on the System Setup page impact the web version of Sage HRMS:
 - i. Message Center
 - ii. Email Notification
 - iii. Technical Administration

Sage HRMS Employee Self Service HR Administrators

Users assigned to the role of HR Admin in Sage HRMS Employee Self Service can also "tie" ESS user accounts to Sage HRMS.

1. Log into the premium version of Sage Employee Self Service as an ESS HR Administrator.
2. Select the System Administrator menu in Sage HRMS Employee Self Service.
3. On the System Administrator menu, select Roles and Logon > Logon Maintenance.
4. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
5. In the search results table, click the employee's name.
6. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
7. Click Save.

Note: Users with access to both the premium web version of Sage HRMS and Sage HRMS Employee Self Service can toggle between products by clicking the product name in the title bar.

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.