



Sage HRMS

Q4 SR 2023 Release Notes

January 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 SR 2023

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.

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 2023.
- **Customer Support:** For support resources, visit the [Sage City Customer Resources](#) page, select your country, and then select your product.
- **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 Knowledgebase article 40182: [Which forms should I order for year-end?](#)

U.S. Payroll Tax Updates

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

Federal Legislative Updates

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.

Alaska

The Unemployment Insurance wage base limit changes to \$49,700 for 2024.

Georgia

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

Hawaii

The Unemployment Insurance wage base limit changes to \$59,100 for 2024.

Illinois

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

Indiana

- Indiana withholding tables and instructions have been updated for 2024. 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
IN0019	Steuben 76 CO Regular (NR) IT	1.99%	1/1/2024
IN0025	Local Tax Changes's tab	2.38%	1/1/2024
IN0027	Putnam 67 CO Regular (NR) IT	2.3%	1/1/2024
IN0029	Posey 65 CO Regular (NR) IT	1.45%	1/1/2024
IN0031	Pike 63 CO Regular (NR) IT	1.2%	1/1/2024
IN0036	Ohio 58 CO Regular (NR) IT	2%	1/1/2024
IN0054	Jefferson 39 CO Regular (NR) IT	1.03%	1/1/2024
IN0059	Howard 34 CO Regular (NR) IT	1.95%	1/1/2024
IN0069	Franklin 24 CO Regular (NR) IT	1.7%	1/1/2024
IN0071	Floyd 22 CO Regular (NR) IT	1.39%	1/1/2024

Code	Description	Rate	Effective Date
IN0080	Crawford 13 CO Regular (NR) IT	1.65%	1/1/2024
IN0088	Blackford 05 CO Regular (NR) IT	2.5%	1/1/2024
IN0091	Allen 02 CO Regular (NR) IT	1.59%	1/1/2024
IN0110	Steuben 76 CO Regular IT	1.99%	1/1/2024
IN0116	Ripley 69 CO Regular IT	2.38%	1/1/2024
IN0118	Putnam 67 CO Regular IT	2.3%	1/1/2024
IN0120	Posey 65 CO Regular	1.45%	1/1/2024
IN0122	IT Pike 63 CO Regular IT	1.2%	1/1/2024
IN0127	Ohio 58 CO Regular IT	2%	1/1/2024
IN0146	Jefferson 39 CO Regular IT	1.03%	1/1/2024
IN0151	Howard 34 CO Regular IT	1.95%	1/1/2024
IN0161	Franklin 24 CO Regular IT	1.7%	1/1/2024
IN0163	Floyd 22 CO Regular IT	1.39%	1/1/2024
IN0172	Crawford 13 CO Regular IT	1.65%	1/1/2024
IN0180	Blackford 05 CO Regular IT	2.5%	1/1/2024
IN0183	Allen 02 CO Regular IT	1.59%	1/1/2024

Iowa

- Iowa withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- Effective January 1, 2024, the withholding certificate for 2024 will no longer reference number of withholding allowances but rather withholding amounts on Line 6. Sage 300 will continue to use the **Exemptions** field in the Employee record.
- To convert the withholding amount on Line 6 to Sage 300 **Exemptions**, divide the withholding amount on Line 6 by \$40 and enter the value into the Exemptions field in Sage 300.

For example,

- If the Line 6 amount is \$80, ($\$80 / \$40 = 2$), in Sage 300, enter **2** in the **Exemptions** field.
- If the Line 6 amount is \$40, ($\$40 / \$40 = 1$), in Sage 300, enter **1** in the **Exemptions** field.

Kentucky

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

Code	Description	Rate	Effective Date
KY0283	Middletown CT Regular IT	1%	01/01/2024

Massachusetts

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

Minnesota

- Minnesota withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- The Unemployment Insurance wage base limit changes to \$42,000 for 2024.

Mississippi

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

North Carolina

- North Carolina withholding tables and instructions, including rates on supplemental wages, have been updated for 2024. Refer to the state publication for more details.
- The Unemployment Insurance wage base limit changes to \$31,400 for 2024.

North Dakota

The Unemployment Insurance wage base limit changes to \$43,800 for 2024.

Ohio

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

Code	Description	Rate	Effective Date
OH0067	Pleasant Hill VI Regular IT	1%	01/01/2024
OH0098	Yellow Springs 2907 SD Regular IT	2%	01/01/2024
OH0926	Bethel VI Regular IT	1%	01/01/2024
OH1062	Ravenna-Rootstown TP JEDD CT Regular IT	2%	01/01/2024
OH1063	Violet TP-Canal Winchester JEDD CT Regular IT	2%	01/01/2024
OH1064	East Union TP-Apple Creek JEDD CT Regular IT	1%	01/01/2024
OH1065	Apple Creek-East Union TP JEDD2 CT Regular IT	1%	01/01/2024

Oregon

There are changes for the following local taxes for 2024. Refer to state publication for more details.

- Metro Supportive Housing Services Income Tax
- Multnomah County Preschool for All Personal Income Tax

For more information, see Sage Knowledgebase article: [Oregon tax changes that may require manual setup and/or changes \(Solution ID 220924960111399\)](#).

Pennsylvania

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

Code	Description	Rate	Effective Date
PA0026	Lower Southampton TP, Neshaminy SD (NR) LST	\$52	1/1/2024
PA0154	Sheffield TP, Warren SD (NR) LST	\$52	12/15/2023
PA0298	Frailey TP, Pine Grove SD (NR) LST	\$52	12/15/2023
PA0350	Middle Smithfield TP, E Stroudsburg SD (NR) LST	\$52	12/15/2023
PA0358	Warsaw TP, Brookville SD (NR) LST	\$52	12/15/2023
PA0425	Dalton BO, Lackawanna Trail SD (NR) LST	\$52	12/15/2023
PA0708	Wattsburg BO, Wattsburg SD (NR) LST	\$52	1/1/2024
PA0807	Cussewago TP, Penncrest SD (NR) LST	\$20	12/15/2023
PA0830	Dunnstable TP, Keystone Central SD (NR) LST	\$52	12/15/2023
PA0972	Loretto BO, Penn Cambria SD (NR) LST	\$52	12/15/2023
PA1025	North Towanda TP, Towanda SD (NR) LST	\$52	1/1/2024
PA1057	Bellwood BO, Bellwood-Antis SD (NR) LST	\$35	12/15/2023
PA1161	Aliquippa CT, Aliquippa SD (NR) LST	\$52	1/1/2024
PA1287	Turbot TP, Milton SD (NR) LST	\$52	12/15/2023
PA1455	Williams TP, Williams Valley SD (NR) LST	\$5	1/1/2024
PA1814	Brokenstraw TP, Warren SD (NR) LST	\$52	12/15/2023
PA1970	Wheatland BO, Farrell SD (NR) LST	removed	12/31/2023
PA2610	Wrightstown TP, Council Rock SD Regular IT	1%	12/15/2023
PA2623	Tullytown BO, Pennsbury SD (NR) Regular IT	1%	12/15/2023
PA2624	Tullytown BO, Pennsbury SD Regular IT	1%	12/15/2023
PA4439	Wheatland BO, Farrell SD (NR) Regular IT	removed	12/31/2023
PA4440	Wheatland BO, Farrell SD Regular IT	removed	12/31/2023
PA4506	Greenville BO, Greenville SD Regular IT	2.25%	12/15/2023

Code	Description	Rate	Effective Date
PA4565	New Castle CT, New Castle SD (NR) Regular IT	1.332%	12/15/2023
PA6850	Westtown TP, W Chester SD Regular IT	1.08%	12/15/2023
PA7612	Braddock BO, Woodland Hills SD Regular IT	1.75%	12/15/2023
PA7993	Hermitage CT, Farrell SD Regular IT	2.25%	1/1/2024
PA7994	Hermitage CT, Farrell SD (NR) Regular IT	1%	1/1/2024
PA7995	Hermitage CT, Farrell SD (NR) LST	\$52	1/1/2024

Rhode Island

- The Unemployment Insurance wage base limit changes to \$29,200 for 2024.
- Rhode Island disability insurance tax (RISDI) information is updated for 2024. Effective for wages paid on or after January 1, 2024:
 - The withholding rate is 1.2%
 - The taxable wage limit is \$87,000 for each employee per calendar year.

Vermont

- Vermont withholding tables and instructions have been updated for 2024. Refer to the state publication for more details.
- Effective January 1, 2024, the Health Care contribution rate will be \$268.24.

Wyoming

The statewide average officers quarterly wage amount has increased to \$14,072.51 for 2024. The amount is for corporate officers and owners only. The quarterly average wage amount is to be used and not actual wages.

For more information, see <https://dws.wyo.gov/dws-division/workers-compensation/owner-officer-information/>

Product updates

The following product updates are included with this release.

Payroll product updates

Canadian Payroll Product Updates

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

Temporary Relevé 1 for 2024

You can now print version 2024-01 of the temporary RL-1 slip for employers who cease to operate their business or make payments of source deductions and employer contributions during the year 2024.

To do this, specify **2024** in the **Payment Year** field in the **Relevé 1** window.

Fix for Non-Periodic Payments

Fixed a problem that caused the incorrect amount of the additional Canada Pension Plan to be deducted for the non-periodic payments.

Fix for Data Activation

Fixed a problem that may prevent Data Activation from completing successfully when there are missing G/L Accounts or required optional fields.

For more information, see Sage Knowledgebase article: [Optional Field COSTTYPE is missing when activating Payroll 8.0 \(Solution ID: 240108203543370\)](#).

Fix for Calculate Payroll

Fixed a problem that caused the error "Could Not Load String" when processing payroll in the **Calculate Payroll** window.

U.S. Payroll Product Updates

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

Premium version of Sage HRMS product updates

Please review the table below for updates to the HRMS premium products included in this release.

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Crystal Report 2020 Designer Support Learn more	Yes		
Delete Employee Record Learn more	Yes		

Crystal Report 2020 Designer Support

You can now preview and print Crystal Reports in the Crystal Report 2020 Designer using the OLE DB 64 Bit provider.

Delete Employee Record

You can now delete an employee record without an error.

Existing version of Sage HRMS and ESS product updates

Please review the table below for updates to the existing version of HRMS products included in this release.

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Crystal Report 2020 Designer Support Learn more	Yes		
Delete Employee Record Learn more	Yes		

Crystal Report 2020 Designer Support

You can now preview and print Crystal Reports in the Crystal Report 2020 Designer using the OLE DB 64 Bit provider.

Delete Employee Record

You can now delete an employee record without an error.

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.

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_706815.exe	10.70.68.15 - 2023 Q4 SR
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	No updates at this time.	N/A
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10_706815.exe	10.70.68.15 - 2023 Q4 SR
Existing version of Sage HRMS Employee Self Service	No updates at this time.	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 article [Which forms should I order for year-end?](#) on the Sage Support website.

Preparing for Year-End Processing

Before you start processing your 2024 payroll, visit the Sage City 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 <http://sagecity.na.sage.com/p/yearend> and 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 2023 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- Preparing for your first payroll of 2024

Sage HRMS update installation instructions

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 and log in if required.
3. In the article, click **Download** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

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: January 31, 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.