

# Sage HRMS

## Q4 SR 2024 Release Notes

January 2025

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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 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 Q3 2024 or later to upgrade to Q4SR 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.
- **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](http://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

## Available now on the Apple iPhone Store

We are excited to announce the 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 is now available on the Apple App store and is coming soon to the Google Play store. Please monitor the [Sage HRMS Community Hub](#) for release updates.

To learn more about our app, see "[Sage HRMS Mobile App](#)" (page 13).

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



# U.S. Payroll Tax Updates

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

## State and Local Legislative Updates

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

**Note:** Sage HRMS U.S. Payroll 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 \$51,700 for 2025.

## Arkansas

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

## Hawaii

- Hawaii withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.
- The Unemployment Insurance wage base limit changes to \$62,000 for 2025.
- State disability insurance rate is updated for 2025.
  - The temporary disability insurance (TDI) maximum weekly wage base will increase to \$1,441.72.
  - The maximum weekly deduction from employee wages will increase to \$7.21.
  - The tax rate of .5% of the wage base remains unchanged.

For more details about setting up related local tax codes, see Knowledgebase article [231030191128320](#).

## Idaho

The Unemployment Insurance wage base limit changes to \$55,300 for 2025.

## Illinois

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

## Indiana

Indiana 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
IN0016	Switzerland 78 CO Regular (NR) IT	1.45%	01/01/2025
IN0024	Rush 70 CO Regular (NR) IT	2.15%	01/01/2025
IN0040	Monroe 53 CO Regular (NR) IT	2.14%	01/01/2025
IN0055	Jay 38 CO Regular (NR) IT	2.5%	01/01/2025
IN0067	Gibson 26 CO Regular (NR) IT	1.3%	01/01/2025
IN0071	Floyd 22 CO Regular (NR) IT	1.89%	01/01/2025
IN0107	Switzerland 78 CO Regular IT	1.45%	01/01/2025
IN0115	Rush 70 CO Regular IT	2.15%	01/01/2025
IN0132	Monroe 53 CO Regular IT	2.14%	01/01/2025
IN0147	Jay 38 CO Regular IT	2.5%	01/01/2025
IN0159	Gibson 26 CO Regular IT	1.3%	01/01/2025
IN0163	Floyd 22 CO Regular IT	1.89%	01/01/2025

## Kentucky

- The Unemployment Insurance wage base limit changes to \$11,700 for 2025.
- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
KY0282	Lyndon CT Regular IT	0.75%	01/01/2025

## Maryland

- Maryland withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.
- For more details about changes to local income brackets, see Knowledgebase article [240311184255530](#).

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

Code	Description	Rate	Effective Date
MD3191	Calvert, Maryland Regular IT	3.2%	01/01/2025
MD3205	St. Mary's, Maryland Regular IT	3.2%	01/01/2025

## Michigan

The Unemployment Insurance wage base limit changes to \$9,000 for 2025.

## Minnesota

- Minnesota withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.
- The Unemployment Insurance wage base limit changes to \$43,000 for 2025.

## Mississippi

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

## Montana

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

## New Mexico

The Unemployment Insurance wage base limit changes to \$33,200 for 2025.

## North Carolina

- North Carolina 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 base limit changes to \$32,600 for 2025.

## North Dakota

- North Dakota withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.
- The Unemployment Insurance wage base limit changes to \$45,100 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
OH1077	Hamersville VI Regular IT	1%	01/01/2025
OH0218	Sidney CT Regular IT	1.5%	01/01/2025
OH0620	Danville 4202 SD Regular IT	1.75%	01/01/2025
OH1076	Mifflin VI Regular IT	1%	01/01/2025

Effective November 19, 2024, the following local tax has been expired:

Code	Description
OH1033	Jefferson TP-Whitehall JEDD CT Regular IT

## Oregon

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

## Pennsylvania

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

Code	Description	Rate	Effective Date
PA4565	New Castle CT, New Castle SD (NR) Regular IT	1.148%	01/01/2025
PA2935	Washington CT, Washington SD (NR) Regular IT	1%	12/15/2024
PA2936	Washington CT, Washington SD Regular IT	1%	12/15/2024
PA4803	Upper Providence TP, Rose Tree SD (NR) Regular IT	1%	12/15/2024
PA4804	Upper Providence TP, Rose Tree SD Regular IT	1%	12/15/2024
PA4871	Aldan BO, William Penn SD (NR) Regular IT	1%	12/15/2024
PA4872	Aldan BO, William Penn SD Regular IT	1%	12/15/2024
PA5686	Altoona CT, Altoona SD Regular IT	1.7%	12/15/2024
PA6390	Shamokin CT, Shamokin SD Regular IT	1%	12/15/2024
PA6628	Lancaster CT, Lancaster SD Regular IT	1.6%	01/01/2025
PA6922	Uwchlan TP, Downingtown SD Regular IT	1.25%	12/15/2024
PA7022	Schuylkill TP, Phoenixville SD Regular IT	1.35%	12/15/2024
PA7092	Phoenixville BO, Phoenixville SD Regular IT	1.1%	12/15/2024
PA7097	Penn TP, Avon Grove SD (NR) Regular IT	0.75%	12/15/2024
PA7098	Penn TP, Avon Grove SD Regular IT	0.75%	12/15/2024
PA7330	Heidelberg TP, Northwestern Lehigh SD Regular IT	1.175%	12/15/2024
PA7438	Elk TP, Oxford SD Regular IT	1.1%	12/15/2024
PA7454	East Whiteland TP, Great Valley SD Regular IT	0.8%	12/15/2024
PA7462	E Pikeland TP, Phoenixville SD Regular IT	1.35%	12/15/2024
PA7889	Ridley Park BO, Ridley SD (NR) Regular IT	1%	12/15/2024
PA7890	Ridley Park BO, Ridley SD Regular IT	1%	12/15/2024
PA7987	Lancaster CT, Conestoga Vly SD Regular IT	1.6%	01/01/2025
PA7990	Lancaster CT, Lampeter-Strbg SD Regular IT	1.6%	01/01/2025
PA0408	East Hanover TP, Northern Lebanon SD (NR) LST	\$26	12/15/2024
PA0766	New Cumberland BO, West Shore SD (NR) LST	\$52	12/15/2024
PA0933	Summit Hill BO, Panther Valley SD (NR) LST	\$52	12/15/2024
PA1289	Shamokin TP, Shamokin SD (NR) LST	\$52	12/15/2024

Code	Description	Rate	Effective Date
PA1375	Manor TP, Penn Manor SD (NR) LST	\$52	12/15/2024
PA1457	White Oak BO, McKeesport SD (NR) LST	\$52	12/15/2024
PA1496	Spring City BO, Spring-Ford SD (NR) LST	\$52	12/15/2024
PA1529	Mt Joy TP, Littlestown SD (NR) LST	\$52	12/15/2024
PA1530	Mt Joy TP, Gettysburg SD (NR) LST	\$52	12/15/2024
PA7931	White Oak BO, Norwin SD (NR) LST	\$52	12/15/2024

## Rhode Island

- Rhode Island withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.
- The Unemployment Insurance wage base limit changes to \$29,800 for 2025.
- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
RISDI	Rhode Island Disability Insurance Tax	1.3%	01/01/2025

## Vermont

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

## Virgin Islands

The Unemployment Insurance wage base limit changes to \$31,100 for 2025.

## West Virginia

The Unemployment Insurance wage base limit changes to \$9,500 for 2025.

## Wyoming

The statewide average officers quarterly wage amount has increased to \$14,768.01 for 2025. 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/employers/wage-reporting-and-coverage/>



# Product updates

The following product updates are included with this release.

## Payroll product updates

### U.S. Payroll product updates

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

#### Payroll Earnings and Deductions W2 Reporting Types

On the Payroll Earnings and Deductions window, you can now create codes for benefits under Medicaid waiver payments. These payments will appear on the W-2 Box 12 with Code II. (Select Medicaid waiver payments under Notice 2014-7 in the W2 Reporting field on the Employer tab.)

### Canadian Payroll product updates

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

- On the Payroll Earnings and Deductions screen, there is a new option in the T4/T4A Reporting list:
  - Box 94 - Indian (Exempt Income) & Box 52 - RPP Contributions

# Sage HRMS Mobile App

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

We're excited to announce that our Sage HRMS Mobile app has officially launched on the Apple App Store!

For our Android users, our app will be coming soon to the Google Play Store. Keep an eye out for the official release announcement on the [Sage HRMS Community Hub](#).

### Sage HRMS Mobile App Features

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 also works on Apple iPhones that run a supported Apple iOS version.

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

## Search and Download the Sage HRMS Mobile app

Apple iPhone users can download the new mobile app by searching for "Sage HRMS" in the Apple App store. Download it today to start enjoying all the app benefits from your mobile phone.

For our Android users, our app will be coming soon to the Google Play Store. Be on the lookout for the release announcement on the [Sage HRMS Community Hub](#) .

## 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
<b>Review Due Report Issue Correction for Year date</b> <a href="#">Learn more</a>	Yes		
<b>Error launching Aatrix from MWA Issue Correction</b> <a href="#">Learn more</a>	Yes		
<b>Group Security added to web version</b> <a href="#">Learn more</a>		Yes	
<b>ESS W-4 Form Available for HR Only Install</b> <a href="#">Learn more</a>			Yes
<b>ESS 2025 W-4 Form Available</b> <a href="#">Learn more</a>			Yes

## Review Due Report Issue Correction for Year date

On the Specific Criteria tab of the "Reviews Due" Compensation reports, if the Year field was populated with a year ending in '25', the report was converting the year to 1925. This issue has been fixed and these reports will now return data for the year 2025.

## Error launching Aatrix from MWA Issue Correction

Fixed an issue where an error was being displayed in MWA when selecting the **Print/Efile** button in an HR only install running an Sage HRMS version before Q4SR 2024 (10.7073).

## Group Security added to web version of Sage HRMS

Sage HRMS Group Security has been added to the **Setup** menu in the web version of Sage HRMS. Security Users in a security group that has access to the Group Security Task (with N/A for the Employer, System for Product, and Rule for Activity) will have access to Group Security.

HRMS Administrators can now manage all existing Security Groups as well as add new security groups using the web version of Sage HRMS. The Group Security page includes all of the existing functionality available in the desktop product for Group Security including the following tabs:

- Group Level Security and Ad Hoc Reporting Security Level
- Field Level Security
- Product Group Filters

The Group Security feature also includes the ability to copy Security Groups. To copy a Security Group, click the **Copy** button on the Security Groups page, select the Security Group you want to copy, enter a New Group Name and click **Continue**. The Security Group page for the new group will open with the security settings from the copied group. HRMS Administrators can then manage the new Security Group and make any necessary changes. This functionality has only been added to the premium web version of Sage HRMS.

**Note:** The MASTER user does not have access to the Group Security Task in the web version of Sage HRMS.



## **ESS W-4 Form Available for HR Only Install**

If you have an HR-only installation of the premium version of Sage HRMS and Sage HRMS Employee Self Service, the W-4 Form is available on the Employee menu in ESS. As with all "new" pages added to the employee menu, the W-4 Form page is set to 'View' access by default and must be changed to 'Approve' to permit employees access to create and submit a W-4 Form for approval.

The W-4 Form follows the Notification workflow in Sage HRMS Employee Self Service and will display a Notification in the message center for both the employee and the "Approver." Sage HRMS Employee Self Service Administrators also have access to the W-4 Form Submission report under the Tax Forms menu on the (Administrator) Reports menu.

## **ESS 2025 W-4 Form Available**

The 2025 W-4 Form is now available in the premium version of Sage HRMS Employee Self Service. Employees can review their 2024 W-4 form or create a new 2025 W-4 form. This version of the form is "informational only" and should not be considered the official copy of the employee's W-4 form.

## 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
<b>Review Due Report Issue Correction for Year date</b> <a href="#">Learn more</a>	Yes	N/A
<b>Error launching Aatrix from MWA Issue Correction</b> <a href="#">Learn more</a>	Yes	N/A

### Review Due Report Issue Correction for Year date

On the Specific Criteria tab of the "Reviews Due" Compensation reports, if the Year field was populated with a year ending in '25', the report was converting the year to 1925. This issue has been fixed and these reports will now return data for the year 2025.

### Error launching Aatrix from MWA Issue Correction

Fixed an issue where an error was being displayed in MWA when selecting the Print/Efile button in an HR only install running an Sage HRMS version before Q4SR 2024 (10.7073).

## My Workforce Analyzer updates

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

## Sage 100 Payroll Link updates

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

# 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
<b>Premium desktop version of Sage HRMS</b>	SageAbraSQLHRMS10.70.73.06.exe	10.70.73.06 - 2024 Q4SR
<b>Premium web version of Sage HRMS*</b> *Includes Employee Self Service if purchased	SageHRMS21.101701_premium_web_HRMS_ESS.exe	21.10.17.01 - 2024 Q4SR
<b>Non-Premium desktop version of Sage HRMS</b>	SageAbraSQLHRMS10.70.73.06.exe	10.70.73.06 - 2024 Q4SR
<b>Non-Premium version of Sage HRMS Employee Self Service</b>	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 includes an FAQ and provides you with information various topics, including employee-related forms, processing reports, and preparing for the first payroll of a new year.

# Premium web version of Sage HRMS installation instructions

This section includes instructions for installing the premium web version of Sage HRMS for customers who have not purchased Sage HRMS Employee Self Service.

**Note:** You must install the latest quarterly update of the premium version of Sage HRMS before installing the premium web version of Sage HRMS.

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

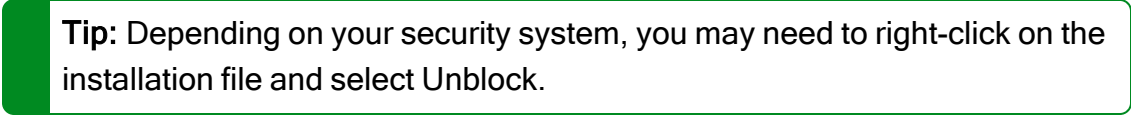
## Before you start:

- Refer to Chapters 1 and 2 in the [Sage Employee Self Service Installation and Setup Guide](#) for Pre-installation Setup and System Configuration requirements.
- See Sage Knowledgebase article [225924250083549](#) for System Recommendations for the premium web version of Sage HRMS.
- 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.
- 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 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 premium web version of Sage HRMS update

1. Using your external backup procedures, back up the Sage HRMS databases to a media device that is external to your product servers:
  - a. Prepare to install premium web version of Sage HRMS by closing all Windows applications.
  - b. Run the setup.exe file provided with the installation package with Administrative privileges (right-click the file and select **Run as Administrator**).
  - c.  **Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.
2. The premium web version of Sage HRMS Setup prepares the InstallShield Wizard.
3. The Welcome to the InstallShield Wizard for Sage HRMS is displayed. Click **Next**, and then follow the prompts on the InstallShield Wizard.
4. In the License Agreement window, read the License Agreement, accept the terms of the license agreement, and click **Next**.
5. In the Customer Information window, enter your User Name and Organization. Uncheck the Install Sage HRMS Employee Self Service checkbox if you are not installing ESS and then click **Next**.
6. In the Destination Folder window, select the path and directory where you want the premium web version of Sage HRMS and its components installed. This must be a local drive. Click **Next**.
7. In the Sage HRMS SQL Server Setup window, specify the server configuration for the Sage HRMS database. Enter the Server Name, Username, Password, and Database. Click **Next**.
8. In the Sage HRMS Web Alias window, the Name/Alias is initially set to "selfservice," but you can change it. The Name/Alias is used to access the premium web version of Sage HRMS from a web browser. Click **Next**.
9. In the Email Configuration window, you must select Enable Emails (SMTP) to install the premium web version of Sage HRMS. Click **Next**.
10. In the SQL Server Setup window, specify your version of SQL Server (the default database embedded with Sage Employee Self Service). Enter the Server Name, Username, Password, and Database. You must provide a SQL Server logon that uses or emulates your SA (System Administrator) permissions. Click **Next**.

11. On the Ready to Install the Program window, click **Install** to proceed with the installation.
12. The system displays Installation windows indicating the progress of the installation. When the InstallShield Wizard Completed window appears, click **Finish**.
13. When the update is complete, click **Yes** to restart your system.
14. After your Sage HRMS server restarts, go to the **Start** menu and select **All Programs > Sage HRMS (Web Version) > System Maintenance** to open the System Maintenance utility. Verify that all the information on the **Configuration and Settings** tab is correct.
15. On the **Configuration and Settings** tab, click the **Generate Master Password** button and copy the password provided to log into the premium web version of Sage HRMS as the Master user.
16. Click Save.
17. Exit the System Maintenance utility.
18. In your browser, navigate to the web alias you entered in Step 8 during the install.
19. Log into the web version Sage HRMS as the MASTER user to complete the install process.

The update is now complete and you are ready to start using the premium web version of Sage HRMS.



# Premium web version of Sage HRMS with Sage ESS update installation instructions

After you have downloaded the premium version of 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 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.

**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.

# Non-premium 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: January 31, 2025.

**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.

# 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.