Sage HRMS

U.S. Payroll
Q1 2020 Release Notes

March 2020

Contents

Product update release notes

> **Important!** All customers who update, maintain, and use Sage HRMS U.S. Payroll 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 U.S. Payroll

Version: Product Update Q1 2020

About product updates for Sage HRMS

Sage HRMS Payroll 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.

> **Note:** Sage HRMS 2015 and 2016 are no longer supported. Product Updates and Quarterly Tax Updates are not available for these older versions of Sage HRMS.

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 http://cdn.na.sage.com/docs/en/customer/hrms/documentation.htm for more.

- **Sage City:** Visit https://sagecity.na.sage.com for blogs, tips, and guidance specific to Sage HRMS.

- **Customer Support:** For additional articles, visit the Sage Knowledgebase at https://support.na.sage.com. For more support resources, visit the Sage City Customer Resources page, select your country, and then select your product.

Payroll Tax Updates

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

Federal Legislative Updates

There are no federal legislative updates with this release.

State and Local Legislative Updates

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

> **Note:** Sage HRMS U.S. Payroll includes some system-supported State Disability Insurance (SDI) codes, which are updated automatically (for example, with rate changes) when you install product updates. To use these codes, your SDI codes must match the system-supported codes.
>
> If you use custom tax codes to capture SDI taxes, note the following:
>
> - If your codes match the system-supported tax codes, you should review the tax code setup before processing payroll.
> - If your codes do not match the system-supported tax codes, you can switch to using the system-supported codes. To do this, you must deactivate your custom tax codes, and then set up the system-supported tax codes.
> - Regardless of whether or not your codes match the system-supported tax codes, you must follow your existing procedures for reporting and filing SDI taxes as custom taxes.
>
> Information about changes to specific system-supported SDI codes is included in the sections for the related states.

Arkansas

Arkansas withholding tables and instructions have been updated, effective March 1, 2020. Refer to the state publication for more details.

Kentucky

The following local tax has been added in the supported tax tables:

Code	Description	Rate	Effective Date
KY0264	Carter CO Regular IT	1%	1/1/2020

Maryland

Maryland withholding tables and instructions have been updated, effective January 1, 2020. Refer to the state publication for more details.

Ohio

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

Code	Description	Rate	Effective Date
OH0478	Lithopolis VI Regular IT	1%	1/1/2020

- The following local taxes have been added in the supported tax tables:

Code	Description	Rate	Effective Date
OH0968	Washingtonville VI Regular IT	0.5%	1/1/2020
OH1014	Risingsun VI Regular IT	1%	1/1/2020

Pennsylvania

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

Code	Description	Rate	Effective Date
PA0145	Beallsville BO, Bethlehem-Center SD (NR) LST	$52	1/1/2020
PA0662	Neshannock TP, Neshannock SD (NR) LST	$52	1/1/2020
PA0822	Mill Hall BO, Keystone Central SD (NR) LST	$30	1/1/2020
PA1088	Hereford TP, Upper Perkiomen SD (NR) LST	$52	1/1/2020

Code	Description	Rate	Effective Date
PA1627	Clay TP, Moniteau SD (NR) LST	$52	1/1/2020
PA2329	Geistown BO, Richland SD (NR) LST	$52	1/1/2020
PA2330	Geistown BO, Greater Johnstown SD (NR) LST	$52	1/1/2020
PA2923	West Middletown BO, Avella SD (NR) Regular IT	1%	1/1/2020
PA2935	Washington CT, Washington SD (NR) Regular IT	1.2%	1/1/2020
PA2936	Washington CT, Washington SD Regular IT	1.2%	1/1/2020
PA4322	Jeannette CT, Jeannette SD Regular IT	1.4%	1/1/2020
PA4751	Erie City CT, Erie City SD (NR) Regular IT	1.65%	1/1/2020
PA6786	New Britain TP, Central Bucks SD Regular IT	1.125%	1/1/2020
PA6788	New Britain TP, North Penn SD Regular IT	1.125%	1/1/2020
PA6838	Whitehall BO, Baldwin-Whitehall SD Regular IT	1.7%	1/1/2020
PA7080	Pittston CT, Pittston SD Regular IT	2.2%	1/1/2020
PA7817	Jeannette CT, Hempfield SD Regular IT	1.4%	1/1/2020
PA7820	Jeannette CT, Penn-Trafford SD Regular IT	1.4%	1/1/2020
PA7866	Oakland BO, Susquehanna SD (NR) Regular IT	1%	1/1/2020
PA7867	Oakland BO, Susquehanna SD Regular IT	1%	1/1/2020

West Virginia

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

Code	Description	Rate	Effective Date
WV0009	Madison CT Service Fee	$65	1/1/2020

Product updates

This update does not include any new features or improvements for payroll, My Workforce Analyzer, or Sage 100 Payroll Link.

Sage HRMS product updates

The following feature and fix are included with this update to Sage HRMS.

EEO-1 reporting

Because EEO-1 reporting is once again based on Component 1 requirements, the changes made to collect and present Component 2 data are no longer needed and were removed:

- The **Update EEO-1 Pay Data** (HRMS Payroll) and **Import EEO-1 Pay Data** (without HRMS Payroll) menu items were removed.

- The **EEO-1 Pay Band** and **EEO-1 Total Hours** fields on each employee's **Current Pay** tab were removed.

- Field-level security for the **EEO-1 Pay Band** and **EEO-1 Total Hours** fields was removed from the **EEO** group.

- The EEO-1 Headcount Detail and EEO-1 Headcount Summary reports no longer contain the EEO-1 pay band and EEO-1 total hours data.

- The electronic file that you upload for EEO-1 reporting once again uses the Component 1 requirements from May 2019.

Display of the installed update

You can now see what update is installed on your machine (along with the version number) on the **About Sage HRMS** page. Select **Help > About Sage HRMS**. Before installing an update, check whether that update is already installed on the machine.

Secure Query

You no longer see an error message when you open an existing query or create a new query and select **View Data** or **Run Query**.

Introducing the subscription version of Sage HRMS

Available starting in June 2020.

The subscription version of Sage HRMS provides the same features as your existing Sage HRMS product but with subscription pricing–and some additional features. Please contact either a Sage Business Partner or Sage Account Manager for additional information on your options for moving to subscription.

The following additional features are included with the subscription version of Sage HRMS.

Home page

The **Home** page has been modernized with icons that you can click to access items such as Sage City, Sage University, and Product Documents, as well as social media sites.

Logon page

The **Logon** page has been modernized and now contains an icon that you can click to show or hide your password. The page also shows the version and update number that is installed on the machine as well as a link to legal information.

Benefit letters

When you create benefit letters in the subscription version of Sage HRMS, a message asks if you want to export the letters to Employee Self Service.

Subscription information

You can view the expiration date of your subscription version of Sage HRMS by selecting **Help > About Sage HRMS**.

Sage Employee Self Service product updates

The following new features and improvements are included in Sage Employee Self Service if you are using the subscription version of Sage HRMS.

The subscription version will be available starting in June 2020. Please contact either a Sage Business Partner or Sage Account Manager about moving to subscription.

Benefit letters

If enabled by the system administrator, benefit letters exported from Sage HRMS can display in Employee Self Service. Employees can then access the new **Benefit Letters** page to view or delete their benefit letters.

Life events

On the **Approve Life Event** page, the administrator can now delete an employee's life event that has a status of **Updated**.

Single sign on

If enabled by the system administrator, when you are already logged on your machine using Active Directory and launch Employee Self Service, you can select to be automatically logged in.

Incompatible versions

Administration users will see a message when their Sage Employee Self Service version is not compatible with their Sage HRMS version.

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

Product update installation instructions

Follow the instructions in this section to download, install, apply, and verify this Product Update.

Before you start:

- Back up your data.
- Make sure all users have exited the program.

Downloading the product update

To download the update:

1. Visit the Sage Knowledgebase at https://support.na.sage.com, click <u>Log on</u>, and then log on to the site.
2. In the Support by product section, click **Select your product**, and then click **more products**.
3. Under Sage HRMS, click your product and version.
4. In the Latest updates section, click an update to download.
5. In the article, click **Download Now** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

Installing the product update

To install the product update:

> **Note:** You should launch the product update on the server where Sage HRMS is installed.

1. To launch the installation program, right-click the Product Update file and run as administrator, or as the current user with administrator rights.

    - If applicable, make sure the **Protect my computer and data from unauthorized program activity** check box is *not* selected.

    - If there is no option to run as administrator, log on as an administrator, and then double-click the Product Update file.

> **Tip:** Depending on your security system, you may need to right-click on the installation file and select Unblock.

2. After the InstallShield Wizard determines requirements, click **Next** to resume installing the Product Update.

3. Click **Finish** to finish the installation.

4. Click **Update**.

5. Click **Yes**. The system starts the installation.

6. Follow the instructions on the windows that follow, and then click **Finish**.

7. Open the Sage HRMS Client. A message prompts you to continue.

Updating Sage HRMS client files

To update Sage HRMS client files:

1. Right-click on the Sage HRMS Client program and select **Run as administrator** to initiate the file update process.

2. Click **OK** to proceed and update your files.

   A message displays that Sage HRMS could not detect the current version of one or more Payroll modules.

   - If you have administrator privileges, click **Yes** to install the Payroll modules now.

   - If you do *not* have administrator privileges, click **No**, and then contact your system administrator to proceed with the installation.

When installation of the Payroll modules is complete, you may be prompted to restart Sage HRMS.

Verifying the product update

After the update is complete, you can confirm that the update was installed successfully by selecting **Help** > **About Sage HRMS** and verifying that the version number corresponds with the version of the update .exe file.

You can also verify the latest tax update is applied to your system by selecting **Payroll** > **Process Payroll** > **Calculate Payroll** and the **Tax Version** listed on the window should display the date: March 31, 2020.

> **Tip:** Now is a good time to update your Sage HRMS Payroll sample data. After installing the Product Update, the next time you log in to your Sample Data, you will be prompted to update files again. Click **OK** to proceed and update your sample data files.

Updating the local tax repository and rates

This section applies only if you use local tax codes in U.S. Payroll.

To update the local tax repository and rates:

1. After the Product Update is complete, log in to Sage HRMS.

2. On the Local/Other Tax Codes window, click the **Install Repository** button to update all of the local tax rates in the system.

3. When you receive the prompt "Install Repository completed. Do you want to continue updating company level local tax records with information from the local repository?":

   - Click **Yes** to automatically update the company rates for all local taxes, or

   - Click **No** if you prefer to select each local tax individually and click the Update button for each one in order to apply the rate changes. This gives you the opportunity to validate rates before and after the changes.

   > **Note:** If you click **No**, you will be required to manually update each employee-level tax. This can be done for all employees at once by tax from **U.S. Payroll** > **Update Taxes**, or by individual employee from **Employee Payroll** > **Taxes**.

4. If you click **Yes**, after the process completes a message displays: "Updating company level local tax records completed. Do you want to continue updating employee local tax records from the local tax repository?".

   - Click **Yes** to automatically update the employee-level rates for all local taxes, or

   - Click **No** if you want to select each employee or use the Update Taxes tax, then update each tax or employee individually.

> **Important!** This process requires security permissions in Sage HRMS to access all employees. Otherwise you may not receive the prompts as described above and employee rates will not be updated.