Sage HRMS

Q4 2021 Release Notes

December 2021

Contents

Contents

Contents

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 2021

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.

- **Sage City Year-End Center:** Visit http://sagecity.na.sage.com/p/yearend for help, guidance, documents, and downloads specific to Sage HRMS Payroll and Year End 2021.

- **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

Federal Withholding Tax Changes for 2022

The IRS released draft withholding and allowance amount tables for wages paid on or after January 1, 2022.

Social Security Wage Base Changes for 2022

For 2022, the maximum amount of earnings subject to the Social Security tax (taxable maximum) is $147,000.

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 $45,200 for 2022.

California

- California withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.
- State disability insurance tax (CASDI) information is updated for 2022. Effective for wages paid on or after January 1, 2022:
    - The withholding rate is 1.1%.
    - The taxable wage limit is $145,600 for each employee per calendar year.

Colorado

- The Unemployment Insurance wage base limit changes to $17,000 for 2022.
- Colorado withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.
- Effective January 1, 2022, you can file withholding taxes for employees using form DR 0004 (Colorado Employee Withholding Certificate). To do so, on the Employee Payroll window specify a filing status of **None - form DR 0004 used instead**, and then specify the amount from the form in the **Amt from line 2 on form DR 0004** field which appears.

Connecticut

For the Connecticut Paid Family and Medical Leave plan, the wage base limit changes to $147,000 for 2022.

For more information, including details about setting up payroll codes, see Sage Knowledgebase article 108247.

Georgia

Georgia withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

Hawaii

The Unemployment Insurance wage base limit changes to $51,600 for 2022.

Idaho

The Unemployment Insurance wage base limit changes to $46,500 for 2022.

Indiana

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

Code	Description	Rate	Effective Date
IN0007	Warrick 87 CO Regular (NR) IT	1%	10/1/2021
IN0034	Owen 60 CO Regular (NR) IT	2.5%	10/1/2021
IN0098	Warrick 87 CO Regular IT	1%	10/1/2021
IN0125	Owen 60 CO Regular IT	2.5%	10/1/2021

Iowa

- The Unemployment Insurance wage base limit changes to $34,800 for 2022.
- Iowa withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

Kentucky

- The Unemployment Insurance wage base limit changes to $11,100 for 2022.
- The following local taxes have either been added or have updated rates in the supported tax tables:

Code	Description	Rate	Effective Date
KY0044	Daviess CO Regular IT	1%	1/1/2022
KY0268	Glendale Megasite TD Regular IT	1%	1/1/2022

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

Code	Description	Wage Base Limit	Effective Date
KY0009	Highland Heights CT Regular IT	$147,000	1/1/2022
KY0013	Newport CT Regular IT	$147,000	1/1/2022
KY0020	Florence CT Regular IT	$147,000	1/1/2022
KY0022	Crestview Hills CT Regular IT	$147,000	1/1/2022
KY0023	Covington CT Regular IT	$147,000	1/1/2022

Code	Description	Wage Base Limit	Effective Date
KY0024	Cold Spring CT Regular IT	$147,000	1/1/2022
KY0027	Boone CO Regular IT	$67,179	1/1/2022
KY0029	Alexandria CT Regular IT	$147,000	1/1/2022
KY0093	Wilder CT Regular IT	$147,000	1/1/2022
KY0096	Warsaw CT Regular IT	$147,000	1/1/2022
KY0161	Jackson CT Regular IT	$147,000	1/1/2022
KY0178	Fort Wright CT Regular IT	$147,000	1/1/2022
KY0188	Edmonton CT Regular IT	$147,000	1/1/2022

Maine

Maine withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

Massachusetts

For 2022, there are changes for Massachusetts Paid Family Leave, and there is a new Massachusetts Paid Medical Leave. Refer to the state publication for more details.

For details about setting up related local tax codes, see Sage Knowledgebase article 95277.

Michigan

Michigan withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

Minnesota

The Unemployment Insurance wage base limit changes to $38,000 for 2022.

Missouri

Missouri withholding tables and instructions, including rates on supplemental wages, have been updated for 2022. Refer to the state publication for more details.

Montana

The Unemployment Insurance wage base limit changes to $38,100 for 2022.

Nebraska

Nebraska withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

Nevada

The Unemployment Insurance wage base limit changes to $36,600 for 2022.

New Jersey

- The Unemployment Insurance wage base limit changes to $39,800 for 2022.
- State disability insurance tax information is updated for 2022. Effective for wages paid on or after January 1, 2022:
    - For employees:
        - The Disability Insurance rate is 0.14%.
        - The Family Leave Insurance rate is 0.14%.
        - The taxable wage limit is $151,900 for each employee per calendar year.
    - For employers:
        - The Disability Insurance rate is set by the state for each employer individually.
        - The taxable wage limit is $39,800 for each employee per calendar year.

For more information about setting up state disability and family leave insurance taxes for 2022, see Sage Knowledgebase articles 102273 and 108199.

New Mexico

- The Unemployment Insurance wage base limit changes to $28,700 for 2022.
- New Mexico withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

New York

- The Unemployment Insurance wage base limit changes to $12,000 for 2022.

- New York withholding tables and instructions, including rates on supplemental wages, have been updated for 2022. Refer to the state publication for more details.

- City of Yonkers Income Tax and instructions, including rates on supplemental wages, have been updated for 2022. Refer to the state publication for more details.

- There are changes for New York Paid Family Leave for 2022. Refer to the state publication for more details.

  For details about setting up related local tax codes, see Sage Knowledgebase article 88150.

North Carolina

North Carolina withholding tables and instructions, including rates on supplemental wages, have been updated for 2022. Refer to the state publication for more details.

North Dakota

- The Unemployment Insurance wage base limit changes to $38,400 for 2022.

- North Dakota withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

Ohio

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

Code	Description	Rate	Effective Date
OH0286	Riverside CT Regular IT	2.5%	1/1/2022
OH0466	Hilliard CT Regular IT	2.5%	1/1/2022
OH0490	Powell VI Regular IT	2%	1/1/2022
OH0595	Preble Shawnee 6804 SD Regular IT	1.75%	1/1/2022
OH1034	Sidney 7508 SD Regular IT	0.75%	1/1/2022
OH1035	Pike-Delta-York 2605 SD Regular IT	1%	1/1/2022
OH1036	Sharon TP JEDD CT Regular IT	2.5%	10/1/2021
OH1037	Etna-Reynoldsburg JEDD 7 CT Regular IT	2%	8/31/2021
OH1038	Lockington VI Regular IT	1%	1/1/2022
OH1039	Nashville VI Regular IT	1%	1/1/2022

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

Code	Description	Wage Base Limit	Effective Date
OH0891	Green TP JEDD II CT Regular IT	$118,712	1/1/2022
OH0892	Green TP Western Ridge JEDD CT Regular IT	$125,323	1/1/2022
OH0948	Harrison Greene JEDD IV CT Regular IT	$115,343	1/1/2022
OH0971	UDF-North Bend JEDD V CT Regular IT	$111,193	1/1/2022
OH1007	McAlisters JEDD VI CT Regular IT	$108,693	1/1/2022

Oklahoma

- The Unemployment Insurance wage base limit changes to $24,800 for 2022.

- Oklahoma withholding tables and instructions, including rates on supplemental wages, have been updated for 2022. Refer to the state publication for more details.

Oregon

- The Unemployment Insurance wage base limit changes to $47,700 for 2022.

- Oregon withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

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

Code	Description	Rate	Effective Date
OR0005	Tri-Met Transit District Excise Tax	0.7937%	1/1/2022
OR0006	Lane County Transit District Excise Tax	0.77%	1/1/2022

- The following local taxes which previously existed in supported tax tables must now be set up as custom taxes:
  - Portland Metro Supportive Housing Services Income Tax
  - Multnomah County Preschool for All Personal Income Tax

For more information, see Sage Knowledgebase article 111399.

Pennsylvania

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

Code	Description	Rate	Effective Date
PA7848	Milford BO, Delaware Valley SD (NR) Regular IT	1%	10/1/2021
PA7849	Milford BO, Delaware Valley SD Regular IT	1%	10/1/2021

Rhode Island

Rhode Island withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

South Carolina

South Carolina withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

Utah

The Unemployment Insurance wage base limit changes to $41,600 for 2022.

Washington

- The Unemployment Insurance wage base limit changes to $62,500 for 2022.

- For quarterly reports, you are now required to report an occupational code for each employee. You do so on the **Employee Supplemental Information** window, in the **Occupational Code** field.

- Effective January 1, 2022, a new Washington Cares Fund Tax (WA0004) of 0.58% applies to employees working in Washington, except those who are exempt.

- There are changes for Washington Paid Family and Medical Leave for 2022.

  Also, you are now required to indicate if a person is exempt from the WA Cares Tax. You specify this on the **Employee Supplemental Information** window using FML-WA as the reporting authority ID. You must also set up a new local tax code.

  For more information, including details about setting up related local tax codes, see Sage Knowledgebase article 95277.

- Effective January 1, 2022, there are changes to the payroll expense tax for businesses that operate in Seattle. For more information, see Sage Knowledgebase article 108679.

Wisconsin

Wisconsin withholding tables and instructions have been updated for 2022. Refer to the state publication for more details.

Product updates

The following product updates are included with this release.

Payroll product updates

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

Add Comments for Employees

The Employee Payroll window has a new **Comments** tab where you can enter comments for employees. You can include these comments on the Employee Information Report.

You can enter a follow-up date for each comment. To set up your system so default follow-up dates are automatically entered, specify a number of days in the **Default Number of Days for Follow Up on Employee Comments** field on the Payroll Options window.

Save settings for calculating payroll

On the Calculate Payroll window, you can now save your settings so they will be used by default the next time you open the window. Saved settings are personal to each Sage 300 user, so each user can save different defaults.

To save your settings, right-click on the Calculate Payroll window to bring up the menu. Click on **Save Settings as Default** on the **Settings** menu. (You can also clear your saved settings, by clicking **Clear Saved Settings** on the same menu.)

Streamlined process for getting to Pre-Check Payroll Register after calculating payroll

After calculating payroll, an improved "processing completed" message appears, which allows you to open the Pre-Check Payroll Register window directly, instead of having to open the window from the desktop. The improved message also allows you to print a report of processing exceptions (if there were any).

Fix for Employee Activity and Transaction History

We have fixed two similar problems that occurred for employees with certain specific employee numbers. For these employees:

- On the Employee Activity window, check information is now displayed on the Checks tab.
- On the Transaction History window, Finders work correctly in the tables on the Earnings/Deductions tab and the Taxes tab.

Fix for reversed checks on Form 941

If you reverse a check that was paid in a previous quarter, the amount of the reversed check is not included on the 941 for the current quarter.

Fix for printing Aatrix forms

We have fixed a problem that occurred when printing Aatrix forms if you were signed in to Microsoft Windows as a user without administration security rights, which caused a message to appear asking you to allow the **AatrixForms** app to make changes to your device.

Sage HRMS product updates

Employee Benefits

Fixed an issue where the Employee Insurance Benefits UI would hang or crash when adding or deleting benefits for certain employees. This issue would occur for employees that had dependents or beneficiaries assigned and the employee was transferred to another company with Cross Employer Transfer.

Calculate Payroll

Fixed an issue where the system could crash after calculating payroll if the machine's date format is set to yyyy-MM-dd.

Attendance Summary

Fixed an issue where Attendance Summary UI could give a Runtime Error when clicking on the + sign to select a plan.

Salary As of Report

Fixed an issue where "Salary As of Report" would crash HRMS if a job code is not selected on the **Specific Criteria** tab.

Sage HRMS Employee Self Service product updates

This update is for the Subscription version of Employee Self Service. There are no updates for perpetual products.

Master User role changes

The master user role pages have been completely redesigned to improve usability and provide consistency with the other roles in the Sage HRMS Employee Self Service product.

Modern and improved Mobile experience

The interface for "ESS Mobility" (Mobile version of the Sage HRMS Employee Self Service application) has been completely redesigned to improve usability and provide consistency with other modern Sage Mobile products.

Improvements to the user experience

- Required fields are indicated with an asterisk (*).

- Buttons are enabled when all required fields have been filled.

- Error messages are displayed under the appropriate field.

Responsive Design

The pages in ESS Mobility are responsive to the user's smart device

Message Center

After logging in, the Message Center will be displayed. Managers will be able to approve or reject Time Off Requests.
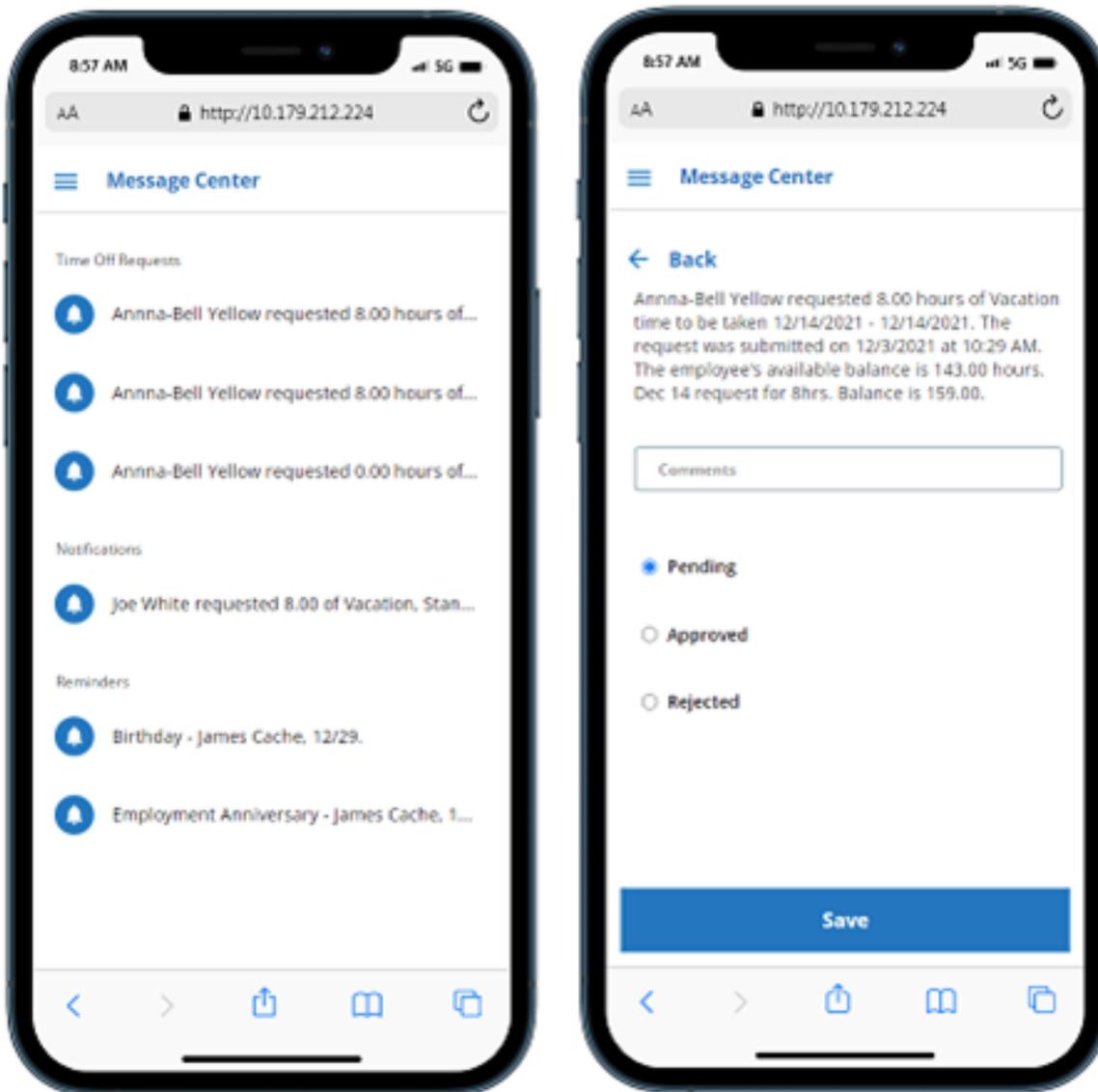
Hamburger icon

The hamburger ☰ is visible at the top left. When selected, it will open into a side menu.

Log off

"Log off" is now located on the top right of the menu.

Time Off

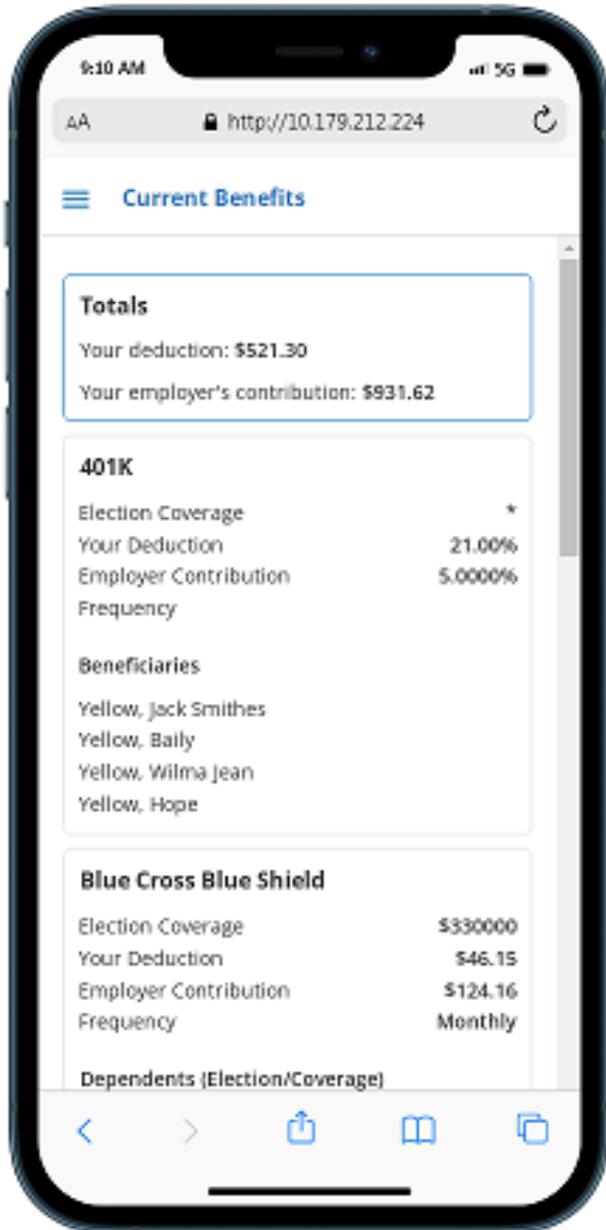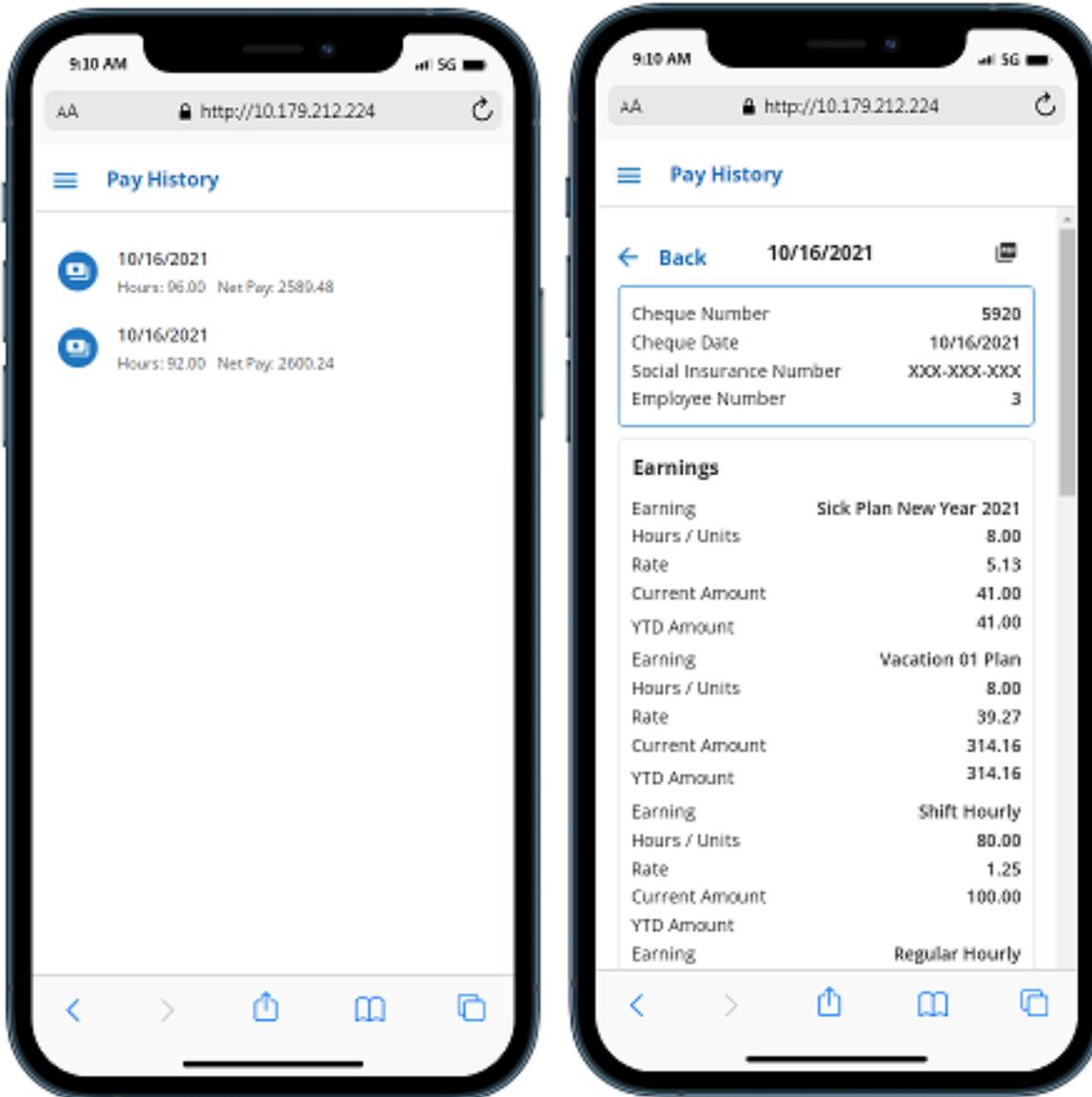Time Off Balance is now displayed in the dropdown list for each plan.

Current Benefits

Improved layout design with the employee's Total amounts at the top of the page.

Pay History

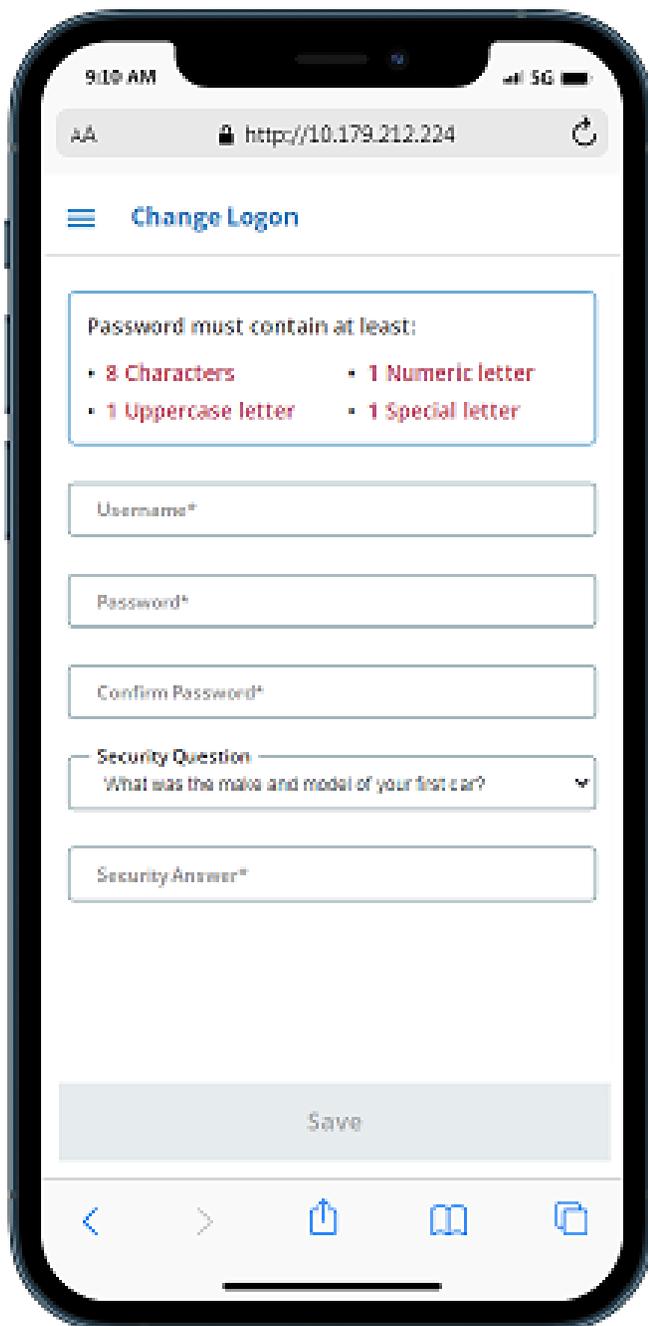Improved layout design with the employee's check information at the top of the page.

Change Logon page

The Change Logon page is now available in the mobile version.

Password requirements setup by the admin are displayed at the top of the page in red text.

When your password meets a requirement, the text for the requirement will turn from red to black.

Sage 100 Payroll Link updates

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

My Workforce Analyzer updates

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

Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage HRMS. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Payroll** > **Government Reports** > **Federal Tax Filing** or **State Tax Filing**. You will be prompted to register your organization with Sage Payroll Tax Forms and eFiling by Aatrix. After registering, you have the option to enroll your company (or companies) in the eFiling service.

For a detailed overview and a price structure of the Sage Payroll Tax Forms and eFiling by Aatrix options, visit our website here:

https://partner.aatrix.com/partners/sagehrms

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 2022 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:

- Printing and filing W-2 forms
- Entering employee supplemental information
- Information about processing year-end 2021 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- Preparing for your first payroll of 2022

Sage HRMS update installation instructions

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

Before you start:

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

Downloading the product update

To download the update:

1. Visit the **Sage Support Resources** page at https://www.sagecity.com/global-resources.
2. Select your **Country or Region** from the drop-down list.
3. Select **Sage HRMS** from the **Products** drop-down list.
4. In the **Solve** tile, click the **Search Sage Knowledgebase** link.
5. Click **Sign In**, and then sign into the site.
6. In the Support by product section, click **Select your product**, and then click **more products**.
7. Under Sage HRMS, click your product and version.
8. In the **Latest updates** section, click an update to download.
9. In the article, click **Download Now** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

Installing the product update

To install the product update:

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

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

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

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

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

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

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

4. Click **Update**.

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

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

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

Updating Sage HRMS client files

To update Sage HRMS client files:

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

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

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

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

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

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

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: January 1, 2022.

> **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.

Sage HRMS Employee Self Service update installation instructions

> **Note:** This modernization release of Sage HRMS Employee Self Service is only for customers on the subscription version of Sage HRMS. If you are not on subscription, please contact either your Sage Business Partner or Sage Account Manager for information on your options for moving to subscription.

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 **Solve** tile, click the **Search Sage Knowledgebase** link.
5. Click **Sign In**, and then sign into the site.
6. In the Support by product section, click **Select your product**, and then click **more products**.
7. Under Sage HRMS, click your product and version.
8. In the **Latest updates** section, click an update to download.
9. In the article, click **Download Now** to launch the Sage Download Manager, or click the **direct download** link to download the executable file.

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.