

# Sage HRMS

## Q4 2022 Release Notes

December 2022

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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 2022

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 2022.
- **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](http://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 2023

The IRS released draft withholding and allowance amount tables for wages paid on or after January 1, 2023.

### Social Security Wage Base Changes for 2023

For 2023, the maximum amount of earnings subject to the Social Security tax (taxable maximum) is \$160,200.

## 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.

## Alabama

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



Code	Description	Rate	Effective Date
AL0034	Irondale CT Regular IT	0.75%	10/1/2022

## Arizona

- The Unemployment Insurance wage base limit changes to \$8,000 for 2023.
- Arizona withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.
- Effective January 1, 2023, withholding tax rates will be changing. For more information, see Knowledgebase article [117850](#).

## Arkansas

Effective October 1, 2022, Arkansas withholding tables and instructions, including rates on supplemental wages, have been updated for 2023. Refer to the state publication for more details.

## California

- California withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.
- State disability insurance tax (CASDI) information is updated for 2023. Effective for wages paid on or after January 1, 2023:
  - The withholding rate is 0.9%.
  - The taxable wage limit is \$153,164 for each employee per calendar year.

## Colorado

- The Unemployment Insurance wage base limit changes to \$20,400 for 2023.
- Colorado withholding tables and instructions, including rates on supplemental wages, have been updated for 2023. Refer to the state publication for more details.
- A new Colorado Paid Family and Medical Leave plan will be effective January 1, 2023. For more information, including details about setting up deduction codes, see Sage Knowledgebase article [95277](#).

## Connecticut

For the Connecticut Paid Family and Medical Leave plan, the wage base limit changes to \$160,200 for 2023.

For more information, including details about setting up payroll codes, see Sage Knowledgebase article [108247](#).

## District of Columbia

Effective January 1, 2022, District of Columbia withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## Hawaii

The Unemployment Insurance wage base limit changes to \$56,700 for 2023.

## Idaho

The Unemployment Insurance wage base limit changes to \$49,900 for 2023.

## Indiana

- Indiana withholding tables and instructions have been updated for 2023. 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
IN0040	Monroe 53 CO Regular (NR) IT	2.035%	10/1/2022
IN0047	LaPorte 46 CO Regular (NR) IT	1.45%	10/1/2022
IN0051	Knox 42 CO Regular (NR) IT	1.7%	10/1/2022
IN0052	Johnson 41 CO Regular (NR) IT	1.4%	10/1/2022
IN0087	Boone 06 CO Regular (NR) IT	1.7%	10/1/2022
IN0132	Monroe 53 CO Regular IT	2.035%	10/1/2022
IN0139	LaPorte 46 CO Regular IT	1.45%	10/1/2022
IN0143	Knox 42 CO Regular IT	1.7%	10/1/2022
IN0144	Johnson 41 CO Regular IT	1.4%	10/1/2022
IN0179	Boone 06 CO Regular IT	1.7%	10/1/2022

- Effective January 1, 2023, there is a new Adopted child dependent exemption. To do so, on the Payroll Employees window, enter the number per qualifying adopted child at the **Adopted Child** field.

## Iowa

- The Unemployment Insurance wage base limit changes to \$36,100 for 2023.
- Iowa withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## Kentucky

- The Unemployment Insurance wage base limit changes to \$11,100 for 2023.
- Kentucky withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.
- Wage base limits have been updated for the following local taxes:

Code	Description	Wage Base Limit	Effective Date
KY0009	Highland Heights CT Regular IT	\$160,200	1/1/2023
KY0013	Newport CT Regular IT	\$160,200	1/1/2023
KY0020	Florence CT Regular IT	\$160,200	1/1/2023
KY0022	Crestview Hills CT Regular IT	\$160,200	1/1/2023
KY0023	Covington CT Regular IT	\$160,200	1/1/2023
KY0024	Cold Spring CT Regular IT	\$160,200	1/1/2023
KY0027	Boone CO Regular IT	\$72,906	1/1/2023
KY0029	Alexandria CT Regular IT	\$160,200	1/1/2023
KY0093	Wilder CT Regular IT	\$160,200	1/1/2023
KY0096	Warsaw CT Regular IT	\$160,200	1/1/2023
KY0161	Jackson CT Regular IT	\$160,200	1/1/2023
KY0178	Fort Wright CT Regular IT	\$160,200	1/1/2023
KY0188	Edmonton CT Regular IT	\$160,200	1/1/2023

- Effective July 1, 2022, the following local tax has been expired:

Code	Description
KY0204	Breathitt CO Regular IT

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

Code	Description	Rate	Effective Date
KY0242	Olive Hill CT Regular IT	2%	10/1/2022
KY0272	Union CT Regular IT	2%	1/1/2023

## Maine

Maine withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## Massachusetts

For the Massachusetts Paid Family and Medical Leave plan, the wage base limit changes to \$160,200 for 2023.

For more information, including details about setting up payroll codes, see Sage Knowledgebase article [95277](#).

## Minnesota

- The Unemployment Insurance wage base limit changes to \$40,000 for 2023.
- Minnesota withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## Mississippi

Mississippi withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## Missouri

- The Unemployment Insurance wage base limit changes to \$10,500 for 2023.
- Missouri withholding tables and instructions, including rates on supplemental wages, have been updated for 2023. Refer to the state publication for more details.

## Montana

- The Unemployment Insurance wage base limit changes to \$40,500 for 2023.
- Montana withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## Nebraska

Nebraska withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## Nevada

The Unemployment Insurance wage base limit changes to \$40,100 for 2023.

## New Jersey

- The Unemployment Insurance wage base limit changes to \$41,100 for 2023.
- State disability insurance tax information is updated for 2023. Effective for wages paid on or after January 1, 2023:
  - The disability insurance rate is 0%.
  - The family leave insurance rate is 0.06%.
  - The taxable wage limit is \$156,800 for each employee per calendar year. For more information, see Sage Knowledgebase articles [102273](#) and [108199](#).

## New Mexico

- The Unemployment Insurance wage base limit changes to \$30,100 for 2023.
- New Mexico withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## New York

- The Unemployment Insurance wage base limit changes to \$12,300 for 2023.
- New York withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.
- City of Yonkers withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.
- There are changes for New York Paid Family Leave for 2023. Refer to the state publication for more details. For more information, see Sage Knowledgebase article [88150](#).

## North Dakota

North Dakota withholding tables and instructions have been updated for 2023. Refer to the state publication for more details

## Ohio

- Effective December 31, 2022, the following local tax has been expired:

Code	Description
OH0816	Wilmington 1404 SD Regular IT

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

Code	Description	Rate	Effective Date
OH0144	Beverly VI Regular IT	1.25%	1/1/2023
OH0162	Tuscarawas VI Regular IT	1.5%	1/1/2023
OH0279	Mt Gilead VI Regular IT	1.25%	1/1/2023
OH0285	Trotwood CT Regular IT	2.75%	1/1/2023
OH0456	Archbold VI Regular IT	1.8%	1/1/2023
OH0479	Lancaster CT Regular IT	2.3%	1/1/2023
OH0526	North Lewisburg VI Regular IT	1.75%	1/1/2023
OH0544	Athens CT Regular IT	1.95%	1/1/2023

Code	Description	Rate	Effective Date
OH0638	Arlington 3202 SD Regular IT	1.75%	1/1/2023
OH1045	Deer Park-Sycamore TP JEDD CT Regular IT	0.75%	4/19/2022
OH1046	Wauseon 2607 SD Regular IT	1.75%	1/1/2023
OH1047	Shalersville TP JEDD CT Regular IT	2%	12/1/2022
OH1048	Hampton Inn JEDD VII CT Regular IT	2%	10/7/2022
OH1049	Valley View JEDD CT Regular IT	1.5%	10/24/2022
OH1050	Rutland VI Regular IT	1%	1/1/2023
OH1051	Fayetteville VI Regular IT	1%	1/1/2023

- 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	\$128,446	1/1/2023
OH0892	Green TP Western Ridge JEDD CT Regular IT	\$135,599	1/1/2023
OH0948	Harrison Greene JEDD IV CT Regular IT	\$124,801	1/1/2023
OH0971	UDF-North Bend JEDD V CT Regular IT	\$120,311	1/1/2023
OH1007	McAlisters JEDD VI CT Regular IT	\$117,605	1/1/2023
OH1045	Deer Park-Sycamore TP JEDD CT Regular IT	\$120,344	4/19/2022

## Oklahoma

The Unemployment Insurance wage base limit changes to \$25,700 for 2023.

## Oregon

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

Code	Description	Rate	Effective Date
OR0005	Tri-Met Transit District Excise Tax	0.8037%	1/1/2023
OR0006	Lane County Transit District Excise Tax	0.78%	1/1/2023

- The Unemployment Insurance wage base limit changes to \$50,900 for 2023.
- A new Oregon Paid Family and Medical Leave plan will be effective January 1, 2023. For more information, including details about setting up deduction codes, see Sage Knowledgebase article [117849](#).

## Pennsylvania

The following local tax codes have been expired:

Code	Description	Rate	Effective Date
PA1452	Winfield TP, South Butler SD (NR) LST	Expired	7/1/2022
PA1625	Clinton TP, South Butler SD (NR) LST	Expired	7/1/2022
PA2347	Saxonburg BO, South Butler SD (NR) LST	Expired	7/1/2022
PA2348	Penn TP, South Butler SD (NR) LST	Expired	7/1/2022
PA2438	Jefferson TP, South Butler SD (NR) LST	Expired	7/1/2022
PA6811	Winfield TP, South Butler SD (NR) Regular IT	Expired	7/1/2022
PA6812	Winfield TP, South Butler SD Regular IT	Expired	7/1/2022
PA7023	Saxonburg BO, South Butler SD (NR) Regular IT	Expired	7/1/2022
PA7024	Saxonburg BO, South Butler SD Regular IT	Expired	7/1/2022
PA7099	Penn TP, South Butler SD (NR) Regular IT	Expired	7/1/2022
PA7100	Penn TP, South Butler SD Regular IT	Expired	7/1/2022
PA7289	Jefferson TP, South Butler SD (NR) Regular IT	Expired	7/1/2022
PA7290	Jefferson TP, South Butler SD Regular IT	Expired	7/1/2022



Code	Description	Rate	Effective Date
PA7553	Clinton TP, South Butler SD (NR) Regular IT	Expired	7/1/2022
PA7554	Clinton TP, South Butler SD Regular IT	Expired	7/1/2022

Expired codes			Replaced with new codes	
Code	Description	Rate	Code	Description
PA7554	Clinton TP, South Butler SD Regular IT	1%	PA7948	Clinton TP, Knoch SD Regular IT
PA7553	Clinton TP, South Butler SD (NR) Regular IT	0	PA7949	Clinton TP, Knoch SD (NR) Regular IT
PA1625	Clinton TP, South Butler SD (NR) LST	\$52	PA7950	Clinton TP, Knoch SD (NR) LST
PA7290	Jefferson TP, South Butler SD Regular IT	1%	PA7951	Jefferson TP, Knoch SD Regular IT
PA7289	Jefferson TP, South Butler SD (NR) Regular IT	0	PA7952	Jefferson TP, Knoch SD (NR) Regular IT
PA2438	Jefferson TP, South Butler SD (NR) LST	\$52	PA7953	Jefferson TP, Knoch SD (NR) LST
PA7100	Penn TP, South Butler SD Regular IT	1%	PA7954	Penn TP, Knoch SD Regular IT
PA7099	Penn TP, South Butler SD (NR) Regular IT	0	PA7955	Penn TP, Knoch SD (NR) Regular IT

Expired codes			Replaced with new codes	
Code	Description	Rate	Code	Description
PA2348	Penn TP, South Butler SD (NR) LST	\$52	PA7956	Penn TP, Knoch SD (NR) LST
PA7024	Saxonburg BO, South Butler SD Regular IT	1%	PA7957	Saxonburg BO, Knoch SD Regular IT
PA7023	Saxonburg BO, South Butler SD (NR) Regular IT	0	PA7958	Saxonburg BO, Knoch SD (NR) Regular IT
PA2347	Saxonburg BO, South Butler SD (NR) LST	\$52	PA7959	Saxonburg BO, Knoch SD (NR) LST
PA6812	Winfield TP, South Butler SD Regular IT	1%	PA7960	Winfield TP, Knoch SD Regular IT
PA6811	Winfield TP, South Butler SD (NR) Regular IT	0	PA7961	Winfield TP, Knoch SD (NR) Regular IT
PA1452	Winfield TP, South Butler SD (NR) LST	\$52	PA7962	Winfield TP, Knoch SD (NR) LST

## South Carolina

South Carolina withholding tables and instructions, including rates on supplemental wages, have been updated for 2023. Refer to the state publication for more details.

## Utah

The Unemployment Insurance wage base limit changes to \$44,800 for 2023.

## Vermont

The Unemployment Insurance wage base limit changes to \$13,500 for 2023.

## Virginia

Effective 10/1/2022, Virginia withholding tables and instructions have been updated for 2023. Refer to the state publication for more details.

## Washington

- The Unemployment Insurance wage base limit changes to \$67,600 for 2023.
- There are changes for Washington Paid Family and Medical Leave for 2023.

For more information, including details about setting up related local tax codes, see Sage Knowledgebase article [95277](#).

- Effective January 1, 2023, there are changes to the payroll expense tax for businesses that operate in Seattle. For more information, see Sage Knowledgebase article [108679](#).

## Wyoming

The Unemployment Insurance wage base limit changes to \$29,100 for 2023.

# Product updates

The following product updates are included with this release.

## Payroll product updates

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

## Sage HRMS product updates

The following changes to Sage HRMS are included with this update.

### Duplicate SSN Report buttons are cut off

Fixed an issue on the Duplicate SSN Report where the Print and Cancel buttons were not showing on the UI.

### Carryover amount showing zero after process time off is run

Fixed an issue where carryover and accrued values on the **Employee Attendance Summary** page were not being updated correctly from Payroll. This would happen when **Process Time Off** was run for Time Off Plans that were set to Use Payroll Accruals.

## Sage HRMS Employee Self Service product updates

The following new features and improvements included in this release of Sage HRMS Employee Self Service are for the premium version only of Sage HRMS.

### Sage HRMS Employee Self Service - Provide the ability to see all enrollments that are available to approve

Added the ability to select multiple Employers tied to an Open Enrollment period. This feature will allow the Benefit Admin to Approve all employees with a Pending Open Enrollment status from all selected companies. There is also the ability to “Select All” or “Deselect All” Employers. Previously you could only do this for one company at a time.

## Sage HRMS Employee Self Service - Provide the ability to see all Life Events that are available to approve

Added the ability to select multiple Employers when approving life events. By default, all employers will be selected and there is now a "Select All" and "Deselect All" option to select all or deselect all employer selections. Previously you could only do this for one company at a time.

## Sage HRMS Employee Self Service - Provide the ability hide Gender and Gender Identity

Administrators now have the ability to show or hide "Gender" and "Gender Identity" fields on the Personal Profile page. These settings are in the Employer Setup page. The new settings are "Display Gender Field" and "Display Gender Identity Field". Select "Yes" to allow employees to see the field. Select "No" if you do not want the employee to see the field.

## Sage HRMS Employee Self Service - Provide the ability to add attachments in Time Off

Employees can now add attachments when requesting time off. Assigned Approvers can view the attachment and approve or reject the request. While approving the request through the manager Time Off page, the manager can update the Attachment codes for the attachments added by the employee for the request.

## Benefit Codes with spaces are not displaying correctly in Sage HRMS Employee Self Service

An issue where plan information would not expand on the Current Benefits page when there is a space in the benefit code has been resolved.

## After upgrade to Q3 Sage ESS still display widgets when set to No Access for employee and manager

Fixed an issue where the home page widgets were showing when the administrator did not allow any page access for employees. All widgets now also respect the security set by administrator for the menu items.

The following fix is included with this update to Sage HRMS Employee Self Service.

### Benefit Admins cannot save Life Events with a Waiver Required when upgrading to Q3

Fixed an issue where the Benefit Admin was not able to save a Life Event when a Waiver was required on a pending benefit.

## 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 2023 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 2022 reports and forms with Sage Payroll Tax Forms and eFiling by Aatrix
- Preparing for your first payroll of 2023



# 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 **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.

## 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 1, 2023.

**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.

# 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.