Sage HRMS

Q3 2022 Release Notes

September 2022

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 Q3 2022

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

- **Customer Support:** For support resources, visit the Sage City Customer Resources page, select your country, and then select your product.

U.S. 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.

Pennsylvania

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

Code	Description	Rate	Effective Date
PA0794	Rome TP, Titusville SD (NR) LST	$10	1/1/2022

Code	Description	Rate	Effective Date
PA4774	Spring Creek TP, Ridgeway SD Regular IT	1.23%	7/1/2022
PA4778	Ridgway TP, Ridgway SD Regular IT	1.23%	7/1/2022
PA4780	Ridgway BO, Ridgway SD Regular IT	1.40%	7/1/2022
PA4794	Horton TP, Ridgway SD Regular IT	1.23%	7/1/2022
PA5743	Reading CT, Reading SD (NR) Regular IT	1%	7/1/2022
PA7093	Philadelphia CT, Philadelphia City SD (NR) Regular IT	3.44%	7/1/2022
PA7094	Philadelphia CT, Philadelphia City SD Regular IT	3.79%	7/1/2022
PA7855	Morrisville BO, Morrisville SD (NR) Regular IT	1%	7/1/2022
PA7856	Morrisville BO, Morrisville SD Regular IT	1%	7/1/2022

Ohio

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

Code	Description	Rate	Effective Date
OH1041	Burbank VI Regular IT	1%	7/1/2022
OH1042	Jefferson TP-Washington CH JEDD CT Regular IT	1.95%	5/18/2020
OH1043	Burton VI-Burton TP JEDD CT Regular IT	1%	8/1/2022
OH1044	Chickasaw VI Regular IT	1%	10/1/2022

Kentucky

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

Code	Description	Rate	Effective Date
KY0108	Shepherdsville CT Regular IT	2%	7/1/2022
KY0148	Madisonville CT Regular IT	2.50%	7/1/2022
KY0167	Harrodsburg CT Regular IT	1.50%	10/1/2022
KY0190	Dayton CT Regular IT	2.50%	7/1/2022

- KY0204 tax has been repealed. For more information, see Sage Knowledgebase article 116770.

Idaho

Idaho withholding tables and instructions, including rates on supplemental wages, 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

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.

Vets 4212 Form

The Vets 4212 Form has been updated to show the current year.

Sage Payroll Link Open Payroll with Cost Centers

Fixed an issue where an error was being displayed after closing the report at the end of the Open Payroll process when Cost Center Overrides were set to Expense Accounts. This change applies to the Integrated version of the Sage Payroll Link.

Sage HRMS Code Table Changes

This applies to Canadian Employers. Fixed an issue where Type of Consent dropdown on the PIPEDA Consent tab of the Demographics page was incorrectly showing "Not in Code Table".

Employee HR Status

The length of the available characters in the Recruiter and the Source of Hire fields on the employee HR Status page has been increased to 50 characters from 25. In addition, the Source of Hire field will now accept spaces and special characters and allow multiple rows of text as well.

Microsoft Windows Server 2022 Compatibility

Sage HRMS and Sage Employee Self Service have now added support for Microsoft Windows Server 2022.

Employee On Leave as of date

Fixed an issue where the On Leave as of date was blank after assigning an employee to a Leave of Absence and then navigating to the previous or next employee from the Demographic page. If the Actual Return date is entered and the Employee Status is not changed to Active, the 'as of' date will be blank per the feature's design.

Sage HRMS Employee Find Update

The employee Preferred Name field has been added to both the Employee Quick Find and Employee Advanced Find in Sage HRMS. When using the Quick Find, you may now search using the employee's id, first name, last name or preferred name. The First name field in the Employee Advanced Find can be used to search for the employee's first name or preferred name. The Preferred Name is now also included in the results header row as a column for the Quick Find.

Note: This change only applies to the premium version of Sage HRMS.

Dependents Rates

Fixed an issue where the dependents rates on a benefit plan would be updated incorrectly when adding or updating a dependent on a Benefit Plan. This could happen when the Benefit Plan is setup to use Rate Tables.

Note: This change only applies to the premium version of Sage HRMS.

Sage HRMS Employee Self Service product updates

The following fixes are included with this update to Sage HRMS Employee Self Service.

Open Enrollment / Life Event Coverage End Dates

Fixed an issue where the Employee's Coverage End Date was incorrectly being updated during an Open Enrollment or Life Event. This would happen if the Benefit Plan was setup as a Dependent Only Plan.

Open Enrollment / Life Event Waived Benefit Records

When an employee Waives Coverage on a Benefit Plan during Open Enrollment or a Life Event, the Benefit Plan will now be available on the employee's Insurance Benefit page and will display the Waive Date on the plan.

Salary Grade Settings in Employee Self Service

The employee's Compensation History grid will now respect the Display Salary Grade and Min/Max/Mid System Setting. This also applies to the Employee's current Compensation detail page. Previously, the Compensation History grid always displayed the Salary Grade column.

Employee Self Service Compensation History Annual Pay

Fixed an issue where the Annual Pay amount was not being displayed correctly when updating an employee's pay information in Job History. The employee's Compensation History records in Sage HRMS Employee Self Service will now display the correct Annual Pay amount.

Employee Self Service Login screen refreshes after being idle

The Sage Employee Self Service Logon page will now respond immediately to Logon attempts regardless if the page has been inactive or idle. Previously, the page would refresh and return you to the Logon screen after clicking the Logon button. Valid Employee Self Service users will now be logged on with their first attempt.

Additional features in this release for the premium version of Sage HRMS Employee Self Service

Employee Leave of Absence Page Change

Employee FMLA Event records will display the FMLA Reason, such as a Birth of Child as the Leave Reason on the employee's Leave of Absence summary page. The Leave of Absence detail page will provide additional information regarding the FLMA Leave.

Employee Self Service Logon Maintenance page load improvement

The Sage Employee Self Service Logon Maintenance page has been enhanced to load quicker.

Employee Length of Service page

Fixed an error when accessing the employee Length of Service page when the Display Home Page setting in System Setup is set to "No".

Manager Widgets in Employee Self Service

Fixed an issue where the Manager widgets in Employee Self Service were not displaying correctly if Employee Self Service was accessed using single sign-on directly from the employee's record in Sage HRMS.

Custom Files and Links in Life Events

Fixed an issue where the Related Links were not displaying correctly for Open Enrollment periods and Life Events.

Sage 100 Payroll Link updates

The changes below are included in this release for customers on the premium version of Sage HRMS.

Sage 100 Labor Codes

In Sage HRMS, if the Labor Code is not mapped to a Job Code, Sage 100 Payroll Link will not update the Sage 100 Labor Code. In this scenario, Job Category which is internally mapped to EEO class will not be updated either. Values for these fields will remain what they were in Sage 100 Payroll Link.

Sage 100 Transfer Checkboxes

For all four transfer pages in Sage 100 Payroll Link, the automatic transfer checkboxes are now un-checked by default. Now when you click Continue on any of these pages, the report(s) will be presented without transferring the data. To perform the transfer after reviewing this report, select the 'Transfer' checkbox before clicking Continue.

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

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.

> **Note:** If you have not already entered your Sage customer account number on the About Sage HRMS page, the first person who logs in to Sage HRMS after this product update is installed will be required to enter your Sage customer account number.
>
> You can review or change your customer account number in **Help** > **About 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: September 14, 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 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.