



# Sage HRMS

## Q1 2022 Release Notes

March 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 Q1 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.

## Arkansas

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

## Delaware

The Unemployment Insurance wage base limit changes to \$14,500 for 2022.

## Kentucky

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

Code	Description	Rate	Effective Date
KY0018	Hazard CT Regular IT	1.25%	1/1/2021
KY0129	Owenton CT Regular IT	1.5%	1/1/2022
KY0269	Fordsville CT Regular IT	1.25%	1/1/2022
KY0270	Ferguson Blvd TIF TD Regular IT	2%	3/9/2017
KY0271	Boone's Ridge TIF TD Regular IT	2%	5/1/2020

## Maryland

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

Code	Description	Rate	Effective Date
MD3205	St Mary's, Maryland Regular IT	3.1%	1/1/2022
MD3208	Washington, Maryland Regular IT	3%	1/1/2022

## Mississippi

Mississippi 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
OH0796	Brimfield-Kent JEDD CT Regular IT	1.75%	1/1/2022
OH1040	Jenera VI Regular IT	1%	1/1/2022

## Pennsylvania

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

Code	Description	Rate	Effective Date
PA0892	Limestone TP, Clarion-Limestone SD (NR) LST	\$52	1/1/2022
PA0984	Dean TP, Penn Cambria SD (NR) LST	\$52	1/1/2022
PA3297	Meyersdale BO, Meyersdale SD (NR) Regular IT	1%	1/1/2022
PA4772	St Marys CT, St Marys SD Regular IT	1.5%	1/1/2022
PA4780	Ridgway BO, Ridgway SD Regular IT	1.17%	1/1/2022

## Washington

The new Washington Cares Fund Tax (WA0004) will *not* be effective January 1, 2022.

As of March 16, 2022, a revised effective date has not been announced.

## West Virginia

The Unemployment Insurance wage base limit changes to \$9,000 for 2022.

# 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 new features and improvements to Sage HRMS are included with this update.

### Province of Employment

For Canadian Payroll, the Province of Employment and Birth Date are now required fields on the New Hire page and the Demographic page. These fields are necessary for data transfer from HRMS to Sage 300 Payroll.

### Gender Identity

The HR Demographics page and Training Demographics page in HRMS will now display a new drop-down for the Gender Identity field. For all existing Employee Demographics records, the Gender Identity field will be set to the value of "None Specified" when upgrading to this product. When completed, the New Hire process will also set the Gender Identity field to the value of "None Specified." The Gender Identity field has also been added to the Employee Profile Report.

### California Pay Data Reporting

HRMS now supports the California Pay Data EFile Report for both individual and multiple establishments. The California Pay Data Report is required by the California Department of Fair Employment and Housing. The new report is available in the EEO Reports. For more information, see Sage Knowledgebase article [114822](#).

### Windows 11

Sage HRMS has now added support for the Windows 11 operating system.

## Premium version

If you have the premium version of Sage HRMS (previously referred to as Subscription), the following features and improvements are also included in this update.

### Include Taxes for Employees by Default

You can now set up taxes to be included for employees by default when you create new employee records. To do this, specify the following settings:

- US Payroll:

On the Federal and State Taxes window:

- On the Basic Info tab, select the Include for Employees by Default option.
- On the G/L Dist tab, specify Yes in the Default field for a distribution code.

- Canadian Payroll:

On the Income Taxes window:

- On the Basic Info tab, select the Include for Employees by Default option.
- On the G/L Dist tab, specify Yes in the Default field for a distribution code.

**Note:** You must do this even if there is only one distribution code for the tax.

This feature will automatically add any Tax where the "Include for Employees by Default" is checked when the New Hire process is completed.

### Preferred Name

HRMS now supports a Preferred Name for employees, students, and Training Instructors.

Preferred Name has been added to the following HRMS pages and Report:

- Add New Hire
- Employee Demographics
- Rehire Employee
- Training Demographics
- Training Add a New Student
- Training Instructor Codes
- Employee Profile Report

## Attendance Summary

Performance improvement for large datasets when loading the Attendance Summary Screen.

## Quick Find

Increased performance on the Quick Find when searching large datasets.

# Sage HRMS Employee Self Service product updates

The following new features and improvements for the premium version of Sage HRMS Employee Self Service are included with this update. There are no updates for the existing version of Sage HRMS Employee Self Service.

## Employee Personal Profile page

The following two new fields have been added to the Employee Personal Profile page:

- Preferred Name
- Gender Identity

The access level for these new fields is controlled by the Personal Profile section on this page. For example, if the fields in the Personal Profile are set to “View,” these fields will also respect this setting.

## Employee Leave of Absence page

The new Leave of Absence page allows the employee to view information related to any leave of absence request, including the absence reasons (such as jury duty), and other details like the Start Date, the employee’s Scheduled Return Date and the number of work hours (or days) the employee has been on leave. The Leave of Absence page may also display a section for information related to FMLA.

**Note:** To display this page, your system administrator must set access to this page to View (on the Page Setup tab of the Employer Setup page).

## Temporary Approver

Managers can now access the Temporary Approver page directly from the Manager menu.

The Temporary Approver page now allows the user to also remove an Approver that they have previously set.

## ESS Mobile

This update includes the following new features and improvements for ESS Mobile.

## Access by Roles

If a user has been assigned additional roles, such as a manager or administrator, a role menu is displayed at the top of the main menu under the user's name. Employees with only the Employee role will not see this menu.

## Time Off page

The Time Off page has been enhanced with a new summary page displaying color coded time off plans, the balance showing as of today and time off requests per plan.

In addition, employees can continue to schedule time off and edit or delete existing absence transactions. The employee can now also select a specific time off plan and view the following details:

- Balance as of
- Carryover
- Accrued
- Taken
- Requested
- Available (Carryover + Accrued - Taken - Requested = Available)

## New Employee Mobile pages

The Employee menu has been expanded to provide access to the following new pages:

- **Personal Profile.** Make changes to personal data such as preferred name, address, and email address. Depending on the Employer Setup, changes may require approval.
- **Leave of Absence.** Review Leave of Absence information and check Leave of Absence (LOA) status.
- **Job.** Review current and secondary job information.
- **Compensation.** See information about current employment compensation including Annual Pay and Pay Period Salary.
- **Length of Service.** Review information about your service with the company, including original hire date, next anniversary date, and length of service. The date used to calculate the length of service is also shown on the page.
- **Performance Review.** See information about your performance review, including the last review date and rating. Employees may also see past performance review information if permitted.
- **Company Phone List.** See contact information (phone numbers and email address) for people in your company.

## Role Menu

Employees in a manager role now see a role dropdown displayed at the top of the main menu. To access the manager pages, the employee must select “Manager” from this dropdown.

## Time Off Requests

The Time Off Request Notification has been enhanced. Managers can now see other time off requests that overlap with this request.

## Employee Profile page

If you are a manager, you can now use the Employee Profile page to review contact information about employees who report to you. Perform a search by entering the first few letters of the employee’s first or last name. Select the employee whose information you want to view. The Employee Profile page displays the employee’s Phone and Email details.

## Emergency Contact

The ESS Mobile manager Emergency Contact page has been updated to include a new Employee filter feature. In addition, if any of the manager’s direct reports have a secondary contact listed in Sage HRMS, this information is also available now in the Mobile version.

## Temporary Approver

The Temporary Approver page has been enhanced to both add and remove a Temporary Approver.

## Logon Maintenance for Administrators

Employees assigned to either the HR Administrator role or the Benefit Administrator role now have the ability to access the Logon Maintenance page by selecting Administrator from the role dropdown. The Logon Maintenance page can be used to manage employee logons and access to HRMS Employee Self Service, including:

- Viewing an employee’s username
- Reviewing an employee’s logon history
- Enabling or disabling an employee’s access to the system (logon status)
- Resetting an employee’s password
- Deleting a logon to free up an employee license

## My Workforce Analyzer updates

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

## Sage 100 Payroll Link updates

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

# 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 **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

**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: March 31, 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.

# 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.