



# Sage HRMS

## Q1 2021 Release Notes

March 2021

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# Product update release notes

**Important!** All customers who update, maintain, and use Sage HRMS or Sage Employee Self Service should read these release notes to obtain valuable information about changes to the software program and payroll legislative database, including steps related to COVID-19 (see [page 11](#)) that must be done **before** installing the Q1 2021 update.

## Product update information

**Product:** Sage HRMS and Sage Employee Self Service

**Version:** Product Update Q1 2021

## 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 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.

## Colorado

Colorado withholding tables and instructions have been updated, effective January 1, 2021. Refer to the state publication for more details.

## Kentucky

- The following local tax was added in the supported tax tables:

Code	Description	Rate	Effective Date
KY0267	Walton Industrial Park TIF TD Regular IT	1.2%	1/12/2017

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

Code	Description	Rate	Effective Date
KY0230	Raceland CT Regular IT	1%	2/5/2021

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

Code	Description	Wage Base Limit	Effective Date
KY0007	McLean CO Regular IT	\$75,000	1/1/2021
KY0223	Hickman CO Regular IT	\$75,000	1/1/2021

## Maryland

Maryland withholding tables and instructions have been updated, effective January 1, 2021. Refer to the state publication for more details.

## Michigan

The Unemployment Insurance wage base limit changes to \$9,500 for 2021.

## Ohio

- Effective February 1, 2021, the following local tax has been expired:

Code	Description
OH0954	Newtonsville VI Regular IT

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

Code	Description	Rate	Effective Date
OH0208	Minerva VI (Sta) Regular IT	1.5%	1/1/2021
OH0509	Minerva VI (Col) Regular IT	1.5%	1/1/2021
OH0529	Minerva VI (Car) Regular IT	1.5%	1/1/2021
OH1025	Sylvania JEDD CT Regular IT	1.5%	1/1/2021
OH1026	Latty VI Regular IT	1%	1/1/2021
OH1027	Norton Barberton JEDZ CT Regular IT	2%	1/1/2015

## Oregon

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

These taxes have variable rates based on income level. You can see details on the Brackets tab of the Local/Other Tax Codes window.

Code	Description	Rate	Effective Date
OR0016	Metro RD Supportive Housing Services (NR) IT (Filing single)	variable	1/1/2021
OR0017	Metro RD Supportive Housing Services IT (Filing single)	variable	1/1/2021
OR0018	Metro RD Supportive Housing Services (Filing jointly)	variable	1/1/2021
OR0019	Metro RD Supportive Housing Services (NR) (Filing jointly)	variable	1/1/2021



# Pennsylvania

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

Code	Description	Rate	Effective Date
PA0901	Beaver TP, Keystone SD (NR) LST	\$52	1/1/2021
PA1317	Washington TP, Montgomery SD (NR) LST	0	1/1/2021
PA1356	Brady TP, Montgomery SD (NR) LST	0	1/1/2021
PA2649	Penndel BO, Neshaminy SD (NR) Regular IT	1%	1/1/2021
PA2650	Penndel BO, Neshaminy SD Regular IT	1%	1/1/2021
PA3062	Warren CT, Warren SD Regular IT	2.8%	1/1/2021
PA4440	Wheatland BO, Farrell SD Regular IT	1.5%	1/1/2021
PA4565	New Castle CT, New Castle SD (NR) Regular IT	1.975%	1/1/2021
PA4566	New Castle CT, New Castle SD Regular IT	2.075%	1/1/2021
PA4825	Prospect Park BO, Interboro SD (NR) Regular IT	1%	1/1/2021
PA4826	Prospect Park BO, Interboro SD Regular IT	1%	1/1/2021
PA4866	Chester CT, Chester-Upland SD Regular IT	3.75%	1/1/2021
PA6021	Aliquippa CT, Aliquippa SD (NR) Regular IT	1.3%	1/1/2021
PA6022	Aliquippa CT, Aliquippa SD Regular IT	1.3%	1/1/2021
PA6194	Lower Frederick TP, Perkiomen Vly SD Regular IT	1.45%	1/1/2021
PA6220	Cheltenham TP, Cheltenham SD Regular IT	1.5%	1/1/2021
PA7237	London Grove TP, Avon Grove SD (NR) Regular IT	0.625%	1/1/2021
PA7847	Milford BO, Delaware Valley SD (NR) LST	\$52	1/1/2021

# Product updates

The following product updates are included with this release.

## U.S. Payroll product updates

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

### Changes for California Pay Data Reporting

You can now enter employee ethnicity information for California Pay Data Reporting.

On the **Other** tab of the **Employee Payroll** window, a new **Ethnicity (California)** field is available. The Ethnicity field that previously existed was renamed **Ethnicity (Federal)**.

To generate the California Pay Data Report, select **Payroll Government Reports**, and then **Federal Tax Filing**. In the **Federal Tax Filing** window, select the **CA Pay Data Report**.

### Changes for taxes, earnings, and deductions related to COVID-19

There were a few changes to Payroll resulting from the American Rescue Plan Act (ARPA):

- Effective April 1, 2021, employers are no longer exempt from paying Social Security tax for Emergency Paid Sick Leave, Emergency Paid Sick Leave for Others, and Emergency Paid Family Leave. If you use local tax codes related to COVID-19, follow the steps in [Knowledgebase article 104155](#) **before** installing the Q1 2021 update to ensure the local tax codes were set up correctly. The activation process changes the Employer Calculation Method from **None** to **Percentage of Base** for these taxes. For more information, including details about updating the employer tax rates, see in [Knowledgebase article 110026](#).
- The ARPA expanded and extended provisions found in the Families First Coronavirus Relief Act (FFCRA) and the Coronavirus Aid, Relief, and Economic Security (CARES) Act. For more information, see [Knowledgebase article 110026](#).

### Fix for Federal Income Tax

The calculation of federal income tax to withhold for an employee now includes deductions specified in Step 4(b) on the employee's form W4.

## Fix for City of Yonkers Income Tax

The NYYCIT tax is now correctly calculated for non-resident employees working in the City of Yonkers, New York.

## Sage HRMS product updates

### Attachment titles

When adding an attachment, you must now enter a title for the attachment.

### Attachments for many employee pages

In both the non-subscription and subscription versions of Sage HRMS, you can now add attachments to the following employee pages:

- Termination
- LOA \*\*
- Events \* \*\*
- Wellness \*
- Absence Transactions \* \*\*
- OSHA \*\*
- OHS \*\*
- Workers Compensation \*\*
- Skills \* \*\*
- Education \* \*\*
- Previous Employer \*\*

These pages now have an **Attachments** tab with a table showing information about the attachments. The method to add, view, modify, and delete attachments is the same as for other attachments.

If Employee Self Service is installed, the **Employee Attachments** detail page for certain pages (marked with an \* in the list above) have the **Display in Employee Self Service** check box; select this check box to enable the employee to view that attachment in Employee Self Service.

The summary tables on certain pages (marked with a \*\* in the list above) have a new **Attachments** column that displays **Yes** if that item has attachments.

## Global attachments

In both the non-subscription and subscription versions of Sage HRMS, you can now attach the same file (such as an employee handbook) to a group of employees. Select **Employees > Processes > Global Attachments**. The table on the new **Global Attachments** page shows information about the attachments and whether they are shared with all employees or just selected employees.

When you click **Add**, the new **Global Attachments** detail page opens. It looks similar to other attachment detail pages but enables you to specify the employer and statuses of employees to share the attachment. You can also select certain employees to share the attachment. If Employee Self Service is installed, you can select the **Display in Employee Self Service** check box to enable the employees to view that attachment in Employee Self Service.

## Workers' compensation information

When your enterprise is set up for the United States only (instead of Canada or Both), you can now enter worker's compensation information for employees.

## Employee contributions to savings plans

The tabs on the **Savings Benefits** page for employees were changed. The new **Contribution** tab contains items related to employee and employer contributions, which were moved from the **Benefit Plan** tab.

## Class message

You can now make changes to the Class Roster and Courses Taken without getting the "Already has been added to this class" message (which had stopped processing the changes).

# Additional features for the subscription version of Sage HRMS

## Employee contributions to savings plans

Savings plans can now be set up so that employees automatically contribute a particular amount or percentage. You set this up on the new **Employee Contribution** tab on the **Benefit Saving Plans Detail** page or in a new page in the **Savings Plan Setup Interview**.

If individual employees want to contribute a different amount or percentage, you can change this on the new **Contribution** tab on their **Savings Benefits** page. (This tab contains some items that were moved from the **Benefit Plan** tab.)

# Sage Employee Self Service product updates

## Placeholder text for many items

Placeholder text (showing the proper format to use) now displays for date, social security number, social insurance number, phone number, and postal code items. In addition, the validation of those items as well as many items with numbers was improved.

If you customized the logon stylesheet and product stylesheet for your organization, add these two classes to the end of your customized **.css** files:

```
::-webkit-input-placeholder
{
color: #D8D8DA;
}

:-ms-input-placeholder
{
color: #D8D8DA !important;
}
```

## Logon validation using date of birth

When the system administrator selects **Date of Birth** (and not **Last Name**) as the criteria for **Initial Logon Fields**, users can now successfully enter their date of birth when setting up their logon or when requesting to change their password.

# My Workforce Analyzer updates

## Additional codes

The **Offer of Coverage** code drop-down lists now include two new codes (1T and 1U) that the IRS added for Form 1095-C line 14. These codes can be used if your company offers an Individual Coverage Health Reimbursement Arrangement (HRA).

# 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>

# Product update installation instructions

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

## Important!

If you use U.S. Payroll and use local tax codes related to COVID-19, follow the steps in [Knowledgebase article 104155](#) **before** installing the Q1 2021 update. Verify that:

- Qualified Family Leave is using local tax code COVIDSF
- Qualified Social Security Sick Leave is using local tax code COVIDSS
- Qualified Social Security Sick Leave Other is using local tax code COVIDSO

After installing the update, follow the steps in [Knowledgebase article 110026](#) to set up the employer portion of the Social Security tax, which is effective April 1, 2021.

## 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: March 31, 2021.

**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 Employee Self Service update installation instructions

After you have downloaded the Sage 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 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 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 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 Employee Self Service update

1. Using your external backup procedures, back up the Sage HRMS and Sage Employee Self Service databases to a media device that is external to your product servers:
  - a. Log on to the Sage Employee Self Service server and select **Programs > Employee Self Service > System Maintenance** to open the Sage 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 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 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 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 Employee Self Service as the MASTER user to complete the process.

The update is now complete and you are ready to start using Sage Employee Self Service.

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