# Sage HRMS 2014
# U.S. Payroll
# Q3 2015 Release Notes

**September 2015**

# Contents

# Product Update Release Notes

> **Important!** All customers who update, maintain, and use Sage HRMS U.S. Payroll 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 2014 U.S. Payroll

**Version:** Product Update Q3 2015

## Important Information Regarding Future Updates

The following chart outlines the Sage HRMS product versions supported with Product Updates or Quarterly Tax Updates for each period this year.

**This Q3 2015 release is your final tax and product update for Sage HRMS 2014.**

In order to receive further updates you must upgrade to a supported version of Sage HRMS.

| Release | Q3 2015 | Q4 2015 | Q1 2016 | Q2 2016 | Q3 2016 | Q4 2016 |
|---|---|---|---|---|---|---|
| Sage HRMS 2014 | **Final Update** | — | — | — | — | — |
| Sage HRMS 2015 | Yes | Yes | Yes | Yes | Yes | Yes |
| Sage HRMS 2016 | — | First Update | Yes | Yes | Yes | Yes |

## 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.

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

- **Customer Support:** For additional articles and resources, visit the Sage Knowledgebase at https://support.na.sage.com or contact Customer Support at 800-829-0170 (U.S. and Canada). Please have your Customer ID handy when contacting Support.

# 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 for this Q3 2015 release.

## State and Local Legislative Updates

This section lists the state and local 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.

## Alabama

The following local taxes are added to the supported system tax tables:

| Tax Code | Description | Rate | Effective Date |
|----------|-------------|------|----------------|
| AL0032 | Notasulga CT Regular IT | 1% | 11/10/1997 |
| AL0031 | Tarrant CT Regular IT | 0.5% | 8/2/2010 |
| AL0021 | Tuskegee CT Regular IT | 3% | 10/1/2010 |

## Connecticut

The Connecticut Department of Revenue Services has released revised withholding calculation rules effective January 1, 2015. Refer to the state publication for more details.

## Idaho

The Idaho State Tax Commission has issued new percentage method and wage bracket withholding tables. The allowance has increased to $4,000. Refer to the state publication for more details.

## Kentucky

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

| Tax Code | Description | Rate | Effective Date |
|----------|-------------|------|----------------|
| KY0036 | Coal Run VI Regular IT | 1% | 10/1/2015 |
| KY0010 | Cumberland CO Regular IT | 1.25% | 10/1/2011 |

| Tax Code | Description | Rate | Effective Date |
|----------|-------------|------|----------------|
| KY0192 | Danville CT Regular IT | 1.5% | 10/1/2015 |
| KY0251 | Pike CO Regular IT | 1% | 7/1/2015 |
| KY0069 | Pioneer Village CT Regular IT | 1.5% | 7/1/2015 |

## Michigan

Effective July 1, 2015, the The Michigan Unemployment Agency has decreased the state UI taxable wage base to from $9,500 to $9,000.

## North Dakota

Effective July 1, 2015, the following tax rate changes have been made:

- The tax rate ranges from 1.1% to 2.9%.

- The supplemental withholding rate decreases from 2.28% to 2.05%.

Updated with the revised withholding tables from the North Dakota Department of Taxation.

## Ohio

The Ohio Department of Taxation released revised withholding tables for taxable years beginning in 2015 and thereafter. Refer to the state publication for more details.

Ledgemont 2805 School District has merged with Berkshire 2801 School District. As of July 1, 2015, all former residents of Ledgemont School District are now considered residents of Berkshire School District. The tax withholding rate for former residents of Ledgemont School District (OH0825 - Ledgemont 2805 SD Regular IT) is decreased to the Berkshire School District rate of 1% (OH0770 - Berkshire 2801 SD Regular IT).

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

| Tax Code | Description | Rate | Effective Date |
|----------|-------------|------|----------------|
| OH0916 | Amanda VI Regular IT | 1.0% | 9/1/2015 |
| OH0913 | Berkshire TP Delaware JEDD CT Regular IT | 1.85% | 7/1/2015 |
| OH0914 | Coshocton-Franklin TP JEDD CT Regular IT | 2.0% | 7/1/2015 |
| OH0915 | Coshocton-Tuscarawas TP JEDD CT Regular IT | 2.0% | 7/1/2015 |
| OH0649 | Hicksville 2004 SD Regular IT | 0.75% | 1/1/2015 |
| OH0428 | Indian Hill VI Regular IT | 0.575% | 1/1/2015 |

| Tax Code | Description | Rate | Effective Date |
|---|---|---|---|
| OH0912 | Trimble VI Regular IT | 1.0% | 7/1/2015 |
| OH0917 | Troy TP JEDD CT Regular IT | 2.25% | 8/1/2015 |
| OH0918 | Walton Hls-Sagamore Hls TP JEDD CT Regular IT | 2.5% | 7/21/2015 |

# Pennsylvania

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

| Tax Code | Description | Rate | Effective Date |
|---|---|---|---|
| PA0593 | Bell TP, Kiski SD (NR) LST | $52 annually | 1/1/2015 |
| PA2849 | Chanceford TP, Red Lion SD (NR) Regular IT | 1% | 1/1/2015 |
| PA0811 | Cochranton BO, Crawford Central SD (NR) LST | $52 annually | 1/1/2015 |
| PA1430 | Conyngham TP, North Schuylkill SD (NR) LST | $52 annually | 1/1/2015 |
| PA3003 | Elco BO, California SD (NR) Regular IT | 1% | 1/1/2015 |
| PA5484 | Franklin BO, Conemaugh Valley SD Regular IT | 1.4% | 1/1/2015 |
| PA1224 | Hatfield BO, North Penn SD (NR) LST | $52 annually | 1/1/2015 |
| PA7845 | Matamoras BO, Delaware Valley SD (NR) Regular IT | 1% | 7/1/2015 |
| PA7846 | Matamoras BO, Delaware Valley SD Regular IT | 1% | 7/1/2015 |
| PA7093 | Philadelphia CT, Philadelphia City SD (NR) Regular IT | 3.4828% | 7/1/2015 |
| PA7094 | Philadelphia CT, Philadelphia City SD Regular IT | 3.9102% | 7/1/2015 |
| PA0599 | Rouseville BO, Oil City SD (NR) LST | $52 annually | 1/1/2015 |
| PA4625 | Smithfield BO, Albert Gallatin SD (NR) Regular IT | 1% | 1/1/2015 |
| PA2941 | Stockdale BO, Charleroi SD (NR) Regular IT | 1% | 1/1/2015 |
| PA2725 | West Manheim TP, South Western SD (NR) Regular IT | 1% | 1/1/2015 |

## Sage HRMS Product Updates

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

### VETS-4212 Report

The VETS-4212 report (Reports > Employees > EEO Reports) has been updated with the final report information.

# Sage Payroll Tax Forms and eFiling by Aatrix

Sage Payroll Tax Forms and eFiling by Aatrix is a feature included with Sage HRMS 2014. This functionality provides updated reports and forms at no cost and enables you to fill out and file tax forms electronically for a small fee.

To begin using tax forms with Sage Payroll Tax Forms and eFiling by Aatrix, open one of the tax forms available in **Federal Tax Filing** or **State Tax Filing** from **Payroll** > **Government Reports** after installing this update. 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/index.php/sagehrms

# Product 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.
>
> - Download the Product Update from the Sage Customer Portal.

## Downloading the Product Update

**To download the update:**

1. Visit the Sage Knowledgebase at: <u>https://support.na.sage.com</u>, click the orange **Login** button, and log on to the site.

2. Select **Sage HRMS** under **My Products** in the left menu bar.

3. Select your product and version under **Browse Products** in the left menu bar.

4. Click the **Download software** tab (in the center of the screen), then scroll down to the **Product updates** section.

5. Click **Download Sage HRMS 2014 Q3 2015 product update**.

6. 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.

   The InstallShield Wizard appears.

2. After the 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. Launch the Sage HRMS Client 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 verify the version number corresponds with 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 30, 2015.

> **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 into 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.