



Sage HRMS

Q1 2026 Release Notes

March 2026

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Contents

- Product update release notes** 1
 - Product update information 1
 - About product updates for Sage HRMS 1
 - Support and resources 2
- Product updates** 3
 - Payroll product updates 3
 - U.S. Payroll product updates 3
 - Canadian Payroll product updates 4
 - Premium version of Sage HRMS product updates 4
 - Non-Premium version of Sage HRMS and ESS product updates 11
 - My Workforce Analyzer updates 14
 - Sage 100 Payroll Link updates 14
- How to choose the right product update** 15
- Non-premium version of Sage HRMS Employee Self Service update installation instructions** 16
 - Downloading the update 16
 - Installing the Sage HRMS Employee Self Service update 17
- Sage HRMS update installation instructions** 19
 - Downloading the product update 21
 - Installing the product update 21
 - Updating Sage HRMS client files 22
 - Verifying the product update 22
 - Updating the local tax repository and rates 23

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 2026

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.

Important! With every release, we test 2 versions back of Sage HRMS. For this release, you should be on Q4 2025 or later to upgrade to Q1 2026.

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.
- **Community Hub:** Visit <https://communityhub.sage.com/us> for blogs, tips, and guidance specific to Sage HRMS.
- **Customer Support:** For support resources, visit the [Sage Support Resource Centre](#) page.

Product updates

Payroll product updates

U.S. Payroll product updates

The following new features and improvements to payroll are included in this update.

New Option for OBBB Act for Qualified Double Overtime Compensation

We have added a new option in the **Report as** field on the Payroll Earnings and Deductions window, to support IRS reporting requirements under the OBBB (One Big Beautiful Bill act):

- Form W-2 - Total amount of qualified double overtime compensation (TT)

Note: This option is for reporting double overtime and is only for use if you report double overtime as a separate Earning\Deduction. It is not meant to be used with an Overtime Schedule.

For more information, see Sage Knowledgebase article: [251209183518997](#).

2026 Nacha Rule Update for Payroll

For all PPD Credits for payment of wages, salaries and similar types of compensation, the **Company Entry Description** field must contain the description PAYROLL.

For more information, see Sage Knowledgebase article: [260323184447260](#).

Extended EFT Deposit File Name length

We have updated EFT processing to support deposit file names up to 16 characters to meet bank requirements; the **Deposit File Name** can be updated in **Payroll Setup > EFT Options**.

Canadian Payroll product updates

The following new features and improvements to payroll are included in this update.

Fix for T4 and T4A forms for the 2025 tax year

We have fixed issues with the T4 and T4A forms to ensure they use the updated 2025 form layouts and that both the employer and employee addresses are correctly updated on the forms. .

For more information, see Knowledgebase article: [260202230355223](#).

Fix for printing and XML generation of T4 and T4A forms

We have fixed a problem that occurred when printing T4 and T4A forms or generating the XML file if special characters were present in employer or employee details.

For more information, see Sage Knowledgebase article: [260204162903983](#).

Temporary Relevé 1 for 2026

You can now print version 2026-01 of the temporary RL-1 slip for employers who cease to operate their business or make payments of source deductions and employer contributions during the year 2026. To do this, specify 2026 in the Payment Year field in the Relevé 1s window.

Extended EFT Deposit File Name Length

We have updated EFT processing to support deposit file names up to 16 characters to meet bank requirements; the **Deposit File Name** can be updated in **Payroll Setup > EFT Options**.

Premium version of Sage HRMS product updates

Premium product updates include new features and enhancements for both the desktop version and the web version of Sage HRMS. If you have also purchased Sage HRMS Employee Self Service, updates for the premium version of ESS will also be included. Please review the table below to learn more about these changes.

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
New Sage HRMS Payroll Web Screens Learn more		Yes	
Sage HRMS Payroll Setup in web version Learn more		Yes	
Sage HRMS Payroll Tasks in web version Learn more		Yes	
Sage HRMS Payroll Processes in web version Learn more		Yes	
Sage HRMS Payroll Reports in web version Learn more		Yes	
Sage HRMS System Setup > Delete Audit Trail Record Learn more		Yes	
Sage HRMS Employee Process > Import Work Location Data in web version Learn more		Yes	
Sage HRMS California Pay Data Reporting Updates Learn more	Yes	Yes	
Employee Self Service Defect Correction on login page Learn more			Yes

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Employee Self Service Defect Correction on W-2 and T-4 Forms due to employee number justification Learn more			Yes

New Sage HRMS Payroll Web Screens

In the Q1 2026 release, the premium web version of Sage HRMS introduces new Payroll web screens that run in parallel with the desktop version of Sage HRMS. These Payroll web screens are available for both U.S. Payroll and Canadian Payroll.

Additional Payroll web screens will continue to be delivered in future quarterly releases.

Setup > Payroll or Canadian Payroll > Payroll or Canadian Setup

The following Payroll Setup pages are available as payroll web screens in the premium web version of Sage HRMS in this release:

Bank Services

- Banks
- Bank Options
- G/L Integration
- Distribution Codes

Code Tables

- Work Classification

General Ledger

- Account Groups
- Accounts
- Account Structures
- Create Accounts

- Optional Fields
- Options
- Segment Codes
- Source Codes

Optional Fields

- Optional Fields

Payroll Setup

- Fiscal Year Calendar

Tasks and Processes > Payroll or Canadian Payroll

The following **Payroll Tasks** are available as web screens in the premium web version of Sage HRMS in this release:

- Employee Earnings Distribution
- Update Earnings/Deductions

The following **Payroll Processes** are available as payroll web screens in the premium web version of Sage HRMS in this release:

- Update Check Publish Date

Reports > Payroll or Canadian Payroll

The following **General Ledger Reports** are available as payroll web screens in the premium web version of Sage HRMS in this release:

General Ledger Reports

- Account Groups
- Account Structures
- Chart of Accounts
- Options
- Segment Codes

- Source Codes
- Source Journals

Delete Audit Trails Records added to the premium web version of Sage HRMS

The **Delete Audit Trails Records** page is now available in the premium web version of Sage HRMS. We have enhanced this version of the **Delete Audit Trails Records** by providing the option to also delete records from files no longer being tracked by your organization and that may be orphaned in the database. You can access the new page by going to Setup > System > Maintenance and selecting Delete Audit Trails Records in the premium web version of Sage HRMS.

Import Work Location Data process available in the premium web version of Sage HRMS

We have added the **Import Work Location Data** process to the premium web version of Sage HRMS. The Import Work Location Data screen can be used to import Work Location Data for California Employees. Administrators can now import this data using the premium web version of Sage HRMS or the desktop version of Sage HRMS. This feature is only available for U.S Companies.

See the [Import Work Location Data](#) help topic to learn more about this process. Click [here](#) to download an Import Work Location Data (.CSV) file template. Employee Work Location information must be imported in the CSV file format. You can access the new page by going to Tasks and Processes > Employees > Process and selecting Import Work Location Data in the in the premium web version of Sage HRMS.

Sage HRMS California Pay Data changes

California Pay Data Reporting Requirements are changing. Effective January 1, 2026, employers are required to include additional data fields when submitting their forms. The new data fields include employees' exemption status, employment type, and weeks worked during the reporting year. These fields are optional for the 2025 reporting year and are required for the 2026 reporting year as of the Sage HRMS Q1 2026 Release date.

To support the new California Pay Data Reporting Requirements, we have made the following changes to Sage HRMS:

1. **EEO Pay Data** tab on the Current Pay page Changes:

- Total Hours Worked has been renamed Total Annual Hours Worked.
- New field added to the tab: Total Annual Weeks Worked.
 - Value defaults to '0'.

2. **California Pay Data Detail/EFile Changes:**

The report has been modified to support the new reporting requirements. After selecting your criteria, click Preview to see the changes below:

- The following columns have been added to the header row of the report:
 - NAME
 - TITLE
 - WEEKS WORKED
- The label - **Total Weeks Worked by EEO Class** has been added to the report summary.

3. **California Pay Data Detail/EFile (Export file) Changes:** - Integrated version

The following changes have been made to the EFile Export file:

Added New Columns to the 2025 EFile:

1. Exemption Status
2. Employment Type (See Note below for mapping details)
3. Total Annual Weeks Worked

Removed Column from the 2025 EFile:

- Was an EEO-1 Report filed for this establishment last year? (No longer being tracked)

Renamed Columns in the 2025 EFile:

1. Number of Employees* is now - Total Number of California Employees in This Employee Group*
2. Total Hours* is now - Total Annual Hours Worked*

Repositioned Columns in the 2025 EFile:

- Is this establishment the employer's headquarters?* is now adjacent to the Was a California Pay Data Report filed for this establishment last year?*
- The number of remote employee information columns have been moved to the end before the Row-Level Clarifying Remarks column.
- The Total Annual Hours Worked column and the Total Annual Weeks Worked column are grouped together before the Mean Hourly Rate and Median Hourly Rate columns.

Note: Employment Type: Each employee must be categorized as one of the following three employment types: "Full-time," "Part-time," or "Intermittent." To apply this category, Sage HRMS is using the employee's Employee Type code from their Current Job record. Employee Type codes are mapped to one of 3 Payroll Employee Type codes in the Code Table Setup in Sage HRMS.

When the California Pay Data Detail/EFile Export is generated, the 3 Payroll Employee Type codes are automatically mapped to the California Pay Data employee types below:

- Full Time = Full-time
- Part Time = Part-time
- Seasonal = Intermittent

Example: If Employee Type = Consultant and the Payroll Employee Type is Seasonal, this Employee Type will be mapped to Intermittent. The Employment Type column in the Export file will be populated with the value of "Intermittent."

4. Import Employee Pay Bands Process Updated

We have updated the **Import Employee Pay Bands** process and template to support the California Pay Data Reporting Requirements for 2025 due in 2026.

The following changes have been made to the Import Employee Pay Bands template file:

- Renamed Column: Total Annual Hours Worked
- New Column: Total Annual Weeks Worked

This change was implemented in all desktop versions of Sage HRMS as well as the premium web version of Sage HRMS.

For **HR Only** customers, see the [Import Employee Pay Bands](#) help topic to learn more about this process. Click [here](#) to download the updated Import Employee Pay Bands (.CSV) file template which includes the above column changes.

5. Update Employee Pay Bands Process Changed

We have updated the **Update Employee Pay Bands** process to support the California Pay Data Reporting Requirements for 2025 due in 2026.

The **Update Employee Pay Bands** process will now also update the Total Annual Weeks Worked field on the EEO Pay Data tab of the employee's Current Pay page.

This change was implemented in all desktop versions of Sage HRMS as well as the premium web version of Sage HRMS.

Sage Employee Self Service Issue Correction

Fixed an issue where the Password and Confirm Password labels were covered up by the Save button.

Sage ESS Defect Correction on W-2 and T-4 Forms due to employee number justification

Fixed an issue where the employee number justification prevented W-2 and T-4 forms from being available in Sage Employee Self Service.

Non-Premium version of Sage HRMS and ESS product updates

This update includes changes to the non-premium (existing) version of Sage HRMS. There are no updates to the non-premium (existing) version of Sage HRMS Employee Self Service.

Product Updates	Non-Premium (Existing) HRMS	Non-Premium (Existing) ESS
Sage HRMS California Pay Data changes	Yes	N/A

Product Updates	Non-Premium (Existing) HRMS	Non-Premium (Existing) ESS
Learn more		

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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.

How to choose the right product update

Please review the chart below to help determine which download .exe you need to install.

Unlock the full potential of your premium Sage HRMS product by downloading the premium web version of Sage HRMS from the [Sage HRMS Download Portal](#). Enjoy familiar features along with new enhancements that simplify your tasks and allow you to work from any location. Don't miss out on this premium opportunity!

If you have this product:	You should Install:	Quarterly Version
Premium desktop version of Sage HRMS	SageAbraSQLHRMS10.70.80.13.exe	10.70.8013- 2026 Q1
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.102401_premium_web_HRMS_ESS.exe	21.1024.01 - 2026 Q1
Non - Premium desktop version of Sage HRMS	SageAbraSQLHRMS10.70.80.13.exe	10.70.8013- 2026 Q1
Non - Premium version of Sage HRMS Employee Self Service	No updates	No updates

Non-premium version of 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 HRMS Download Portal](#).
2. Click the appropriate download link and log in if required.
3. In the article, click **Download** to download the product update.

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.

Sage HRMS update installation instructions

Important! Sage HRMS Integrated uses enhanced security features. User security policies are now enforced by Windows Account Policies on the machine running MS SQL Server. If you are unfamiliar with these changes, please review the information below before proceeding.

Upgrade Prerequisites

- Back up your databases.
- Back up your Site folder and User folder within the Shared Data folder.
- Create a backup copy of all of your payroll customized reports and check forms before upgrading.
- Review your Local Security Policies on your SQL Server machine and set the Minimum Password age to 0.
- Verify that you are upgrading from a supported version of the Payroll Modules.
- Verify you have access to the Sage HRMS Client using the Master user account information before upgrading.
- Review the sharing settings on the SageHRMSServer folder.
- Verify the SQL account to be used during the installation has full DB Create (administrative) credentials.

Enhanced Security Features

The following changes were made to support these features:

- During the Sage HRMS Client upgrade, there may now be a forced restart of the Client and the windows server machine.
- If this is necessary, the user is presented with a new message stating that: “Sage HRMS Client needs to restart. Save all your files before continuing.”

- The Sage HRMS Client wizard will create two new MS SQL databases (Vault and Store) during the upgrade.
- The user will be prompted to change the default password for the Payroll Administrator (Sage 300) during the Sage HRMS Client upgrade to meet the new password complexity rules if it is not complex enough.
- Password Complexity Rules dictate that a password must have a minimum length of 8 characters, with a minimum of 1 lower-case character, 1 upper-case character, 1 numeric character, and 1 special character.
- The Minimum password length security policy will be set to 8 characters.

After upgrading

- Use the Database Connection Tool to ensure all connections are valid.
- Verify the ADMIN user can successfully access the Database Setup tool using their new complex password
- Restore your custom payroll report folders:
 - The report .DLL's have been updated to a newer version and must be copied to your customized payroll report folders.
 - The updated .DLL's are located on the Sage HRMS Client machine at the following path: C:\Program Files (x86)\Sage\Sage Accpac\ - UP80A or CP80A.
 - Copy only the .DLL's used for each of your customized payroll reports.

Follow the instructions in this section to download, install, apply, and verify the Product Update for all desktop versions of Sage HRMS.

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 HRMS Download Portal](#).
2. Click the appropriate download link and log in if required.
3. In the article, click **Download** to download the product update.

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 26, 2026.

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.