

Sage HRMS

Q2 2025 Release Notes

June 2025

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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 Q2 2025

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 Q1 2025 or later to upgrade to Q2 2025.

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.

Canadian Payroll Tax Updates

The following federal, provincial, and territorial tax changes are included in this update.

You may need to adjust your employee records to reflect these tax changes.

Provincial and Territorial Legislative Updates

Personal Tax Credits for the 2025 mid-year release

Effective July 1, 2025, the provincial and territorial personal tax credits that employees can claim have changed. These changes are reflected in the new 2025 provincial and territorial TD1 forms, and the Québec TP-1015.3-V form. The basic personal amounts that have changed are listed below.

	January 2025	July 2025	July 2025 (Prorated Amount)
Manitoba	\$15,969	\$15,780	\$15,591
Prince Edward Island	\$14,250	\$14,650	\$15,050
Saskatchewan	\$18,991	\$19,491	\$19,991

Alberta

On February 27, 2025, the Government of Alberta announced that for 2025 and subsequent tax years, a new tax rate of 8% will be applied on the first \$60,000 of an individual's taxable income.

Since employees have been taxed at the rate of 10% for the first six months of the year, a prorated tax rate of 6% will apply for the remaining six months commencing with the first payroll in July.

The Alberta budget also introduced the Alberta Supplemental Tax Credit for taxpayers with personal tax credits greater than \$60,000. As a result, there is a new factor (K5P) added to the guide.

Since the employees have not received this tax credit for the first six months of the year, the formula has been prorated.

The T4 formula for Alberta is also updated to account for K5P.

Manitoba

On March 20, 2025, the Government of Manitoba announced that for 2025 and subsequent tax years, the Manitoba Basic Personal Amount (BPAMB) and the Manitoba personal income tax bracket thresholds will not be indexed.

The BPAMB for 2025 is \$15,780. Since the employees have received the indexed BPAMB of \$15,969, a prorated BPAMB of \$15,591 will be applicable for the remaining six months commencing with the first payroll in July.

Since the employers have made deductions based on the indexed personal income tax bracket thresholds for the first six months of the year, prorated amounts will be applicable. Similarly, prorated tax brackets for payroll effective July 1st will be effective.

Nova Scotia

On February 18, 2025, the Government of Nova Scotia announced that the Nova Scotia Basic Personal Amount (BPANS) is now set at the maximum of \$11,744, regardless of the taxable income.

For 2025, if the BPANS formula was previously implemented on your payroll system, some employees may have received a lower basic personal amount for the first six months of the year. Therefore, for the last 6 months in the year, employers will have the option to use a prorated basic personal amount calculation for these employees to account for the lower basic personal amount used for the first six months of the year, commencing with the first payroll in July.

BPANS:

- Where $A \leq \$25,000$, BPANS is equal to \$11,744;
- Where $\$25,000 < A < \$75,000$, BPANS is equal to $\$11,744 + [(A - \$25,000) \times 6\%]$;
- Where $A \geq \$75,000$, BPANS is equal to \$14,744.

Prince Edward Island

On April 10, 2025, the Government of Prince Edward Island announced an increase to the Basic Personal Amount (BPA) from \$14,250 to \$14,650, effective January 1, 2025.

Since the employees have received a lower basic personal amount for the first six months of the year, a prorated basic personal amount of \$15,050 will apply for the remaining six months commencing with the first payroll in July.

Saskatchewan

On December 5, 2024, the Government of Saskatchewan announced an increase to the BPA from \$18,491 to \$19,491, effective January 1, 2025.

Since the employees have received a lower basic personal amount for the first six months of the year, a prorated basic personal amount of \$19,991 will apply for the remaining six months commencing with the first payroll in July.

U.S. Payroll Tax Updates

The following federal, state, and local tax changes are included in this update.

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 & Canadian 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.

Alabama

Effective July 1, 2025, Alabama will reinstate the state income tax on overtime pay for non-exempt employees.

For more information, see Sage Knowledgebase article: [231211185204510](#)

Georgia

Georgia withholding tables and instructions, including rates on supplemental wages, have been updated for 2025. Refer to the state publication for more details.

Idaho

Idaho withholding tables and instructions, including rates on supplemental wages, have been updated for 2025. 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:

Code	Description	Rate	Effective Date
KY0239	Crittenden CO Regular IT	1.5	07/01/2025
KY0249	Somerset CT Regular IT	0.9	07/01/2025

Ohio

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

Code	Description	Rate	Effective Date
OH0894	Oak Hill VI Regular IT	1%	07/01/2025
OH1079	Milford JEDD VIII CT Regular IT	1%	04/01/2025
OH1080	Union TP-Batavia JEDD 9 CT Regular IT	1%	06/01/2025
OH1081	Millville VI Regular IT	1%	07/01/2025
OH1082	North Hampton VI Regular IT	1%	07/01/2025

Oregon

Effective July 1, 2025, the Eugene Community Safety Payroll Tax exemption will increase accordingly with Oregon state minimum wage.

Due to the minimum wage exceeding \$15.00 per hour, the middle tier tax rate of 0.3% previously imposed has been eliminated.

All other covered employees will be withheld at the 0.44% tax rate.

The minimum rates will increase as follows:

- Standard Minimum Wage: \$15.05 per hour
- Portland Metro Minimum Wage: \$16.30 per hour
- Non-Urban Minimum Wage: \$14.05 per hour

For more information, including details about setting up related local tax codes, see Sage Knowledgebase article: [220924960111399](#).

Pennsylvania

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

Code	Description	Rate	Effective Date
PA2907	South Canaan TP, Western Wayne SD (NR) Regular IT	0.5%	04/01/2025
PA2908	South Canaan TP, Western Wayne SD Regular IT	0.5%	04/01/2025

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

Code	Description	Rate	Effective Date
PA2206	Gratz BO, Upper Dauphin SD (NR) LST	\$52	01/01/2025

Utah

Utah withholding tables and instructions have been updated for 2025. Refer to the state publication for more details.

Product updates

The following product updates are included with this release.

Payroll product updates

U.S. Payroll product updates

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

Puerto Rico Income Tax (PRSIT)

Fixed a problem where Puerto Rico Income Tax (PRSIT) was not being applied to employees earning less than \$20,000 .

Printing W2 Forms

Fixed a performance issue when printing W2 forms.

New Jersey Family Leave

Fixed a problem where the Employee Family Leave Rate on the NJ-927 Reports did not display the correct employee rate.

Child Support EFT

The following states are now supported to generate electronic child support payments,

- Kansas
- North Carolina
- Washington

Indiana local taxes

Fixed a problem where the Indiana local taxes were not using the exemptions filed on form WH-4 to calculate taxable income.

Local taxes will now use the exemptions from the state income tax (INSIT) and will no longer use the exemptions from the local tax.

To ensure taxes are calculated correctly,

1. Select INSIT in the Employee record, Taxes tab.
2. Open Tax Information.

Review the exemptions and update if necessary.

Tax Number and Reporting ID fields expanded

The following fields have been expanded from 15 to 17 characters,

- Payroll Options > Tax Number
- Federal and State Taxes > Reporting ID
- Local and Other Custom Taxes > Reporting ID

Canadian Payroll product updates

This update does not include any new features or improvements to payroll.

Sage HRMS Mobile App

Sage HRMS Mobile App New Mobile App Version

A new version of the Sage HRMS Mobile app will soon be available in the Apple App store and the Google Play store. We are excited to announce the following enhancements to the Sage HRMS Mobile app.

WCAG Accessibility Changes

The Sage HRMS Mobile App has been updated to meet Web Content Accessibility Guidelines (WCAG) in order to make the application more accessible for all users.

These updates include:

- Compatibility with screen readers for both Android users and iOS users
- Improved user interface for easier manual navigation
- Text alternatives for icons and buttons
- Color contrast for touch targets and text
- Text resizing without loss of functionality or content
- All functions accessible via screen reader touch gestures

Time-based One-Time Password (TOTP) Authentication

Sage Employee Self Service now provides the option to configure a Time-based One-Time Password (TOTP) as an Additional Authentication method. TOTP provides an additional layer of security in ESS by requiring a code from an authenticator app in addition to a password to access an employee's account.

After TOTP authentication is enabled, the employee will need to install an Authenticator app on their device and log into Employee Self Service from the browser version. Upon first login, the user will follow the screen prompts to register their Authenticator.

Important! The upcoming release of the Sage HRMS Mobile app will be required to take advantage of the new TOTP Authentication method. Check the [Sage HRMS Community Hub](#) for release notices for the Sage HRMS Mobile app.

Company Phone List

The Company Phone List UI has been added to the mobile application, allowing users to search for and view contact information for people in your company. Users can view phone, email, and organization level information from this interface.

Performance Review

The Performance Review UI has been added to the mobile application, allowing users to view information about your performance review, including the last review date and rating.

Performance Review history will also be displayed for organizations that have configured that information to display.

Installing the latest version of the Sage HRMS Mobile app

Employees do not need to uninstall their current version of the Sage HRMS Mobile app before installing the latest version.

Important! Version Compatibility Notice: To access the latest mobile features, both the Sage ESS browser version and the Sage HRMS Mobile app must be updated to the current quarter. If Sage ESS is upgraded but the mobile app is not, some features will not be available. To ensure full functionality, both must be updated to the latest versions.

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
Sage HRMS Now Supports TOTP Authentication Learn more		Yes	Yes
Sage HRMS Accessibility Initiative In Progress Learn more			Yes
Direct Deposit added to the web version of Sage HRMS for HR Only installs Learn more		Yes	
Export Direct Deposit Information in web version of Sage HRMS Learn more		Yes	

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Cross Employer Transfer - Additions to Optional HR Data in web version of Sage HRMS Learn more	Yes	Yes	
Sage HRMS Mobile App Info tile added to HRMS Admin home page Learn more		Yes	
New Web Functionality added to Group Security in web version of Sage HRMS Learn more		Yes	
Employee Direct Deposit page available in ESS for HR Only installs Learn more			Yes
Sage EULA updated in install modules for all versions Learn more	Yes	Yes	Yes
ESS Windows Authentication log in issue correction Learn more			Yes

Sage HRMS Now Supports TOTP Authentication

Sage HRMS now supports Two-Factor Authentication using a **Time-based One-Time Password (TOTP)**. TOTP provides an additional layer of security in ESS by requiring a code from an authenticator app in addition to also requiring a password to access an employee's account.

A **Time-based One-Time Password (TOTP)** code is a temporary passcode. The passcode is generated based on the current time and a shared secret key. These codes are valid for a short window of time and expire after 30 seconds. The code automatically changes in the authenticator app, making the login authentication method more secure. In addition,

employees will scan a QR Code using their authenticator app. This process registers the user's authenticator app with a key that is unique to their Sage ESS account. This value remains stored with their user id even if the Authentication method is changed in Sage ESS and an Authenticator app is no longer required to access ESS.

We have added a new option to the **Additional Authentication** drop-down on the Logon Setup page in Sage HRMS Employee Self Service to support this new Authentication method. The Master user can enable **Time-based One-Time Password (TOTP)** authentication, by selecting the **Authenticator App** option in the **Additional Authentication** drop-down. We have also renamed the "Send Code" Authentication option to "Email Verification Code" for clarity.

To support the different scenarios employees may experience when Authenticator security is enforced, we have updated the **Additional Security Verification** page in Sage ESS to support **TOTP** authentication. The **Additional Security Verification** page will display a **QR Code** when the employee has not registered an **Authenticator App** with their account. This page is now included in the login sequence from the pages below:

1. Login
2. Username and Password Help
3. First-Time User Register Here

In addition to the pages above, we have also added a new page to allow existing users to get help in certain cases such as when a new phone needs to be registered, the employee's authenticator app was accidentally deleted or the employee's ESS account was deleted. The **Authenticator Help** link is available on the Sage ESS Login page when **TOTP** authentication is enabled. The link is displayed below the **Username and Password Help** link.

To use the **Authenticator Help**, employees must have an existing Sage ESS account and access to the desktop browser version of Sage ESS in order to scan a QR Code. Employees should have also installed an **Authenticator app** on their mobile device.

Important! The **Additional Authentication** method applies to these products: The web version of Sage HRMS , Sage ESS browser version, ESS mobile browser version and the Sage HRMS Mobile app. For all premium versions of Sage HRMS Employee Self Service, it is recommended to register the authenticator app from the browser version of Sage ESS using a desktop browser. Employees using the Sage HRMS Mobile app

must use the desktop browser version for creating or updating logon information.

Preparing your employees for Additional Authentication

To let your employees know that the logon requirements have changed, add custom instructions to your ESS logon page. The instructions are displayed on the logon page to the left of the logon fields. You can also modify the “Banner Name” on the logon page to display a short message. This text is displayed above the logon fields. See [Customizing the logon page](#) for more details.

To enable Time-based One-Time Password (TOTP) Authentication

1. Log on to HRMS Employee Self Service as the Master user.
2. On the **System Administrator** menu, select **Roles and Logon > Logon Setup**.
3. Under the Logon Properties section, select the **Additional Authentication** dropdown and select the option - **Authenticator App**.
4. Click **Save**.

Important! The upcoming release of the Sage HRMS Mobile app will be required to take advantage of the new TOTP Authentication method. Users will not be able to access the mobile application on the existing version once TOTP Authentication is enabled. Check the [Sage HRMS Community Hub](#) for release notices for the Sage HRMS Mobile app.

What are the initial setup steps my employees need to follow?

Your employees should follow the steps below the first time you enable TOTP Authentication. An Authenticator app will be required for all ESS users to access Sage HRMS Employee Self Service any time TOTP Authentication is enabled.

All ESS Users (Employees)

1. Download and install an **Authenticator app** on their cell phones.
2. Go to the Apple App store or the Google Play store.
3. Search for and install one of the available **Authenticator apps** .

Tip: If your employee already has an existing **Authenticator app** on their cell phone, they can use it and register their Sage ESS account with it.

Existing ESS Users (Employees)

1. Login to Sage ESS by entering your Username and Password.
2. Click **Sign In**.
3. The **Additional Security Verification** page opens. Follow the directions on the screen to continue.
 - A **TOTP Authenticator** app is required to continue.
 - Install an authenticator app on your mobile device, or use an existing app.
 - Scan the QR code displayed on the **Additional Security Verification** page to register your authenticator (if not already registered).
 - Enter the Code generated by your app.
 - Click Submit to log in.

New ESS Users (Employees)

1. On the Sage ESS Logon page, click the **First-Time User Register Here** link.
2. On the Create New Logon page:
 - Enter the requested information.
 - Select a Security Question, and then type the Security Answer.
3. Click **Next**.
4. On the second Create New Logon page:
 - Enter the Username that you want to use.
 - Enter the Password that you want to use.
 - Enter your Password again to confirm it.
5. Click **Save**.
6. The **Additional Security Verification** page opens. Follow the directions on the screen to continue.
 - A **TOTP Authenticator** app is required to continue.
 - Install an authenticator app on your mobile device, or use an existing app.
 - Scan the QR code displayed on the **Additional Security Verification** page to register your authenticator (if not already registered).

- Enter the Code generated by your app.
- Click Submit to log in.

Forgot Password ESS Users (Employees)

1. On the Sage ESS Logon page, click the **Username and Password Help** link.
2. On the **Change or Reset Password** page, enter the requested information.
3. Click **Next**.
4. On the **Forgot Your Password** page, enter your Security Answer.
5. Click **Save**.
6. On the **Change or Reset Password** page, enter your new password.
7. Enter your new Password again to confirm it.
8. Click **Save**.
9. The **Additional Security Verification** page opens. Follow the directions on the screen to continue.

Tip: If your employee already has an existing **Authenticator app** on their cell phone, they can use it to register their Sage ESS account with it.

Authenticator Help (Existing Employees)

You must have a current Logon to use **Authenticator Help** and be able to scan a **QR Code** from your phone.

1. On the Sage ESS Logon page, click the **Authenticator Help** link.
2. Enter your First Name and Last Name on the **Authenticator Help** page to verify your Logon.
3. Click **Next**.
4. Enter your Security Answer.
5. Click **Save**.
6. Enter your Username and Password on the Additional Security Verification page.
7. Click **Submit**

8. The **Additional Security Verification** page opens. Follow the directions on the screen to continue.

- A **TOTP Authenticator** app is required to continue.
- Install an authenticator app on your mobile device, or use an existing app.
- Scan the QR code displayed on the **Additional Security Verification** page to register your authenticator (if not already registered).
- Enter the Code generated by your app.
- Click Submit to log in.

Change Logon (internal page)

The **Change Logon** page provides a way for an employee to register an authenticator app when they have lost their phone or got a new one or might have accidentally deleted their authenticator app.

1. Log on to Sage HRMS Employee Self Service with your current logon credentials.
2. Click the **profile** icon in the right corner of the title bar, and then select **Change Logon** to open the **Change Logon** page.
3. Scan the QR Code to register your **TOTP Authenticator app**.
4. Click **Save**.

The next time you want to access Sage HRMS Employee Self Service, you must use your Authenticator app.

Note: An Authenticator app will be required to access Sage HRMS Employee Self Service any time TOTP Authentication is enabled. The Master user; however, is not impacted by any of the Additional Authentication options.

Sage HRMS Accessibility Initiative In Progress

As part of our ongoing effort to improve the usability of the Sage HRMS web application, we are implementing enhancements to align with recognized accessibility standards, including the Web Content Accessibility Guidelines (WCAG). Accessibility improvements will continue to be introduced in each release as we work towards achieving WCAG 2.2 Level AA compliance.

We recognize that implementing accessibility enhancements is important to ensure all users can access and navigate our products without barriers or limitations and recent legislation in states such as Colorado and California require that some government entities meet WCAG compliance standards. We have been working hard to update our web and mobile interfaces to meet those requirements to support all users and remain compliant with evolving legal requirements.

To reach the largest group of users in phase one of our initiative, we prioritized updates to the most frequently accessed employee pages in Sage HRMS Employee Self Service. We have made changes like improved field labels, adding accessible names to input fields, adding language references to pages, alternate text to fields and improved page tabbing. These changes enhance how our applications work with screen readers and other accessibility tools and will not be visible to most users.

Employee pages in Sage ESS that have been updated to support Accessibility:

- Personal Profile
- Time Off
- Pay History
- Home page
- Logon

The Sage HRMS mobile app is also being enhanced to support the WCAG compliance standards as well.

Direct Deposit added to the web version of Sage HRMS for HR Only installs

Direct Deposit is now available in the web version of Sage HRMS for HR Only installs. The Direct Deposit page is on the Job and Pay menu in the web version of Sage HRMS for HR Only installs that are not integrated with Sage 300 Payroll. Like other pages in the premium web version of Sage HRMS, you must search for and select an employee before you can view details or make changes to an employee's Direct Deposit information.

The Direct Deposit page will not be displayed in the Sage HRMS Admin's menu by default after you upgrade. Before accessing the Direct Deposit page in the premium web version of Sage HRMS, ensure that your Security Group has access to the Direct Deposit page. Login to

the premium web version of Sage HRMS as an HRMS Admin who has access to the "System" product and can access the Setup > System > Security > Group Security page. Select the Sage HRMS User's Security Group and review the HR product Detail Activity for the Direct Deposit Task (page). Ensure that the Allow Access column for the Direct Deposit Task (page) has been set to Allow Access.

Note: At this time, the premium web version of Sage HRMS does not support the Direct Deposit page for customers using Sage 300 payroll.

Export Direct Deposit Information in web version of Sage HRMS

A new page has been added to the **premium web version of Sage HRMS** called **Export Direct Deposit Information**. This page allows the HRMS Admin to search for and select a group of employees with Direct Deposit Information and export this data into a .CSV file. The exported data is from the [SageHRMS_Live].[href] table.

The **Export Direct Deposit Information** page is only available in the premium the web version of Sage HRMS for customers using the HR Only product and for customers with the HR Only product integrated with Sage 100 Payroll Link. This new page is displayed on the HRMS Admin's Job and Pay menu.

If you are using the premium web version of Sage HRMS with the HR Only product, and your Security Group does not have access to any companies, the following message is displayed on the Export Direct Deposit Information page - "No assigned employers have access to Export Direct Deposit Information."

If you are using the web version of Sage HRMS with the HR Only product integrated with Sage 100 Payroll Link, and your Security group does not have access to a company that has enabled Direct Deposit in the web version, the following message is displayed on the **Export Direct Deposit Information** page - "No assigned employers have access to Export Direct Deposit Information."

Employee Search

The **Export Direct Deposit Information** screen is designed with an employee search feature like other pages. Most of the search fields operate the same as other searches. The Employer drop-down; however, behaves a little differently for each of the products mentioned above.

HRMS Admins using a Sage HRMS HR Only install will only see Employers in their Security Group. The rules governing the Employer drop-down for an HR Only install integrated with Sage 100 Payroll Link are different. The HRMS Admin's Security Group must have access to a company who has enabled Direct Deposit in the web version of Sage HRMS. If no companies in their Security Group have enabled Direct Deposit, the previous message regarding access to this page is displayed.

When the Employer drop-down is populated, the Enterprise option is only available if the HRMS Admin has two or more Employers meeting the page security and data requirements described above. In addition, if Enterprise is available, the Employer drop-down also includes an additional option to select Multiple Employers.

Selecting Multiple Employers from the Employer drop-down will expose an extra control to the right of the Employer drop-down. The control displays a list of Employers, each with a corresponding checkbox. This feature allows the HRMS Admin to select multiple companies at once without selecting all the companies.

Two other search options are also displayed on the **Export Direct Deposit Information** screen depending on your product subscription.

If you are using the web version of Sage HRMS and have also purchased Sage HRMS Employee Self Service, an additional search field is displayed under the Social Security field labeled - **Include Employees With Pending Changes**. When this option is available, the search results table also includes an additional column labeled "Pending Changes."

The **Include Employees With Pending Changes** option allows users to include or exclude employees with pending Direct Deposit changes in Employee Self Service. Selecting "Yes" will include employees with pending changes only if the employee **also** has "approved" Direct Deposit records.

For employers who also use the Sage 100 Payroll Link, you will see an additional search option under the Custom Search Criteria section. The **Include Employees With Direct**

Deposit Set to No field allows users to include employees whose Direct Deposit field on the Sage 100 Payroll Setup is set to No. Previously approved Direct Deposit records will be included in the export file when this field is set to Yes.

Employee Selection

After defining your search criteria, click **Go** to see your results. All employees are selected by default in the results table. You can change the option for each employee by deselecting the check box on the employee record. The check box in the header row of the table also acts as a “Select All/Deselect All” button. The results table does not display any Direct Deposit data, only the search fields are displayed with corresponding data if applicable.

Selecting **Export** will generate a .CSV file with the employees selected. The export file name includes the date the file was exported and is saved by default to the Downloads folder.

The fields listed below are included in the export file:

- Employee Name
- Employee ID
- SSN/SIN
- Company Code
- Employee Status
- Priority Order
- Bank Account Number
- Routing Number
- Account Type
- Bank Description
- Distribution Method
- Percent/Amount
- Pre-Note Sent
- Pre-Note Date
- Change Date

Cross Employer Transfer - Additions to Optional HR Data in web version of Sage HRMS

We have added E-Verify and Direct Deposit information to the **Copy Optional HR Data** section in the Cross Employer Transfer task, allowing administrators the option to transfer this data when completing a Cross Employer transfer.

E-Verify Information

You can now choose whether to transfer E-Verify Information from the desktop version of Sage HRMS or from the premium web version of Sage HRMS. The **Copy Optional HR Data** tab in the Cross Employer Transfer feature has been updated to include the option to transfer E-Verify Information. If you are in the desktop version of Sage HRMS, you will also see a message indicating that this data is available in the premium web version of Sage HRMS. E-Verify Information is enabled for all product installs.

When E-Verify Information is selected to transfer, all corresponding Notes and Attachments with the employee's E-Verify Information is also transferred with the employee to the new employer.

Direct Deposit

The second transfer option we added is Direct Deposit. This option is only available in the web version of Sage HRMS. It is enabled only for HR Only customers and for customers integrated with Sage 100 Payroll Link under specific data conditions.

When Direct Deposit is enabled for customers integrated with Sage 100 Payroll Link, a message is displayed on the Cross Employer Transfer page in the desktop version of Sage HRMS informing the user that the Cross Employer Transfer process must be completed using the premium web version of Sage HRMS.

To transfer Direct Deposit information for customers integrated with Sage 100 Payroll Link, Direct Deposit must be enabled at the company level and at the employee level as well. When these conditions are not true, the Direct Deposit checkbox is disabled in the Copy Optional HR Data list on the Cross Employer Transfer page.

If your subscription also includes ESS, employees with pending direct deposit records cannot be transferred. A message is displayed on the first page of the Cross Employer Transfer stating that - “The selected employee has submitted a request to update their Direct Deposit information. Please contact an administrator to resolve this request before completing a Cross Employer Transfer.”

Sage HRMS Mobile App Info tile added to HRMS Admin home page

We will occasionally refresh the static content on the home page of the web version of Sage HRMS. This release will feature information about the Sage HRMS Mobile app.

New Web Functionality added to Group Security in web version of Sage HRMS

The Group Security Task filter for the HR product Detail activity in the web version of Sage HRMS now includes both **E-Verify Information** and **Direct Deposit** under the Tasks section. The Allow Access column must be selected for each Security Group that should have access to these pages in the web version of Sage HRMS. If this step is not completed after the upgrade, the E-Verify Information page and the Direct Deposit page will not be available on the Sage HRMS Admin menu.

Employee Direct Deposit page available in ESS for HR Only installs

The Employee **Direct Deposit** page has been added to the Sage Employee Self Service application for customers with Sage HR Only installs.

In order to allow Employees to submit changes for approval, the **Direct Deposit** page must be set to “Approve” on the Page Setup tab of the Employer Setup page in Sage ESS. You must also assign either an ESS HR Admin or Benefit Admin as the “Approval” role. Set the page to “View” if you want employees to be able to only see their current Direct Deposit record and not make changes.

Employees can access the Direct Deposit page from the Employment menu in Sage HRMS Employee Self Service. If this page is set for "Approval," there will be a message at the top of the page informing employees that changes will require approval. Employee changes are not immediately available until approved.

Sage EULA updated in install modules for all versions

The Sage EULA has been updated in all of the Sage HRMS product installs.

ESS Windows Authentication log in issue correction

Fixed an issue where Windows Authentication fails during subsequent login attempts for employees terminated in one company and rehired in another. Terminated Employees rehired into a different company in your enterprise are now able to login successfully when Windows Authentication is configured in Sage Employee Self Service.

Non-Premium version of Sage HRMS and ESS product updates

This update does not include any new features or improvements to the Non-Premium version of Sage HRMS or to the Non-Premium version of Sage HRMS Employee Self Service.

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	SageAbraSQLHRMS10.70.76.15.exe	10.70.76.15-2025 Q2
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.102001_premium_web_HRMS_ESS.exe	21.10.15.01 - 2025 Q2
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10.70.76.15.exe	10.70.76.15-2025 Q2
Existing version of Sage HRMS Employee Self Service	N/A	N/A

Sage HRMS update installation instructions

Important! Starting with Sage HRMS Q1 2024, Sage HRMS Integrated now 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.
- The following Sage 300 payroll modules have also been updated:
 - Bank
 - General Ledger
 - System Manager

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: June 26th, 2025.

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.

Premium web version of Sage HRMS Setup and Configuration

This section includes instructions for setting up the premium web version of Sage HRMS.

After installing the premium web version of Sage HRMS, the following steps must be completed to see the HRMS menu items.

1. From the Start menu on the server where the web version of Sage HRMS is installed, select All Programs > Sage HRMS (Web Version)> System Maintenance to open the System Maintenance utility.
2. On the **Configuration and Settings** tab, click the **Generate Master Password** button and copy the password provided to log into Sage HRMS (Web Version) as the Master user.
3. Click Save.
4. Exit the System Maintenance utility.
5. In your browser, navigate to the Sage HRMS Web Alias you entered in Step 8 of the install.
 - a. For example: `http://{servername}/selfservice/`
6. Log into the web version Sage HRMS using the Master username and the password you copied from step 2 above.
7. Click Sign In.
8. Select System Admin > Roles and Logon > Logon Setup.
9. On the Logon Setup page for Initial Logon Fields, select the check boxes for one or more fields (such as Last Name or Email Address).
10. In the Employee Status area, select the check boxes for one or more employee statuses for employees who are allowed to create a logon, change their password, and log on to the system.
11. In the Password Properties area and Logon Properties area, specify the properties.
12. In the Logon Reset Message area, enter a custom message that your employees will see when they cannot successfully log on and they click the Username and Password Help link on the Sage HRMS logon page.

13. At the bottom of the Logon Setup page, select five security questions to present to a user when they attempt to create a new logon.
14. Click Save.
15. Select System Admin> Roles and Logon > Change Password.
16. On the Change Password page for Password, type new password for your master user, following the requirements shown on the page.
17. For Confirm Password, type the new password again to confirm.
18. Click Save.
19. Select System Admin> Roles and Logon > Logon Maintenance.
20. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
21. In the search results table, click the employee's name.
22. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
23. Click Save.
24. Repeat steps 14 -18 for each user that requires access to the web version of Sage HRMS.
25. System Setup
 - a. Select System Admin> select System Settings > System Setup.
 - b. On the System Setup page, enter or select the appropriate setting for each item in the following areas of the page:
 - Message Center
 - Display Notifications Since
 - Archive Messages
 - Deleted Archive Messages Prior To
 - Email Notification
 - Include Custom Message
 - Technical Administration

- Technical Admin Email Address
- System Emails Sent From
- Mail Relay

First-Time User Register Here

A User account is required to access to the web version of Sage HRMS.

1. On the Logon page, click **First-Time User Register Here**
2. On the Create New Logon page:
3. Enter the requested information.
4. If included by your administrator, select a Security Question, and then type the Security Answer.
5. Click Next.
6. On the second Create New Logon page:
 - a. Enter the Username that you want to use.
 - b. Enter your Password again to confirm it.
 - c. Enter the Password that you want to use.
 - d. Click Save.
7. You are now logged into the premium web version of Sage HRMS and should see the HRMS menu items.

Premium version of Sage HRMS Employee Self Service Setup and Configuration

This section includes instructions for setting up the premium web version of Sage HRMS to work with ESS.

After installing the premium version of Sage Employee Self Service, the following steps must be completed to see the HRMS menu items.

1. Log into the premium web version of Sage Employee Self Service as the Master user.
2. Select System Admin > Roles and Logon > Logon Maintenance.
3. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
4. In the search results table, click the employee's name.
5. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
6. Click Save.
7. Repeat steps 3 - 7 for each user that requires access to the web version of Sage HRMS.
8. Verify the settings on the System Setup page
 - a. Select System Admin > select System Settings > System Setup.
 - b. The following settings on the System Setup page impact the web version of Sage HRMS:
 - i. Message Center
 - ii. Email Notification
 - iii. Technical Administration

Sage HRMS Employee Self Service HR Administrators

Users assigned to the role of HR Admin in Sage HRMS Employee Self Service can also "tie" ESS user accounts to Sage HRMS.

1. Log into the premium version of Sage Employee Self Service as an ESS HR Administrator.
2. Select the System Administrator menu in Sage HRMS Employee Self Service.
3. On the System Administrator menu, select Roles and Logon > Logon Maintenance.
4. On the Logon Maintenance page, search for the ESS user whose account you want to tie to Sage HRMS.
5. In the search results table, click the employee's name.
6. To tie this user's account to Sage HRMS, click the HRMS User dropdown and select the appropriate user.
7. Click Save.

Note: Users with access to both the premium web version of Sage HRMS and Sage HRMS Employee Self Service can toggle between products by clicking the product name in the title bar.

System Recommendations for Sage HRMS and Sage HRMS Employee Self Service

Upcoming Changes to Sage HRMS and Sage ESS System Requirements

Sage HRMS Payroll Web Screens pending upcoming release in Q3 2025

The Sage HRMS product team is planning on releasing Payroll Web Screens in the upcoming Q3 2025 release in September 2025. Sage HRMS Payroll Web Screens do not support Windows Server 2016 and SQL Server 2016. Please plan to upgrade your system environments before Q3 in anticipation of this release.

Windows 10 Announcement

Windows 10 Note: Microsoft has announced Windows 10 support will be discontinued in October 2025.

See Sage Knowledgebase article [225924250083549](https://knowledge.sagepub.com/225924250083549) for the current hardware and software requirements for all versions of Sage HRMS and Sage HRMS Employee Self Service.