



Sage HRMS

Q2 2026 Release Notes

July 2026

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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 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 SR 2025 or later to upgrade to Q2 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.

Canadian Payroll Tax Updates

The following 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

This section lists provincial and territorial legislative updates available with this release. If a province and territory is not listed in this section, there are currently no tax updates or product modifications for that province and territory.

British Columbia

On February 17, 2026, the Government of British Columbia announced a change to the lowest personal income tax rate and the BC tax reduction.

For 2026 and subsequent years, the lowest personal tax rate is increased from 5.06% to 5.60%.

Since the employers have used a lower tax rate for the first six months of the year, a prorated lowest personal income tax rate of 6.14% will apply for the remaining six months commencing with the first payroll in July.

The tax rates and brackets are as follows:

- For income under \$50,363, the tax rate is 6.14% (prorated)
- For income from \$50,363 to \$100,728, the tax rate is 7.70%
- For income from \$100,728 to \$115,648, the tax rate is 10.50%
- For income from \$115,648 to \$140,430, the tax rate is 12.29%
- For income from \$140,430 to \$190,405, the tax rate is 14.70%

- For income from \$190,405 to \$265,545, the tax rate is 16.80%
- For income of \$265,545 and over, the tax rate is 20.50%

In addition, for 2026 and subsequent years, the basic reduction is increased from \$562 to \$690.

The basic reduction amount was indexed to \$575 effective January 1, 2026.

Since this amount was used for the first six months of the year, a prorated basic reduction amount of \$805 will apply for the remaining six months.

Prince Edward Island

On April 14, 2026, the Government of Prince Edward Island introduced a new income tax bracket.

For 2026 and subsequent years, taxable income above \$200,000 is subject to a 20% tax rate.

Since the employers have used a lower tax rate for the first six months of the year, a prorated rate of 21% will apply for the remaining six months commencing with the first payroll in July.

The tax brackets and rates are as follows:

- For income under \$33,928, the tax rate is 9.50%
- For income from \$33,928 to \$65,820, the tax rate is 13.47%
- For income from \$65,820 to \$106,890, the tax rate is 16.60%
- For income from \$106,890 to \$142,520, the tax rate is 17.62%
- For income from \$142,520 to \$200,000, the tax rate is 19.00%
- For income of \$200,000 and over, the tax rate is 21.00% (prorated).

Personal Tax Credits for the 2026 mid-year release

Effective July 1, 2026, the provincial and territorial personal tax credits that employees can claim have changed. These changes are reflected in the new 2026 provincial and territorial

TD1 forms, and the Québec TP-1015.3-V form. The basic personal amounts that have changed are listed below.

	January 2026	July 2026	July 2026 (Prorated Amount)
Newfoundland and Labrador	\$11,188	\$13,094	\$15,000

Federal Legislative Updates

There are no federal legislative updates with this release.

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.

Arkansas

Arkansas withholding tables and instructions, including rates on supplemental wages, have been updated for January 1, 2026. Refer to the state publication for more details.

Georgia

Georgia withholding tables and instructions, including rates on supplemental wages, have been updated for May 11, 2026. 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
KY0184	Elsmere CT Regular IT	1.75%	07/01/2026
KY0256	Grant CO Regular IT	2%	07/01/2026
KY0289	Irvington CT Regular IT	0.25%	01/01/2026
KY0290	Grace Commercial Park TIF TD Regular IT	1%	10/01/2023
KY0291	Falmouth CT Regular IT	1.5%	07/01/2026

Maryland

To ensure accurate Maryland local tax calculations, employees with a Maryland local tax must also have Maryland State Income Tax (MDSIT) assigned in the employee record. Payroll now enforces this requirement during employee setup.

For existing employee records, review the tax setup to ensure this requirement is met to prevent errors during payroll processing.

For more information, see Sage Knowledgebase article [260414155155137](#).

Ohio

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

Code	Description	Rate	Effective Date
OH1096	Jersey-New Albany JEDD I CT Regular IT	2%	05/01/2026
OH1097	Jersey-New Albany JEDD II CT Regular IT	2%	05/01/2026
OH1098	Jersey-New Albany JEDD III CT Regular IT	2%	05/01/2026
OH1099	Green-Chillicothe JEDD CT Regular IT	2%	01/01/2026
OH1100	Millennial Moments JEDD CT Regular IT	1%	01/01/2024

Oregon

Effective July 1, 2026, the Eugene Community Safety Payroll Tax exemption will increase in accordance with Oregon state minimum wage.

The minimum rates will increase as follows:

- Standard Minimum Wage: \$15.55 per hour
- Portland Metro Minimum Wage: \$16.80 per hour
- Non-Urban Minimum Wage: \$14.55 per hour

Employees earning less than the annualized standard minimum wage amount remain exempt from withholding. All other covered employees will be withheld at the 0.44% tax rate.

For more information, including details about setting up related local tax codes, see Sage Knowledgebase article: [260701140035663](#).

Pennsylvania

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

Code	Description	Rate	Effective Date
PA0916	Miles TP, Penns Valley SD (NR) LST	\$52	01/01/2026
PA7834	Liberty TP, Montrose SD (NR) Regular IT	1%	04/01/2026
PA7835	Liberty TP, Montrose SD Regular IT	1%	04/01/2026

Utah

Utah withholding tables and instructions have been updated for 2026. Refer to the state publication for more details.

West Virginia

West Virginia withholding tables and instructions, including rates on supplemental wages, have been updated for January 1, 2026. Refer to the state publication for more details.

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

Code	Description	Rate	Effective Date
WV0001	Weirton CT Service Fee	\$260	05/17/2026

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.

New Treasury Tipped Occupation Codes (TTOC) Support for W-2 2026 Forms

You can now assign Treasury Tipped Occupation Codes (TTOC) on the Payroll Employee Supplemental Information screen to meet W-2 Form 2026 reporting requirements. See Knowledgebase article: [260603155330890](#) for more details.

Support for Employer Contributions to Trump Accounts for W-2 2026 Forms

You can now set up a Benefit earnings code to track and report employer contributions to Trump Accounts, with a new "Employer Contributions to Trump Accounts" W-2 reporting option available in Payroll Earnings and Deductions setup. See Knowledgebase article: [260603155330890](#) for more details.

Canadian Payroll product updates

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

Transaction History

Fixed an issue in Transaction History where the warning message displayed incorrect contribution limits when taxes (such as CPP and CPP2) exceeded the allowed limits.

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 Expression Builder in the desktop version of Sage HRMS Learn more	Yes		
Sage HRMS Q2 Expression conversion Learn more	Yes		
Language Preference now available in Sage Employee Self Service Learn more			Yes
Login Authentication now available at User account level in Sage Employee Self Service Learn more			Yes
Login Authentication now allows Trusted Devices option in Sage Employee Self Service Learn more			Yes
Sage HRMS Payroll Bank Reports in web version Learn more		Yes	
Defect correction on Salary tab of Job Code Details Learn more	Yes		

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Sage HRMS products now support TLS 1.3 Learn more	Yes		
Security Enhancement: File Access Controls Learn more		Yes	Yes

New Expression Builder in the desktop version of Sage HRMS

We are excited to introduce a new version of the **Expression Builder** in the desktop version of Sage HRMS. This change supports ongoing product modernization as we upgrade technology by replacing the existing Visual FoxPro (VFP) Expression Builder with a newer version that supports only SQL-based syntax. This change improves long-term support, aligns with modern technology standards, and enables future enhancements.

The new Expression Builder screen has been modified to improve usability by removing unnecessary options and drop-downs such as unsupported VFP controls. Other changes include moving the "From Table" selection and corresponding Fields list to the top of the screen. The Expression panel is now displayed at the bottom of the screen above the buttons. Functions are still available by selecting a Category (i.e. "String" or "Math") first and then a Function. As you work with Sage HRMS, whenever you see the Expression Builder button, click it to open the new Expression Builder window to create an expression.

Other improvements in the new Expression Builder include ensuring that only the tables and fields relevant to the specific feature (i.e. Process, Report...) are available to select and use in your expression. In the VFP version of the Expression Builder, invalid tables and fields were occasionally available in the UI to select. Tables and fields are now displayed with their respective names and descriptions directly from the Sage HRMS Live database in the new version of the Expression Builder.

Reports that use the Expression Builder will now use the new version of the Expression Builder. If you use expressions when running Reports in Sage HRMS and have saved any

default options, you will need to click the **Restore Defaults** button on the Reports window to ensure that the criteria is available again for the report. Click **Save Defaults** to save your default report options again. In addition, after you generate a report by printing, previewing, or exporting it, Sage HRMS saves your selection criteria. The next time you select that report, the saved selection criteria is available again.

See the [Using the Expression Builder](#) help topic for more information.

Note: Because Sage HRMS functions are unique to the Sage HRMS system they are not accessible from within the Expression Builder and will fail if you click **Verify**. To use a Sage HRMS function, you must manually enter it in the Expression window.

For example, if you are using the **COUNTDEP()** Sage HRMS function and open it in the Expression Builder and click **Verify**, you will get the message below:

" Invalid Expression.

'COUNTDEP' is not a recognized built-in function name."

Review the list of supported [Sage HRMS functions](#) for more information.

Sage HRMS Q2 Expression conversion

During the **Q2 2026** upgrade, Sage HRMS will evaluate and automatically convert existing FoxPro expressions into SQL expressions. If any expression fails to upgrade, the upgrade process will display a message indicating that one or more expression could not be successfully converted. A .csv file will also be generated identifying the failed conversions. This file is available on the server where Sage HRMS is installed (SageHRMSServer\Data\ExpressionBuilderMigrationLog). You should review this file and address any failed expressions. While there is no immediate deadline, we strongly recommend resolving any failed expression in a timely manner to ensure continued compatibility.

See the "Troubleshooting Failed Expressions" article for more information.

To assist with validating your expression data after fixing or removing your failed expressions, you can run the **Expressions Migration** utility as described below.

Expressions Migration Utility

The Q2 Sage HRMS install also includes a testing tool to help evaluate the expressions in your Sage HRMS Live database. The **Expressions Migration** utility can be found in your Sage HRMS client folder (ExpressionsMigration.exe) and can be run anytime to retest failed expressions. This tool also provides a .csv file at the end of the process. No data is changed when running the Expressions Migration utility.

Language Preference now available in Sage Employee Self Service

We have added support for Spanish and Canadian French languages in Sage Employee Self Service.

Employee and manager users can select one of three supported languages and view their Sage Employee Self Service pages in their default language. By default, Sage Employee Self Service continues to display content in English for all users.

At this time, language support is available only for internal pages and is not supported on pages such as Sign In, First-Time User, or Username and Password Help.

To change the default language, ESS users can select their preferred language on the **Change Logon** page after logging in. After a language is selected, ESS refreshes and opens either the Home page or the Message Center, depending on system configuration. Employee Self Service page information will now be displayed in the user's Default Language. System data and user entered data will still be displayed in English.

See the [Change Logon](#) help topic for more details.

Note: All Sage Employee Self Service widgets on the user's home page are reset when changing the default language on the Change Logon page.

Login Authentication now available at User account level in Sage Employee Self Service

The Logon Maintenance screen in Sage Employee Self Service now supports configuring Login Authentication at the user account level. System Admins can define authentication

requirements by selecting one of the existing Authentication methods from the Additional Authentication dropdown.

The Additional Authentication field will default to the system level value for all existing ESS users when upgrading to Q2. For example, if Additional Authentication is set to use the Security Question option on the Logon Setup page, all existing ESS users will also be set to this method after upgrading.

The Search feature and the results table on the Logon Maintenance page have also been updated to support this feature. Users can now search by an Additional Authentication type or can leave the For dropdown blank in this scenario to return all users with an existing ESS account. In the latter case, the new Additional Authentication column in the results table can be sorted to identify users by Authentication.

In addition to the above changes, we have also added an Export feature to the Logon Maintenance page. Clicking the Export button in the page footer will generate a .csv file containing the Logon Maintenance search results. The "ExportLogonMaintenance.csv" file is saved in your Downloads folder. This file contains the following columns from the results table:

- Employee
- EmployeeStatus
- AccountStatus
- Employer
- EmployeeID
- AdditionalAuthentication

The Additional Authentication dropdown has also been added to the Logon Maintenance screen in the **mobile browser** version. System admins using this version of ESS, can assign one of the Authentication methods to individual user accounts. The other additional functionality described above is not available in the mobile browser version.

See the [Logon Maintenance](#) help topic for more details.

Note: All references to the Sage Employee Self Service (ESS) logon process also includes the web version of Sage HRMS.

Login Authentication now allows Trusted Devices option in Sage Employee Self Service

We have enhanced the Sage Employee Self Service Logon Authentication process by providing the master user with the option to "Allow Trusted Devices." This feature offers flexibility for your employees while still reinforcing security standards during the Logon process.

To support this new feature, we have added the two new fields below to the Logon Setup page:

- Allow Trusted Devices
- Trusted Device Duration

By default, the Allow Trusted Devices field is set to **No** when customers apply the Q2 Sage ESS upgrade.

When the Allow Trusted Devices field is enabled, a "Remember This Device" check-box is displayed on the Additional Authentication screen during the ESS Login process. If the user selects this check-box, a secure cookie is saved on that specific browser or device and expires automatically after a set number of days (the Trusted Device Duration value). The user must then re-authenticate and select the "Remember This Device" check-box again to renew the cookie. The user must configure each device separately to bypass the Additional Authentication step during logon.

The Trusted Device Duration drop-down is disabled until the Allow Trusted Devices field is set to **Yes**. Once enabled, the master user can select any of the four options below:

- 1 day
- 7 days
- 14 days
- 30 days

Additional Business Rules

- The Allow Trusted Device setting applies to all ESS users with an Authentication method other than "None."

- When the Allow Trusted Devices option is set to No, all users are impacted regardless of their authentication method.
- When the Additional Authentication field is set to "None" for either the system level (Logon Setup) or the user account level (Logon Maintenance), the "Remember This Device" check-box option is not be available.

Clearing Trusted Devices (clear cookies)

There are multiple ways a trusted device can be cleared:

- Trusted Device cookie automatically expires based on Trusted Device Duration
- ESS Account Locked by an Administrator
- ESS Account Locked by failed logon attempts by the user
- Browser cache is cleared by user
- User changes their password using the Username and Password Help link
- Admin resets the user's password from the Logon Maintenance page
- User selects Clear All Trusted Devices from the Change Logon page
- User registers a new Authenticator app
- Admin selects Clear Trusted Devices For These Employees from the Logon Maintenance page
- Master user changes the Additional Authentication method on the Logon Setup page
- Master user also selects the Overwrite Custom 'Additional Authentication' Set At The User Level check-box when changing the Additional Authentication type
- Master disables the Allow Trusted Device feature

See the [Logon Setup](#) help topic for more details.

Note: All references to the Sage Employee Self Service (ESS) logon process also includes the web version of Sage HRMS.

Payroll Bank reports added to web version of Sage HRMS

Reports > Payroll or Canadian Payroll

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

Bank Reports

- Bank Entries Posting Journal
- Bank Reconciliation
- Banks
- Check Payment Register
- Deposit Register
- Deposits Status
- Distribution Codes
- G/L Integration
- G/L Transactions
- Options
- Reconciliation Posting Journal
- Reconciliation Status
- Transaction Listing
- Transfer Posting Journal
- Withdrawals Status

Defect correction on Salary tab of Job Code Details

Fixed an issue where the next Employee Number was different between the desktop version of Sage HRMS and the premium web version of Sage HRMS. The employee number field will now display the next highest number when the Numeric Employee ID option is set to true in the desktop version of Sage HRMS.

Sage HRMS products now support TLS 1.3

Sage HRMS products now also support Transport Layer Security (TLS) 1.3.

Security Enhancement: File Access Controls

A security vulnerability in Sage Employee Self Service has been fixed. This release includes important security improvements to file handling and access controls in the custom file content delivery system. We've strengthened input validation and path resolution to ensure files are accessed only from authorized locations. While this vulnerability was identified through a security review and has no known exploitation, we recommend updating to this version as part of your regular maintenance cycle.

Non-Premium version of Sage HRMS and ESS product updates

This update includes changes to the non-premium (existing) version of Sage HRMS and the non-premium (existing) version of Sage HRMS Employee Self Service.

Product Updates	Non-Premium (Existing) HRMS	Non-Premium (Existing) ESS
New Expression Builder in the desktop version of Sage HRMS Learn more	Yes	N/A
Sage HRMS Q2 Expression conversion Learn more	Yes	
Defect correction on Salary tab of Job Code Details Learn more	Yes	
Sage Employee Self Service Updated Sage EULA Learn more	N/A	Yes
Open Enrollment Benefit Rate Table Update Learn more	N/A	Yes
ESS Windows Authentication log in issue correction Learn more	N/A	Yes
Security Enhancement: File Access Controls Learn more	N/A	Yes

New Expression Builder in the desktop version of Sage HRMS

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Defect correction on Salary tab of Job Code Details

Fixed an issue where the next Employee Number was different between the desktop version of Sage HRMS and the premium web version of Sage HRMS. The employee number field will now display the next highest number when the Numeric Employee ID option is set to true in the desktop version of Sage HRMS.

Sage Employee Self Service Updated Sage EULA

The Sage EULA has been updated in the Non-Premium version of Sage Employee Self Service.

Open Enrollment Benefit Rate Table Update

Open Enrollment in Sage Employee Self Service now uses the Open Enrollment rate table instead of the Benefit rate table.

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.

Security Enhancement: File Access Controls

A security vulnerability in Sage Employee Self Service has been fixed. This release includes important security improvements to file handling and access controls in the custom file content delivery system. We've strengthened input validation and path resolution to ensure files are accessed only from authorized locations. While this vulnerability was identified through a security review and has no known exploitation, we recommend updating to this version as part of your regular maintenance cycle.

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	SageAbraSQLHRMS10.70.81.26.exe	10.70.8126- 2026 Q2
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.102501_premium_web_HRMS_ESS.exe	21.1025.01 - 2026 Q2
Non - Premium desktop version of Sage HRMS	SageAbraSQLHRMS10.70.81.26.exe	10.70.8126- 2026 Q2
Non - Premium version of Sage HRMS Employee Self Service	SageHRMSESS10_706101.exe	10.70.61.01 - 2026 Q2

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.

Verifying the latest tax update for U.S. Payroll

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 25, 2026.

Verifying the latest tax update for Canadian Payroll

You can also verify the latest tax update is applied to your system by selecting **Canadian Payroll > Process Payroll > Calculate Payroll** and the **Tax Version** listed on the window should display the date: July 1, 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.