



Sage HRMS

Q3 2026 Release Notes

September 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 Q3 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 Q1 2026 or later to upgrade to Q3 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.

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 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.

Idaho

Idaho withholding tables and instructions have been updated effective January 1, 2026. These changes are retroactive to January 1, 2026, and do not require adjustments to withholding previously calculated during the year. Refer to the state publication for more details.

Maine

Maine withholding tables and instructions have been updated for August 14, 2026. Refer to the state publication for more details.

Ohio

Ohio withholding tables and instructions have been updated for August 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
OH1101	Woodville VI Regular IT	1%	07/01/2026

Pennsylvania

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

Code	Description	Rate	Effective Date
PA4817	Springfield TP, Springfield SD (NR) Regular IT	1%	07/01/2026
PA4818	Springfield TP, Springfield SD Regular IT	1%	07/01/2026
PA7093	Philadelphia CT, Philadelphia City SD (NR) Regular IT	3.425%	07/01/2026
PA7094	Philadelphia CT, Philadelphia City SD Regular IT	3.735%	07/01/2026
PA7767	Collingdale BO, Southeast Delco SD (NR) Regular IT	1%	06/15/2026
PA7768	Collingdale BO, Southeast Delco SD Regular IT	1%	06/15/2026

Product updates

The following product updates are included with this release.

Payroll product updates

U.S. Payroll product updates

Cost Center Override now supports Flat Earnings and Flat Benefits

The "Cost Center Override Allocated Based on Calc Base" option is now available for Flat Earnings and Flat Benefits.

Canadian Payroll product updates

T4 and T4A Screens

Added a File Type option to the T4 and T4A screens, allowing users to select **Original**, **Amended**, or **Cancelled**. The selected file type is displayed on the printed form.

Cost Center Override now supports Flat Earnings and Flat Benefits

The "Cost Center Override Allocated Based on Calc Base" option is now available for Flat Earnings and Flat Benefits.

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 Payroll and System Manager Versions in Sage HRMS Learn more	Yes	Yes	
Sage HRMS Vets 4212 Form Update Learn more	Yes		
Ask Sage HRMS replaces Ally in desktop version of Sage HRMS Learn more	Yes		
Expression Builder added to the web version of Sage HRMS Learn more		Yes	
Criteria Table setup added to the web version of Sage HRMS Learn more		Yes	
Custom Search Criteria added to Employee Processes Learn more		Yes	
Employee Processes added to the web version of Sage HRMS Learn more		Yes	
Global Attachments added to the web version of Sage HRMS Learn more		Yes	
Mass Update Processes added to the web version of Sage HRMS Learn more		Yes	
Time Off Processes enhanced in the web version of Sage HRMS		Yes	

Product Updates	Premium HRMS	Premium Web HRMS	Premium ESS
Learn more			
User Security added to Setup in the web version of Sage HRMS Learn more		Yes	
Default Language added to System Setup in Sage Employee Self Service Learn more			Yes
Task Grid Displays User Information Outside Assigned Security Access Learn more		Yes	
Sage Employee Self Service Provider Enrollment Report Issue Correction Learn more			Yes

New Payroll and System Manager Versions in Sage HRMS

Sage HRMS Payroll has been upgraded to Sage 300 2027 Payroll and Sage 300 System Manager 2027. The following Payroll Modules in the desktop version of Sage HRMS have been upgraded with this update:

- The payroll module has been updated to Sage 300 2027
- Bank [BK73A upgraded to BK74A]
- General Ledger [GL73A upgraded to GL74A]
- System Manager [SM7.3 upgraded to SM7.4]

Caution! Custom Reports and Check forms may require attention with this update. Before applying the update, you must manually copy the relevant DLLs in the UP and CP folders under Program Data located on the Sage HRMS Server. The location is C:\ProgramData\Sage\SageHRMSServer\Payroll\CustomReports\UPxxx\ENG.

Sage HRMS Vets 4212 Form Update

The Vets 4212 Form has been updated for 2026.

Ask Sage HRMS replaces HRMS Ally in desktop version of Sage HRMS

We have replaced the HRMS Ally chatbot in the desktop version of Sage HRMS with **Ask Sage HRMS**. **Ask Sage HRMS** uses the **Sage Semantic Engine** to bring a smarter, more responsive experience to users. **Ask Sage HRMS** is available on the top toolbar.

To get started, enter a question in the **How can I help you today?** field and select **Ask**. **Ask Sage HRMS** analyzes the request and returns a concise answer with links to relevant **Sage HRMS** content.

Key capabilities include:

- Source transparency through the **Show sources** option, which is enabled by default.
- Broader content discovery through **Expand search**.
- Example questions that provide quick access to common information.
- Session-based chat context that supports follow-up questions during an active conversation.

When finished, select **Done** to close the chatbot. Select **Help** to open the traditional Sage HRMS Help system.

Expression Builder added to the web version of Sage HRMS

The Expression Builder is now available in the **premium web version of Sage HRMS**. This version of the Expression Builder incorporates the same technology changes and improvements as the desktop version implemented in the Sage HRMS desktop in Q2, 2026.

The Expression Builder supports only SQL-based syntax. Users can select fields, insert predefined functions, and build expressions from an updated interface. The Expression Builder supports both filtering records and applying calculated values, helping users work faster and with greater accuracy. These updates improve usability for administrative tasks that

rely on logic-based criteria, such as selecting a group of records or defining a value based on existing data and helping users work faster and with greater accuracy.

Criteria Table setup added to the web version of Sage HRMS

We have added the **Criteria Table** page to the Code Table Setup menu in the premium web version of Sage HRMS. Criteria Table codes are used to store the selection criteria you use most frequently. For example, if you use an expression frequently, create a code associated with that expression and save it for future use.

Criteria Tables are managed at the Enterprise level, so they are shared across the organization rather than being limited to a single employer. Maintaining Criteria Tables (Codes) is like maintaining other Code Tables with the exception that the system validates the expression before saving.

To add a new Criteria Table, select Setup > Code Tables from the menu. The Criteria Table is available under Code Tables.

To use a Criteria Table, select Criteria Table from the **Custom Search Criteria** drop-down on the Standard Criteria search form.

Custom Search Criteria added to Employee Processes

The **Custom Search Criteria** drop-down is now available on the Standard Criteria search form in the premium web version of Sage HRMS. The Custom Search Criteria allows users to narrow employee searches using predefined or custom criteria instead of manually entering multiple filters each time.

To use your own search criteria, select one of the following methods from the Custom Search Criteria drop-down list:

- Criteria Table
- Criteria Builder
- Expression Builder

The Custom Search Criteria dropdown is currently available on several of the process screens in the **premium web version of Sage HRMS**.

Global Attachments added to the web version of Sage HRMS

We have also added Global Attachments to the Employee Process menu in the premium web version of Sage HRMS.

The **Global Attachments** process in the premium web version of Sage HRMS gives HRMS Admins a centralized way to upload a document once and distribute it to all employees or a targeted groups of employees. The Shared with option on the **Global Attachments Details** page has been enhanced to give users the option of viewing the list of employees before saving the attachment to the employee record.

Mass Update Processes added to the web version of Sage HRMS

We have added the **Employee Mass Update** page and the **Time Off Mass Update** page to the premium web version of Sage HRMS. Administrators can select the data table to update, choose the field to change, define what records to include, and manually enter the new value or apply an expression created using the new Expression Builder.

To access these pages, select Tasks and Processes:

- Employees > Processes
- Time Off > Processes

Note: You must run the Import Calculations process in the desktop version of Sage HRMS to ensure that all updated information is current and up-to-date after complete the Mass Update process.

Time Off Processes enhanced in the web version of Sage HRMS

Custom Search Criteria is now fully supported for the following Time Off processes in the premium web version of Sage HRMS:

- Accrue Time
- Add Attendance Plans
- Change Attendance Plans

- Close Accrual Year
- Create Absence Transactions
- Delete Absence Transactions
- Reset Current Accrual Year

The above processes were added to the premium web version of Sage HRMS in a previous release with only the Criteria Builder option available. In Q3, Administrators now have the option of selecting a Criteria Table or using the Expression Builder in addition to the Criteria Builder when running the above Time Off processes.

User Security added to Setup in the web version of Sage HRMS

User Security has been added to the Setup menu in the web version of Sage HRMS. Use this page to create and maintain User Security records for both versions of Sage HRMS.

Administrators can manage all User Security tasks such as creating and maintaining user records, assign security groups and delete security users from this page. When a user is selected for deletion, the system checks whether that user still has scheduled work in progress. This includes:

- Tasks in the desktop scheduler
- Pending processes in the web process scheduler

In this scenario, a message is displayed at the top of the page explaining that the delete option is disabled while tasks or processes are pending. This message is also displayed as a tool-tip when hovering over the Delete icon. In addition to this message, a report icon is displayed. Selecting the icon opens a new report called the "Tasks and Processes Not Removed" in a separate window. This report gives the administrator a list of what items must be completed or removed before the user can be deleted. The Master user cannot be deleted.

Default Language added to System Setup in Sage Employee Self Service

This release introduces Language Settings at the System - level in Sage Employee Self Service. This gives organizations better control over supported languages while still allowing

employees to use the language that best fits their needs. The System Setup page in ESS has been updated to support this feature.

The master user can manage the languages available in the ESS application from the System Setup page. The Active Languages setting determines which languages are available to users, while Default Language specifies the language that is selected by default. For this release, English, French, and Spanish are active languages, and English is the default language. When the organization's default language changes, employees without a personal preference are updated automatically, reducing manual maintenance and improving consistency across the employee experience.

During the Q3 ESS upgrade, no changes are made to the employee's default language setting. Employees who have selected a default language, will continue to be set to this language. All other ESS accounts will default to English after the upgrade.

The Language Setting feature is not supported in the premium web version of Sage HRMS.

Note: All Sage Employee Self Service widgets on the user's home page are reset when the Language Settings are changed on the System Setup page and the user's Default Language is changed as a result.

Task Grid Displays User Information Outside Assigned Security Access

Fixed an issue where some employee search pages did not respect the Administrator's security group. The search page no longer displays any employees the user does not have permission to view.

Sage Employee Self Service Provider Enrollment Report Issue Correction

Fixed an issue where the State was being displayed twice on the report.

Non-Premium version of Sage HRMS and ESS product updates

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

Product Updates	Non-Premium HRMS	Non-Premium ESS
New Payroll and System Manager Versions in Sage HRMS Learn more	Yes	
Sage HRMS Vets 4212 Form Update Learn more	Yes	

New Payroll and System Manager Versions in Sage HRMS

Sage HRMS Payroll has been upgraded to Sage 300 2027 Payroll and Sage 300 System Manager 2027. The following Payroll Modules in the desktop version of Sage HRMS have been upgraded with this update:

- The payroll module has been updated to Sage 300 2027.
- Bank [BK73A upgraded to BK74A]
- General Ledger [GL73A upgraded to GL74A]
- System Manager [SM7.3 upgraded to SM7.4]

Caution! Custom Reports and Check forms may require attention with this update. Before applying the update, you must manually copy the relevant DLLs in the UP and CP folders under Program Data located on the Sage HRMS Server. The location is C:\ProgramData\Sage\SageHRMSServer\Payroll\CustomReports\UPxxx\ENG.

Sage HRMS Vets 4212 Form Update

The Vets 4212 Form has been updated for 2026.

My Workforce Analyzer updates

We have updated the links under **Your tools and resources** on the home page of the **My Workforce Analyzer** in this release.

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	SageAbraSQLHRMS10.70.8219.exe	10.70.8219- 2026 Q3
Premium web version of Sage HRMS* *Includes Employee Self Service if purchased	SageHRMS21.102601_premium_web_HRMS_ESS.exe	21.1026.01 - 2026 Q3
Existing desktop version of Sage HRMS	SageAbraSQLHRMS10.70.8219.exe	10.70.8219- 2026 Q3
Existing 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\ - UP80xor CP80x (folder versions may change per release).
 - 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.

Note: If you have not already entered your Sage customer account number on the About Sage HRMS page, the first person who logs in to Sage HRMS after this product update is installed will be required to enter your Sage customer account number.

You can review or change your customer account number in **Help > About 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: September 24, 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: September 30, 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.