Sage | HCM

Payroll kick-off

Payroll moves from Sage 300 to Sage HCM in the new year

Teams meeting

Presented by Stephen O'Sullivan

Sage HCM replaces Sage 300 payroll

In the new year. Sage HCM runs in a web browser.

Moves to Sage HCM

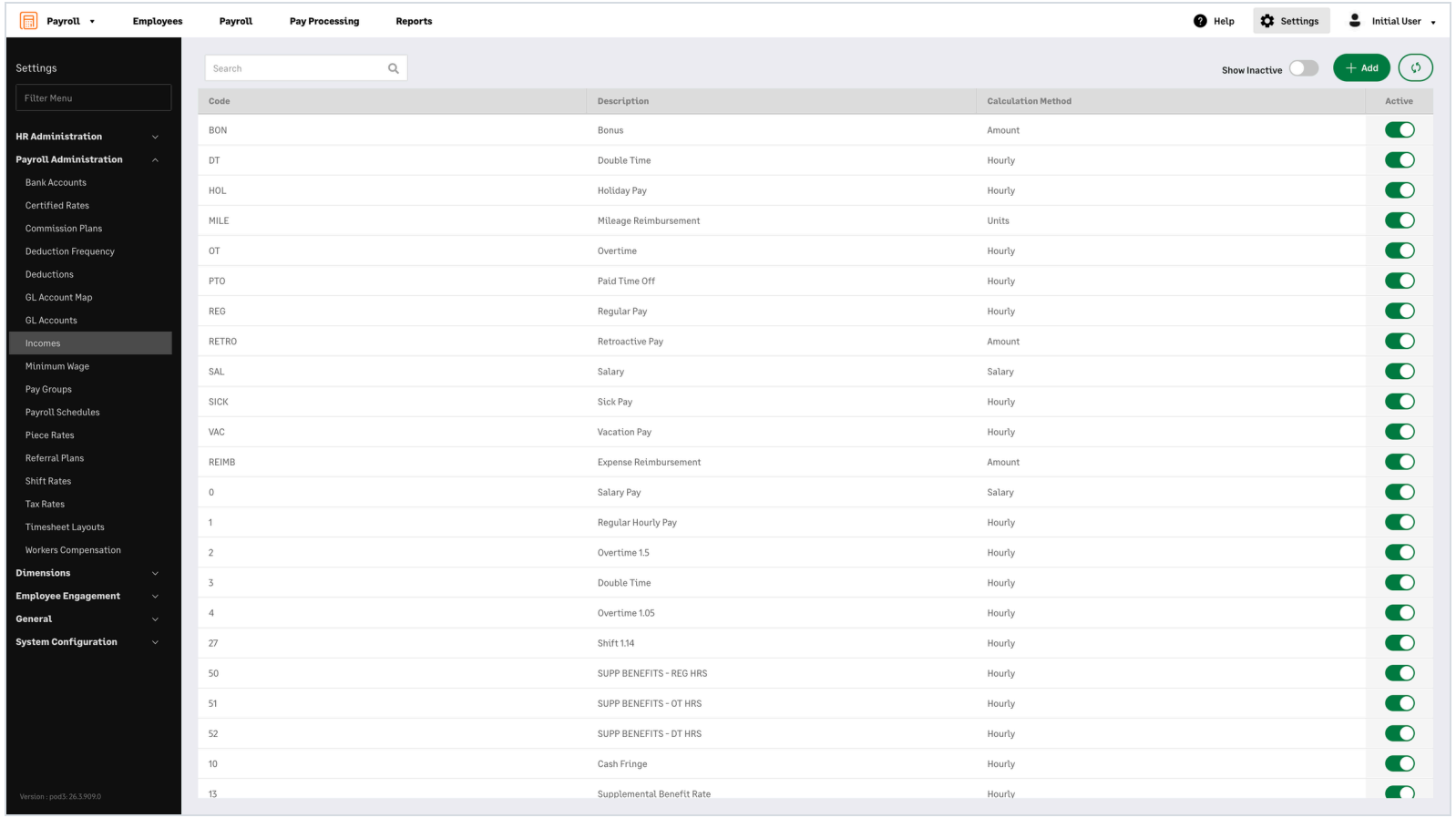
- Weekly union and salaried payroll
- Checks and direct deposit
- Deductions, taxes, union rates and workers' comp
- Union fund and certified payroll reports, built again
- W-2s and year-end filings, most likely through Aatrix

Stays as it is

- Hours come in from Jobber and Timekeeper
- Paid time off in Timekeeper
- Old payroll history readable in Sage 300
- ADP payroll support: to be decided

Pay codes

The live Sage HCM site: Settings, Incomes

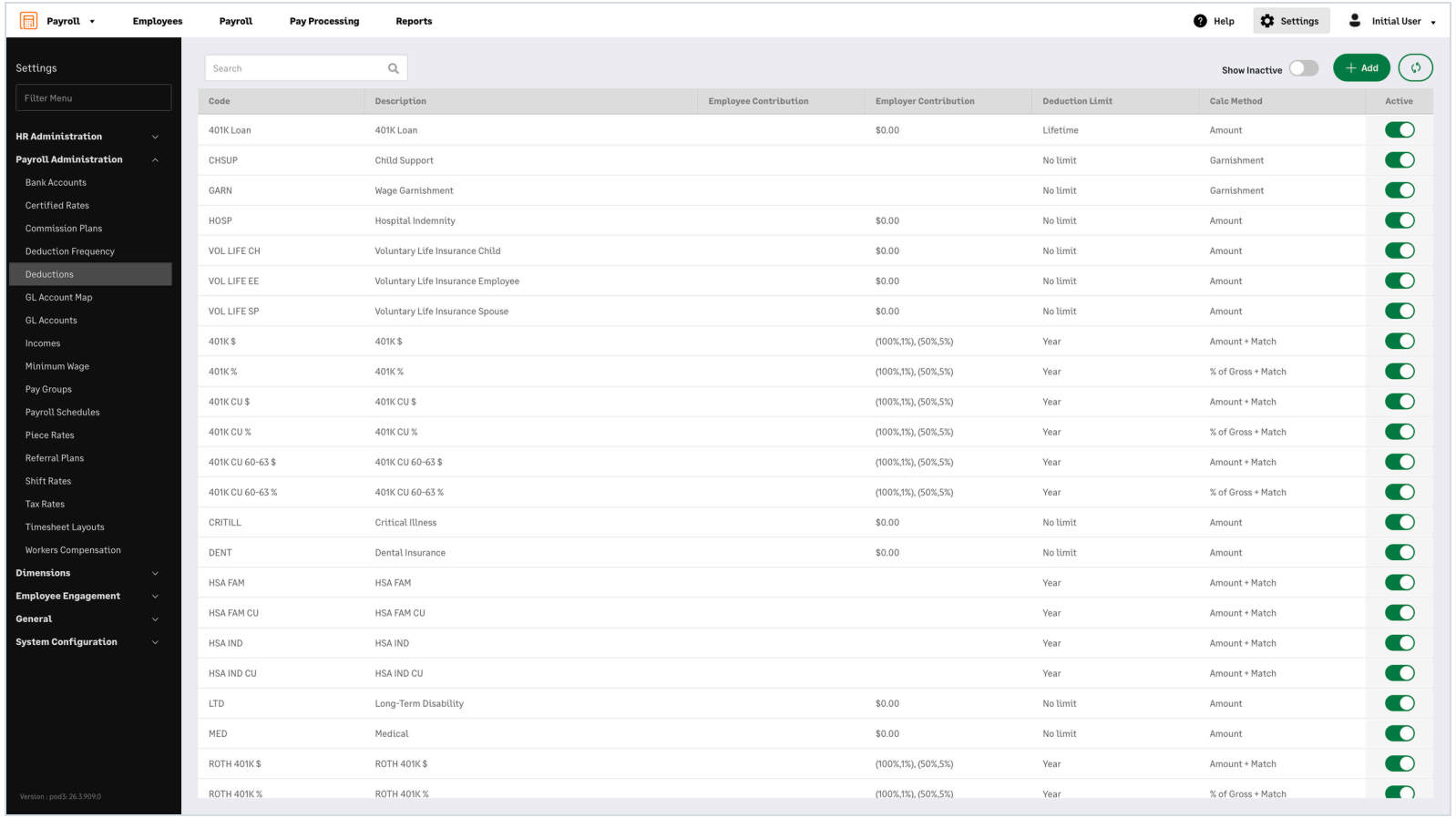


What is different from Sage 300

- Pay codes are called “incomes”
- Each Sage 300 pay code keeps its own line
- A separate test site for practice

Deductions

The live Sage HCM site: Settings, Deductions



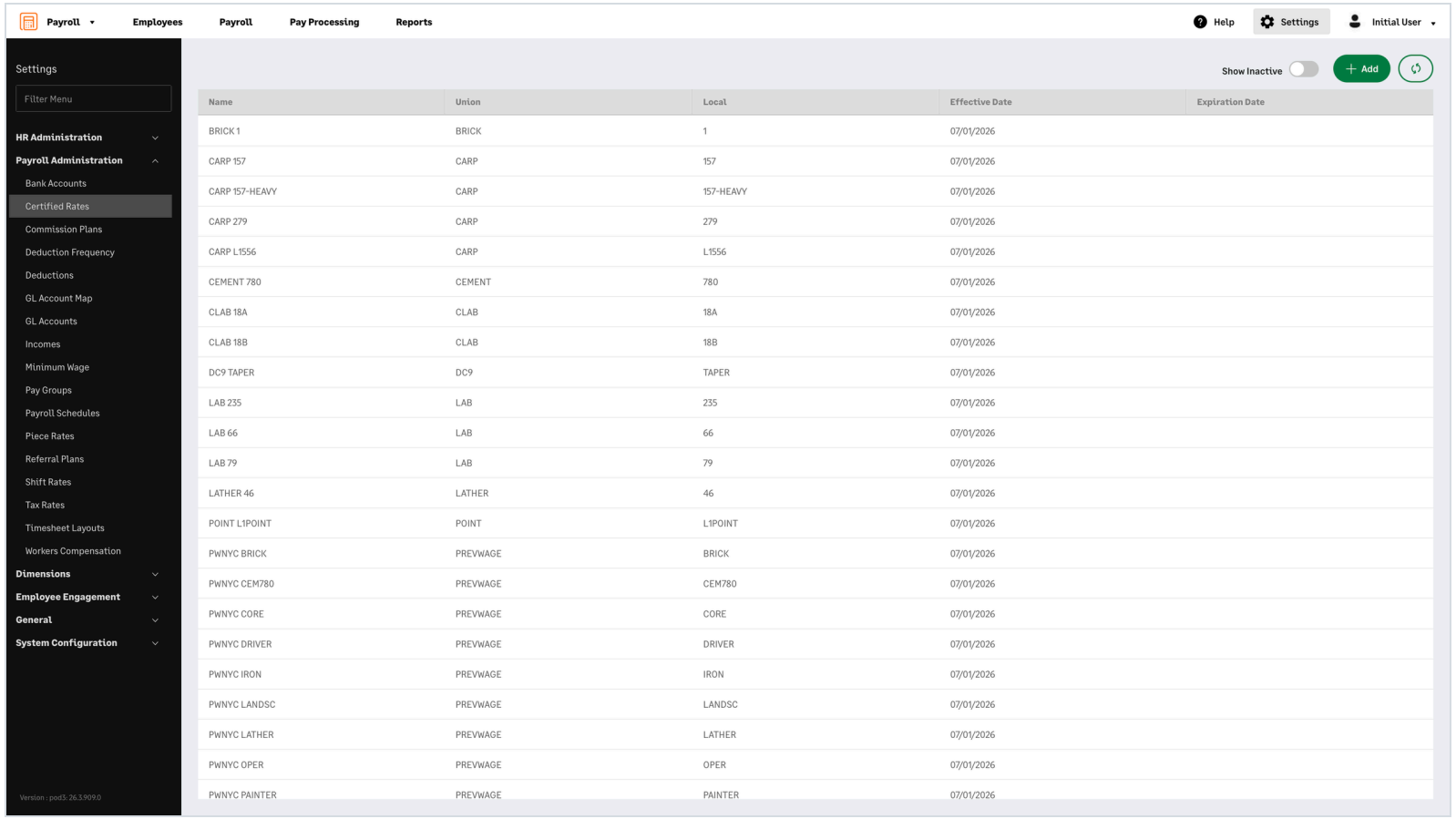
Code	Description	Employee Contribution	Employer Contribution	Deduction Limit	Calc Method	Active
401K Loan	401K Loan		$0.00	Lifetime	Amount	
CHSUP	Child Support			No limit	Garnishment	
GARN	Wage Garnishment			No limit	Garnishment	
HOSP	Hospital Indemnity		$0.00	No limit	Amount	
VOL LIFE CH	Voluntary Life Insurance Child		$0.00	No limit	Amount	
VOL LIFE EE	Voluntary Life Insurance Employee		$0.00	No limit	Amount	
VOL LIFE SP	Voluntary Life Insurance Spouse		$0.00	No limit	Amount	
401K $	401K $		(100%,1%), (50%,5%)	Year	Amount + Match	
401K %	401K %		(100%,1%), (50%,5%)	Year	% of Gross + Match	
401K CU $	401K CU $		(100%,1%), (50%,5%)	Year	Amount + Match	
401K CU %	401K CU %		(100%,1%), (50%,5%)	Year	% of Gross + Match	
401K CU 60-63 $	401K CU 60-63 $		(100%,1%), (50%,5%)	Year	Amount + Match	
401K CU 60-63 %	401K CU 60-63 %		(100%,1%), (50%,5%)	Year	% of Gross + Match	
CRITILL	Critical Illness		$0.00	No limit	Amount	
DENT	Dental Insurance		$0.00	No limit	Amount	
HSA FAM	HSA FAM			Year	Amount + Match	
HSA FAM CU	HSA FAM CU			Year	Amount + Match	
HSA IND	HSA IND			Year	Amount + Match	
HSA IND CU	HSA IND CU			Year	Amount + Match	
LTD	Long-Term Disability		$0.00	No limit	Amount	
MED	Medical		$0.00	No limit	Amount	
ROTH 401K $	ROTH 401K $		(100%,1%), (50%,5%)	Year	Amount + Match	
ROTH 401K %	ROTH 401K %		(100%,1%), (50%,5%)	Year	% of Gross + Match	

What is different from Sage 300

- 401(k), child support, garnishments, insurance
- Each Sage 300 deduction keeps its own line

Union rates by local

The live Sage HCM site: Settings, Certified Rates



Name	Union	Local	Effective Date	Expiration Date
BRICK 1	BRICK	1	07/01/2026	
CARP 157	CARP	157	07/01/2026	
CARP 157-HEAVY	CARP	157-HEAVY	07/01/2026	
CARP 279	CARP	279	07/01/2026	
CARP L1556	CARP	L1556	07/01/2026	
CEMENT 780	CEMENT	780	07/01/2026	
CLAB 18A	CLAB	18A	07/01/2026	
CLAB 18B	CLAB	18B	07/01/2026	
DC9 TAPER	DC9	TAPER	07/01/2026	
LAB 235	LAB	235	07/01/2026	
LAB 66	LAB	66	07/01/2026	
LAB 79	LAB	79	07/01/2026	
LATHER 46	LATHER	46	07/01/2026	
POINT L1POINT	POINT	L1POINT	07/01/2026	
PWNYC BRICK	PREVWAGE	BRICK	07/01/2026	
PWNYC CEM780	PREVWAGE	CEM780	07/01/2026	
PWNYC CORE	PREVWAGE	CORE	07/01/2026	
PWNYC DRIVER	PREVWAGE	DRIVER	07/01/2026	
PWNYC IRON	PREVWAGE	IRON	07/01/2026	
PWNYC LANDSC	PREVWAGE	LANDSC	07/01/2026	
PWNYC LATHER	PREVWAGE	LATHER	07/01/2026	
PWNYC OPER	PREVWAGE	OPER	07/01/2026	
PWNYC PAINTER	PREVWAGE	PAINTER	07/01/2026	

What is different from Sage 300

- Union rates are called “certified rates”
- One table per union local, each with its start date

Salaried payroll in Sage HCM: the new workflow

1. Hours and PTO in Timekeeper

As today

→

2. Salaried batch made in Sage HCM

Weekly amounts

→

3. Sage HCM works out pay and tax

Automatic

→

4. Register checked

Manually approved

↓

5. Direct-deposit file made

Generate ACH

←

6. Released at Flagstar

Aim: direct send for 5 and 6

←

7. Payroll entry to Sage Intacct

One entry per run

Jobs and GL: in 2026, 3,089 of 4,230 salary lines were on a job. Each line needs a project in Sage HCM.

No project means overhead (625002), not job cost (500100). A converter adds the cost type for Sage Intacct.

Weekly union payroll in Sage HCM: the new workflow

1 Hours from Jobber and Timekeeper
Overtime worked out

→

2 Hours file imported into Sage HCM
Each file imported once

→

3 Hours checked against site check lists
Time register in Sage HCM

→

4 Sage HCM works out pay, fringes, dues
Union rate tables

↓

5 Register checked and batch approved
A second person approves

←

6 Checks print; deposit file made
Most union pay is by check

←

7 Files to Flagstar
Positive pay and deposits

←

8 Union and certified reports
Plus the entry to Sage Intacct

Who does each step comes from your answers to the question list.

A payroll week in Sage HCM

In outline. Your own steps come from your answers.

1. The hours file comes in from Jobber and Timekeeper
2. Payroll checks the hours
3. Sage HCM calculates the payroll
4. Payroll checks the register and approves the batch
5. Checks print; the direct-deposit file goes to the bank
6. The positive pay file goes to Flagstar
7. The payroll entry goes to Sage Intacct
8. Union fund and certified payroll reports

What we need from you

1 Your question list

sage.navillus.io: sign in with your Navillus account. Answers save as you type.

2 A session at your desk

With Stephen and Arya, on your own tasks. You tell us how long you need.

3 Every report you run

Mark decides which Sage 300 reports come across. Tell us any that are missing.

4 Then the Accordant meeting

After the sessions, with questions.

Where to learn

1 Payroll guides

Weekly payroll, direct deposit and checks, step by step

2 Accordant

Sage's set-up partner: training after the sessions

3 Sage University

Sage HCM online courses

4 Stephen and Arya

Any question, any time



Questions

and discussion

Sage | HCM

Stephen O'Sullivan · Arya Kotibhaskar