Software Release Notes

OnePoint Human Capital Management

December 2020 R72

Table of Contents

Supported Operating Systems and Browsers

The table below shows currently supported operating systems and browsers.

NOTE: The list shown in the table below are operating systems we support, though they may not be actively tested.

Platform	OS Version		Browser	Version
Desktop			Internet Explorer	11
Windows	7, 10		Microsoft Edge	latest
Mac	10.13.4 (High Sierra)		Google Chrome	latest
Mobile			Mozilla Firefox	latest
iOS	11.4.1 -> latest		Safari	latest
Android	6.0.1-> latest			

Human Resources

Benefit Plans

Vendor Copy Column Added to Benefit Plans Report Page

198465: In the October 2020 system release (14701), a setting was created at the parent level of the benefit plan to allow the system to automatically copy employee level vendor information from one plan year to the next. As a benefit administrator, you can now easily see on the benefit plan listing page which plans have that setting enabled (*Company Settings > Profiles/Policies > Benefits > Plans*).

New **Benefit Plan: Vendor** columns can now be added to the report page via the *Select Columns* option. If there are multiple vendors, additional columns are available.

- Benefit Plan: Vendor Info 1
- Benefit Plan: Vendor Info 2
- Benefit Plan: Vendor Info 3

Checklists

Checklist Bell Count

202745: The My Checklist Bell Count will be restored to its previous functionality. This feature allows users to easily identify how many checklists have open items assigned to them by viewing the Bell Count.

IMPORTANT NOTE*: The Bell Count will not be available immediately following the system release. This functionality will be restored in a phased rollout over a period of several weeks.*

Compensation Management

Link Added for Loop Dependencies found within Organization Chart

196656: Loop dependencies can happen within a company's organization chart. For example, Monique is the boss of John and John is the boss of Monique; this loop dependency is a problem that will prevent Compensation Management from being used.

To solve this, when an error message is shown within Compensation Management, the error message will now contain a clickable link.

The link will open a pop-up Employee Information page, limited to only those employees with a loop dependency. Each employee listed will link out to their respective employee profile so corrections can be made to eliminate the loop.

Custom Forms

Employees Able to See Manager Notes on Modified Custom Forms

130547: When employees process their To Do Items from a Custom Form Workflow, those employees will now be able to see Manager notes as well as enter their own notes and upload documents when at the Modify step of the workflow. Notes can be accessed by employees from the footer of the To Do Item via the Notes icon and from the header of the form via the Notes icon.

Demographic Custom Fields

Default Value After Employee Creation

178985: Previously, when a Demographic Custom Field containing a default value was used to hire employees, the default value was not filled on the employee profile page. This applied to manual hire, hire through HR Action and employee import.

Now, when a Demographic custom field with a default value is defined in the Company (*Company Settings > Profiles/Policies > Demographic > Custom Fields*), this default value will now appear in that demographic custom field upon hire of the employee whether through manual hire, HR Action hire, API or import. This will function just as it does when a default value is entered into an HR custom field.

Employee Information

Training/Certification: Lookup List Added

182117: When adding trainings or certifications to an employee under Team > My Team > Employee Information, the method for selecting the items will be done through a lookup list, rather than a simple drop-down. This will allow for the accommodation of larger lists of 50+ items.

HR Actions

Limiting Codes Presented to Users for Position Assignment Action Item156658: When adding the Position Assignment action item to an HR Action, the Position Assignment Change Reason codes presented to users assigned to the HR Action will be limited based on the type of HR Action. For example, a Hire or Rehire HR Action will only present Position Assignment Change Reason codes related to hiring; a demotion or termination code would not be presented as an option for these types of HR Actions.

Future Dated HR Actions for Pay Grades

192637: In an HR Action when the Pay Grade item is included, it brings in the Min/Max of the Pay Grade according to the rates in the Pay Grade as of today (the day the HR Action is being processed). In cases where the HR Action is future-dated, the pay grade Min/Max will now update as of that future effective date.

Imports

Employees Import: Personal Email Field Added

200353: In the October 2020 system release, Personal Email fields were added in various parts of the system and in employee profiles. In this release, we have added the **Personal Email** field to the Employees import template.

Managed Cost Centers

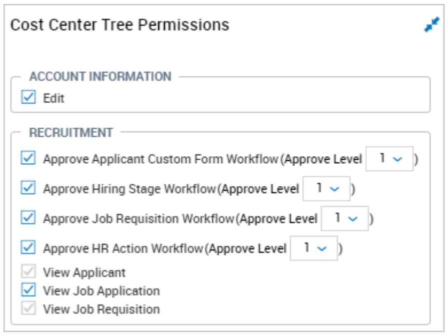
In the February 2020 system release, work was done to Managed Cost Center functionality to make it available in more areas of the application. This included adding a new Cost Center Managers widget to cost center maintenance under Global Setup where managers and permissions could be added.

In this release, we are continuing to expand this functionality by adding additional managed cost center functionality for HR Recruitment.

Setting Permissions in Cost Centers

The *Cost Center Tree Permissions* have been updated to reflect the options available for cost center managers. You can set permissions at the cost center level, which will trickle down to the managers. If managers should have different permissions from those set at the cost center level, each manager can be edited accordingly from their employee accounts.

When checking *View Job Application*, the *View Applicant* and *View Job Requisition* settings will automatically check and then gray out. This allows users to view applicant, job application, and job requisition links from the pages in Recruitment.



Permissions to Same Manager for More Than One Cost Center from Same Tree

151191: Permissions from more than one cost center tree can be granted to the same manager from within the Managed Cost Center widget.

Scenario 1

- CC2 is a child of the CC1 cost center tree.
- EMP1 is the manager of CC1 and CC2 via the Managed Cost Center (MCC) widget. The cost center permissions for CC1 and CC2 are set differently in the widget.
- CC2 is added to Job Requisition A.
- When EMP1 logs in, he will have access to the MCC relevant data pertaining to Job Req A; the permissions coming from CC2 in the MCC widget. Cost center permissions of CC1 are not relevant for this scenario.

Scenario 2

- CC3 is a child of CC2 and CC2 is a child of the CC1 cost center tree.
- EMP1 is manager of CC1 and CC2 via the Managed Cost Center (MCC) widget. The cost center permissions for CC1 and CC2 are set differently in the widget.
- CC3 is added to Job Requisition A.
- When EMP1 logs in, he will have access to MCC relevant data pertaining to Job Req A in accordance with the cost center permissions of CC2 (i.e. immediate parent cost center permissions are considered.) Cost center permissions of CC1 are not relevant for this scenario.

Import Templates: Employee Managed Cost Centers Template Updated/Moved

150395: The ***Employee Managed Cost Center*** import template has been updated to include the HR Recruitment permissions. Due to this addition, the category in which this template was located (*Time & Attendance Data*) will now be accessed from the *Employee Setup* category.

Permissions	**View Applicant**		1	Y/N	
	View Job Application		1	Y/N	
	View Job Requisition		1	Y/N	
	Approve Applicant Custom Form Workflow		1	Y/N, 1-5	Setting this flag to Y will enable permission "Approve Applicant Custom Form Workflow" with "Approve Level"=1. If numbers 1-5 are used instead of "Y", "Approve Applicant Custom Form Workflow" permission will be enabled with the corresponding approve level.
	Approve Hiring Stage Workflow		1	Y/N, 1-5	Setting this flag to Y will enable permission "Approve Hiring Stage Workflow" with "Approve Level"=1. If numbers 1-5 are used instead of "Y", "Approve Hiring Stage Workflow" permission will be enabled with the corresponding approve level.
	Approve Job Requisition Workflow		1	Y/N, 1-5	Setting this flag to Y will enable permission "Approve Job Requisition Workflow" with "Approve Level"=1. If numbers 1-5 are used instead of "Y", "Approve Job Requisition Workflow" permission will be enabled with the corresponding approve level.
	Approve HR Action Workflow		1	Y/N, 1-5	Setting this flag to Y will enable permission "Approve HR Action Workflow" with "Approve Level"=1. If numbers 1-5 are used instead of "Y", "Approve HR Action Workflow" permission will be enabled with the corresponding approve level.
	Edit (Account Information)		1	Y/N	

MCC & Workflows: Cost Center Manager Added to Applicant Custom Form Workflow Steps

145619: For companies with the HR sub-system enabled, System Administrators can now assign Cost Center Managers to certain steps in the *Applicant Custom Form* workflow (Workflow: *Custom Form* / Subtype: *Applicant*). This will allow the correct manager to act on a job application routed through the workflow.

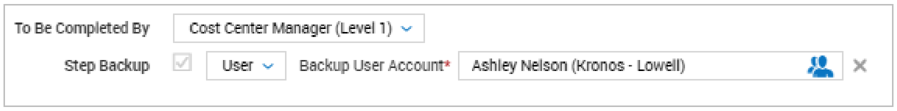
Applicant Custom Form Workflow

The Cost Center Manager option is now available to be selected in the following steps:

- Approve/Reject (available in the *To Be Completed By* field)
- Collect Note (available in the *To Be Completed By* field)
- Generate Email (available in the *Send Notification To* field)

MCC & Workflows: Cost Center Manager Added to Job Requisition & HR Action Request Workflows

145694 & 145702: In *Job Requisition* and *HR Action Request* workflows, the *Cost Center Manager* can now be selected for the *To Be Completed By* (or *Send Notification To* or *Create For* or *To Be Initiated By*) steps. When selecting a cost center manager, a *Step Backup User* will be required; so in the event the cost center manager is terminated, the workflow will not stall, and the To Do Item will route to the backup user.



- For the *Job Requisition* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, and *Checklist* steps.
- For the *HR Action Request* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, *Collect Note, Initiate HR Action Request* and *Checklist* steps.
  - In the *Managed Cost Centers* widget of employee accounts, when editing the permissions for a cost center, a new ***Approve HR Action Workflow (Approve Level 1-5)*** has been added to support the cost center manager assigned to an *HR Action Request* workflow.

MCC & Workflows: Cost Center Manager Added to Hiring Stage Workflow

145693: In the *Hiring Stage Change Request* Workflow, the Cost Center Manager is now available for selection in the workflow steps. They can be selected for the *To Be Completed By* (or *Send Notification To* or *To Be Initiated By* or *Create For*) steps. When selecting a cost center manager, a *Step Backup User* will be required; so in the event the cost center manager is terminated, the workflow will not stall, and the To Do Item will route to the backup user.

The MCC manager is recognized in the workflow because the cost center is attached to the Job Requisition which the application is linked to - the application is linked to the applicant.

- For the *Hiring Stage Change Request* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, *Initiate Form, Initiate HR Action Request*, and *Checklist* steps.

MCC & Recruitment Reports: Filter Added to Reports for Cost Center Managers

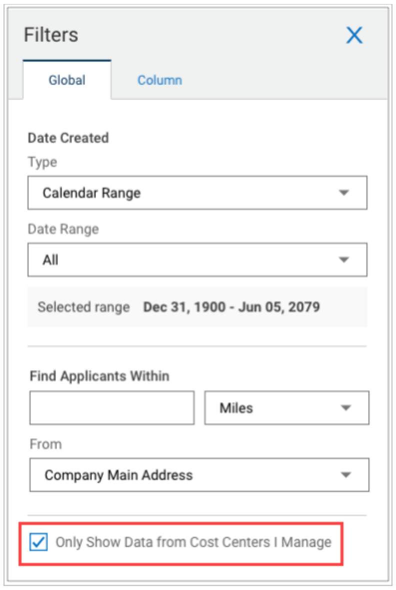
145995, 146126, 146101, 146100, 146105, 146106, 150939, 146113, 146102, 146115, 146122, 146103, 146127, 176785, 146129:

A new *Show My Managed Data Only* filter has been added to multiple Recruitment reports. When enabled, the filter will adjust the report data and display only information related to the manager's managed cost center, along with the Group members of managed cost centers.

- When the filter is disabled, the cost center manager will see all data to which they have access.
- The filter will be enabled by default when managed cost centers is enabled for the manager.
- For System Administrator (SA) login, and for other logged in users who have the MCC (Managed Cost Centers) widget disabled, the MCC filter will not be applied by default on the landing page of Recruitment reports. However, the option to apply the MCC filter will still be provided in Filters.
- If the MCC widget is enabled for the logged in user (whether or not the cost center is configured in the widget) the MCC filter will be applied by default in the reports.

When clicking the filter icon, the *Filters* panel will show the setting checked for that report.

New UI



The filter is available in the following reports.

Report	Classic UI Menu Path	New UI Menu Path
All Forms Report	*My Employees > Forms > All Forms*	*Team > Recruitment > Forms > All Forms*
Applicants Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicants*	*Team > Recruitment > Candidates > Applicants*
Applicant WOTC Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant WOTC*	*Team > Recruitment > Candidates > Applicant WOTC*
Applications Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Job Applications*	*Team > Recruitment > Candidates > Job Applications*
Applicant Interviews Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Interviews*	*Recruitment > Candidates > Applications*
Applicant Checklists Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Checklists*	*Team > Recruitment > Pre-Boarding > Applicant Checklists*
Applicant Checklist Items Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Checklists. Items are accessed from an icon within the report.*	*Team > Recruitment > Pre-Boarding > Applicant Checklist Items*

Applicant Questionnaire Answers Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Questionnaires. Answers are shown in the Question Answer column of the report.*	*Team > Recruitment > Candidates > Applicant Questionnaire Answers*
Applicant Forms Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Forms > Applicant*	*Team > Recruitment > Pre-Boarding > Applicant Forms*
Background Checks Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Background Check > Background Checks*	*Team > Recruitment > Pre-Boarding > Background Checks > Background Checks*
Background Check History Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Background Check > Background Checks History*	*Team > Recruitment > Pre-Boarding > Background Checks > Background Check History*
Job Requisitions Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Job Requisitions*	*Team > Recruitment > Job Requisitions*
Time To Hire Report	*My Reports > HR > Recruitment > Time to Hire*	*Team > Recruitment > Reports > Time To Hire* *Or* *My Info > My Reports > Recruitment Reports > Time To Hire*

Notifications

Reminder Notification for Expired Visas

179560: A new **Visa Expiration** notification is now available under *Company Settings > Global Setup > Notifications* in the *Account* category. The notification can be configured to warn the selected recipients of an employee's expiring visa; providing that visa information is listed in the Account Demographics widget of employee accounts.

Pay Grades

Automatic Pay Grade Steps Import: Adding Pay Grades with Automatic Steps Supported

190092: Pay Grades with Automatic Steps are now supported in the Automatic Pay Grade Steps import. After adding the auto step configuration fields, the associated automatic steps can be added. Supported fields include Effective Date, Step Name, Duration Days/Duration Weeks/Duration Months/Duration Years, and Rate Change.

- The Pay Grade ID is used as the primary identifier.
- Pay Grade Name is used as the secondary identifier.

- Since there is no requirement for the Pay Grade name to be unique, there can be multiple pay grades with the same name. In this case, the auto steps are added to the pay grade which has the specified name AND is returned by the Data Base first.
- If a Pay Grade cannot be found by ID or by Name, the new Pay Grade is created.

	E	F	G	H	I	J	K	L	M	N	O	P	Q
1		Auto Step Configuration					Automatic Steps						
2	Currency	Change Rates on Effective Date	Calculate From	Use	Pay Change Effective Date Type	On	Effective Date	Step Name	Duration Days	Duration Weeks	Duration Months	Duration Years	Rate Change
3													
4													
5													
6													

Warning Message Added When Changing Step and Grade via Mass Edit

177534: When a Pay Grade is selected in the Pay Information widget on the Mass Edit page for employee profiles, an inline warning message is shown to the user. The message reads: "The selected Pay Grade can affect existing Automatic Pay Grade Steps".

- If a Default Job is added and contains a Default Pay Grade, the message will appear.
- In the Cost Centers widget, if a Default Cost Center is added and contains a Default Pay Grade, the message will appear.

Performance Management

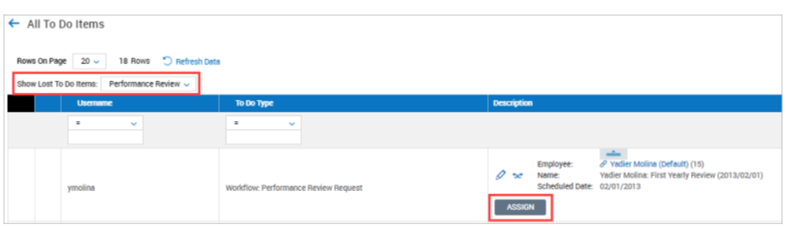
All To Do Items Report: Viewing Lost/Unassigned Performance Review To Do Items

155356, 200594: To help administrators and managers track performance review workflow To Do Items that were not properly configured with a manager or back-up user, that would cause the To Do Item to not be assigned and become lost, the All To Do Items report will now have an option to view those lost To Do Items.

From the All To Do Items report, located under *My Info > My Reports > System Reports > System Utilities > All To Do Items*, a **Show Lost To Do Items** selector will now be available to view these items when selecting **Performance Review** from the selector drop-down. The items displayed will give the option to **Assign** the lost item to a valid user. That user will then get the To Do item assigned to them and it will appear in their Mailbox To-Do Items and will appear on the All To-Do Report now as a valid To-Do Item vs. a Lost To Do Item.

In the Lost To Do view, the *Select Row* and *Delete To Do Item* checkboxes will not be available in the row-level actions and the *Delete To Do Items* and *Delete All To Do Items* buttons will also not be available from the top of the page. The reason for this is due to the status of the items being lost and they were never created/sent to a specific person. You would need to delete the performance review from the actual Performance Reviews page, which will then delete it from the All To Do Items report page.

NOTE: Currently the All To Do Items report is only available in the desktop experience. There are plans to make this available in the mobile experience in a future release.



Bulk Download of Performance Reviews

124926: From the Performance Reviews report page, multiple performance reviews can now be selected and then downloaded as a PDF. All selections will display in a single PDF. Previously, you had to open each review and download.

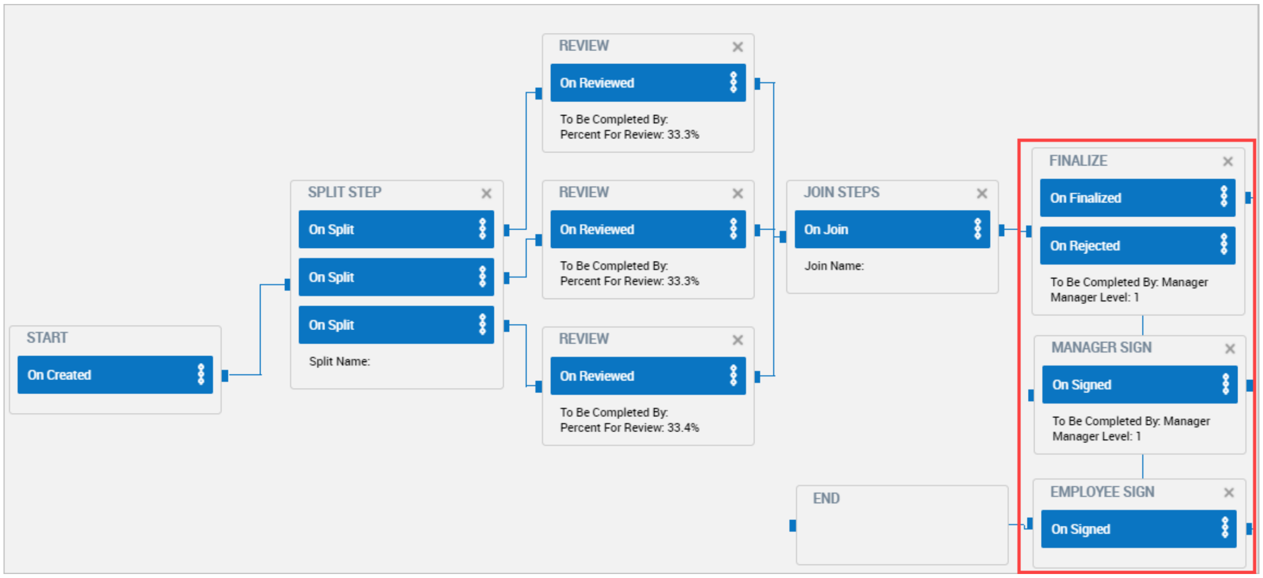
Performance Reviews: Adding Notes and Documents Any Time in Review Process

99922, 170356: Once a performance review is created, both managers and employees can add notes or upload supporting documents at any time during the review cycle using either the notes or documents icon on any of the tabs in the review. Once the review is finalized/ended this will not be allowed. Previously, both managers and employees were restricted from adding notes or uploading supporting documents until it was their turn in the review process.

Performance Reviews: E-Sign of Reviews After Finalizing

7724: Historically, e-sign functionality only allowed employees to e-sign their review if they were part of the workflow and this could only happen before it had been finalized. You will now be able to let employees e-sign their review after it has been finalized, i.e., after the manager and employee have met and discussed the review.

- Managers are not required to be part of the review steps piece of the workflow but can still sign if they are associated to the Manager sign step.
- Using the E-sign framework for employee and manager, the administrator can add the Sign steps in the workflow that would come after the finalizer step allowing a user to e-sign before the finalizer step.
- When the E-Sign button is clicked on either Employee or Manager sign steps, it will automatically bring the user to the Summary tab instead of the Instructions tab first.
- The message piece on the manager sign and employee sign steps that state "and before the "Finalize" step" has been removed. This piece of the step message was a reminder to include sign steps prior to the Finalize step and no longer applies.



Review Profiles: Date Flexibility – Default Job Change Date Option Added

102552: A new **Default Job Change Date** option was added to the **Anchor Date** drop-down list of options. The benefit of this new option is that since a performance review profile can be automatically added as a result of a Default Job, now the proper dates based on the job change will automate the proper dates for the performance review of that new job.

- All new profiles will default to ***Review Date*** in the *Anchor Date, First Review [From], Review End [From],* and *First Review Start Date* fields, but can be edited to different dates.

To provide additional flexibility, any Custom Dates enabled in the *Account Custom Dates* widget of Company Setup will also display in the drop-down list of date options.

Performance Review Workflow: Visibility Options for Reviewees

99094: Based on configurations, employees historically have been allowed to view feedback from all managers, both while in progress and at the completion of the review.

In the **Use Visibility Settings for Reviewee** section of the **Review** and **Check** steps of Performance Review workflows, we have updated the logic so when these settings are enabled in one step, the logic will be retained on each subsequent Review or Check step in the workflow and the settings will be visible in those subsequent steps to the workflow creator(s).

For example, if you have three Review steps in a workflow, and on Review Step 2 you enable the visibility settings for reviewees, those settings will carry forward to Review Step 3, will be viewable to the workflow creators in workflow configuration but will be grayed out and read-only so the settings cannot be changed.

These workflow visibility settings for reviewees override any visibility settings in the Options widget of the employee's assigned performance review profile. . If the workflow doesn't have the visibility settings enabled, the profile will determine what they can see.

Performance Review Workflow: Visibility Options for Reviewers

185215: If you enable **Use Visibility Settings For Reviewer** in a performance review workflow, at least one option must be selected. These settings do not carry forward when you have multiple review steps configured. You can set different visibility settings for each review step. In the manager's To Do Item and under *Team > Performance Review*, they will only see the settings enabled in the workflow.

These workflow visibility settings for reviewers override any visibility settings set in the *Options* widget in the user's assigned performance review profile. If the workflow doesn't have the visibility settings enabled, the profile will determine what they can see.

Position Management

Reports: Default Column Changes in Position History Report

198767: The following default columns in the Position History report have been added.

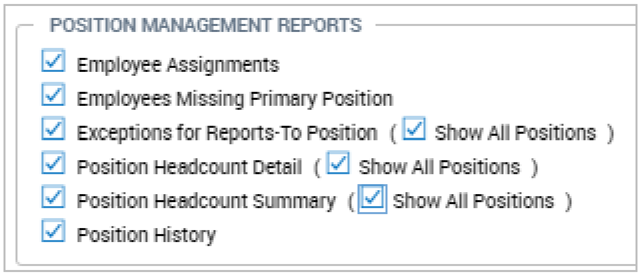
- Position Name
- Employee Full Name

Additionally, the Employee ID has been removed as a default column but can be added via the *Add/Remove Columns* option.

Security: 'See All Positions' Options Added for Position Reports

152942: A new **Show All Positions** security setting has been added to security profiles that will allow users to view position assignment details and exception reporting that goes beyond the user's set hierarchy of positions.

The setting is located in the *Position Management Reports* widget on the *Reports* tab of security profiles and affects the *Position Headcount Detail* report, *Position Headcount Summary* report and *Exceptions for Reports-To Position* report.



Recruitment

Offer Letters

181802, 181785

A new ***Offer Letters*** option is now available to support creating and maintaining offer letters for both internal and external applicants. The option is located under *Team > Recruitment > Offer Letters*. The letters contain pre-defined text with multiple system tags that will auto-fill account and system data. You can edit the text with a full HTML text editor and can add other tags. These letters will be sent via email to the recipient(s) using the email address on file for the applicant.

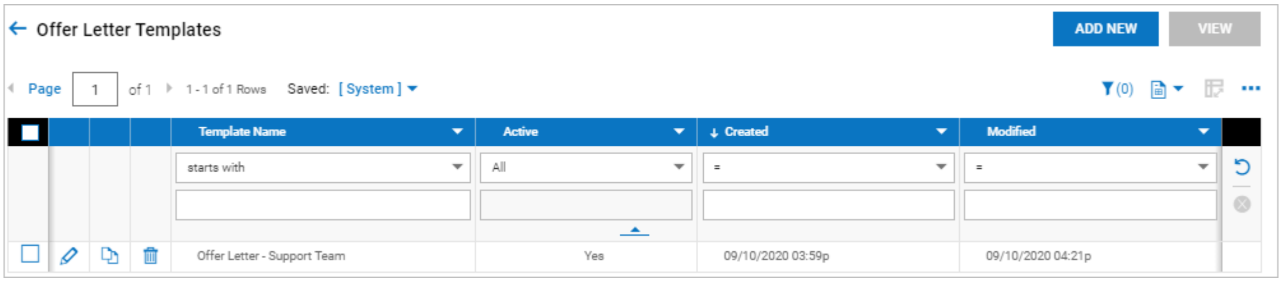
Offer Letters: Security

New security settings have been added to control user access to Offer Letters and Offer Letter Templates. In the *Recruitment* section under the *HR* tab of security profiles, two new settings can be set to either *View* or *View/Edit*, plus the ability to *Add/Delete*. The settings are:

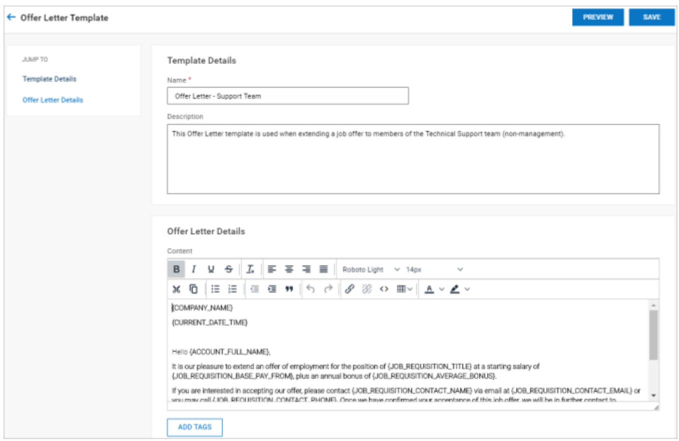
- Offer Letter Templates
- Offer Letters

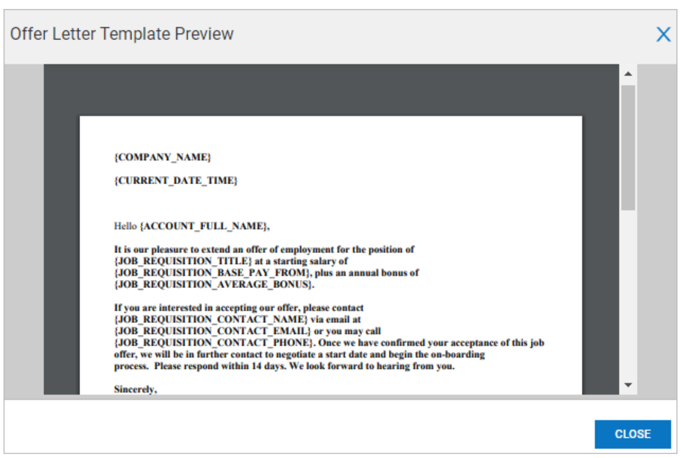
Offer Letters: Templates

Offer letters can be saved as templates and reused to create new letters. A new menu option to create and maintain offer letter templates is available under *Company Settings > HR Setup > Applicant Tracking/Recruitment > Templates Library > Offer Letter Templates*. Templates have a full HTML text editor complete with system tags that can be added to the body of the letter. The report page has standard features of viewing, editing, cloning, deleting, and adding. If the template is in use, users will receive a warning message; *This template has been used # time(s) in the Offer Letters and the template name from these offer letters will be removed. Proceed?*



Each template is divided into *Template Details* and *Offer Letter Details*. A *Preview* option allows you to see how the letter will look. The preview will show the tags used; once assigned to a recipient, the tags will be replaced with system information stored for the job requisition and/or applicant (if there is no system information for a tag used, the preview will just retain the tag so that the user can make necessary changes or replace tag with data, if required.)





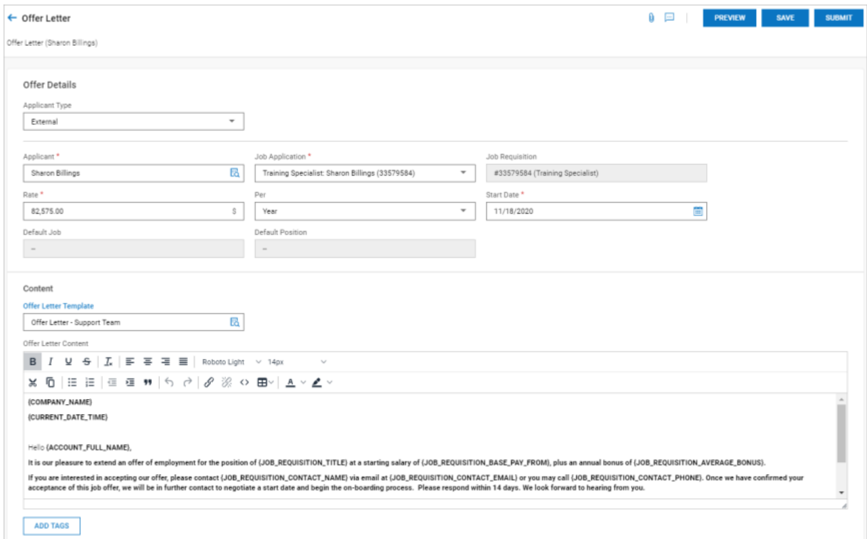
Offer Letters Page - Create and Maintain Offer Letter for Applicants

The offer letter is tied to a Job Application. When the letter is ready, it is created against an applicant based on the Job Application on file for that applicant.

HR Managers can create and manage Offer Letters under *Team > Recruitment > Offer Letters*. Here, Offer Letters can be created for applicants (internal or external.) Offer Letter Templates can be selected here and will populate the Offer Letter Content section. Even when using a template, edits can be made to the content if needed.

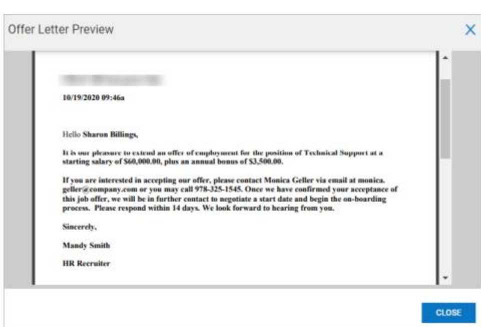
Once saved, options will become available to add documents and notes, preview the letter using the applicant information and system information. If system tags are in use that are not in the applied job requisition, those will appear in tag format. You can edit the job requisition and add the necessary information and then come back and see the information has been added to the preview.

NOTE: When saved, the offer letter will be in draft state and it can be saved any number of times before being submitted, which is when final offer letter is generated.

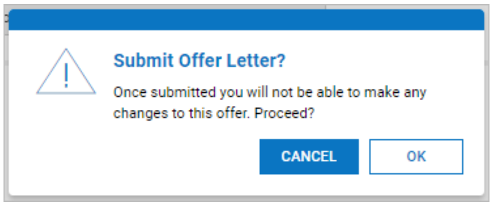


Offer Letters: System Tags – Information not included in Job Requisition

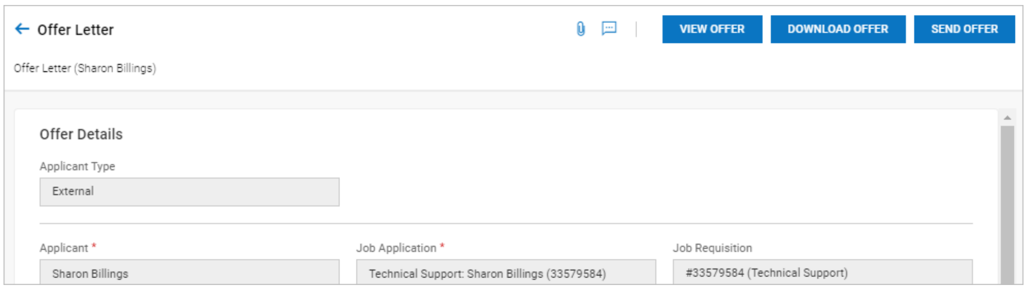
Offer Letters: System Tags – Information complete in Job Requisition



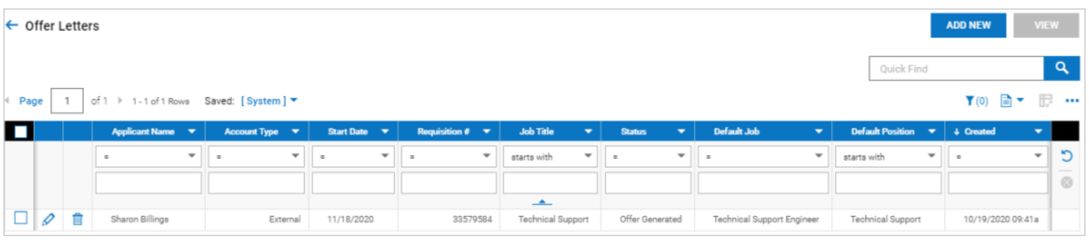
Once the offer letter is ready, it can be submitted by selecting the *Submit* button. Once submitted, the offer letter will be completely grayed-out and no further editing can be applied to the body of the letter. You can still add supporting documents and notes.



From here, you can view the offer (preview window), download the offer to PDF, and send the offer to the applicant.



On the report page, columns will show the status of the offer.



Offer Letters: Job Applications

If a Job Application is in use in an Offer Letter, and users attempt to delete those job applications, a message will be displayed to the user; *Could not delete. It is used in Offer Letter.*

Recruitment & Position Management

Position Fields Added to Recruitment Report Pages

198767: For companies with both Recruitment and Position Management enabled, new Position fields can be added via the *Add/Remove Columns* option.

- **Job Requisition Report Page**: Position Abbreviation
- **Time to Hire Report**: Position Abbreviation

Recruitment Questionnaires

Questionnaires Available for Internal Applicants

182715: In a previous release, we communicated about application questionnaires being available in the applicant portal for external candidates only. In this release, those questionnaires will now be available for internal applicants as well.

Warning Message Icon Added to Questionnaire Link

WFR-156101: When there is a warning message prompting the user about open Recruitment Evaluation questionnaires to be completed, a warning icon will now also be displayed next to the Questionnaire link in the left jump link panel.

Reports

Course/Certification Fields Added to Training/Certification Report

192311: Three fields from the Course/Certification configuration have been added to the Training/Certifications report (*Learning > Training/Certifications*) so users can have more complete information in one report. The following fields can be added via the *Add/Remove Columns* option.

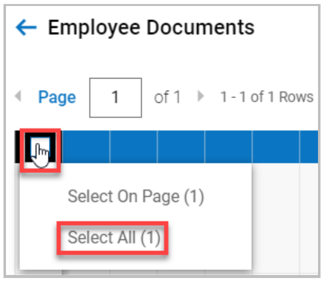
- Code
- Deduction (requires Payroll sub-system)
- Vendor (requires Payroll sub-system)

Select All Option in Multiple Report Pages

101646: Users can select all rows in the Employee Documents report page, whether the rows are on the current or other pages, by using the **Select All** action. The top-left checkbox, at the header level, provides the *Select All* action.

When selected, a pop-up provides the ability to *Select On Page* or *Select All*. When the *Select All* checkbox is enabled, the top-left checkbox and all row-level checkboxes remain selected when a user navigates to multiple pages of rows within a report.

Employee Documents report page (Team > HR > HR Maintenance > Employee Documents)



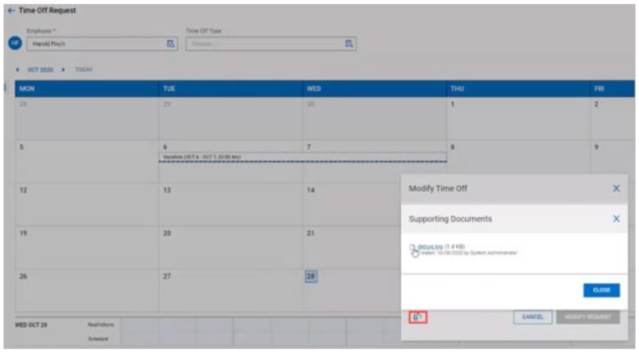
Time and Labor

Added Document to Time Off Request / Modify Time Off Request

Attach Documents in Time Off Request Pop-Up

198069: Users can now attach a document to a Time Off Request. A new setting has been added to the *Default Settings* widget in the *Time Off Request Profile, Employee Can Attach Document*. When this option is enabled, a paperclip icon will display on the *Time Off Request* pop-up, giving users the ability to attach documents to the request.

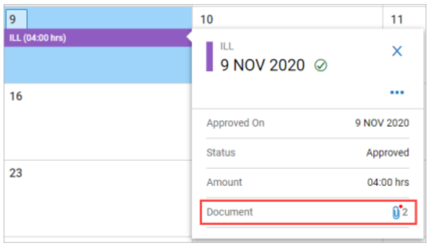
If you select *Modify* in the submitted Time Off Request, you will be able to view Supporting Documents form the *Modify Time Off* window.



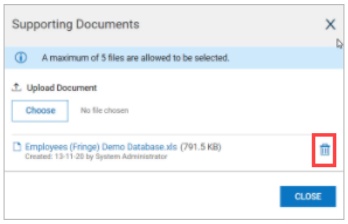
To allow employees to attach documents to the Time Off Request, enable *Employee Can Attach Documents* in the *Default Settings* section from the Time Off Request Profile.

Document Link Added to Pop-Up/Ability to Delete

198080, 198566: From the pending Time Off Request pop-up, users will be able to view documents that were attached to the Time Off Request.



Once a document is attached, users can delete the document from the *Supporting Documents* pop-up in the pending Time Off Request.



All Time Off Documents Report

203714: An *All Time Off Documents* report is available, which will contain information on uploaded documents related to the time off request. This report can be accessed in Desktop, the Mobile App, and the Mobile Version on Desktop from the following:

- *Time > Reports > Time Allocation > All Time Off Documents*
- *My Reports > Time Reports > Time Allocation > All Time Off Documents*

Report visibility is dependent on the *Integrated Document Storage* Marketplace Product being added, and the *All Time Off Documents* security item enabled from the *Reports* tab in the *Employee Time Reports* section.

Added Option to "Run Each Day of Frequency Period" in Extra Flat Pay Rule

199693: Previously, for Pay Calc 2.0 companies, in the *Extra Flat Pay* rule, the system would calculate based on hours worked in the week or the last day of the period one time at the end of the period.

What's been added: A new option, *Run Each Day Of Frequency Period*, has been added to the *Extra Flat Pay* settings for the *Weekly* frequency. When this option is enabled, the rule will calculate the counter amount for each day of the week where Overtime is calculated.

All Time Entry Report Excludes Deleted Time Entries

201029: Previously, deleted time entries from the timesheet would still display and were grayed out on the *All Time Entries* report. Going forward, deleted time entries will no longer display on the *All Time Entries* report, along with the *Approve Time Entries* reports and *Approve Time Entries* Report Dialogs notification report.

Bulk Timesheet – Manager Policies

Bulk Timesheet v2 – All Manager/Employee Changes Require Comment

164029: Users can add comments after updating the timesheet if the *All Employee Changes Require Comment* option is enabled in *Employee Policies* in the Bulk Hours Timesheet Profile, and/or the *All Manager Changes Require Comment* is enabled in *Manager Policies* in the Bulk Hours Timesheet Profile.

Bulk Timesheet v2 – All Manager/Employee Changes Require Reason Codes

164030: After saving a modification to the timesheet, a *Review Changes* pop-up will display for the user to choose a reason code and/or enter comments if the *All Employee Changes Require Reason Codes* option is enabled in *Employee Policies* in the Bulk Hours Timesheet Profile, and/or the *All Manager Changes Require Reason Codes* is enabled in *Manager Policies* in the Bulk Hours Timesheet Profile.

Change Cost Center Time Allocation Difference Between Classic and New Timesheet

198931: In the classic timesheet and new timesheet on Desktop, employees are able to split their time for a day without the ability to add or delete time.

With this release, employees on the Mobile App and the Mobile Version on Desktop can now split time with the *Edit Personal Time* option enabled.

Configuration Documents

Pay Calculations Profiles Rules Structure in Configuration Documents

198777, 198848, 198779, 204538, 204535, 204536, 204539: For companies utilizing Pay Calculations 2.0, users can download an easily understandable Configuration Summary document so that non-technical audiences can digest the document. The following Pay Calculation rules now have a customized structure in the PDF configuration document:

- *Exception Based On Start Time*
- *Exception Based On End Time*
- *Apply Counter Limits*
- *Apply Rate Table (Counters)*
- *Daily Overtime*
- *Weekly Overtime*
- *Identify Lunch And Breaks (v.2)*

CSV Format Exported an Extra Row When Using Two Data Records

203071: When exporting using a Custom Tabular (CSV) export format, most companies use a single Data Record when building the columns out that will be exported. However, if a second Data Record was needed that required different columns to export data in a different order, the second Data Record would export even if there was no relevant data, producing empty rows.

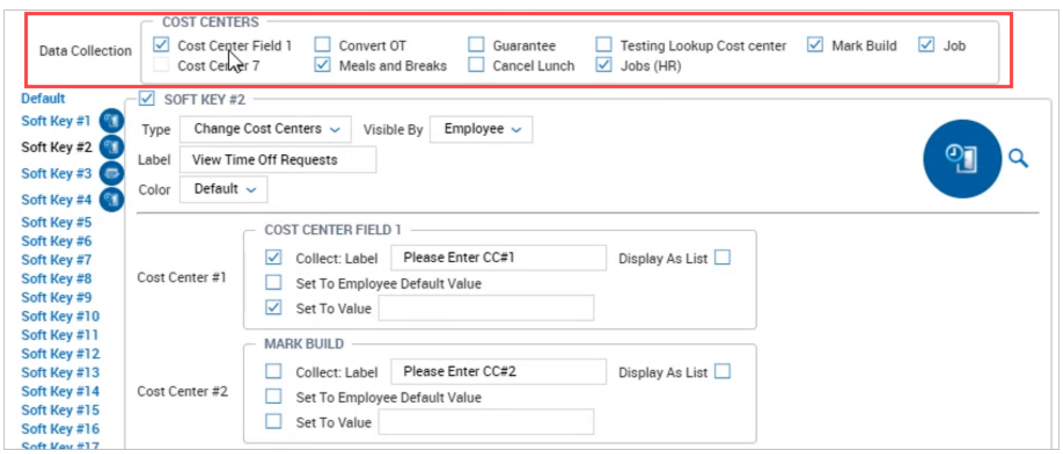
What's been added: A new checkbox has been added when *Data Record* is selected for the *Type*. When this box is enabled, empty rows will not display in the exported file for the second Data Record.

Data Collection

Allow CC1-10 to be Selected on Touch Clock

187086: Previously, OnePoint devices only allowed Cost Centers 1-5 to be displayed for employees to transfer at the clock.

What's new: For organizations that need more cost centers to be available at the clock device, a new section has been added to the *Terminal Configuration* page, *Data Collection*.



In this section, you can enable up to 7 Cost Centers for the *Change Cost Centers* soft key Type, and each cost center enabled in this section can be mapped to any of the cost center fields that are set up in Cost Center 1 through 10.

NOTE: If you change which cost centers in the *Data Collection* section that are enabled, make sure to click *Save* afterwards, otherwise the cost center fields will not update.

Deprecation Inline Message – "Time Entry Approval" Setting in Detailed Hours Overview Reports

208951: In a future release, the setting in the *Detailed Hours Overview* report, *Time Entry Approval*, will no longer be supported. The following warning message will display at the top of the report: *The Time Entry Approval report setting in the Detailed Hours Overview will be retired in the February 2021 release. Time Entries can alternatively be approved from the All Time Entries report, Approve Time Entries report, or directly within timesheets.*

Mass Delete Requests via Pending Approval Reports

Mass Delete Functionality on Overtime > Pending Approval Report

190018: Previously, managers did not have the option to delete outdated or invalid overtime requests via the *Pending Approval* report (*Time > Overtime > Pending Approval*) as a mass action.

What's new: A *Delete* button has been added to the overtime request *Pending Approval* report under *Time > Overtime > Pending Approval*. This will affect the *Pending Approval* report and *History* report (MSS and ESS). This allows managers to delete outdated requests prior to migration to a Workflow environment.

New UI Conversions

Notification Report "Time Entries To Approve"

196732: The notification report *Time Entries To Approve* has been converted to the Mobile App and the Mobile Version on Desktop. You can now set this report from the *First Screen* lookup in the Security Profile to be the user's first screen. This will allow users to be able to access the report on their mobile device after being navigated from the notification. This is only available for users with report dialogs enabled.

Personal Rate Table Reason Codes

Rate Tables – Security Permissions for Extensions

184665: Previously, when users were given security permission to view/edit rate tables, those users were able to edit rate table entries as well as rate table extensions; there was no option available to separate view/edit permissions from rate tables and rate table extensions.

What's been added: A new security permission has been added under the *HR* tab within the *Rates* section, *View* or *View/Edit Rate Tables Extensions*. If this option **is not** enabled, the *Extensions* table under Rate Table will be hidden. If the user is given *View* permission, the *Extensions* table will display and will be grayed out. If the user is given *View/Edit* permission, the *Extensions* table will be editable.

Rate Tables – Require Reason Codes for Rate Table Entry Changes (Manual/HR Action)

184529, 202650: Previously, there was not an option available to require a reason code for a rate table entry change, which made it difficult to track all changes made to rate tables by managers, as well as why the changes were made.

What's new: Users can now require managers to choose a reason code when manually, or through an HR Action, creating a personal rate table change. A new global setting has been added, *Personal Rate Table Changes Require Reason Codes*, under *Company Settings > Global Setup > Company Setup*, from the *Global Policies* tab. If this option is enabled, when the manager is in the employee's rate table and adds a new rate, a required *Reason Code* drop-down will display in the *Add New Rate* window for the manager to select a reason for the change. Once the reason code is selected and saved, a *Reason Code* column will display in the *Rates* table, in *Preview Personal Rate Table*, and in the *Detailed Rates* report.

Rate Tables

Added Global Rates History Report

189791: Currently, the *Detailed Rates* report only displays the employee's personal rate table.

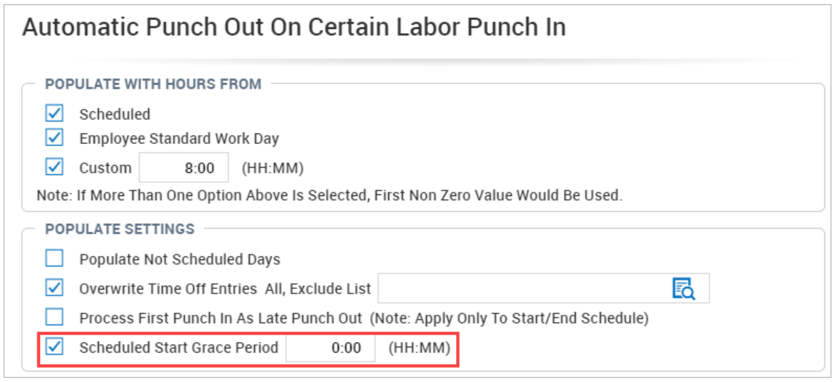
What's new: A new report is now available, *Global Rates History*, under *Team > HR > Reports > Employee Maintenance > Global Rates History*. This report is similar to the *Detailed Rates* report, but the *Global Rates History* report includes historical rate changes for each rate table entry, and users can also edit the report. This report includes personal rate tables and global rates.

Reporting

"Automatic Punch Out On Certain Labor Punch In" Timesheet Rule to Work with Early/Late Punches

202055: The Timesheet Profile rule, *Automatic Punch Out On Certain Labor Punch In*, allows for an Out punch to be auto populated for the day based on an employee's In punch, and the Out punch is generated based on hours from the employee's schedule, standard work day or a custom setting. Previously, the auto population did not work if an employee punched before their scheduled start time. This caused managers to have to manually enter the Out punch for the day.

What's new: A new field, *Scheduled Start Grace Period*, has been added to the *Populate Settings* section of the *Automatic Punch Out On Certain Labor Punch In* rule. When enabled and with time entered, this will allow the system to still calculate the auto population of time if the employee punches within the configured range of the scheduled start time. If a start punch is entered within that grace period from the scheduled start time, the automatic punch out will be auto populated with the scheduled end time. For example, if an employee has a schedule of 8:00 AM to 4:00 PM and the grace period is set for 30 minutes, a punch at 7:35 AM would trigger an automatic punch out for 4:00 PM.



If the rule is left blank, the grace period will not be applied.

Reports

Select All Option in Multiple Report Pages

101630, 101488, 101486: Users can select all rows in multiple report pages, whether the rows are on the current or other pages, by using the *Select All* action. The top-left checkbox, at the header level, provides the *Select All* action.

When selected, a pop-up provides the ability to *Select On Page* or *Select All*. When the *Select All* checkbox is enabled, the top-left checkbox and all row-level checkboxes remain selected when a user navigates to multiple pages of rows within a report.

- **All Open Timesheets** report page (*Team > Time > Timesheets > All Timesheets > View By > All Open*)
- **All Open Timesheets** report page (*Team > Time > Timesheets > All Timesheets > View By > All Timesheets*)
- **Pending Approval** report page (*Team > Time > Timesheets > Pending Approval*)

Start/End and Bulk Hours – Extra Settings

Enabled Keyboard Navigation

164020, 163959: As seen in the Classic UI, in the new timesheet for both timesheet profiles, users can now navigate the timesheet fields using the arrows on the keyboard. As you navigate from one field to another, the field that you are in will be highlighted. The up/down arrow will move up/down one row in the same column; the right/left arrow will move right/left one field, and if the highlighted field is in the last navigable field on that row, it will be moved down one row.

Start/End – Extra Settings

Start/End Timesheet v2 – Highlight Edited Time

163960: In the *Extra Settings* widget, the option *Highlight Edited Time* is available to enable, which will make manually entered or edited time on the timesheet under the *Time Entry* tab within the *From* and *To* columns highlighted with a red *e* symbol.

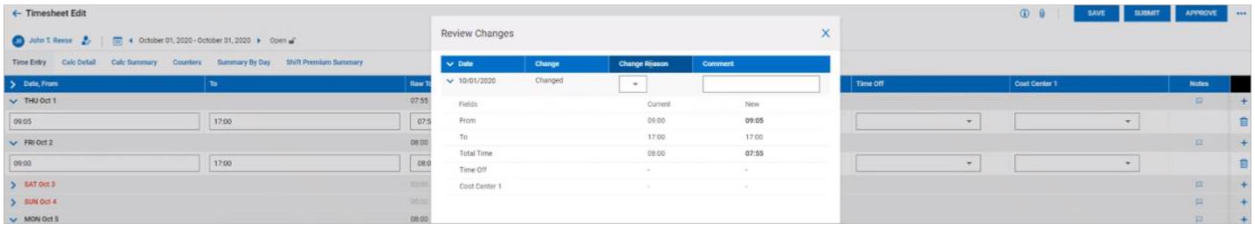
Start/End Timesheet v2 – Highlight Weekends

163966: In the *Extra Settings* widget, the option *Highlight Weekends* is available to enable, which will highlight Saturday and Sunday red on the timesheet.

Start/End – Manager Policies

Start/End Timesheet v2 – All Manager/Employee Changes Require Comment

163988: Users can now be required to add comments upon updating the timesheet if the *All Employee Changes Require Comment* option is enabled in *Employee Policies* in the Start/End (All Days) Timesheet Profile, and/or the *All Manager Changes Require Comment* is enabled in *Manager Policies* in the Start/End (All Days) Timesheet Profile. When the timesheet is updated, a *Review Changes* pop-up will display.



Start/End Timesheet v2 – All Manager/Employee Changes Require Reason Codes

163989: After saving a modification to the timesheet, a *Review Changes* pop-up will display for the user to choose a required reason code and/or enter comments if the *All Employee Changes Require Reason Codes* option is enabled in *Employee Policies* in the Start/End (All Days) Timesheet Profile, and/or the *All Manager Changes Require Reason Codes* is enabled in *Manager Policies* in the Start/End (All Days) Timesheet Profile.

Time Input Component Updates

205609: The following updates have been made to the Time Input field:

- The “*m”* symbol has been replaced with an “*e*” in the Time Input field in the timesheet
- The “*e*” symbol is highlighted in red in read-only timesheets

Time Entry Logic on Days with Multiple Entries – Timesheet v2

194406: When users enter time in the time entry field, the system chooses whether to select AM/PM based on what the previous entry was. Previously, when a second time entry was made on the same day, the system did not consistently select AM/PM correctly. Going forward, the system will interpret AM/PM correctly for multiple time entries in the same day.

Time Off Reports and Card View Consolidation

Time Off History <MSS> Employee’s Name Added to Cards

198919: Previously, if the employee selector was empty, there was no way to differentiate employees’ time off cards.

What’s been added: In order to help distinguish employees’ time off cards in the *Time Off History*, the employee’s name will now be included in each time off card whether the employee selector was filled out or not.

Timesheet Punch Settings

Show Change Punch Interpretation (Mobile)

178856: In the September 2020 release, a newly designed Change Punch In/Out Interpretation icon was made available in the New Timesheet Experience for Desktop users. In this release, the Change Punch In/Out Interpretation icon is now available for Mobile App users, which will allow them to easily change their punch from In to Out and vice versa from their mobile device.

Timesheet v2

Web Punch Access Profile – Clock Widget

198556: *Web Punch Access Profile* settings are now supported on the *Clock* widget and *Clock* page for the Mobile App and the Mobile Version on Desktop. If the IP address is not included in the *Web Punch Access Profile* settings, employees will be restricted from punching using the *Clock* widget and page, as well as mobile access restriction.

Timesheet Views Added Back to Menu

204066: In a previous release, timesheet views were consolidated and removed from the Menu, which required more clicks from the user.

In this release, all *Timesheet Views* (depending on what is enabled in the user's security profile) have been added back to the Menu under *Team > Time > Timesheets* for Desktop, the Mobile App, and the Mobile Version on Desktop. These views include:

- **All Timesheets**
- **Pending Approval**
- **By Pay Period**
- **By Week**
- **Current**
- **All Open**

Verify CC Lookup List Component – Rate Table

196351: Previously, the Cost Center lookup was not displaying cost centers in the *HR Detailed Rates* page if the option in the *Settings* section of Cost Center Properties, *Allow Time Allocation Towards This*, was disabled. Going forward, cost centers will display in the lookup if *Allow Time Allocation Towards This* is not enabled.

New Timesheet Feature Gaps

All New Timesheet feature gaps (outlined in the *New Timesheet Feature Gaps* table in the September 2020 R70 TLM Release Notes) have full feature parity with the Classic Timesheet.

Table of Relocated Pages

The following pages have moved to another part of the menu. These menu changes affect either the Mobile App, the Desktop Experience, or both.

Ticket	Product	Component	Old Menu Path	New Menu Path	Desk-top	Mobile
139375 199216	TLM	Rate Tables	*My Employees > Employee Maintenance > Rates > Rate Tables*	*Company Settings > Global Setup > Rate Tables*	Yes	No
139375 199216	TLM	Counters	*Time > Timesheets > Counter Distribution Requests > All*	*Company Settings > Time & Labor Maintenance > All Counter Distribution Requests*	Yes	No
139375 199216 160785	TLM	Timesheet	*Time > Timesheets > All Timesheets > Auto Populate Timesheet*	*Company Settings > Time & Labor Maintenance > Auto Populate Timesheet*	Yes	No
139375 199216 160785	TLM	Timesheet	*Time > Timesheets > All Timesheets > Duplicate Timesheets*	*Company Settings > Time & Labor Maintenance > Duplicate Timesheets*	Yes	No
139375 199216 160785	TLM	Timesheet	*Time > Timesheets > All Timesheets > Reapply Pay Calculations*	*Company Settings > Time & Labor Maintenance > Reapply Pay Calculations*	Yes	No
139375 199216 160785	TLM	Timesheet	*Time > Timesheets > All Timesheets > Reapply Rates to Timesheets*	*Company Settings > Time & Labor Maintenance > Reapply Rates To Timesheets*	Yes	No
139375 199216 160785	TLM	Accruals	*Accruals > Test > Accruals Test*	*Company Settings > Profiles/Policies > Accruals > Accruals Test*	Yes	No

Feature Retirements

The table below outlines functionality that has been retired or is planned to be retired.

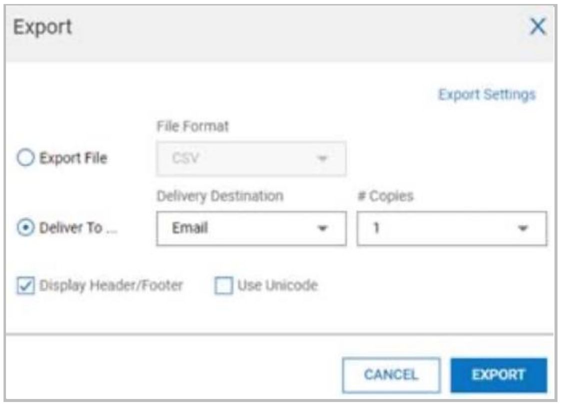
Retired Features

Product/ Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
TLM	*Time Entry Approval* report setting in *Detailed Hours Overview* report	*My Reports > Time Reports > Time Allocation > Detailed Hours Overview*	Desktop	This report setting is no longer supported. Time Entries can alternatively be approved from the *All Time Entries* report, *Approve Time Entries* report, or directly within timesheets.	February 2021
TLM	VCA Configuration For Report Dialogs In Notifications	*Employee Profile*	Desktop, Mobile Version on Desktop, and Mobile	The VCA Configuration For Report Dialogs In Notifications section of the Employee Profile (which includes the *Enable Virtual Code Authentication* checkbox) is no longer supported. In replacement of the verification code, a security token has been built into the link of the report.	December 2020

Payroll

Deliver To Functionality for Reports

67702: Administrators now have access to the *Deliver To* functionality for reports so they can send reports to destinations such as Printers, Email addresses, Google Drives, etc. from the *Export* option within a report. Company Administrators must have *Full Access* enabled in their assigned security profile, and for System Administrators, the *Deliver Reports* security item must be enabled within the user's assigned security profile (*Maintenance > Admin Company > Configurations > Security Profiles*, *Reports* section on the *Reports* tab).



Users must also be able to export reports via the appropriate security profile permission, *Export Reports*, in the *Reports* section on the *Reports* tab of their assigned security profile.

At least one Delivery Destination should be configured in the company under *Company Settings > Payroll Setup > Delivery Destinations* (for companies with the Payroll sub-system enabled), and the *Visible (Will Be Displayed In Dropdown Of Available Destinations)* option must be enabled for the destination.

Alternatively, users who log in to an Admin company and have the appropriate security access to *Deliver Reports* can utilize the *Deliver To* feature to send a report to a certain destination when logged in to any child companies.

When the *Deliver To* option is chosen, a separate set of selections appear for the user to choose:

- A delivery destination (*Delivery Destination*)
- The number of copies (*# Copies*)

PLEASE NOTE:

- The **SFTP** Delivery Destination Type is not currently supported. This may be planned in a future release.
- The **Payroll** sub-system should be enabled to utilize the *Deliver To* feature.

Forms 1099-NEC and 1099-MISC

1099-NEC Forms Can Be Downloaded

194462: Users can now download form 1099-NEC at the following locations:

- *Payroll > Forms > 1099-NEC*
- *HR > Forms > Governments Forms > 1099-NEC*

Similar to previous functionality for 1099 forms, users can download multiple 1099-NEC forms at one time and also select a Download Type (to specify how many forms appear on a page).

1099-MISC Forms Can Be Downloaded

198096: Users can now download form 1099-MISC at the following locations:

- *Payroll > Forms > 1099-MISC*
- *HR > Forms > Governments Forms > 1099-MISC*

Similar to previous functionality for 1099 forms, users can download multiple 1099-MISC forms at one time and also select a Download Type (to specify how many forms appear on a page).

Forms 1099-NEC and 1099-MISC Can Be Delivered from Year End Processing

193255, 194432, 198063, 198093: Administrators can initiate delivery of forms 1099-NEC and 1099-MISC at:

Maintenance > Administration > Year End Processing > Payroll Year End Processing > Utilities

Configuration of delivery for these forms uses the same 1099 Print Options and Delivery Policies steps that existed for 1099 forms.

Note that a best practice will be to order your forms stock in the same size for both 1099-NEC and 1099-MISC forms. Due to the form changes, we suggest that you print test forms to ensure that you don't need to make any changes to the *Left* and *Top* adjustments you currently have in the *1099* widget in the *Printed W2/1099 Options*. Our testing determined that setting *Adjust Left* to 0 and setting *Adjust Top* to 6 worked best for both the *Nelco/Greatland Pressure Seal (Legal)* and *Pressure Seal (Letter)* stock. However, many printers are different, so these settings might not work with your printer.

Override Unemployment State Field Renamed

198270: In the Mass Edit Pay Statements window, the Override Unemployment State field is now named Override Unemployment State/Province to clarify that it can accept a Province when required.

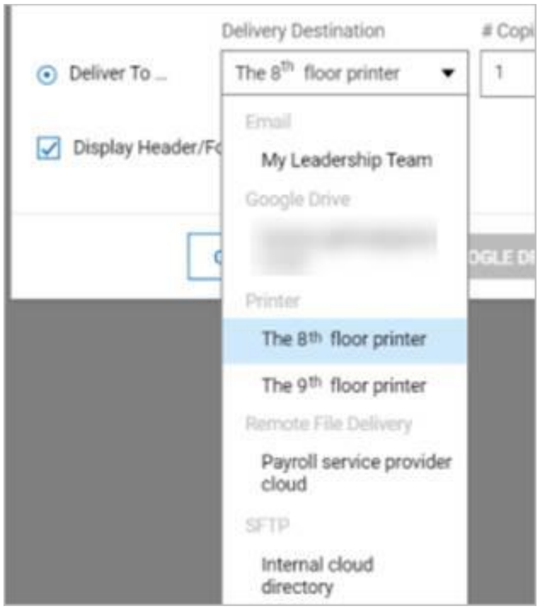
Payroll Country Verification

187306: When the system processes a payroll or calculates pay statements, it now verifies that the Country configured for the payroll matches the Country of the default company bank and the originating bank.

Payroll Setup: Delivery Destinations Report Page Grouped by Type

205511: When selecting a destination from the *Deliver To* drop-down in the Export Report pop-up, listings are grouped by the type of destination, which is set via *Company Settings > Payroll Setup >*

Delivery Destinations. For example, all Email destinations will be grouped together, all Printer destinations will be grouped together, etc.



Scheduler

Added Monthly and Weekly Schedule Overview Pages

196701, 196700: In a previous release, the *Schedule Overview (Monthly)* and *Schedule Overview (Weekly)* pages were deprecated. Going forward, these two pages will be available in Desktop, under *Team > Schedule > Schedule Overview (Monthly)* and *Team > Schedule > Schedule Overview (Weekly)*.

Added Checkbox Multi-Select Option and Edit Button for Mass Edit in Summary By Employee Report

173867, 173868: In Desktop, the Mobile App, and the Mobile Version on Desktop, in the *Summary By Employee* report, checkboxes are now available for you to select multiple shifts. When selected, you have the option to mass delete by clicking the *Delete* button at the top of the report. In addition, there is an *Edit* button available, which will display a *Manage Shift* pop-up window. From the *Manage Shift* window, you can apply edits to the date, time, cost center, skill, etc. for the selected shifts all at one time.

NOTE: Constraint violations will not prevent the updates from saving but will be flagged as a violation after the save.

MSCC and SCC Widgets – Search

193184, 193183: In the Mobile App and the Mobile Version on Desktop, a search bar has been added to the *Scheduled Cost Center* and *Managed Scheduled Cost Center* widgets in the Employee Profile. This will help users with a large number of cost centers to quickly search for what they need.

Replaced Time Frame for Total Hours on Time Off Display on Schedules (Bulk Type Only)

173847: Previously, time off displayed on schedules as a timeframe (i.e. 12a-8a) for a full day or partial day (bulk) time off. This could be confusing to managers, as it indicated the employee was only off during those hours but may be available outside those hours.

What's new: Time off hours that do not have a defined start and end time will now display the total amount of hours taken off instead of a timeframe.

Time Off Hours in Schedule Hours Calculation

187276: Previously, for time off in schedules, the time off was included by default in the scheduled hours, which caused issues such as the time off being included in total hours, as well as visually misrepresenting the scheduled hours in the schedule views.

What's new: You can now choose whether to include time hours off in schedules. From the *Time Offs* page (*Company Settings > Global Setup > Time Offs*), in the *Time Off Properties* widget, a setting is available to enable within the *Settings* section, *Include Time Off in Scheduled Hours*. This setting will control if time off should be taken into calculation for total hours on schedules and reports and will reflect visually in the schedule views.

Weekly Schedule by Daily Rule Available in Mobile Version on Desktop

199256: The *Weekly Schedule (By Daily Rule)* report is now available in the Mobile App and the Mobile Version on Desktop, under *Team > Schedule > Team Schedule View > Weekly Schedule (By Daily Rule)*. Edit actions in the report will be available in a future release.

Cross Product

Affordable Care Act (ACA)

ACA Data Summary & ACA Data Detailed Reports Performance

203571, 203327: The system has been updated so the ACA Data Summary and ACA Detailed reports run more quickly and do not give a Difficulty retrieving data error when processing very large numbers of employees.

2020 Form 1094-C

193279: The 2020 version of From 1094-C has been added and is available in the system. It is available under *Team > Benefits > ACA > Forms > Employer Forms 1094-C*.

2020 Form 1095-C for Employees and Dependents & Pressure Sealed Form Updates

193273, 193274, 193275, 185313:

Employees 1095-C Form

The 2020 version of Form 1095-C is now available for download and use in the system under *Benefits > ACA> Forms > Employee Forms 1095-C* and the year 2020 is selected. This is available when selecting *Add New* or *Mass Add New*.

NOTE: To add the year to your company so it is available in the 1095-C report page, add the year(s) under *Team > Benefits > ACA > ACA Year End Processing*.

Dependents 1095-C Form

Form 1095-C for Dependents is also available and is located under *Benefits > ACA> Forms > Dependent Forms 1095-C.*

NOTE: For this menu option to be available, you must check the *Enable COBRA reporting for self-insured health plan* within the ACA Settings widget of Company Setup.

Pressure Sealed Form

The Pressure Sealed 2020 Form 1095-C is available under the *Print Forms* link in the ACA Year End Processing checklist. The form has been adjusted to better fit the required paper so employees and postal service can see everything accurately. These adjustments only apply to the 2020 version.

New Codes for Line 14 in the ACA Timeline

193819: To assist users responsible for ACA reporting, the system now presents all possible codes that can go into Line 14 of the ACA Timeline, indicating the type of coverage offered to the individual, so that users can complete reporting for the selected year properly.

The following codes have been added to the *Line 14 Codes (Series 1)* drop-down in the ACA Timeline found within the Employee Profile by clicking on the *Manage Employee's ACA Timeline* link within the ACA Timeline Overview widget.

- 1L
- 1M
- 1N
- 1O
- 1P
- 1Q
- 1R
- 1S

NOTE: Due to the late release of the form and lack of specific instructions for these new codes, the system will not generate these codes automatically. If you wish to use these new codes for your 2020 reporting, the ACA Timeline will need to be updated manually or via import.

Support for New Codes for Line 14, New Line 17 to ACA Import

193820: Users can utilize the new codes for Line 14 and the new Line 17 on the Form 1095-C without having to go month-by-month, employee-by-employee, so that they can make updates in a fast and efficient manner.

On the tab *Sheet 2* of the *ACA Account Data* import template (with instructions), the following updates/additions have been made:

- Cell E27 has been updated from 1A to 1K to **1A to 1S**.
- Cell F27 has been updated to *Note that code 1I became inactive with 2016 reporting, codes 1J and 1K were not available prior to 2016 reporting, and codes 1L - 1S were not available prior to 2020 reporting***.**
- A row has been added to the bottom (continuing with the sa.me formatting) in row 31
  - Cell A31 is the continuation of shading as in other cells A10-A30.
  - Cell B31 now reads *Zip Code.*
  - Cells C31 and D31 are NULL.
  - Cell E31 reads *#####*.
  - Cell F31 reads *Zip Code used for Affordability calculations (to be used only when Line 14 code is 1L, 1M, 1N, 1O, 1P, 1Q, 1R, or 1S)*.

On the tab *Sheet 1* of the *ACA Account Data* import template, a column has been added to the end in column AB labeled *Zip Code*.

The new codes on Line 14 are recognized, as is already the behavior for the other codes. For example, **1J** entered on the import template will populate that month on the ACA Timeline with **1J**. If an entry in column X, *Coverage Code*, does not match one of the codes within the Line 14 drop-down, it is ignored.

For the new Line 17, if an entry in *Zip Code* (column AB) does not match the format, it is ignored as is the current functionality with Line 15.

New Line 17 Zip Code Row to ACA Timeline

193822: The IRS released the 2020 Form 1095-C, and this included a new Line 17 for Zip Code. The system now presents users with the new field, Line 17, on the 2020 Form 1095-C, so users can be sure they are providing their employees with the most up to date version of the form and remaining compliant with IRS regulations.

A new row has been added to the ACA Timeline found within the Employee Profile by clicking on the *Manage Employee's ACA Timeline* link within the *ACA Timeline Overview* widget. This new row appears on the *Form 1095-C* section of the page, after *Line 16 Codes (Series 2)*. The row is labeled as *Line 17 Affordability Zip Code*.

Please note the following security requirements:

Users have View/Edit access if they have View/Edit access to the *ACA (Affordable Care Act) Timeline* in their current assigned Security Profile.

Users have View Only access if they have View access to the *ACA (Affordable Care Act) Timeline* in their current assigned Security Profile.

Users with the *ACA (Affordable Care Act) Timeline* security item disabled in their current assigned Security Profile will not have access to the ACA Timeline.

A new row has also been added to the *ACA Timeline Overview* widget found within the Employee Profile. This new row appears between the existing *Line 16 Codes (Series 2)* and *Hours* rows and is Read Only. The new row is labeled as *Line 17 Affordability Zip Code*.

This new Line 17 is populated when Line 14 for the same month uses one of the new offer of coverage codes that pertain to HRA's (1L, 1ML, 1N, 1O, 1P, 1Q, 1R, 1S). The IRS has not yet released details about when these new codes should be used or specifications for Line 17, so the system does not populate this new row automatically. If you have an employee whose Form 1095-C requires Line 17 to be populated, you must manually adjust the ACA Timeline or use the *ACA Employee Data* import template.

REMINDER: It is a best practice to update the ACA Timeline for an employee and not the individual Form 1095-C. Should you need to delete the Form 1095-C, any manual adjustments made to it will be deleted as well.

Calendars

Birthday Calendars Available in Mobile Environment

196368, 196370, 196367: The monthly, weekly and yearly birthday calendars are now available in the mobile environment. This applies to users with proper security permissions (Reports tab, Employee Information Reports section.)

Monthly Birthday Calendar

- My Info > My Reports > HR Reports > Calendar > Birthday Calendar by Month
- Team > HR > Reports > Calendar > Birthday Calendar by Month

Weekly Birthday Calendar

- My Info > My Reports > HR Reports > Calendar > Birthday Calendar by Week
- Team > HR > Reports > Calendar > Birthday Calendar by Week

Yearly Birthday Calendar

- My Info > My Reports > HR Reports > Calendar > Birthday Calendar by Year
- Team > HR > Reports > Calendar > Birthday Calendar by Year

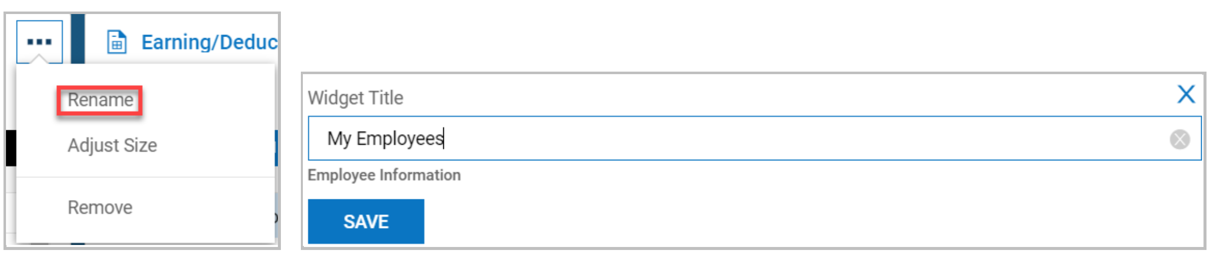
Company Documents

My Company Documents Converted to a Report Style Page

202894: The Documents page, located under *My Info > My Company > Documents* has now been converted from a table format to a standard report style page where views can be saved, columns filtered/added/removed, etc. The list of documents is uploaded from *Company Settings > Our Company > Document Upload*.

Rename Option Added to Report/Chart Tiles on Dashboard Layout

185292: On the Dashboards, a ***Rename*** option is available under the ellipsis of Reports/Charts and Pivot Chart tiles. Upon selecting the *Rename* option, users can modify the label that appears on the tile. The Report name is displayed below the user defined name field.



- Users can clear the field, Save or Cancel. An empty field cannot be saved, and the option to Save is disabled until text is entered.
- Cancel (*X*) returns the Widget Title to the last saved label. If a user wishes to return the label back to its default/original state, the user must manually copy and paste the report name (small text underneath the title field) into the Widget Title field.
- The tile label does not need to be unique from other tiles. Alphanumeric and special characters are supported, and there is no character limit. If a title is truncated, a tooltip provides the full label when a user hovers over the title.

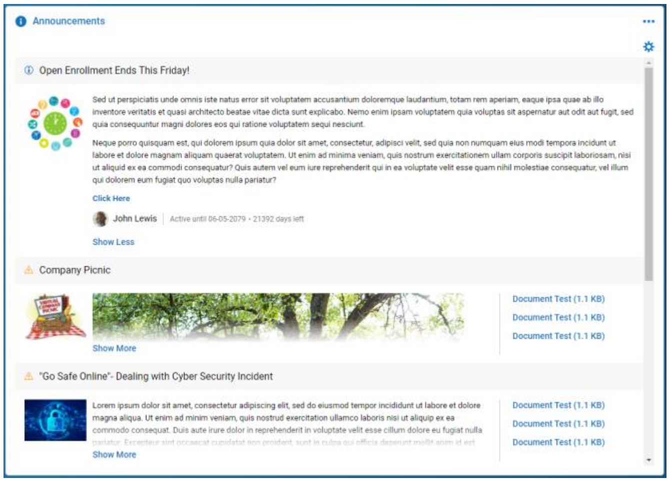
- When a label is modified and saved, the new tile label adopts a hyperlink that takes users to the report. If a user opens the Re-Arrange Tiles panel on the Dashboard, the changed tile labels are supported. Label changes do not apply across tabs if the same tile is added to another tab.
- The option to change labels is also available in the Dashboard Layout Profile configuration, and changes made to the profile display for end users.

Dashboard Widgets

Announcements Widget - Showing Details In Listings

147539, 203184: Users can now view text and images in the Announcements widget listings without the need to click on the announcement headline, allowing users to read the important information quickly. The Announcement widget must be included in the Dashboard Layout, and users must have access to the posted announcements based on group or security profile settings.

Users can view and access all documents uploaded to each announcement via one click.



Employee Profiles

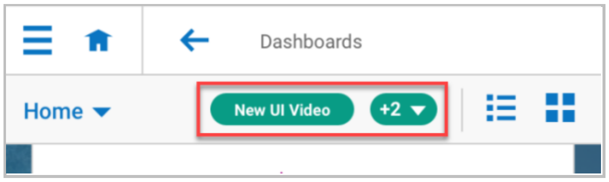
MSCC and SCC Widgets – Search Added

193184, 193183: In the Mobile App and the Mobile Version on Desktop, a search bar has been added to the *Scheduled Cost Center* and *Managed Scheduled Cost Center* widgets in the Employee Profile. This will help users with a large number of cost centers to quickly search for what they need.

Personalized Experience

Dashboard Call To Action (CTA) in Mini Header

180782: While scrolling on a page, users see a mini Header anchored to the top of the page. A green pill icon is included with the Dashboard CTA mini Header. Each Call To Action is an individual pill icon. When selected, the CTA directs the user to the appropriate destination (My Topics tab, External Link, Internal Link).



Today's Tasks in Mini Header

180770: While scrolling on a page, users see a mini Header anchored to the top of the page. A blue pill icon with a drop-down is included with all Today's Tasks for a given user. The pill icon contains the Today's Tasks, the "*+ number*" (of tasks), and the drop-down. By clicking the pill, a pop-up with the relevant tasks and counters appears. When the user selects a task, s/he will be redirected to the relevant report/page.

Add Link Indication to Dashboard Call To Action and Today's Tasks Drop-Down

186687: Users with multiple ongoing Events/Topics now have a clear indication that the list they see in the Dashboard Call To Action (CTA) drop-down is a list of different Events/Topics. This applies where the Home page with the Home Dashboard show several Today's Tasks and Call To Actions presented on the page.

By clicking drop-down icon, a list with Events appears. By selecting an Event from the drop-down list, the My Topics tab of the panel is opened. Upon hovering over an Event name, the background becomes light blue.

My To Do Items and My Mailbox

190294: The *My To Do Items* and *My Mailbox* have been retired from the Main Menu, Start Widget configuration, and Quick Links configuration in the New UI. Users can access these items by clicking the *My Mailbox* indicator (bell icon) in the upper right corner of the screen within the application, in both the Desktop environment and the Mobile Application.

Reports, Report Pages, & Reporting Options

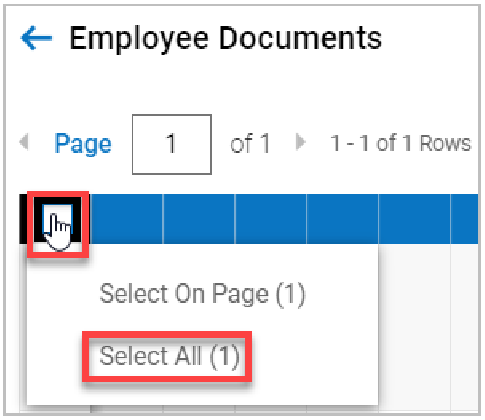
Select All Option in Multiple Report Pages

101646, 101630, 101488, 101486: Users can select all rows in multiple report pages, whether the rows are on the current or other pages, by using the **Select All** action. The top-left checkbox, at the header level, provides the *Select All* action.

When selected, a pop-up provides the ability to *Select On Page* or *Select All*. When the *Select All* checkbox is enabled, the top-left checkbox and all row-level checkboxes remain selected when a user navigates to multiple pages of rows within a report.

- **Employee Documents** report page (*Team > HR > HR Maintenance > Employee Documents*)
- **All Open Timesheets** report page (*Team > Time > Timesheets > All Timesheets > View By > All Open*)
- **All Open Timesheets** report page (*Team > Time > Timesheets > All Timesheets > View By > All Timesheets*)

- **Pending Approval** report page (*Team > Time > Timesheets > Pending Approval*)



Retired Options/Features

Turtles Widget in the Classic Dashboard

14085: As of December 2020, Flash will no longer be supported in Google Chrome, and possibly other internet browsers. The Turtles widget in the Classic Dashboard and Dashboard Premium experiences will not work correctly since it requires Flash.

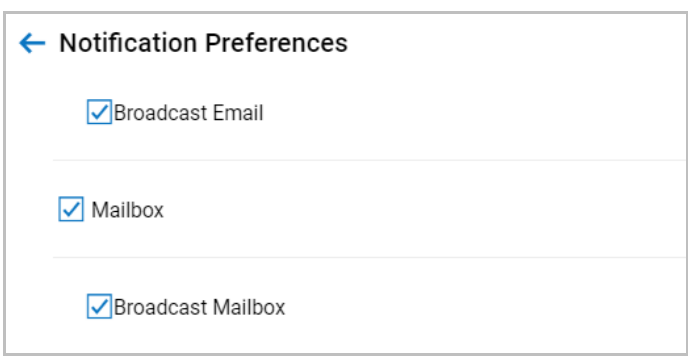
The Turtles widget in the New UI Dashboard experience does not require Flash and it works correctly with all supported browsers such as Google Chrome and Microsoft Edge. Users are encouraged to adopt the New UI Dashboard experience to ensure that the Turtles widget functions correctly.

SMS Twilio/Broadcast Messaging

Opt In/Out for Broadcast Messages

180326: Users can now opt in or out of Broadcast Messages, giving them added control over the types of notifications that they receive. A user can opt in/out from the Notification Preferences under *My Info > My Profile > Notification Preferences*. All Broadcast Messaging options are checked and active by default.

Broadcast Messaging can be turned off by unchecking the related boxes for *Broadcast Email*, *Broadcast Mailbox*, and *Broadcast Message SMS*. Unchecking these has no effect on the options under them for *Primary Email*, *Mailbox*, and *SMS*. If *Primary Email*, *Mailbox* or *SMS* are disabled, the corresponding Broadcast Messaging option is disabled as well.



2-Way SMS Message for Approve/Reject Response

197864: When users receive an SMS text message to approve or reject a request, and the request is rejected and requires a comment as to why, the instructions in the text message will clearly instruct the user how to respond and allow them to enter the comment in the text message.

Example outgoing message

Please reply Y/N followed by this code 73756 to Approve/Reject this request. If N, please also provide a brief comment.

Reply STOP on +13173427186 to unsubscribe.

Response/Reply Example
N 76542 Employee no longer eligible at this time.

2-Way SMS Messages for Scheduler

WFR-183046: In Scheduler, some of the items that can be sent via SMS text messaging require additional details in addition to the approve/reject.

These items will contain additional details related to the request. For example: "Please reply Y/N <space> followed by this code 11234 to Approve/Reject this request. Please note that the reply will automatically be applicable to the first Peer to Approve Peer request. Please login to WFR to change peers/modify this request."

- Schedule Open Shift
- Schedule Request for Coverage
- Schedule Shift Swap