Software Release Notes

OnePoint Human Capital Management

February 2020

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OnePoint Human Capital Management
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Supported Operating Systems and Browsers

The tables below show the operating systems and browsers currently supported.

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
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			

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Human Resources

Benefits

Benefit Plans: User Defined Coverage Type Based on PP Hours (Classic UI & New UI)

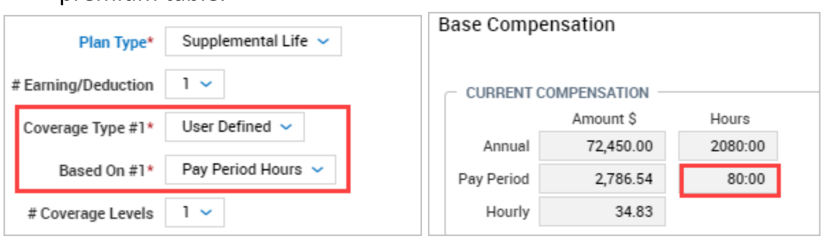
129427 & 129456: A new *User Defined* Coverage Type has been added to Benefit Plans when benefit premiums should be based on employee level information stored on the employee's record. When selecting *User Defined*, a secondary *Based On* drop-down will be required. This drop-down will populate with supported fields for user defined benefit premium rate tables. Supported data includes:

- **Pay Period Hours** – Pulled from *Current Compensation* section of *Base Compensation* widget.

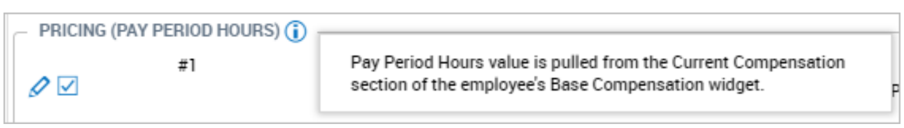
Benefit premiums can be based on the expected hours worked per pay period as listed in the *Current Compensation* section of the *Base Compensation* widget in employee accounts.

The *Pay Period Hours* selection is tied to the Pay Period Hours field in the *Current Compensation* section of the *Base Compensation* widget of employee records.

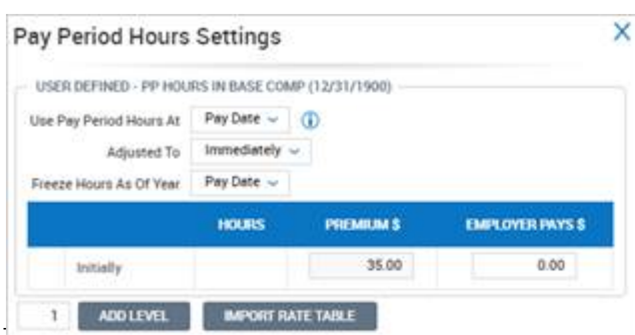
- When the plan is assigned to employees, their premium will be determined based on the pay period hours listed in their employee record and how that aligns with the table in the benefit plan.
- If the employee's hours in the *Current Compensation* section of the *Base Compensation* widget changes, the benefit plan's premium will change dynamically based on how those changes align with the settings in the premium table.



In the plan's *Coverage Levels* widget, the *Pricing* section will show the pricing is based on *Pay Period Hours*.



When you click to edit the pricing table, you can set the premium the employee and employer pays. The default settings in the drop-downs are set for the most common scenario but can be edited with other settings.



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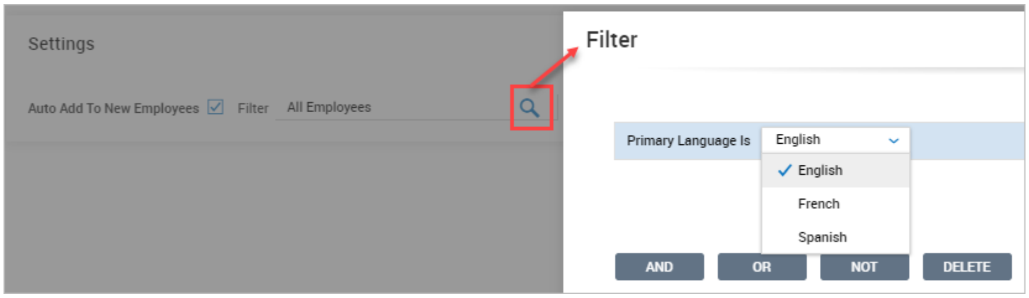
Checklists

Primary Language Option Added to Filter (Classic UI & New UI)

7739: Within the *Auto Add To New Employees* option in Checklists, the filter accessed there will now contain the ***Primary Language*** option. When selected, the system will auto-assign the proper checklist based on the primary language of the employee. Checklists are accessed under *Company Settings > HR Setup > Checklists*.

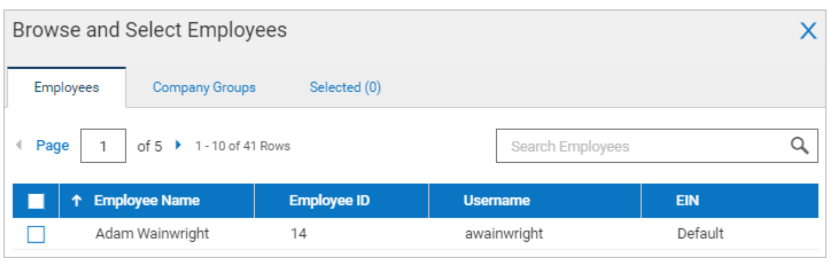


Employee Lookup

New Columns Added to Employee Lookups (Classic UI & New UI)

144990: Across the platform, many employee lookups have been updated. We have added ***Employee ID*** and ***Username*** columns. Prior, only *Employee Name* and *EIN* were shown.

Example:



E-Verify & I9 Forms

I9 Forms: Document Number I-551 Required if Birth Date on or After 8/31/1989 (Classic UI & New UI)

143805: To be in compliance with E-Verify requirements, any I9 form created for an employee whose birthdate is on or after August 31, 1989 will be required to furnish Document Number I-551 with the I9 form.

In our application, when adding an I9 form in E-Verify and the date of birth meets the criteria AND the following is also set, the *Document #* field will display and be required.

Citizenship is set with one of these two statuses:

- A lawful permanent resident
- An alien authorized to work

Documents is set with:

- List A Document

List A Document is set with:

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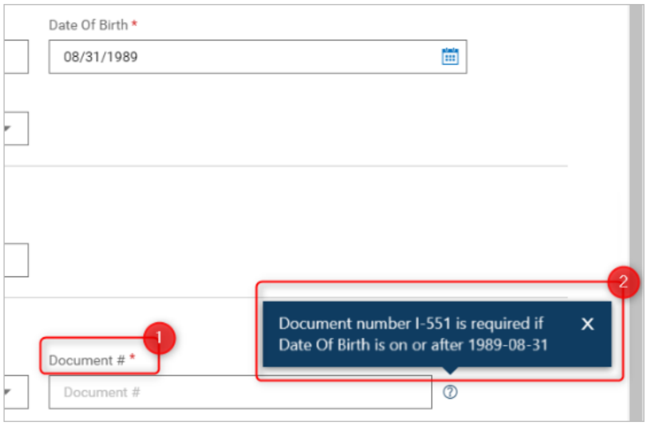
- Permanent Resident Card or Alien Registration Receipt Card (Form I-551)

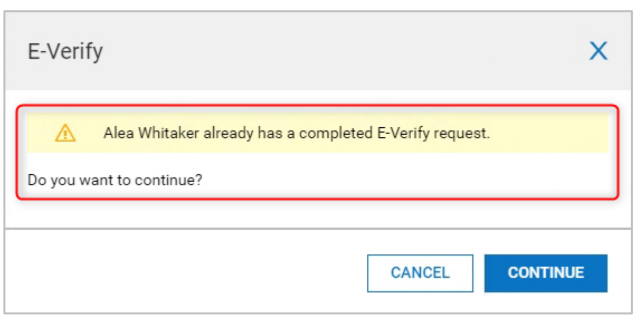


Creating E-Verify Requests from I9 Form (Classic UI & New UI)
142968: When a user clicks the *Add E-Verify Request* button from an I9 form page, they can confirm if an E-Verify Request can be created, using the same validation behavior found when creating an E-Verify Request from *Team > HR > Employee Maintenance > E-Verify*.

Once in an I9 form and then clicking the *Add E-Verify Request* button, you will receive different validation messages or the E-Verify Request screen.

If a completed request has not been found, you will be able to proceed to the E-Verify Request creation screen.

If a completed request already exists for the employee, you will receive a pop-up with a warning message stating "<First name> <Last name> already has a completed E-Verify request. Do you want to continue?"



If the employee already has an open request, you will receive a pop-up with a warning message stating “"<First name> <Last name> already has an open E-Verify request. Do you want to continue?", by clicking the *Review Duplicate* button, you will be taken to a report listing all the employee’s other E-Verify requests.

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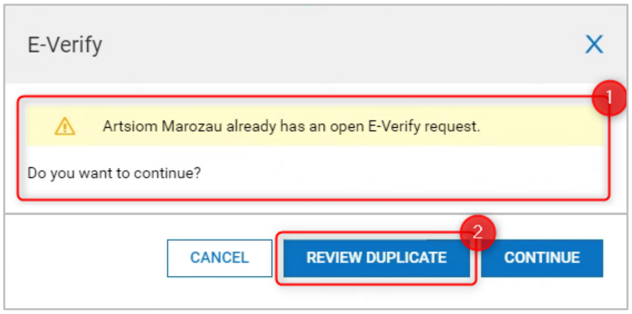
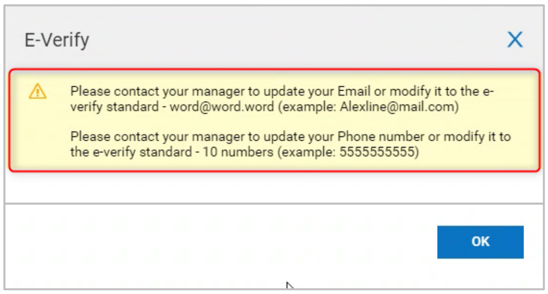


If you or other administrators do not possess one or more required data fields needed to create E-Verify requests, which includes name, phone number, and email address, you will receive a warning message and you will not be able to proceed with the creation process.



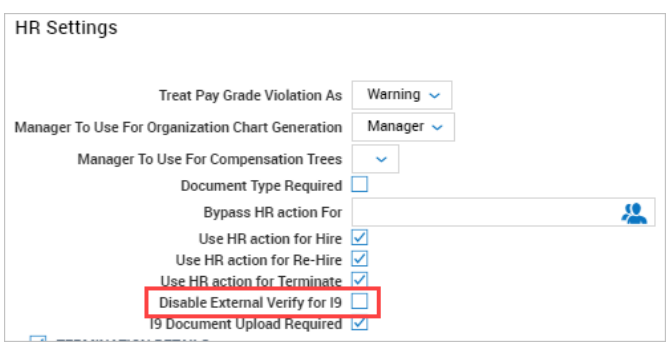
If your organization has a pending termination status with E-Verify, you and other administrators will receive a popup with a warning message stating, “Your company has a status of 'Pending Termination', you don't have access to create E-Verify requests.", and you will not be able to proceed with the creation process.

E-Verify v.30 (Classic UI & New UI)

142197: We are now compliant with v.30 of E-Verify and all functionality from the previous version is now removed from the product.

HR Settings: New Option to Disable External Verify Button (Classic UI & New UI)

141688: In the *HR Settings* widget of *Company Setup*, a new ***Disable External Verify for I9*** setting is available. When checked, this option will remove the *Switch To External Verify* when adding an I9 form for a new hire. The absence of this button will enforce internal verification of I9 forms.



With setting checked – no external verification option available

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With setting unchecked – external verification available (such as through E-Verify)

Forms

Government Form CC-305 Added to System (Classic UI & New UI)

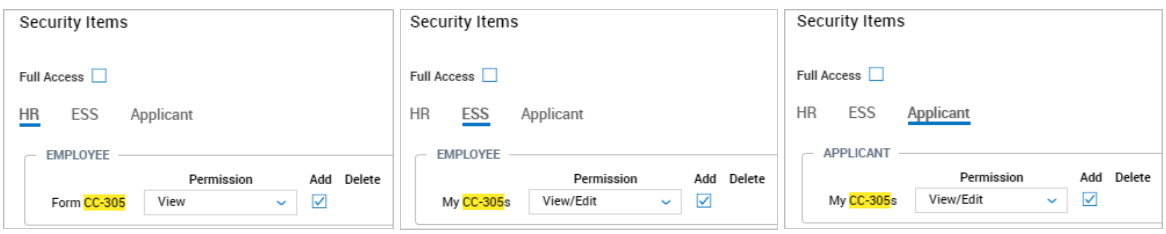
7553 (EPIC), 141699, 141701, 141706, 145467, 143905, 143883, 141703, 141702, 141704, 141713, 141712, 143920, 149710, 141709:

The government CC-305 form for Voluntary Self-Identification of Disability has been added to the system as an available form for employees and applicants. This form is only available for companies where the U.S. has been enabled in Company Setup. Previously, this form had to be created as a custom form.

NOTE: GDPR Data Retention policies will apply to this form as it does for other governmental forms.

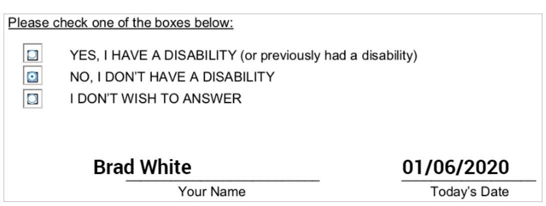
Security

This form has been added to security profiles where users can be given permissions under the HR, ESS, and Applicant tabs.



Employees

From *My Info* > *My HR* > *Forms* > *Government Forms* > *CC-305*, employees can, with proper permissions, create a form, respond with an answer, then submit the form. An option is available to download the form to PDF.



Please check one of the boxes below:

- ☐ YES, I HAVE A DISABILITY (or previously had a disability)
- ☐ NO, I DON'T HAVE A DISABILITY
- ☐ I DON'T WISH TO ANSWER

Brad White	01/06/2020
Your Name	Today's Date

Managers

From *Team* > *HR* > *Forms* > *Government Forms* > *CC-305*, managers can create the form for one or more employees. Once created, the form has an option to be downloaded to PDF. Managers cannot answer the form for the employee or submit.

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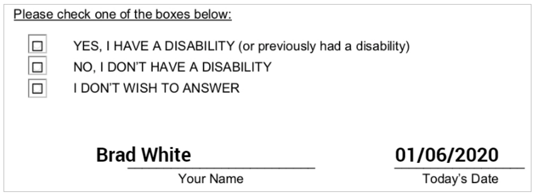
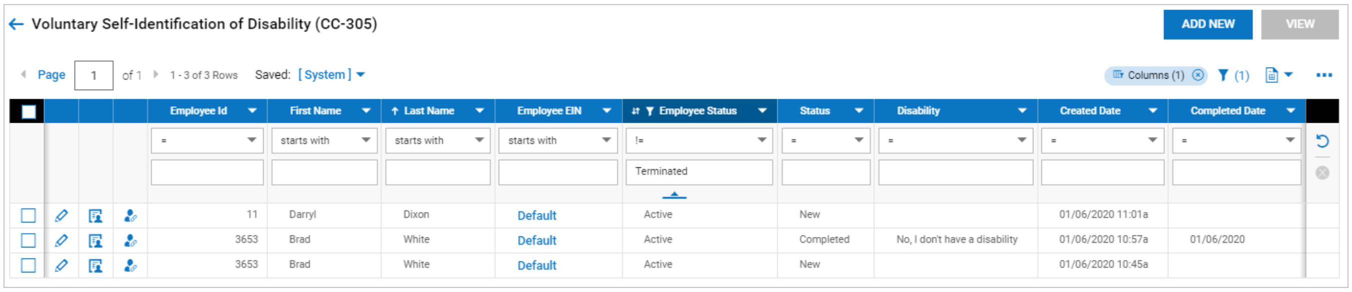


Please check one of the boxes below:

☐ YES, I HAVE A DISABILITY (or previously had a disability)
☐ NO, I DON'T HAVE A DISABILITY
☐ I DON'T WISH TO ANSWER

Brad White — Your Name
01/06/2020 — Today's Date

Once an employee has completed a form, managers can review it under this report page.



Voluntary Self-Identification of Disability (CC-305)

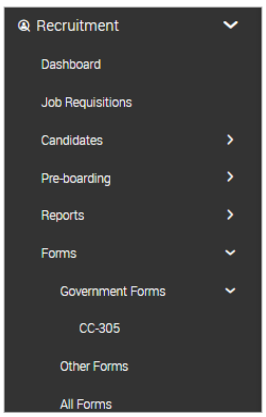
ADD NEW | VIEW

Page 1 of 1 · 1 - 3 of 3 Rows · Saved: [System] · Columns (1) · (1)

Employee Id	First Name	Last Name	Employee EIN	Employee Status	Status	Disability	Created Date	Completed Date
=	starts with	starts with	starts with	!=	=	=	=	=
				Terminated				
11	Darryl	Dixon	Default	Active	New		01/06/2020 11:01a	
3653	Brad	White	Default	Active	Completed	No, I don't have a disability	01/06/2020 10:57a	01/06/2020
3653	Brad	White	Default	Active	New		01/06/2020 10:45a	

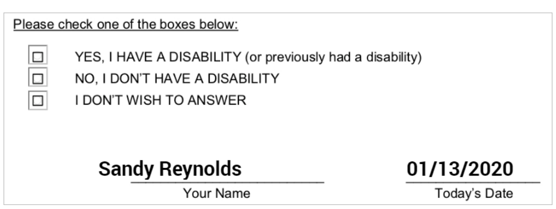
Recruitment – New Forms Menu

Under *Team* > *Recruitment*, a new *Forms* menu has been added. Under *Forms*, we have added *Government Forms*, *Other Forms*, and *All Forms* menu items.



Managers & Applicants

The CC-305 form has been added to *Team* > *Recruitment* > *Forms* > *Government Forms*. Managers can add a new form for an applicant but cannot fill out the form for the applicant but can view the form once the applicant completes it. Creating the form will auto-fill the applicant's name and date of creation. If the applicant is hired and becomes an employee, the report page will maintain the history from when they completed the form as an applicant and will show on the applicant report. Managers can download the form as a PDF.



Please check one of the boxes below:

☐ YES, I HAVE A DISABILITY (or previously had a disability)
☐ NO, I DON'T HAVE A DISABILITY
☐ I DON'T WISH TO ANSWER

Sandy Reynolds — Your Name
01/13/2020 — Today's Date

On the report page, applicants can be view/edited, and the downloaded PDF can be added to the applicant profile in the *Employee Documents* area.

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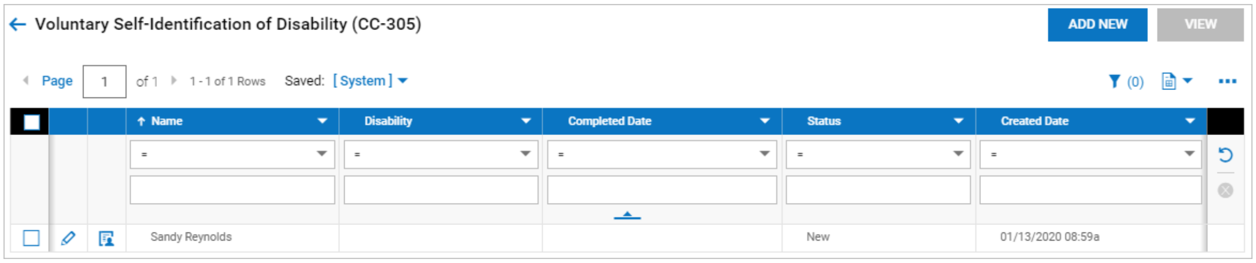
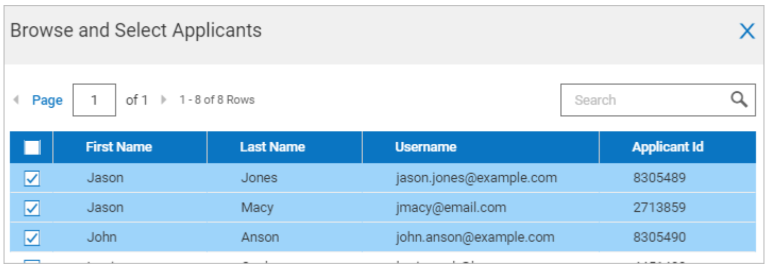


Mass Add Forms

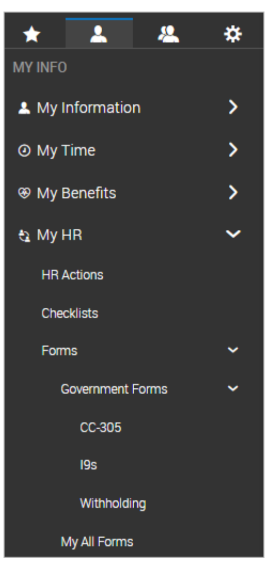
The CC-305 form can be added in mass, which may be required depending on your type of business. Multiple applicants/employees can be added when using *Add New* under *Team* > *Recruitment* > *Forms* > *Government Forms* > *CC-305*.



From the report page, managers can then select multiple employees, click *View*, and scroll through the employees to view the forms. The back arrow will return to the report page.

Applicants

The CC-305 form is available for applicants under *My Info* > *My HR* > *Forms* > *Government Forms*.



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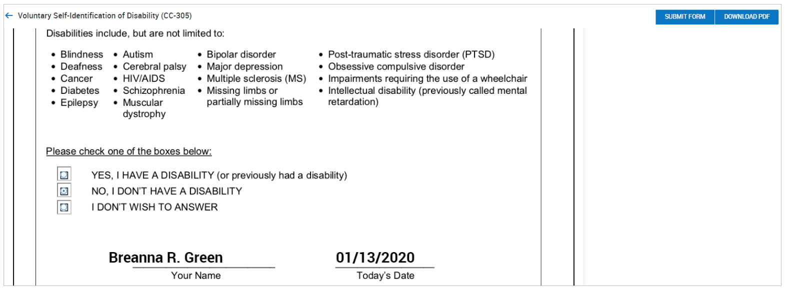
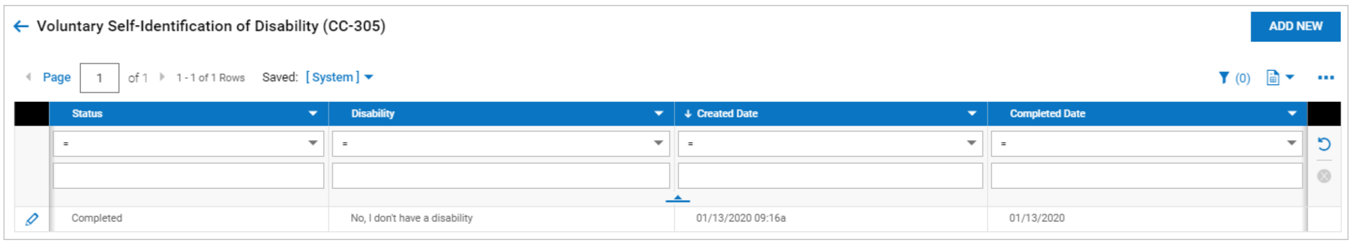
If a form has not been assigned to an applicant via a checklist or other methods, applicants with proper security permissions can add a new form, fill it out and then submit from this page. Applicants can also download the form as a PDF.



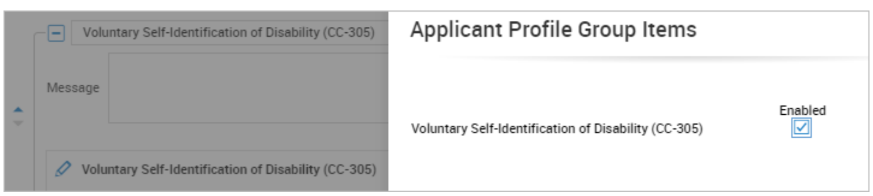
The report page will maintain the history and show the status of the form.



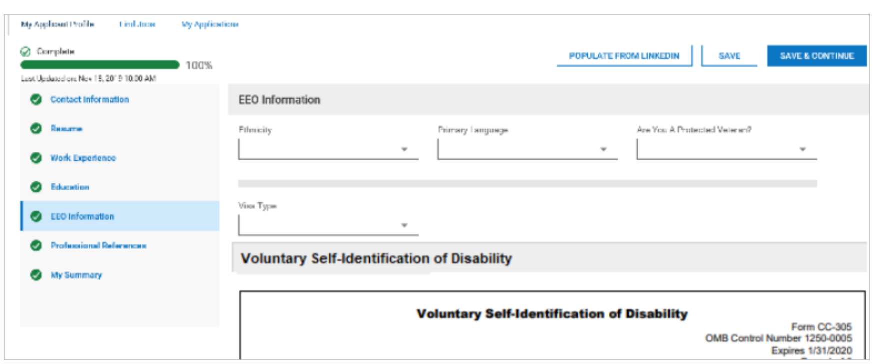
Applicant Profiles

Administrators and managers can enable the CC-305 form in applicant profiles via the *EEO Information* item in Applicant Profile Setup. This is located under *Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Profile Setup*.

When opening the *EEO Information* item for editing, the *Voluntary Self-Identification of Disability (CC-305)* item will be shown in the list. When clicking the edit icon for this item, a pop-up will display where the item can be enabled and then saved. Also ensure the *EEO Information* item is checked as *Enabled*.



Once the item is enabled, applicants will have the form available in their applicant profiles on the *EEO Information* tab via the *My Jobs Portal*.



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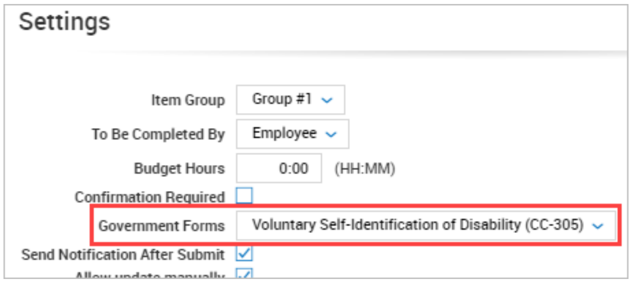
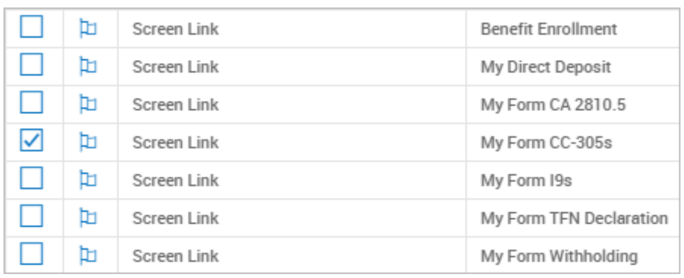
Applicant Checklists

Administrators and managers can add the CC-305 form can be added to applicant checklists with the *Government Form* item. This can be added under *Company Settings* > *HR Setup* > *Applicant Tracking/Recruitment* > *Checklists*. Once added and the checklist is sent to applicants to complete, they can access, fill out the form and then submit.

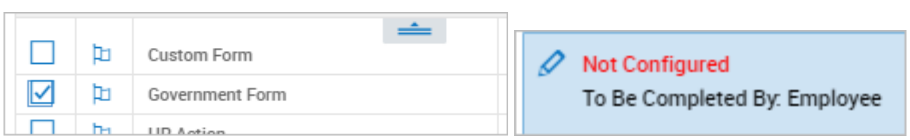


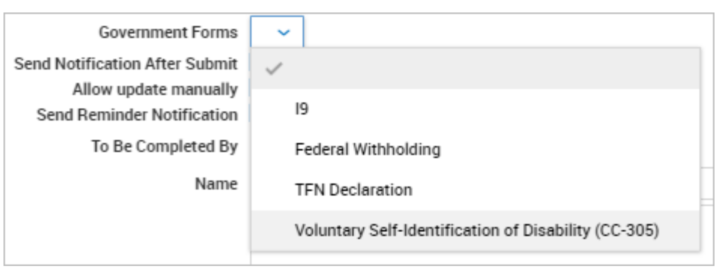
Checklists

The form is available to be added as a screen link in checklists. These can be added in Employee Setup checklists (*Company Settings* > *HR Setup* > *Checklists*) (*Company Settings* > *HR Setup* > *Onboarding* > *Checklists*.)



Also within employee checklists, the form itself can be added by selecting the *Government Form* item. After adding this item, you will need to configure it by clicking the edit icon. On the *Settings* pop-up, you can select the CC-305 form.





HR Actions

Single HR Action in List for Hire/Re-Hire/Terminate Takes User Directly Into HR Action (Classic UI & New UI)

143107: In the December 2019 release, we introduced settings in Company Setup, that when enabled, forces users to use an HR Action of that sub-type when hiring, re-hiring, or terminating employees. These settings are located in the HR Settings widget of Company Setup. They are:

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- Use HR Action for Hire
- Use HR Action for Re-Hire
- Use HR Action for Terminate

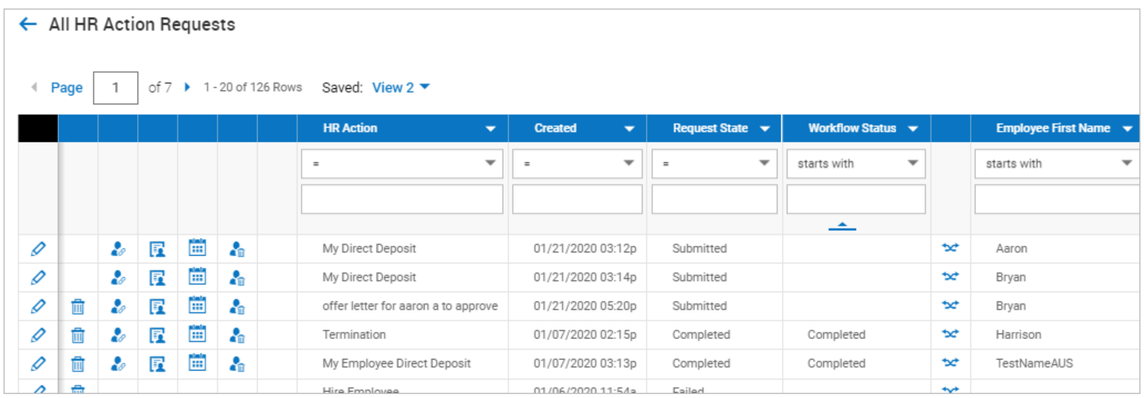
If there are multiple HR Actions available to the user for a given sub-type, those will display in a list of options from which the user can choose.

In this release, we have made it more convenient for users when there is only one HR Action available for Hire/Re-Hire/Terminate. In such cases, the single item will not display in the list by itself. Instead, the user will be taken directly to that HR Action so they will not have to click the Hire/Re-Hire/Terminate button and then select an option in the list to start the HR Action. Once they click one of the buttons in the Employee Information screen, it will bring them directly to that single HR Action.

Update to All HR Action Requests Report (Classic UI & New UI)
76084: In the ***All HR Action Requests*** report, we will now show data for the ***My Information Action Request*** HR Actions, including history, pending, and future dated items.

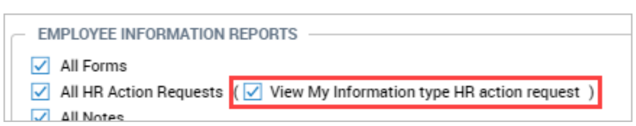
Having this information available will help users by creating an audit trail for certain items and reviewing for mistakes. Previously, only information for the *My Employee Action Request* displayed in the report.

The report is located under *My Info* > *My Reports* > *HR Reports* > *Employee Maintenance* > *All HR Action Requests*.



The security setting controlling access to this report has been updated as well.

On the *Reports* tab of security profiles, in the *Employee Information Reports* section, a new ***View My Information type HR action request*** setting has been added to the ***All HR Action Requests*** setting. When checked, users will be able to see the *My Information Action Request* data in the report.



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Managed Cost Centers

MCC Company Settings: Cost Center Managers Widget Added to Cost Center Edit Page (Classic UI & New UI)

145445, 145618, 150684, 147184: A *Cost Center Managers* widget is now available on the Cost Center edit page, located under *Company Settings* > *Global Setup* > *Cost Centers*. Administrators can add, remove or edit managers from the widget.

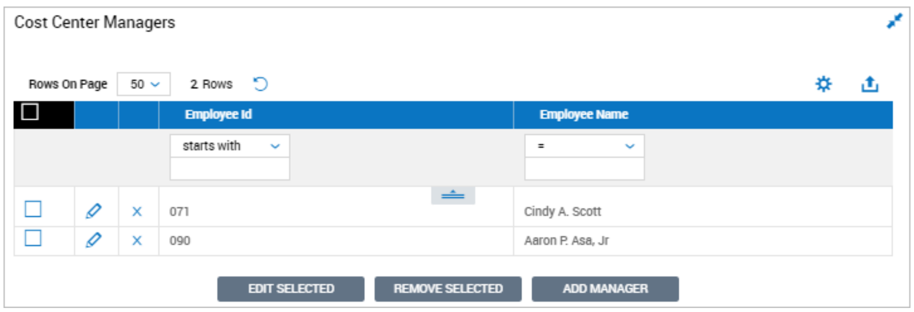
Enabling the Widget in Cost Centers

In *Edit Tree Settings*, ensure the *Cost Center Managers* checkbox in the header (and below) are enabled in the *Levels* widget to make the MCC widget available in *Edit Tree*. By default, this setting will be disabled.

The Cost Center Managers Widget

Managers in the widget can be edited to grant/deny permissions for various recruitment and time management functions.

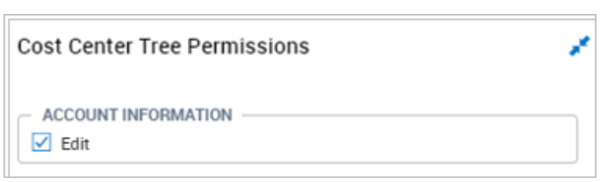
Any permissions set in the cost center via *Cost Center Tree Permissions* are reflected in the *Edit Manager Permissions* of each cost center manager. For example, if the cost center tree has granted permissions for *Approve Applicant Custom Form Workflow* and *Approve Time Off Requests*, those permissions will carry over to the manager and will be enabled in the *Edit Manager Permissions* pop-up.



- **Edit Selected** – Checking one or more managers allows for mass editing of permissions.
- **Remove Selected** – Check one or more managers to remove them from the widget. A confirmation warning will display.
- **Add Manager** – Allows users to add managers from a list of employees for which the user has access.

Account Information [Edit]

The ***Account Information / Edit*** option allows system administrators to give cost center managers access to their subordinate accounts, which gives them the ability to edit the *Employee Information* page for their employees. If the *Edit* checkbox is unchecked, managers will have view-only access.



- This permission is available at the cost center level in the *Cost Center Tree Permissions* widget as well as in the *Managed Cost Centers* widget of employee accounts.

NOTE: To access subordinate accounts, cost center managers must also have the *Employee Information (My Team) – View/Edit* permission set in their security profiles.

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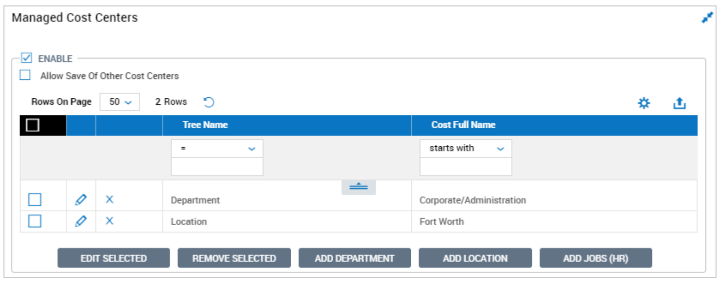
MCC Employee Information: MCC Widget in Employee Information for HR-Only Companies (Classic UI & New UI)

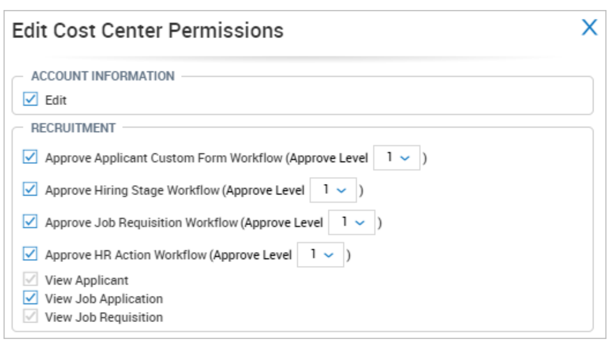
146028, 148343: For customers having only the HR sub-system enabled, the ***Managed Cost Centers*** widget is now available in *Employee Information*. When the widget is added to a manager's employee account, cost centers can be added, and permissions set for each one.

Adding these cost centers to the widget indicates in the system that this employee manages these cost centers. The system will automatically generate a *Managed Cost Centers* Group where the manager is granted the permissions set there. Note that it is possible to set the same permissions to all cost centers from one tree via the *Cost Center Tree Permissions* widget in *Global Setup*.



Managed Cost Centers Permissions

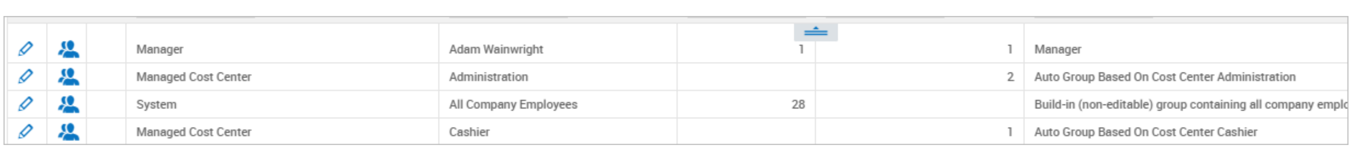
The permissions set at the cost center level are also available at the employee level for cost center managers. If the manager's permissions should be different from the permissions set at the cost center level, those can be edited here.



MCC Groups: Deleting Members From Managed Cost Centers Group

147224: Members of a Managed Cost Centers (MCC) group can now be deleted. Individual users can be removed through the use of a delete icon (X). To remove multiple employees at once, checkboxes next to each member in a group can be checked and a *Remove Selected* button will now be available.

These are located under *Company Settings* > *Global Setup* > *Groups* > *Edit*.



Manager	Adam Wainwright	1	1	Manager
Managed Cost Center	Administration		2	Auto Group Based On Cost Center Administration
System	All Company Employees	28		Build-in (non-editable) group containing all company emplo
Managed Cost Center	Cashier		1	Auto Group Based On Cost Center Cashier

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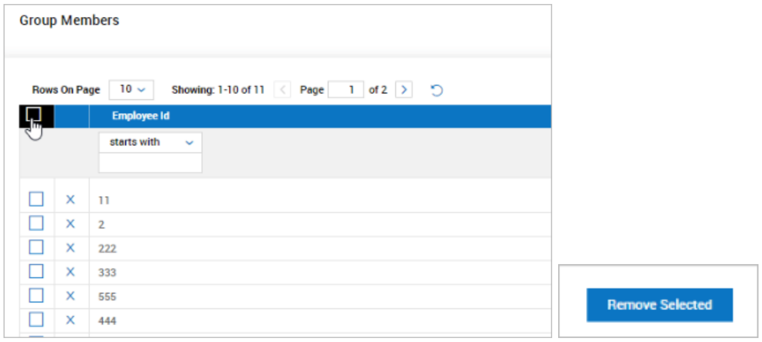


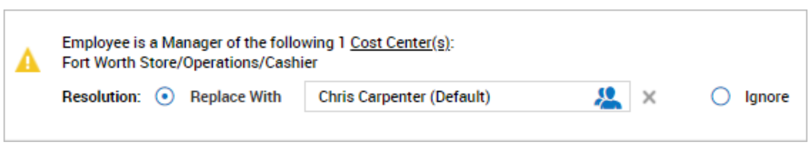
MCC & Workflows: Replacement of Terminated Managers in Workflow (Classic UI & New UI)
145846 & 146993: A new widget will now display when a manager assigned to a cost center is terminated. The ability to replace a cost center manager upon termination will prevent workflows from stalling when the cost center manager is assigned to a step (such as approve/reject) in the workflow.

NOTE: This will be supported only when manually terminating the manager via Employee Information.

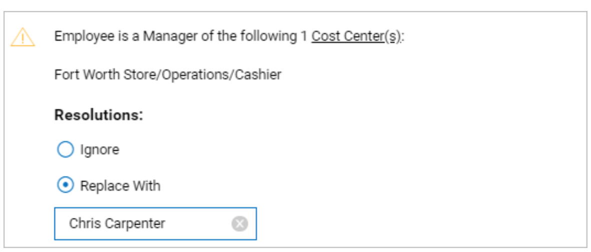
The widget contains the information about all the cost centers assigned to the manager to be terminated, as well as a field with a user lookup to assign a new manager.

The new manager is granted all the permissions and pending To Do Items that the terminated manager had. An option to ignore the replacement is also available. If *Ignore* is selected, the workflow will advance and skip the step assigned to the terminated cost center manager.

Classic UI



New UI



National ID Numbers Supported in Questionnaires (Classic UI & New UI)
134882 & 142974: When creating questions in HR questionnaires, additional National ID numbers are now supported. You will see these options when creating a question for employees using *Type: Employee* and *Field: Account Status* or for applicants using *Type: Applicant* and *Field: Account Contacts*.

The following National ID numbers are supported:

- Social Security Number (previously supported)
- Social Security Number (France)
- Social Insurance Number

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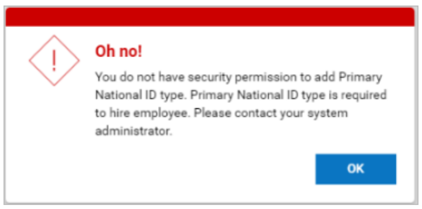
- National Insurance Number
- Citizen Service Number
- Tax File Number

Other (user defined) National ID fields are validated based on the following settings:

- *Primary National ID Type is Required/Unique* (Company Setup) and is the primary for the applicant or employee for whom the questionnaire is used.
- *Question is Required* (Questionnaire configuration).

Error Message Added When Adding Primary National ID Type During Hire (Classic UI & New UI)

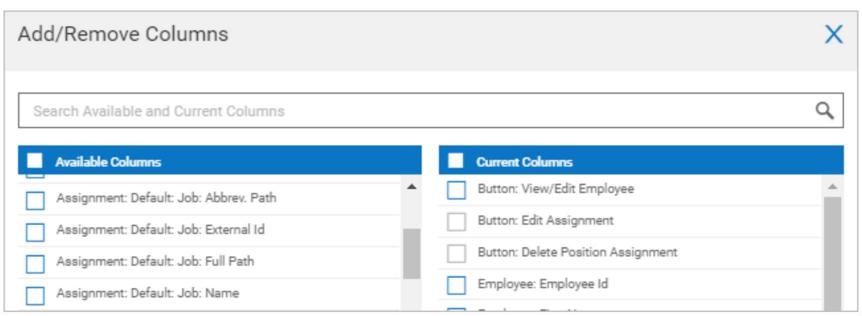
138877: For users who do not have permission to enter Primary National ID numbers during the hire of an employee in a Multi-EIN company, and the field is required, an error message will now display to inform the user they are lacking permissions. This can occur when using a Hire HR Action or a manual hire.



Position Management

Cost Center Info from Assignment Added to Report (Classic UI & New UI)

137758: Previously, after adding assignments containing cost center information, this data was not available to be pulled into the Employee Assignments report page. In this release, that information can now be pulled into the report. Each cost center will be prefixed with *Assignment:*, followed by the cost center name.



Position Assignment Change Reasons (Classic UI & New UI)

141223, 141225, 141666, 141221: Companies using Position Management will now have the option to use reason codes when changing position assignments for employees. Company administrators can create change reason types under *Company Settings > HR Setup > Position Assignment Change Reason Codes*.

When defining a reason code, users can select a type from the drop-down. Types include: *Demotion*, *New Hire*, *Promotion*, *Re-Hire* and *Transfer*. Once a *Type* is selected, add a *Name* and optional *Description*.

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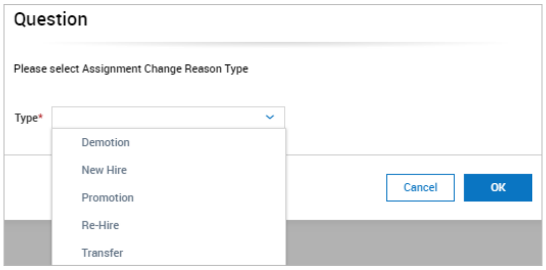
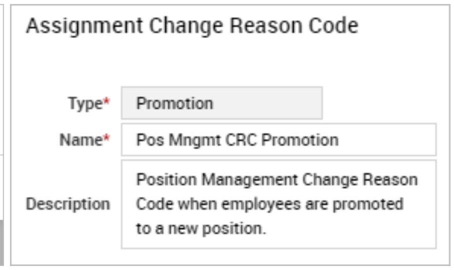
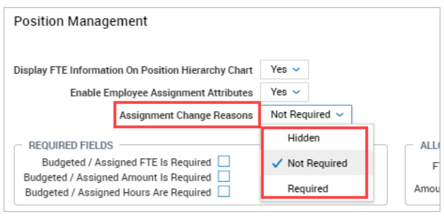




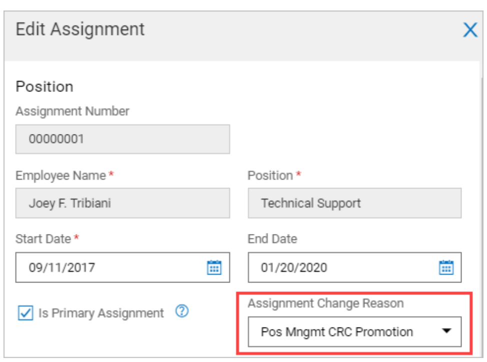
Company Setup

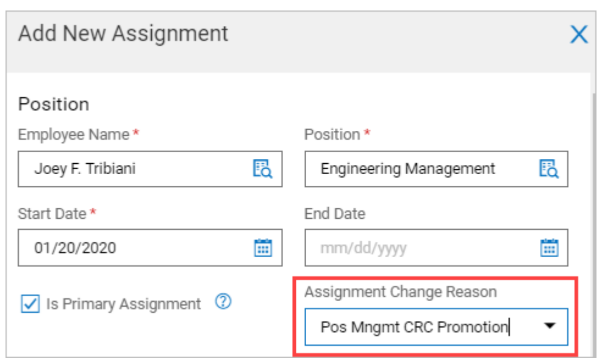
System administrators can determine if Position Assignment Change Reasons are required when users change an employee's position. This is done in the *Position Management* widget under *Company Settings > Global Setup > Company Setup*. At the company level, this can be set as *Required*, *Not Required*, or *Hidden* (users won't see the option.) It will be set as *Not Required* by default.



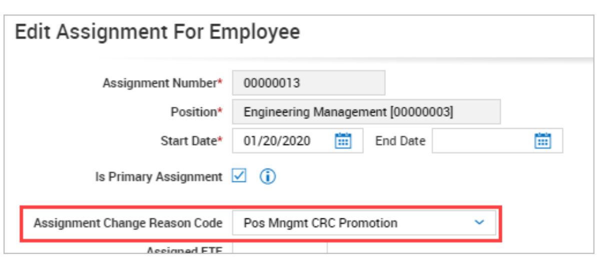
Using Position Assignment Change Reason Codes

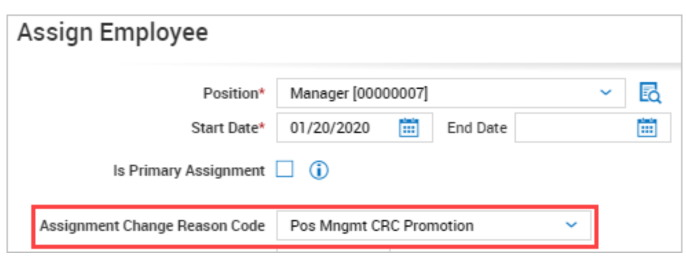
When editing an employee position assignment, options from the ***Assignment Change Reason*** drop-down can be selected to indicate why the change is being made, i.e. when adding an *End Date* to a position. The codes can be used when editing or adding assignments.





The ***Assignment Change Reason*** field can also be accessed in employee accounts in the *Assignments To Positions* widget when editing or adding an assignment.





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Position Reports

The ***Assignment Change Reason Code*** data is available as a column to be pulled into various Position Management reports via the *Add/Remove Columns* option. The column is available in the following reports:

- **Assignments to Positions** – *Team > My Team > Employee Information > Assignment To Positions widget*
- **Position History** – *Team > My Team > Reports > Position History*
- **Position Assignment History** – *My Info > My Reports > System Reports > Audit Trail*
- **Employee Assignments** – *Team > My Team > Employee Assignments*

Reports

Address Columns Added to Employee Status Changes Report (Classic UI & New UI)

145792: Address columns have been added to the *Employee Status Changes* report. These are not default columns but can be added to the report. The report can be accessed from:

New UI: *My Info > My Reports > HR Reports > HR Maintenance > Employee Status Changes*

Classic UI: *My Reports > HR > Employee Status Changes*

- Employee Address: Address 1
- Employee Address: Address 2
- Employee Address: City
- Employee Address: Country
- Employee Address: County
- Employee Address: Full
- Employee Address: Postal/Zip Code
- Employee Address: State/Province
- Employee Alt. Address: Address 1
- Employee Alt. Address: Address 2
- Employee Alt. Address: City
- Employee Alt. Address: Country
- Employee Alt. Address: Postal/Zip Code
- Employee Alt. Address: State/Province

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New UI Enhancements

New UI Updates – Table of Functionality Added to Pages

The table below shows the updates made within the New UI and the functionality added.

Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
144429 (EPIC)	HR	Account Contacts	*See below*	Account Contacts page converted to New UI view when Account Contacts items are added to Custom Forms, Questionnaires, HR Actions and Benefit Plans	Yes	Yes
143006	HR	Account Contacts in HR Actions	*Company Settings > HR Setup > HR Actions Type: My Employee Information: Regular, Hire, Re-Hire, Termination Type: My Information*	When adding Account Contacts in HR Actions, resulting To Do Item for recipient will show New UI view when updating Account Contacts.	Yes	Yes
143005	HR	Account Contacts in Custom Forms	*Company Settings > HR Setup > Custom Forms Type: Employee*	When adding Account Contacts in a page in Custom Forms, the resulting To Do Item for recipient will show New UI view when updating Account Contacts.	Yes	Yes

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Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
143008	HR	Account Contacts in Benefit Plans & Enrollment	*Team > Benefits > Benefit Plans* & *My Benefits > Enrollments*	Add Account Contact & Edit Account Contact	Yes	Yes
147597	HR	Account Contacts in Custom Form item attached to an HR Action	*Company Settings > HR Setup > Custom Forms* *Company Settings > HR Setup > HR Actions*	For user receiving HR Action with Custom Form attached and containing Account Contacts item: Manage Contacts -Add Contact & Manage Contacts – Edit Contact	Yes	Yes

New UI: Anniversary and Birthday Calendars (Desktop)

When any of the TLM, HR, Payroll, or Scheduler sub-systems are enabled, managers can now view Anniversary and Birthday Calendars under *My Info* > *My Reports* > *HR Reports* > *Calendar* or *Team* > *HR* > *Reports* > *Calendar* in the New UI desktop experience. The following reports are now available:

- Monthly Birthday Calendar (145813)
- Weekly Birthday Calendar (145814)
- Yearly Birthday Calendar (145812)
- Monthly Anniversary Calendar (145805)
- Weekly Anniversary Calendar (145803)
- Yearly Anniversary Calendar (145809)

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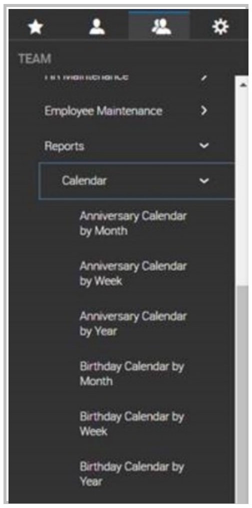
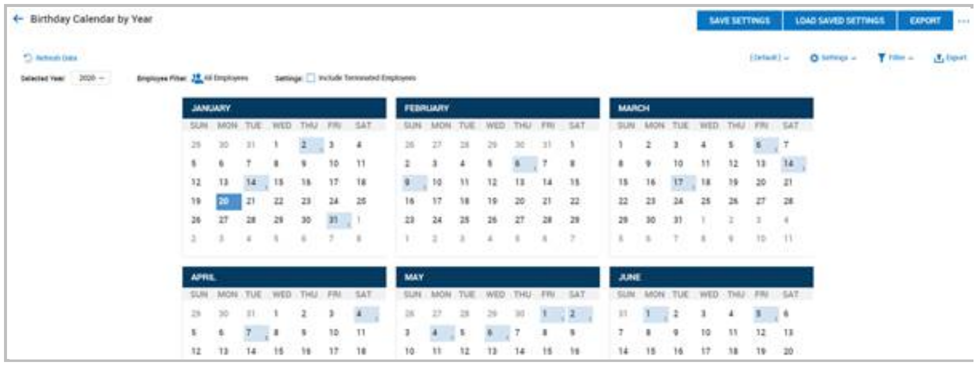
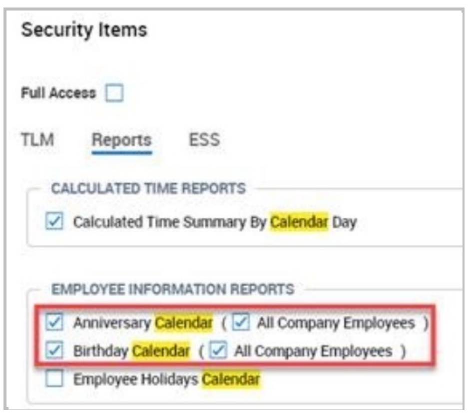




Users with the corresponding calendar security item(s) enabled in their assigned Security Profiles (in the *Employee Information Reports* section on the *Reports* tab) can view the calendar(s).



New UI: Benefits

Search Field to Include Coverage Name & Plan Name in Benefit Plans (Mobile & Desktop)

135147: Previously, when using the Search field in Benefit Plans, entering or selecting the Benefit Plan name along with the Coverage Name, i.e., Dental (Waived), the system returned no results even though the plan existed. We have updated the search parameters to return search results based on both the plan name and coverage name.

Downloading Benefit Plans to PDF (Desktop)

130253 (EPIC): In the New UI, Company Administrators will now have a ***Download Selected To PDF*** button available in the Benefits Plans page under *Company Settings* > *Profiles/Policies* > *Benefits* > *Plans*. This will allow users to have a copy of the plan's configuration.

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Downloading of Benefit Questionnaire Answers (Mobile & Desktop)

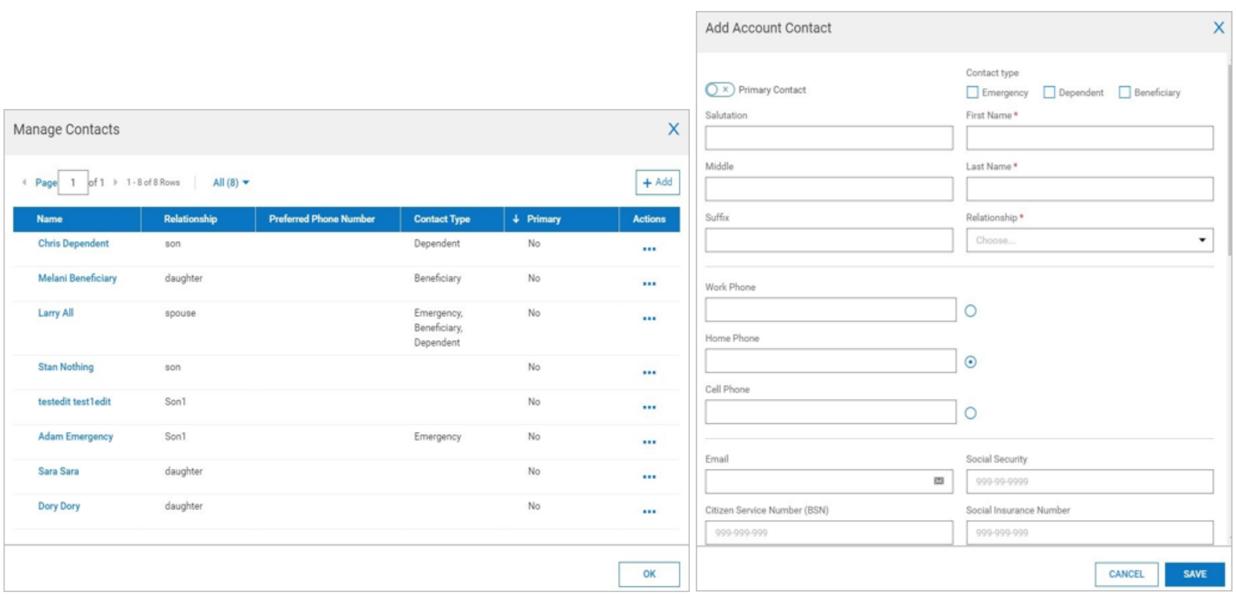
141871: Users in the New UI will now be able to download Benefit Questionnaire answers. The ability to view these options is dependent on the user's security settings.

The answers can be viewed from the following places:

- On the *Benefits Change Requests Summary* page or the *Benefits Change Requests Detail* page when viewing a questionnaire, under *Team > Benefits > Enrollment Requests*. A *Download PDF* button will be available.
- On the *Benefit Questionnaire Answers* page under *Team > Benefits > Reports*.
  - Security settings for managers:
    - HR tab, Employee section – Benefit Enrollment Questionnaire (View or View/Edit)
    - HR tab, Employee section - Workflow Questionnaires (View, Add, Delete)
    - HR tab, HR Tables section – Form Questionnaire (View, Edit, Add, Delete)
- By employees in a new enrollment, by selecting *View Questionnaire* from the action ellipses.
- By employees during open enrollment while answering questions, by clicking the *Download PDF* button.
  - Security setting for employees:
  - ESS tab, Benefits section – check Benefit Questionnaires

Benefit Questionnaire Account Contacts Pop Up Updated for New UI (Mobile & Desktop)

143988: Benefit Enrollments with an accompanying questionnaire where an Account Contacts item is attached will now be shown in the New UI experience for both desktop and mobile.



- Managers can see it when clicking *Manage Contacts* while viewing the questionnaire under *Team > Benefits > Enrollment Requests > Change Requests Summary*. Contacts can be added/deleted.
- Employees can see it when clicking *Manage Contacts* in the benefit questionnaire during benefits enrollment under *My Info > My Benefits > Enrollment*. Employees can add contacts and delete contacts not included in the benefit plan.

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New UI: Checklists

Multi Selection Added to Employee Lookup in Checklists (Mobile & Desktop)

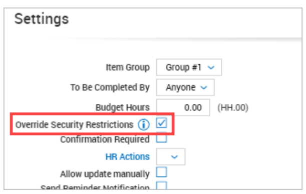
141693: In the New UI, when assigning a new checklist, the option to assign multiple employees to the checklist is now available. In the *Employee(s)* drop-down, you can now click *Browse* and select one or more employees from the pop-up.

Checklists Screen after Checklist Item Selection (Mobile App)

146183: When navigating to *My HR* > *Checklists*, the bottom of the Checklist Item page was displayed and the user was unable to scroll on the page. Now the Checklist Item page is displayed automatically scrolled to the top, and the user is able to scroll on the page.

Override Security Restrictions Added to HR Action Item in Checklists (Mobile & Desktop)

111847: In the New UI, when adding the HR Action item to a checklist, the option to ***Override Security Restrictions*** will now be available. When checked, this will simulate a user with full access if the recipient of the checklist has security restrictions around processing HR Actions.

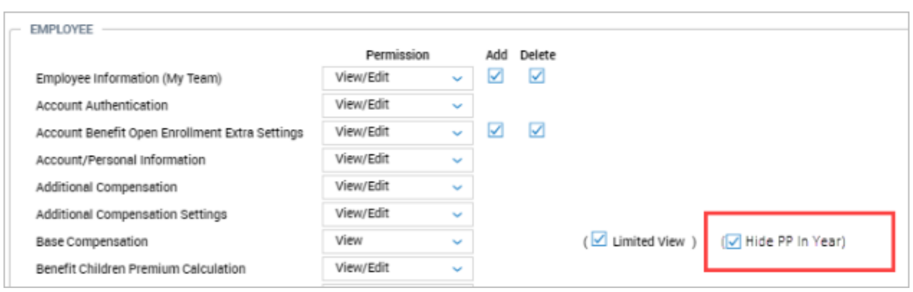


New UI: Employee Information

Base Compensation Widget Updates (Mobile & Desktop)

153135: In the December 2019 system release, we added a *Limited View* security setting to the *Base Compensation* permission, located in the *Employee* section of the *HR* tab of security profiles. This setting hides certain fields from view of the user. In that release, the ***PP In Year*** value was not hidden from view when this security setting was enabled.

In this release, we added a new security profile setting to hide the ***PP In Year*** value as part of the *Limited View* security setting.



This functionality is useful in situations where an employee is hired (HR Action or manual process) and the company does not have a default pay period profile set in Company Setup. This would cause the *PP In Year* value to be 0. A hiring manager would manually input this field and may not understand the setting and enter an incorrect value resulting in the employee having the wrong pay period for their employee type.

- When ***Hide PP In Year*** is enabled in the security profile, the ***PP In Year*** value will be automatically updated based on the Pay Period Profile assigned during the hire process, whether using an HR Action or the manual Hire button in Employee Maintenance.

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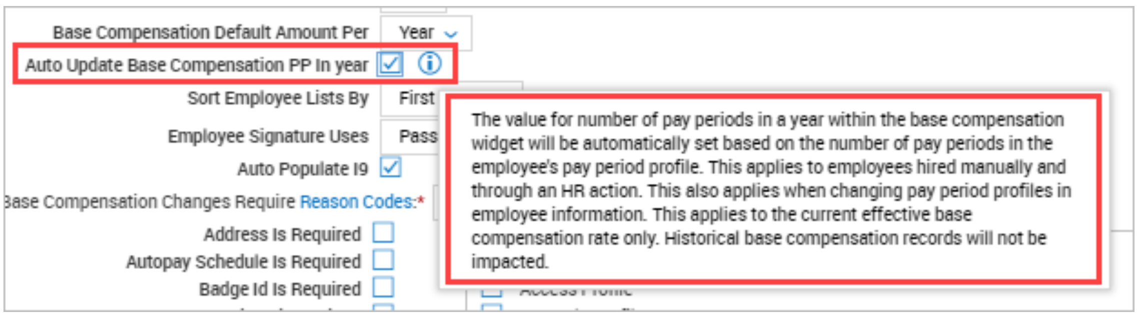
- Automatic updates will not be applied when the *Hide PP In Year* setting is disabled.
- The *Hours Per PP* value will be hidden in reports when the *Hide PP In Year* setting is enabled.

If you wish to take advantage of the automatic Pay Period Profile update without having to use the *Hide PP In Year* security setting, we have added a new setting in the *Account Policies* widget of *Company Setup*.

The ***Auto Update Base Compensation PP In Year*** setting, when checked, will update the Base Compensation widget in employee accounts based on the Pay Period Profile assigned to them during initial hire or when changing the profile for established employees. An Info icon explains how the setting works.



New UI: Hiring & Position Management

Position Assignment Widget Available on Manual Hire Page (Mobile & Desktop)

114750 & 114907: For companies using Position Management, the *Position Assignment* widget can now be toggled on or off during the manual hire process (through the Hire button in Employee Information.) Enabling the widget during the hiring process allows you to add position information to new hires at the time of hire. If the information is not added during the hiring process, it can be added later.

To enable the widget, administrators will check the ***Enable Position Assignment At Hire*** checkbox in the *Account Policies* widget of *Company Setup*.

Once checked, the ***Position Assignment Information At Hire Is Required*** setting becomes active. This setting can be checked to require users to enter position information when hiring.

When hiring, the *Position Assignment* widget will display. If the information is set as required, red asterisks will indicate required fields. Otherwise, users can click *Continue* to move past the widget. If the *Is Primary Assignment* checkbox is selected, after filling the position details, the defaults from the position will be applied.

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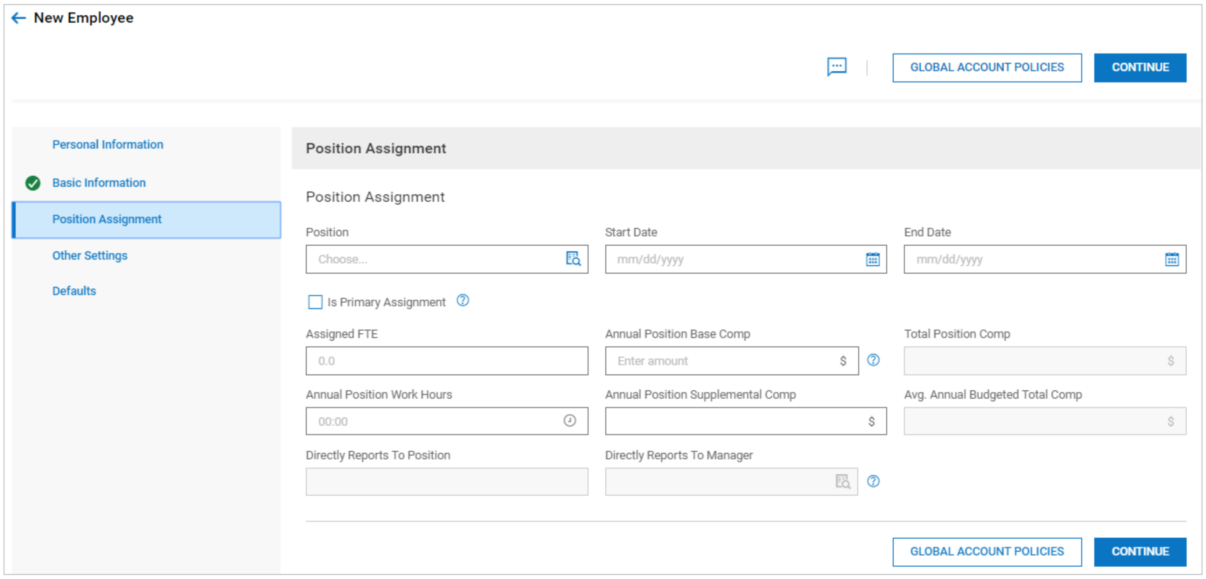

New UI: HR Actions

Selecting Cost Center Limits in HR Actions (Mobile & Desktop)

141416: Previously in the New UI, when a user processed an HR Action containing cost center action items, the ability to select any level in the cost centers as a limit root was not available (as it was in the Classic UI.) Only cost center levels marked as *Allow Time Allocation* could be selected as a limit root.

This was an issue in TLM, since in some cases employees must be limited to a parent cost center that would not allow time allocation, but many items under that parent would need to be accessible by employees without allowing time to that parent.

Moving forward, the same options available in the Classic UI will now be available in the New UI and users will be allowed to select any levels as a limit root.

New UI: Performance Management

Peer Feedback Workflow: Feedback Providers Value Added to Notification Step (Mobile & Desktop)

143140: In the Generate Notification step of the Peer Feedback Workflow, Feedback Providers has been added to the *Send Notification To* drop-down. This will allow the notification to be sent to the feedback providers involved in the process. If the value is selected and feedback providers have not yet been set, the notification will not be sent until those providers are identified.

Detailed Report for Peer Feedback (Mobile & Desktop)

136465: A new detailed report for peer feedback has been added to the system and will display the details around peer feedback including the Peer Feedback Name, Employee Name/ID, Status, the Created, Start Date, End Date and more via Select Columns. Options are available in the report to delete the feedback and view the workflow.

The report is available from the following locations:

- *Team* > *Talent* > *Reports* > *Peer Feedback Report*
- *Team* >*Talent* > *Performance* > *Peer Feedback* > *Assigned* (tab) > *Actions* ellipses

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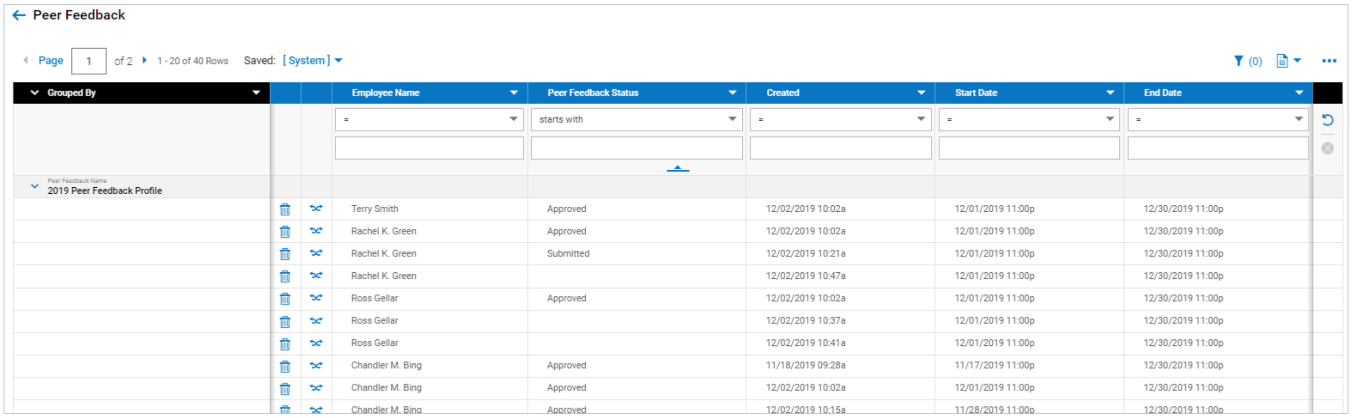
- *My Info > My Reports > Talent Reports > Peer Feedback Report*



Results Added to Performance Reviews in New UI (Mobile & Desktop)

149251: On the *Summary* tab of Performance Reviews, results of the employee's review are now available in the *Results* widget. Details in the widget include:

- Signed by Employee
- Signed by Reviewer
- Final Rating
- Comments

New UI: Recruitment (General)

Notify Applicant Option Added to Job Requisitions Page (Mobile & Desktop)

135041: In the October 2019 system release, functionality was introduced to notify an applicant of a job requisition and invite them to review and apply. A *Notify Applicant* button was added in job requisitions.

In this system release, we are adding the ***Notify Applicant*** option to the *Job Requisition* report page. This option will provide users with less clicks to access this feature and prevent them from having to open each job requisition.

The functionality on this page works the same as it does when using the button inside a job requisition; upon clicking the icon on the *Job Requisition* page, users will be prompted to select an applicant and then complete a communication template and send to the applicant.

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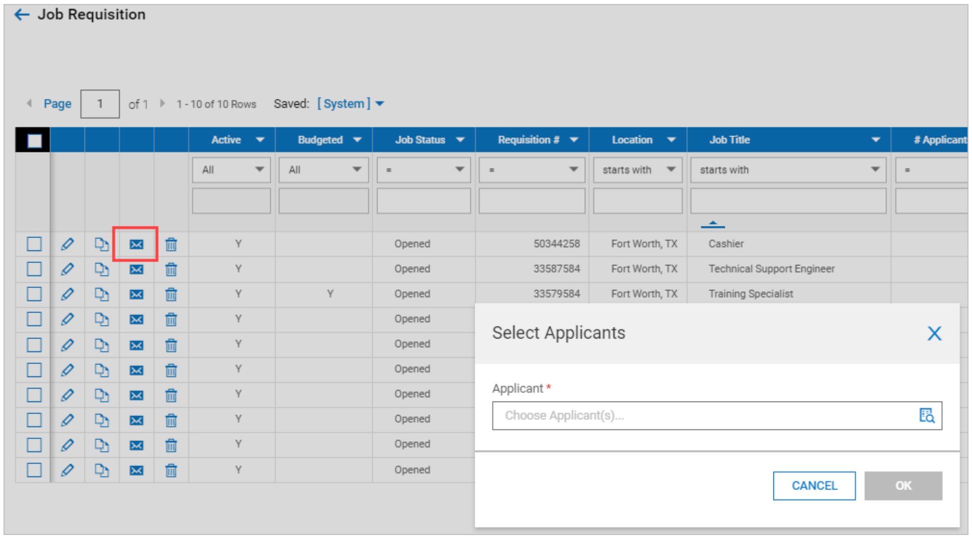
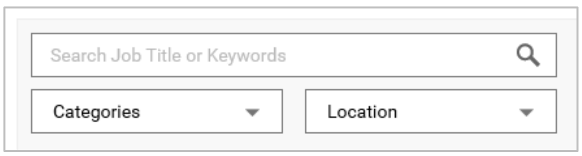


Recruitment Applicant Portal: Update to Job Search Page

138734: We have updated the Job Search page of the applicant portal to have the same features found in the Find Jobs area. The Find Jobs page has the ability to search job titles or keywords, but also has a drop-down for Categories and Location, which will now be included in the Job Search page.



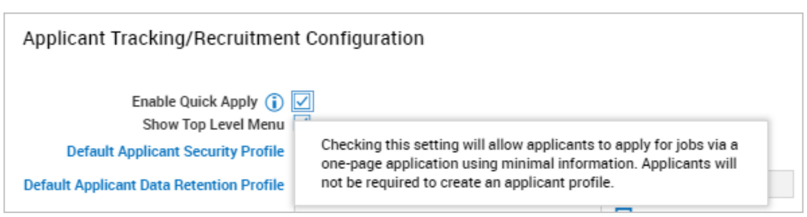
New UI: Recruitment Quick Apply

A new Quick Apply option has been added to the Recruitment module. This option can be enabled in job requisitions when the job simply doesn't require detailed information from the applicant. Applicants can use Quick Apply to apply for jobs by entering minimal information. In the next release, applicants will receive an email notification giving them the opportunity to reset their password and complete their applicant profile, but it will not be required.

Enabling Quick Apply

135442, 135443, 151089: A new ***Enable Quick Apply*** option has been added to the *Applicant Tracking/Recruitment Configuration* widget in the *Applicant Tracking/Recruitment Configuration* page.

A tool tip is available stating: *Checking this setting will allow applicants to apply for jobs via a one-page application using minimal information. Applicants will not be required to create an applicant profile.*



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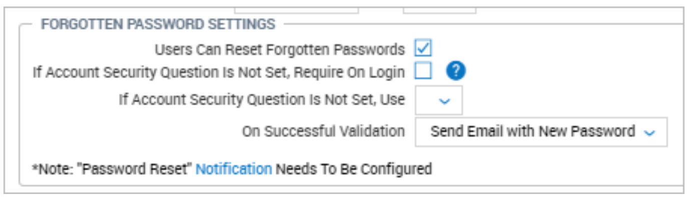
Once enabled, users with the proper security permission will see an ***Allow Quick Apply*** checkbox in the *Requisition Details* of Job Requisitions.

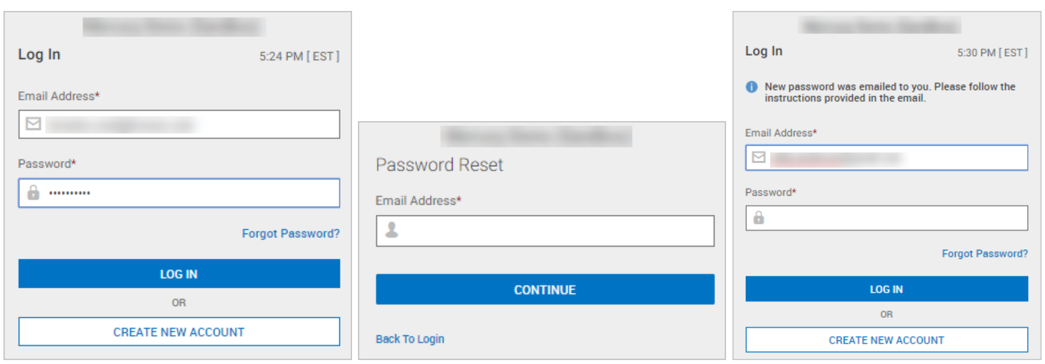
It is advised that the ***Users Can Reset Forgotten Passwords*** in the *Forgotten Password Settings* is enabled so applicants using *Quick Apply* can reset their own passwords. By having this on, applicants can click the *Forgot Password* link, and proceed without the need to contact anyone. This may also encourage them to set up their sign-on credentials and profile. **CAUTION**: By having this functionality enabled, it will be enabled for employees as well as applicants. Currently, we do not have separate password settings available.



Using Quick Apply - What Applicants Will See

Log In

If applicants forget their password, and you have enabled the password reset options, they can click the *Forgot Password?* link and the *Password Reset* page will display. After entering their email address and clicking *Continue*, they will receive an email containing a reset link and instructions.



Quick Apply Application

With Quick Apply enabled, when applicants click the Apply button for a job, an abbreviated application form will display, requiring minimal information.

- The form will be pre-populated with the job *Title* as a minimum, *Category* and *Location* may be there if included in the requisition.
- Applicants must list their *First Name* and *Last Name*.
- Fields for *Email* and *Phone* allow the applicants to enter their method of contact.
- In the *Areas of Interest* field, applicants can select from a pre-populated list from Categories and Industries.

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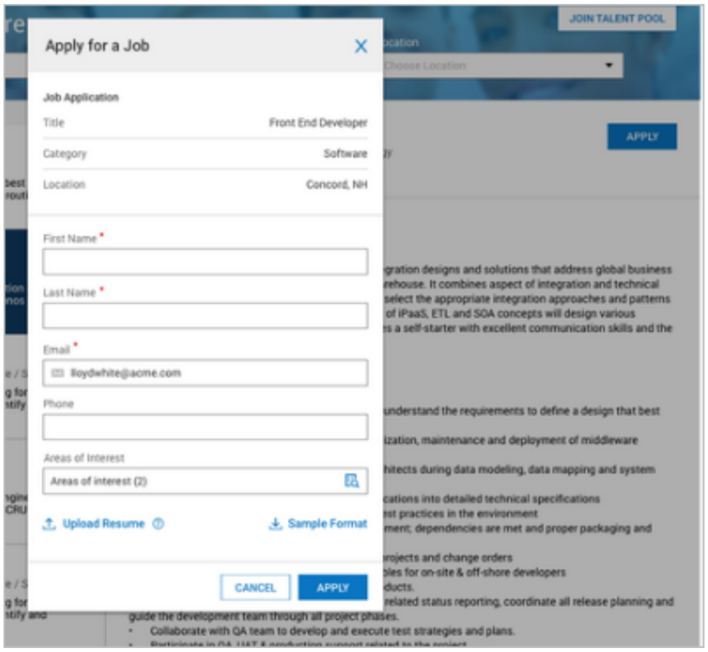
- An *Upload Resume* link is available for applicants, and supports PDF, .DOC, .DOCX and TXT formats. The *Sample Format* link will download the sample format currently available in the Applicant Profile screens.



Create New Account

Applicants can create their account by filling out the fields on the Create page. Clicking *Cancel* will return them to the *Log In* page.

If Data Retention is turned on in your company, and applicants choose to create an account and supply their resume or personal information, applicants will see an additional pop-up where they will agree to their data being kept.

Security Permissions for HR Professionals Using Quick Apply

135440: Recruiters, HR Managers or other users of Recruitment Quick Apply should have the following security permission. This permission will allow users access to the Quick Apply option on Job Requisitions.

On the *HR* tab of the security profile, in the *Recruitment* section, set the ***Job Requisition Quick Apply*** setting to either ***View*** or ***View/Edit***.

Configuration Elements of Quick Apply

Areas of Interest

143462: Administrators can create a customized list of what applicants will see in the selection list in the *Areas of Interest* field on the Quick Apply screen. This is done under *Company Settings* > *Global Setup* > *Global List Definitions* > *Areas of Interest*.

A system pre-defined list will be available. Each entry can be edited where the name can be changed localized to the one of the supported languages set in your company. The *Visible* checkbox will allow entries to be set as visible or hidden from the selection list in *Areas of Interest* in Quick Apply. The sort order can be changed, and new entries can be added.

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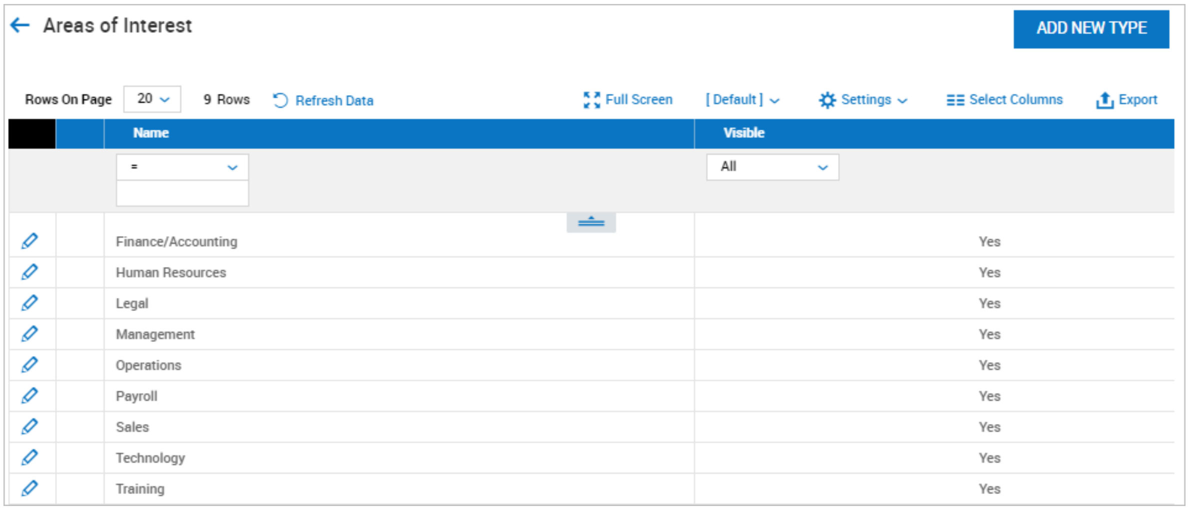
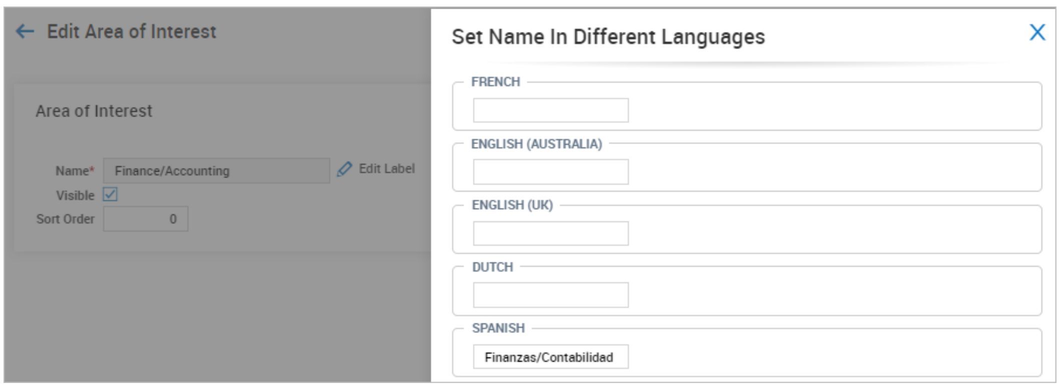
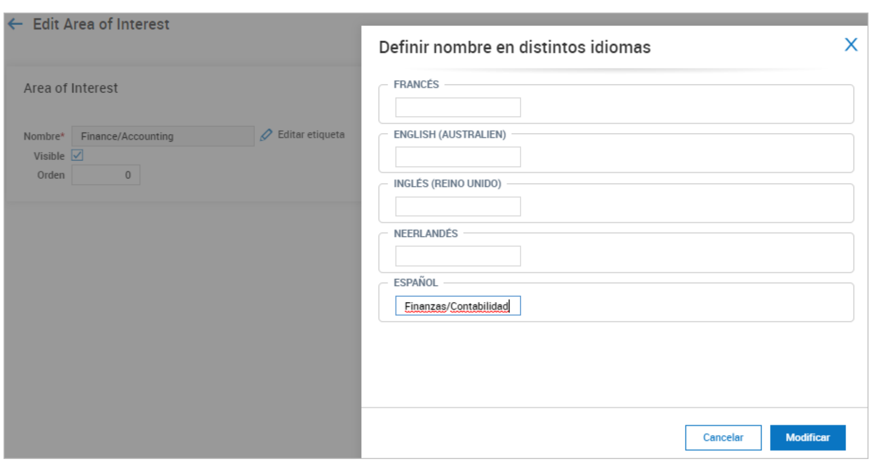


When editing an entry to change the name label, the language options that display are based on the entries set in *Locales* (*Company Settings* > *Global Setup* > *Locales*).



Example: If your company's default language and country are set to Mexico/Spanish, the labels will display in the Spanish language, along with the original U.S. English. Editing the label will allow you to enter the Spanish translation for the field. If, for example, your company's default country and language is United States/U.S. English, but you want the labels translated for Spanish and French, you can define those and when applicants access the *Areas of Interest* field, they will see all defined languages.



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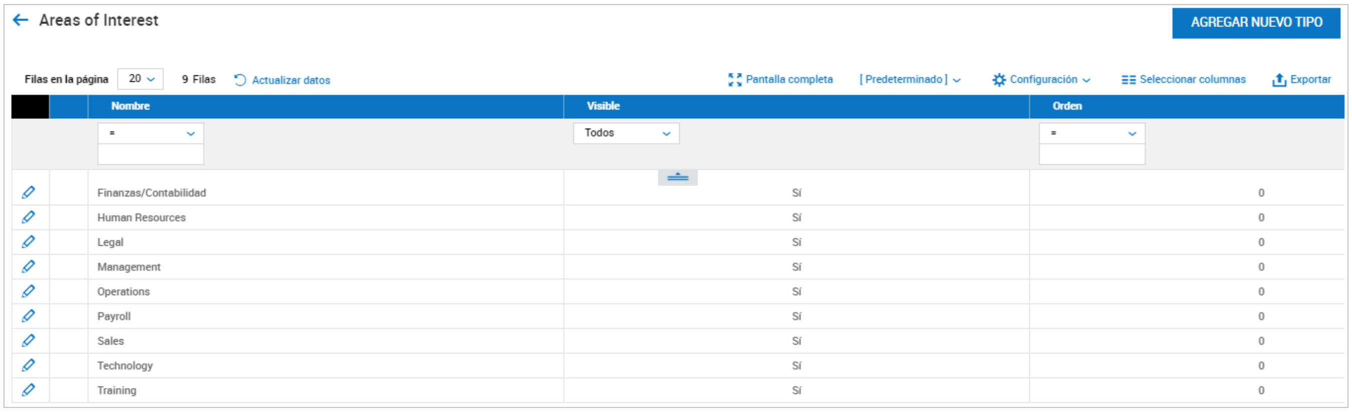
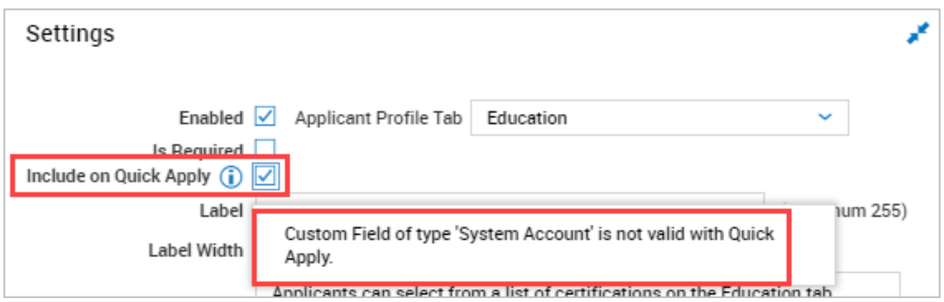


Nombre	Visible	Orden
Finanzas/Contabilidad	Sí	0
Human Resources	Sí	0
Legal	Sí	0
Management	Sí	0
Operations	Sí	0
Payroll	Sí	0
Sales	Sí	0
Technology	Sí	0
Training	Sí	0

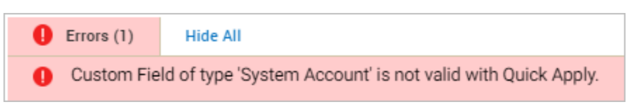
Applicant Custom Fields with Quick Apply

148568: Administrators and managers creating custom fields for applicants can indicate if applicant custom fields should be included in Quick Apply. Inside the Custom Field Property configuration page, an ***Include on Quick Apply*** checkbox in the *Settings* widget will include that field and any list items in applicant custom forms. This is done under *Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Custom Fields*.

When *Include on Quick Apply* is checked, the applicant custom field will show in the *Custom Fields* section of the Quick Apply screen. If applicants complete the field, their applicant record will be updated accordingly. If the applicant uses Quick Apply for additional jobs, the applicant's record will be overwritten with the custom fields from the most recent application.



Note that *System Account* cannot be used when *Include on Quick Apply* is enabled. An error message will display if attempting to use in this way.



Applicants Report - Quick Apply Records

135414: Applicants applying for jobs using Quick Apply will be included in the Applicants report page under *Team > Recruitment > Candidates > Applicants*. Columns will include:

- **Quick Apply** – Yes or No values. Drop-down included to select either Yes/No response for filtering purposes. This will be a default column.
  - The value will not change if an applicant initially uses Quick Apply and later applies via traditional full apply. Conversely, if an applicant applies via traditional full apply, then applies for a job with Quick Apply, the value will update with Y to indicate the applicant is in the system as a Quick Apply applicant.

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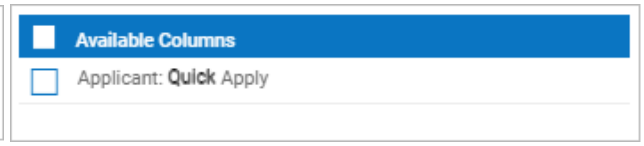
- **Areas of Interest** – If more than one area of interest is selected by the applicant, they will all display. This column includes filtering. This column must be added.
  - If applicant applies for the job again and selects different areas of interest, the report column will append the entries accordingly.
- **Localized Areas of Interest** – If an applicant has applied for jobs with Quick Apply using one or more enabled languages, these will display in this column. This column must be added.



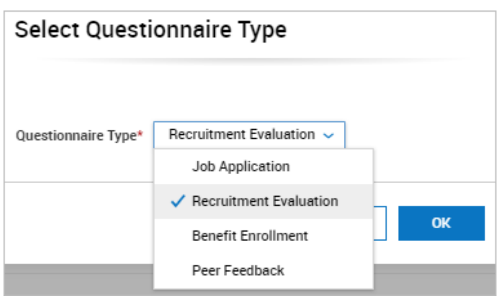
New UI: Recruitment Questionnaires

119714 (EPIC) The enhancements shown below are all related to new functionality around the Recruitment Questionnaire.

New! Recruitment Evaluation Questionnaire Type Added (Mobile & Desktop)

138791: For companies using the Recruitment module, a new ***Recruitment Evaluation*** questionnaire type is available and can be configured under *Company Settings > HR Setup > Form Questionnaires*. The form allows you to add customized questions, which can be assigned to candidates while processing their job application for the purpose of collecting additional information; for example, when conducting applicant phone screens or applicant interviews.

NOTE: In scope of this enhancement, please note that in the *Questionnaire Type* drop-down, *Job Requisition* has been renamed to *Job Application.*



Assigning Recruitment Evaluation Questionnaires (Mobile & Desktop)

138792: Once a Recruitment Evaluation Questionnaire has been configured, it can be assigned to candidates, but can also be assigned to yourself, recruiters, or other managers. The questionnaire can be added/assigned in the following areas:

- Job Applications page (*Team > Recruitment > Candidates > Job Applications*)
  - View job application (*Questionnaires* widget with jump link – click *Add* in widget – select one or more recruitment questionnaires – select one of more employees to assign questionnaire)

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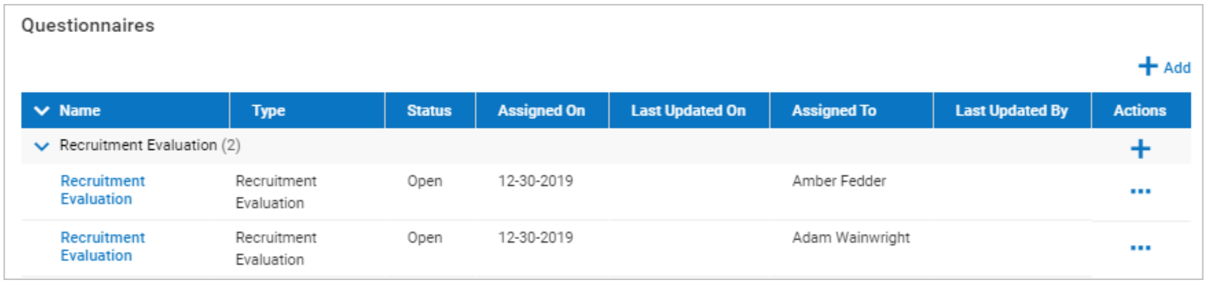
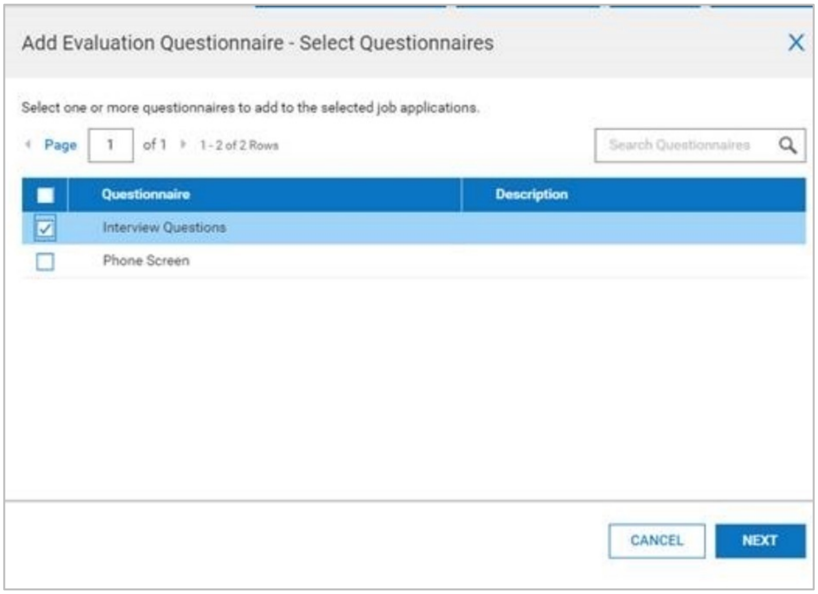
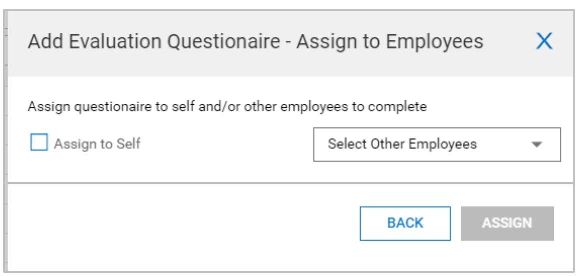
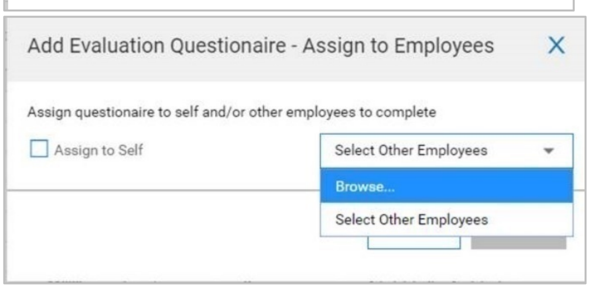




After clicking *Next*, add to employee(s) or self.





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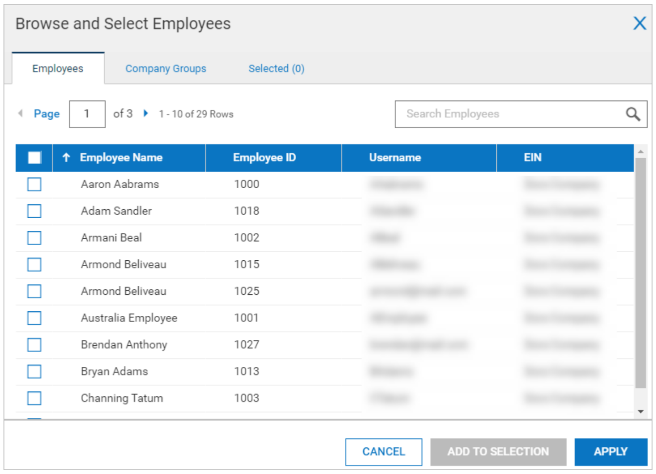
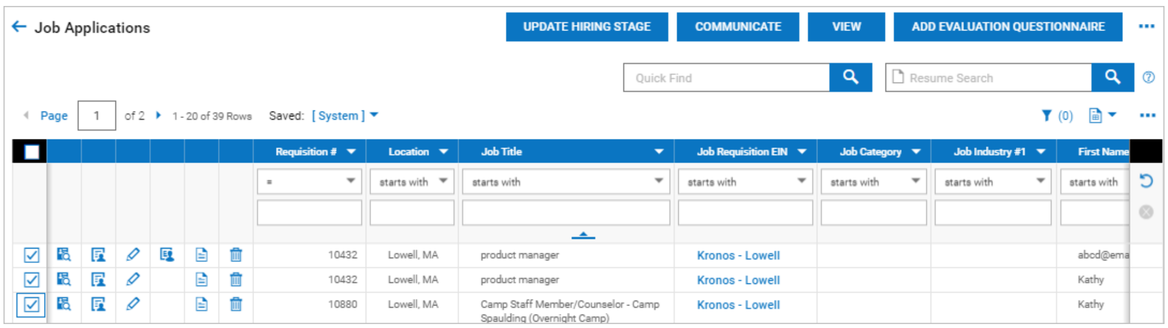
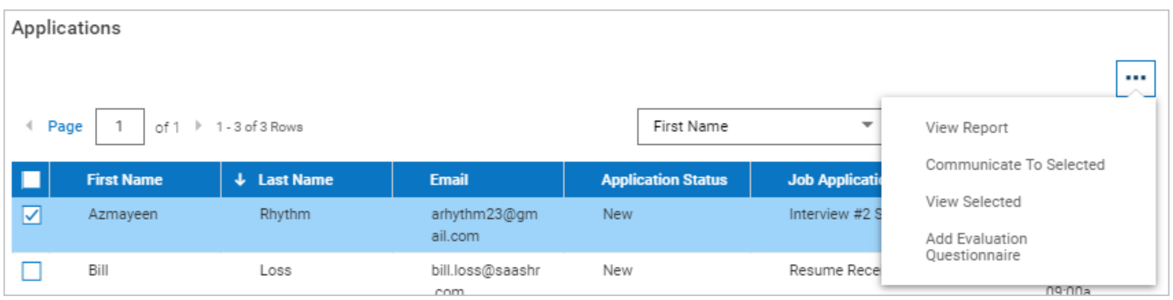


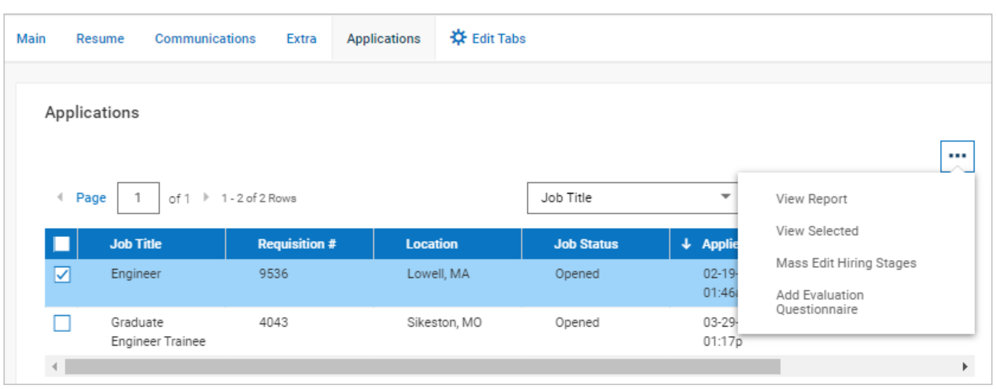
– Questionnaires can be added in bulk from report page via *Add Evaluation Questionnaire* button.



- Job Requisitions (*Team* > *Recruitment* > *Job Requisitions*) – view one or more job requisitions - *Applications* section. Add one or more questionnaires to one or more applicants in list.



- Applicants page (*Team* > *Recruitment* > *Candidates* > *Applicants*).
  – View applicants – *Applications* tab – select one or more applicants – add one or more questionnaires and assign to one or more employees.



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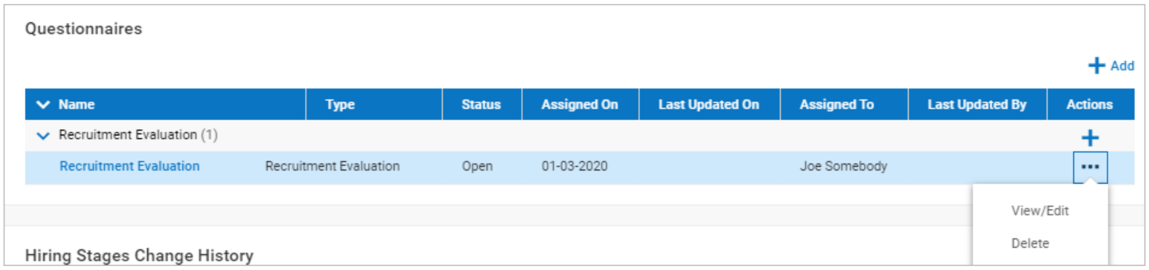
Job Applications: Questionnaires Widget when Viewing Application (Mobile & Desktop)

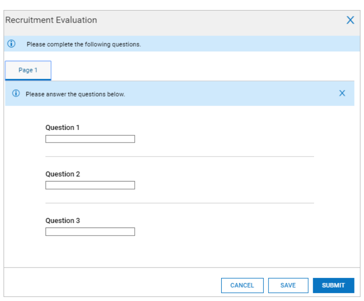
119715: For recruiters, once a new form has been assigned to a Job Application, they can immediately view, manage, or complete the form without navigating to another part of the system. This is accomplished with a new ***Questionnaires*** widget that is available when viewing a Job Application under *Team > Recruitment > Candidates > Job Applications*.

Both applicant and recruitment questionnaires will appear in this widget.

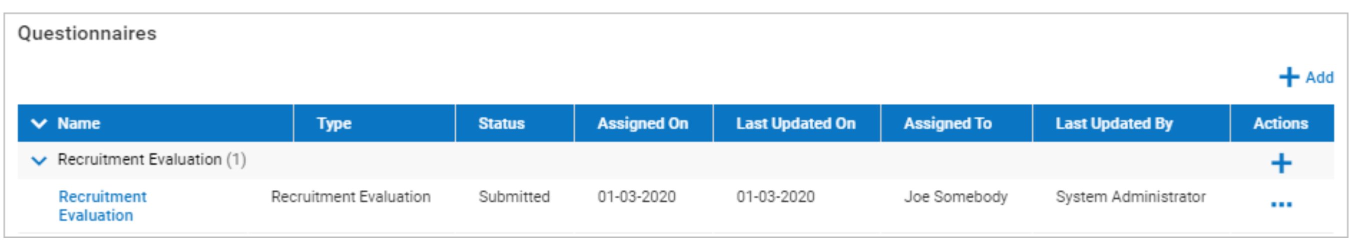


In the widget, users with proper permissions can add one or more recruitment questionnaires to the selected job application and can view/edit or delete the questionnaires. If the user should fill out the questionnaire, the hyperlinked name of the questionnaire can be clicked and will open, can be completed and then submitted. If the questionnaire is not ready to be submitted, it can be saved, and users can complete it later. Once submitted, it can no longer be edited.

For applicant questionnaires, users can view but cannot edit, delete, or assign.



Once the questionnaire is completed and submitted, the columns in the widget will indicate the status and updates. Notifications are available when questionnaires are assigned or completed (see 138794 & 138901 below.)



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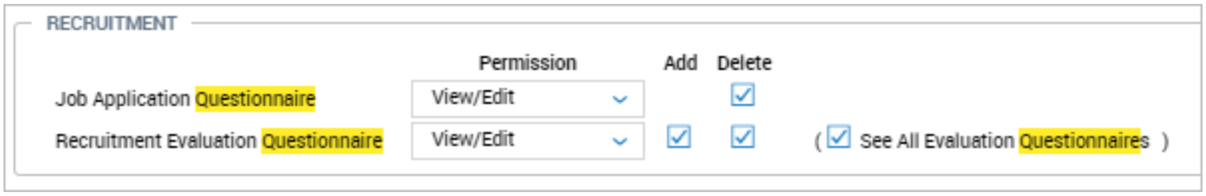
Security Permission

In the *Recruitment* section of the *HR* tab of security profiles, the ***Recruitment Evaluation Questionnaire*** setting will give users permission to View, View/Edit, Add or Delete questionnaires in the *Questionnaires* widget.

An additional ***See All Evaluation Questionnaires*** setting allows users to view all evaluation questionnaires in the widget. If this setting is unchecked, users can only view evaluation questionnaires assigned to them.

- If a manager is assigned a questionnaire to complete, they will only be able to view or edit the questionnaire assigned to them unless they also have *See All Evaluation Questionnaires* enabled. Then they will be able to view or edit any questionnaires based on security permissions.

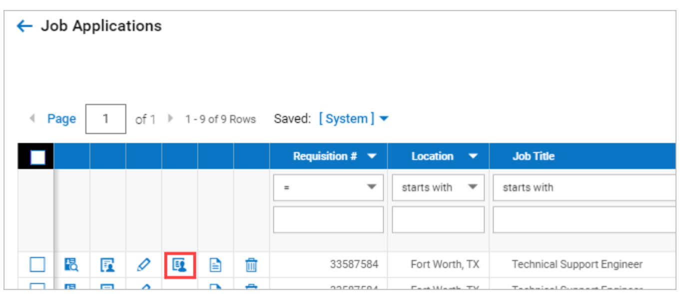


Job Applications: Questionnaire Icon Added to Job Applicants Page (Mobile & Desktop)

139769: A ***View Questionnaires*** icon has been added to the *Job Applications* page under *Team > Recruitment > Candidates > Job Applications.* If more than one questionnaire has been assigned to an applicant, the icon will display.

If the applicant completed a Job Application Questionnaire, the icon will appear and take the user to the questionnaire as it always has, however, if that job application has both a Job Application Questionnaire and a Recruitment Evaluation questionnaire (or multiple Recruitment Evaluation Questionnaires), the icon will take the user to the Questionnaires widget of the job application for viewing all.

Desktop



Mobile

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Notifications: Recruitment Questionnaire Assigned & Completed (Mobile & Desktop)

138794 & 138901: Two new notifications are available to inform selected recipients when a Recruitment Evaluation Questionnaire has either been assigned or has been completed. These have standard features of other notifications in the system (recipients, optional conditions, customized messages for email/SMS and system tags) and can be configured under *Company Settings* > *Global Setup* > *Notifications*, in the *Questionnaire* category.

System: QUESTIONNAIRE UNGROUP

	Recruitment Evaluation Questionnaire Assigned	Send communication when recruitment evaluation questionnaire has been assigned
	Recruitment Evaluation Questionnaire Completed	Send communication when recruitment evaluation questionnaire has been completed by assignee

Reports: Applicant Questionnaire Answers Report Updated (Mobile & Desktop)

138793: The *Applicant Questionnaire Answers* report has been renamed to ***Recruitment Questionnaire Answers***. The report is located under *Team* > *Recruitment* > *Candidates* > *Recruitment Questionnaire Answers*.

- To allow recruiters/managers visibility to answers for Recruitment evaluation questionnaires, a ***Questionnaire Type*** default column has been added to the report. Users with proper security permissions will be able to see all questionnaire types.
- A new ***Completed By*** column can be added to the report and will show who completed the questionnaire (whether it was the applicant or recruiter/manager/employee.)

Recruitment Questionnaire Answers UPDATE HIRING STAGE

Page 1 of 2 1 - 20 of 22 Rows Saved: [System] Additional Options (3) (3)

Grouped By	First Name	Last Name	Question Label	Question Answ...	Job Category	Application Sta...	Job Ap...	Answ...	Questionnaire Type
	starts with	starts with	=	=	starts with	=	=	=	=
Job Title Department Manager									
System Id 33570176									
	MaryJo	Reilly	Are you able to pass a crimin...	["Yes"]	Management	New	Application ...	Default	Job Application
	MaryJo	Reilly	Are you able to bend and lift ...	Yes	Management	New	Application ...	Default	Job Application
System Id 33590144									
	Sally	Applicant	Are you able to pass a crimin...	["Yes"]	Management	New	Screen Can...	Default	Job Application
	Sally	Applicant	Are you able to bend and lift ...	Yes	Management	New	Screen Can...	Default	Job Application
System Id 33593220									
	Dora	Nelson	Are you able to bend and lift ...	Yes	Management	New	Application ...	Default	Job Application
	Dora	Nelson	Are you able to pass a crimin...	["Yes"]	Management	New	Application ...	Default	Job Application
System Id 33593221									
	June	Calendar	Are you able to pass a crimin...	["Yes"]	Management	New	Application ...	Default	Job Application
	June	Calendar	Are you able to bend and lift ...	Yes	Management	New	Application ...	Default	Job Application
System Id 33599808									

New UI: Recruitment – Job Requisition Templates

Job Requisition Templates Now Available in Recruitment

141847 & 141849 & 143326: HR professionals can now simplify the creation of Job Requisitions by creating and using templates. Once security permission has been granted, users can find this option under: *Company Settings* > *HR Setup* > *Applicant Tracking/Recruitment* > *Templates Library* > *Job Requisition Templates.*

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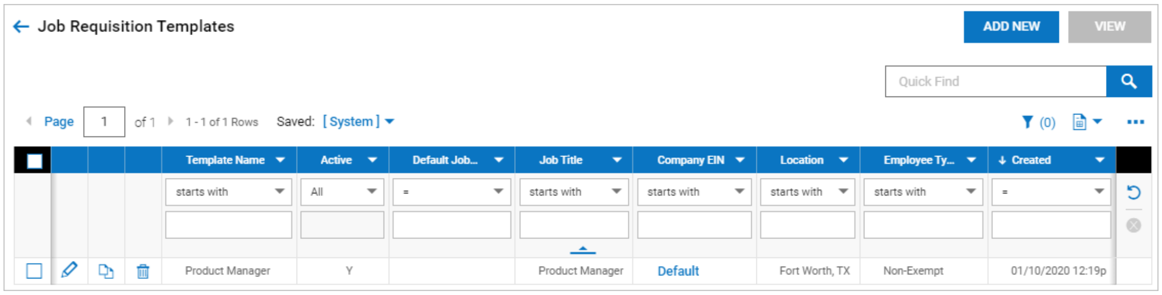
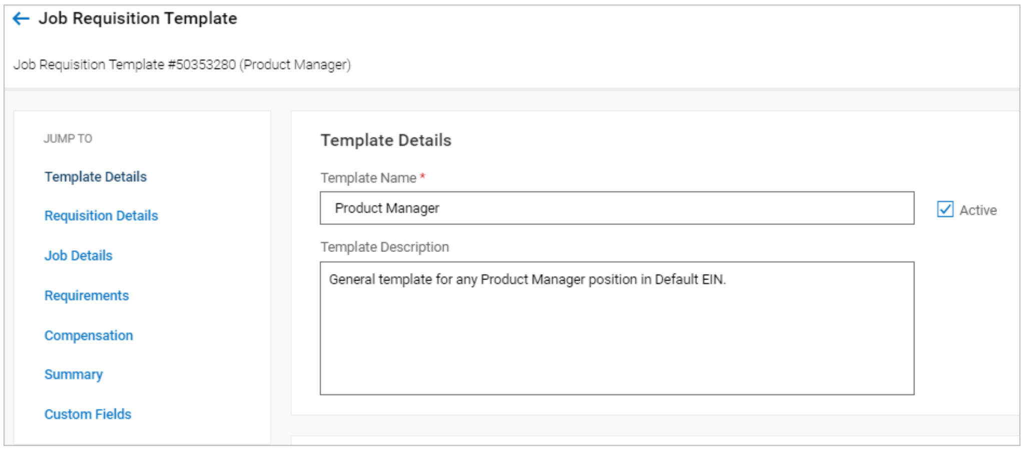
The template allows for details, requirements, compensation, summaries and custom fields to be added. On the report page, the template can be edited, cloned and deleted.





To use templates, users will access job requisitions under *Team* > *Recruitment* > *Job Requisitions*. When adding a new requisition, templates can be selected from the ***Job Requisition Template*** field. When selecting a template a warning will display to inform users some fields on the page will be overwritten by some of the fields on the template.

Once the template is applied, fields can be edited if needed and any additional information can be added to complete the requisition.

Security Permission for Job Requisition Templates

To give users permission to the Job Requisition Templates, affected users' security profiles should be set with the ***Job Requisition Templates*** setting enabled. The setting is in the *Recruitment* section of the *HR* tab. The permission can be set for *View*, *View/Edit*, as well as *Add/Delete*.

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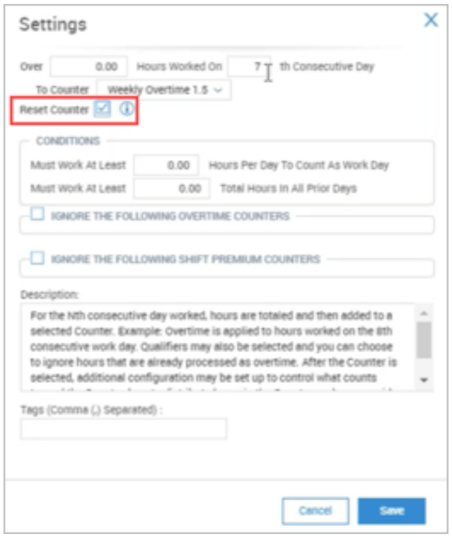
Time and Labor

Added Reset Option to “Nth Day Overtime” Rule (Classic UI & New UI)

104731: A new *Reset Counter* option has been added to the Pay Calc 2 *Nth Day Overtime* rule so that the consecutive day threshold will reset after the set amount of consecutive days worked has been met. When the counter resets, the employee will not receive overtime until the X consecutive day is met again. If the *Reset Counter* checkbox is disabled, overtime will be applied to all days worked on and after the X consecutive day until the employee stops working consecutive days.



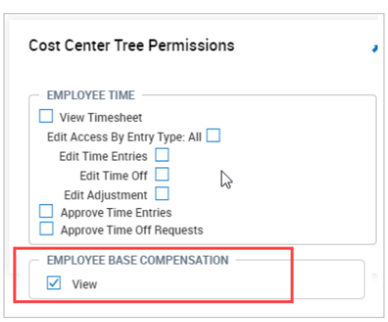
Added Time Off Name Column to Late / Early / Absent Report (Classic UI & New UI)

136090: A new default column, *Time Off Name*, has been added to the *Late / Early / Absent Report* in order to show what the time off hours were tied to. For example, if an employee had 6 hours of time off for vacation, then vacation can be entered in the *Time Off Name* column for those 6 hours.

MCC

MCC – View Base Compensation Permissions (Classic UI & New UI)

96836: A new setting has been added to the MCC group permissions to control if a manager of the group can view or not view base compensation for employees in the selected Cost Center. On the *Cost Center Tree Permissions* page within the *Employee Base Compensation* widget, enable or disable the *View* checkbox.



- For companies that have MCC enabled, the *View* permission will be **enabled** by default.

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- For all new companies or companies that don't have MCC enabled, the *View* permission will be **disabled** by default.

NOTE: The *View* checkbox is available only to companies that have *Enable Group Manager Base Compensation Permissions* enabled globally from *Company Settings* > *Global Setup* > *Company Setup* under the *Company Config* tab within the *Manager Policies* widget.

MCC & Workflows

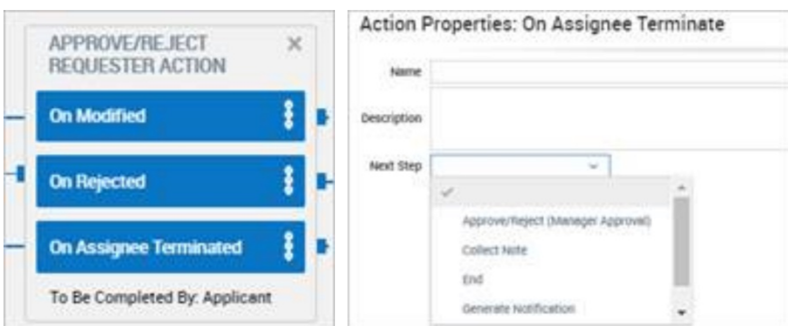
"On Assignee Terminated" Action Step Added to Approve/Reject Step in Workflows (Classic UI & New UI)

145887: In the *Approve/Reject* step of certain workflows, a new *On Assignee Terminated* action step has been added. If a cost center manager assigned to a workflow is terminated, this action step can be used to route the workflow to the designated next step in the workflow.

NOTE: If a replacement manager has been assigned upon a cost center manager's termination, the workflow will route to the replacement manager for completion.

This action step is available in the following workflows:

- Timesheet workflows
- Overtime Request workflows
- Time Off Request workflows
- Timesheet Change Request workflows



Overtime Workflow

Timesheet Change Request/Overtime Request Workflows – To Be Completed by "All Managers" (Classic UI & New UI)

50696, 144511: In the *Approve/Reject* step of the *Timesheet Change Request* and *Overtime Request* workflows, a new option has been added, *All Approval Managers*, to the *To Be Completed By* drop-down. This will allow all users to receive timesheet change requests/overtime requests in their *My To Do Items*. After a manager approves the request, they will be able to move on to the next step in the workflow.

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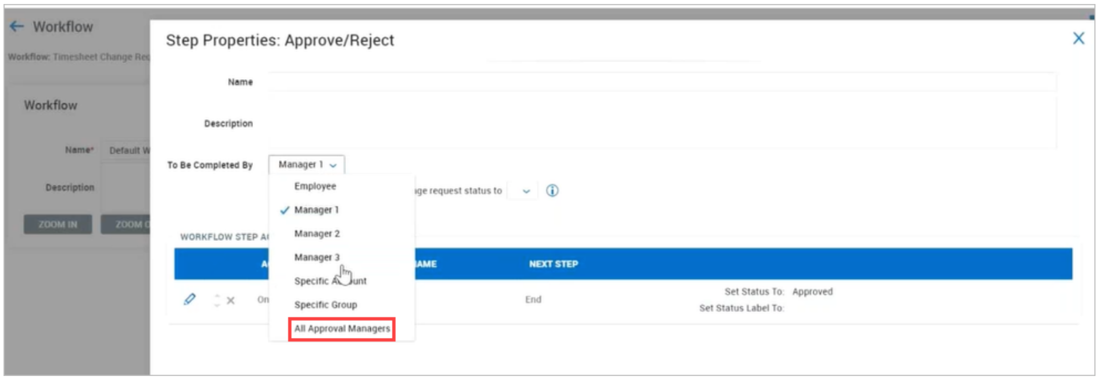
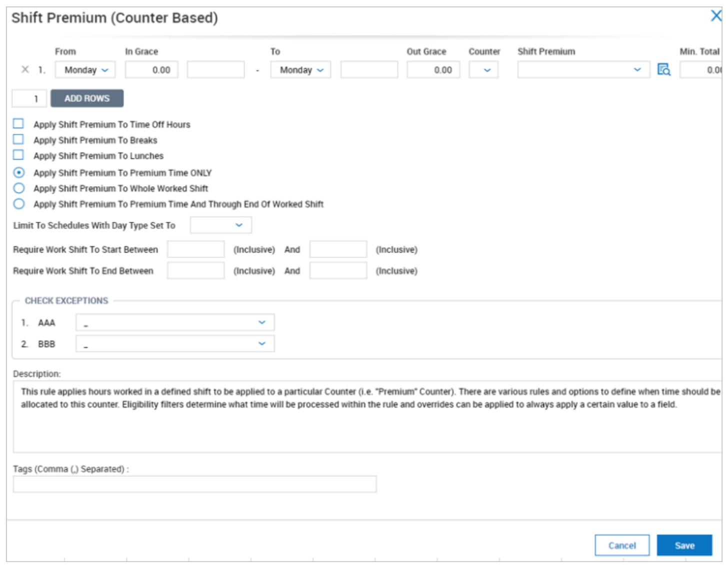


Pay Calc 2

Consolidated PC2 Shift Premium Rules – Counter Based (Classic UI & New UI)

71376: A new Pay Calc 2 shift premium rule has been added, *Shift Premium (Counter Based)*, that contains aspects of all shift premium rules, including:



- Counter
- Shift Premium
- Grace (In/Out)
- Min Hours
- Overlap Entries
- Check Exceptions
- Filters
- CC Override
- Counter Conditions
- Ignore (the following shift premiums)
- Clock in or out (before or after a specific time)
- Apply Shift Premium to lunches, breaks and time offs
- Limit To Schedules With Day Type

Distribute Time Off Cost Centers (Classic UI & New UI)

92503: A new rule has been added for Pay Calc 2 companies, *Distribute Time Off Cost Centers*, so that time off hours can distribute to cost centers proportionally based on the cost centers an employee works in a day, which would allow the time off and payment to be processed in the corresponding cost centers. You can configure what counts toward time off and what counts toward worked time.

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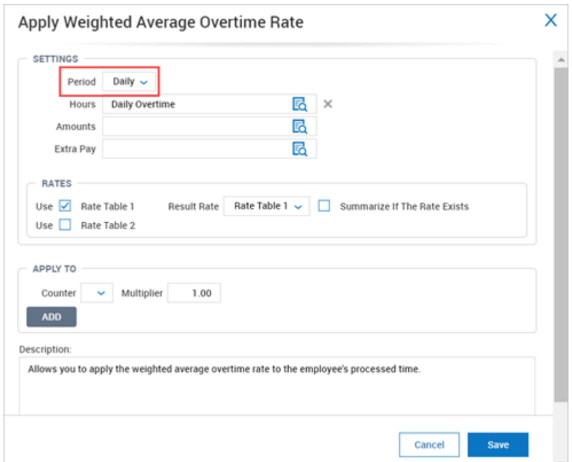
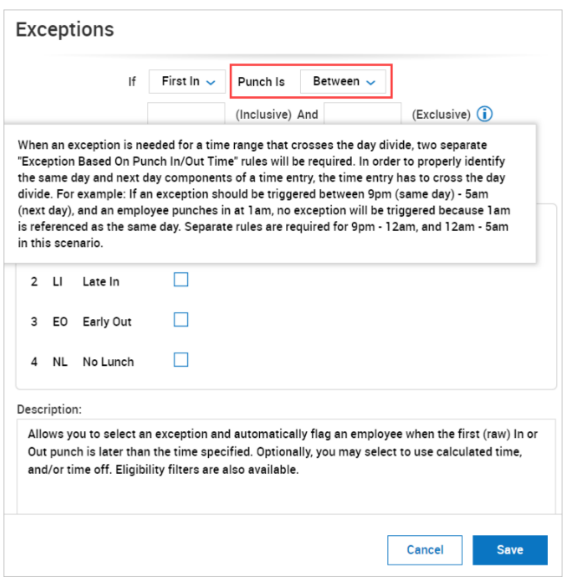
Pay Calc 2 – Apply Weighted Average Overtime Daily Option (Classic UI & New UI)

144982: For *Pay Calc 2* companies, a new *Daily* option has been added to the *Apply Weighted Average Overtime Rate* rule. This option will allow average overtime to calculate on a daily basis.



Pay Calc 2 – Exception Based on Punch In/Out Time Crossing Midnight (Classic UI & New UI)

141022: When using the *Exception Based On Punch In/Out Time* Pay Calc 2 rule with *Between* selected for *Punch Is*, the rule will now allow for time ranges to cross midnight. Previously, time entries crossing the day divide were being reverted, causing exceptions to be flagged incorrectly.



Point Rules Will Now Expire Imported Points (Classic UI & New UI)

138717: A new setting is available in the *Points Profile* within the *Individual Point Expiration* rule, *Expire Calculated Points That Exceed Expiration Range*. When this setting is enabled, points that are older than X period will clear.

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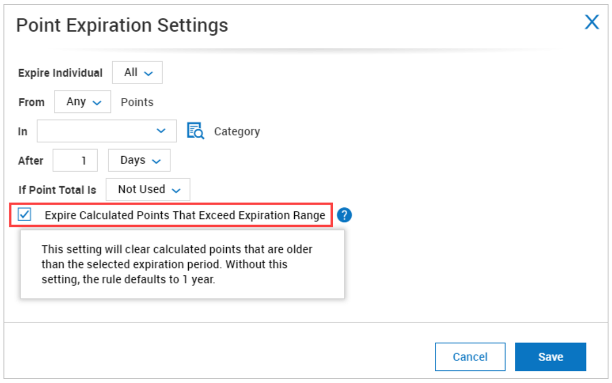

Report Dialogs

Global Settings for "Show Subtotals Only" in Report Dialogs (Classic UI & New UI)

149769: The *Show Subtotals Only* option under *Approve Time Entries* will now only be enabled by default if the setting *Show Subtotals Only in Report Dialogs* is currently enabled at the Admin level within the *Available Functionality* section of Company Information. For any new companies that enable *Show Subtotals Only In Report Dialogs*, the *Show Subtotals Only* setting will be disabled by default.

Required Time Entry Note Upon Rejection (Classic UI & New UI)

139484: If the *Time Entry Note Upon Rejection* setting is enabled in the *Manager Policies* section of Timesheet Profiles, a *Time Entry Note* will be required of managers when rejecting time entries through report dialogs. Previously, this setting only required a *Time Entry Note* when managers rejected individual time entries.

Timesheet Change Request Workflow

Added Join Step to TS Change Workflow (Classic UI & New UI)

44989: A new step has been added to the *Timesheet Change Request* workflow, *Join Steps*, which allows separate steps, such as split steps, to come together to generate the next step in the workflow. The following options are available when the first split step is completed:

- *Leave remaining split steps open*
- *Automatically complete all pending split steps and move to next step in the workflow*
- *Only complete pending split steps associated with this join step*

Added Split Step to TS Change Workflow (Classic UI & New UI)

44988: A new step has been added to the *Timesheet Change Request* workflow, *Split Step*, which allows you to specify what should happen when a step has multiple outcomes. For example, if a manager who has permission to approve or reject a timesheet change request receives a request, if they approve it, a time entry can be created, as well as a generated email. If the request were to be rejected, an email can be generated, and a time entry would not be created.

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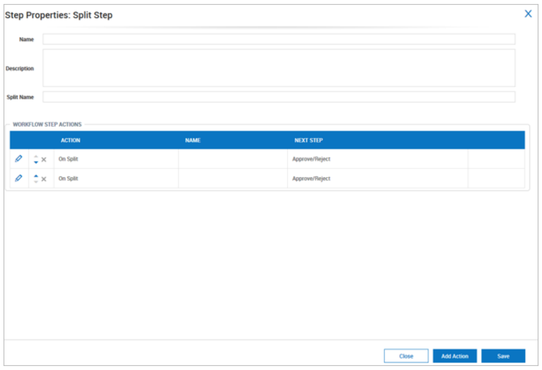
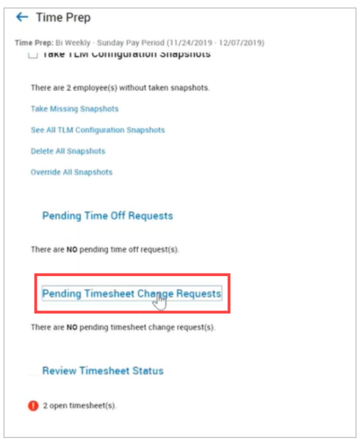
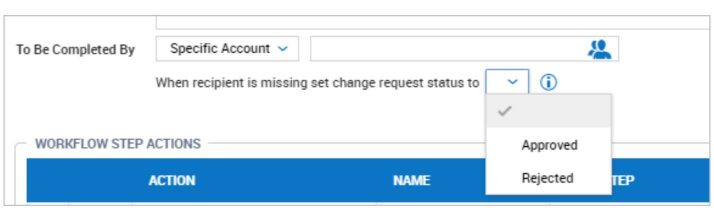


Approve or Reject in Pay Prep Step (TS Change Workflows) (Classic UI & New UI)
44558: When workflows are enabled, Payroll managers are now able to approve or reject timesheet change requests while completing pay prep from the *Pending Timesheet Change Requests* report. Navigate to *Payroll* > *Process Timesheet*, then click the *Pay Period Functions* icon, and the report will be available to select under *Time Prep*.



When you click *Pending Timesheet Change Requests*, the requests will display in the *Timesheet Change Requests Pending Approval* report, and you can approve or reject one request at a time or by mass by clicking the *Approve Checked Requests* button or the *Reject Checked Requests* button. Once the requests are approved or rejected, the requests will no longer display in the report and the workflow will be completed.

Bypass Workflow Step for Manager Recipient (TS Change Approve/Reject) (Classic UI & New UI)
54976: Within the *Approve/Reject Timesheet* workflow step, approvals can now be set up to bypass this step if that level manager does not exist for the employee submitting the Timesheet Change Request so that the workflow can move on. You can select *Approved* or *Rejected* from the drop-down next to *When recipient is missing set change request status to*.



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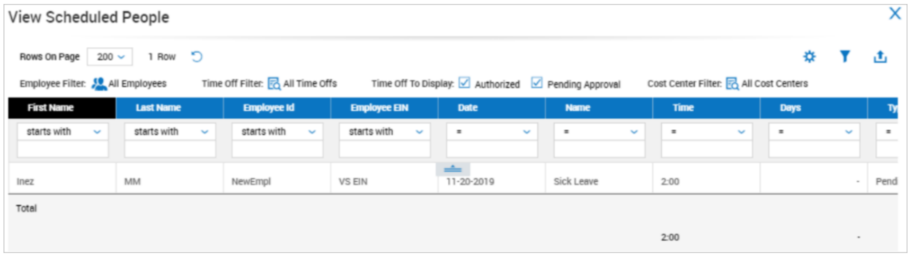
Time Off Request – To Do – View Scheduled People (Classic UI & New UI)

146254: A *View Scheduled People* report is now available from the *Time Off Request* To-Do by selecting *View Scheduled People*. Employees scheduled for the day being requested will display in this report, which will allow for you to determine if you will have adequate staff coverage when approving a time off request.



Time Off Request – To Do – View Time Off Counts (Classic UI & New UI)

146212: You can now view *Time Off Counts* from the *Time Off Request* To-Do. When you select *View Time Off Counts*, the *Time Off Count* window will display. Depending on which columns are enabled under *Global Policies > Accrual Policies: Visible Columns*, the following columns will display in the *Time Off Counts* table:

- *Type*
- *Accrued To*
- *Current Accrued*
- *Current Balance*
- *Available Balance*
- *Taken*
- *Scheduled*
- *Pending Approval*
- *Carry Over*
- *Carry Over Used By Balance*
- *Earned After Last Carry Over*
- *Projected Accrual*
- *Projected Balance*
- *External Authorized*
- *External Taken*
- *External Carry Over*

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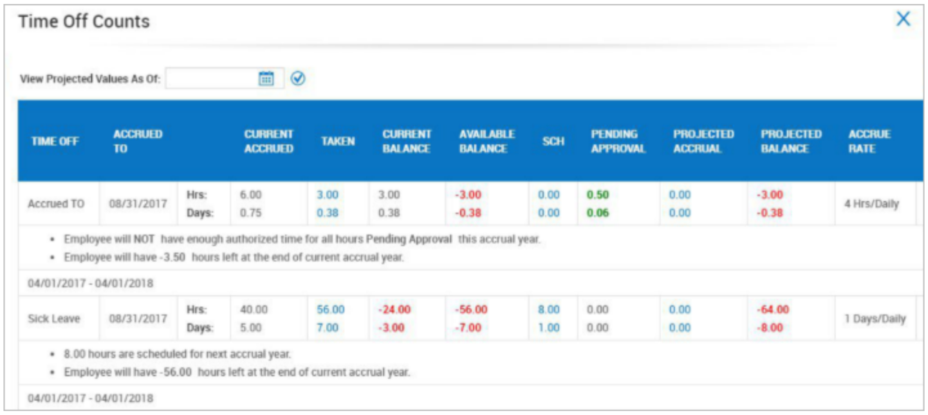
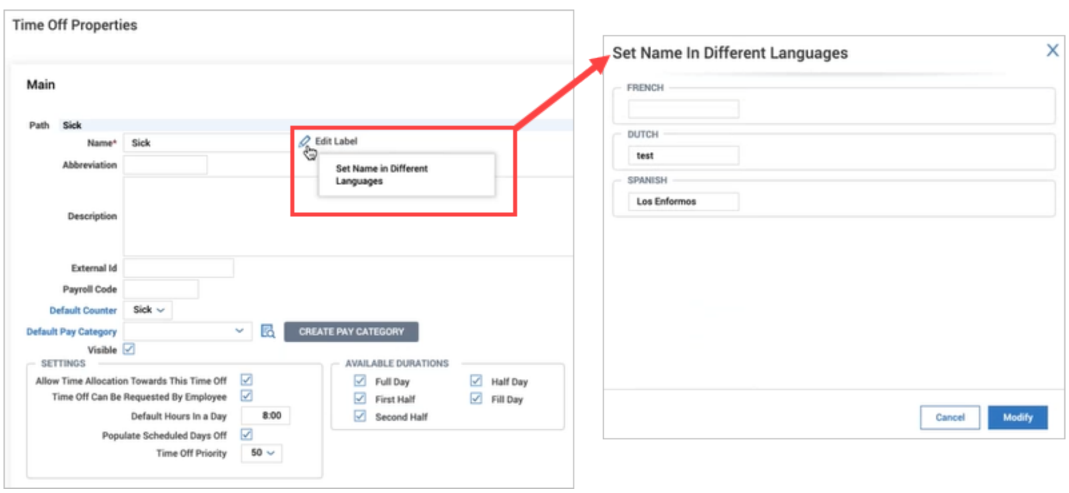


Translations (Classic UI & New UI)

139017, 139010, 139009, 139013, 139011: Fields and selectors that have manually defined labels can now be translated by the system according to the Counters, Time Off and Accruals configuration, and according to the employee's set locale. The following reports, screens, selectors and widgets have the capability of being translated:

- *Counters* and *Time Off* values in reports
- *Counters* and *Time Off* selectors and values in all timesheet tabs
- *Time Off Request* screen
- *Accrual Balance* widget & *Accrual Balance* cards
- *Open Absence* screen



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New UI Updates – Table of Functionality Added to Pages

The table below shows the updates made within the New UI and the functionality added.

Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
141897 (EPIC)	TLM	Reports	*MSS: Team > Time > Overtime > Pending Approval*	Managers can view and approve/reject *Pending Overtime Requests* via reports	Yes	Yes
141897 (EPIC)	TLM	Reports	*MSS: Team > Time > Overtime > History*	Managers can view the list of all overtime requests	Yes	Yes
111801 (EPIC)	TLM	Reports	*MSS: Team > Time > Timesheets > Change Requests*	Managers can approve/reject timesheet *Change Requests* via reports	Yes	Yes
142016	TLM	Reports	*MSS: Team > Accruals > Used By Balances*	Managers can view the *Used By Balances* Accruals report in the New Mobile App, and subtract unused hours	Yes	Yes
142017	TLM	Reports	*MSS: Team > Accruals > Modify Employee Hours*	Managers can view the *Modify Employee Hours* report and select an entry to modify the Accrual balances	Yes	Yes
115187 (EPIC)	TLM	Reports	*MSS: Team > Accruals > Balances*	Managers can view employee *Accrual Balances*	Yes	Yes

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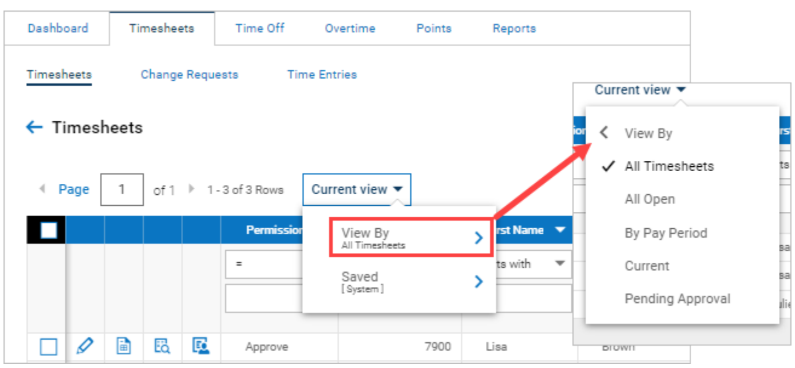
Ticket or (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
145628	TLM	Reports	*MSS: Team > Accruals > Used By Balances*	Managers can view the *Used By Balances* report on the Desktop	Yes	Yes
141904 145627	TLM	Reports	*Team > Accruals > Balances As Of Date*	Managers can view the *Balances As Of Date* report	No	Yes

New UI: All Timesheets Report

Access Timesheet Reports via Toggle [MSS] (Desktop & Mobile)

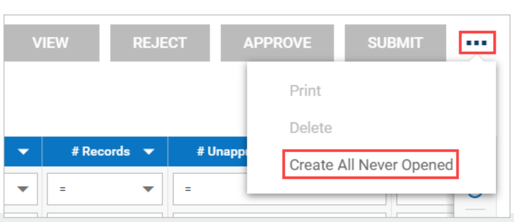
For managers to be able to view, approve or reject, submit for approval, and print or delete from the *Timesheets* report, security permissions must be set in the Security Profile. Within the *Time Editing/Approving Functionality* widget under the *TLM* tab, enable under Timesheets: *View/Edit* and *Available Views*.

138388, 145425: Managers can now access the *All Timesheets*, *By Pay Period*, *All Open*, *By Week*, *Current*, and *Pending Approval* reports via a toggle from the *Timesheets* report. Navigate to *Team* > *Time* > *Timesheets* > *Timesheets*. Select the *Current view* drop-down, then select *View By*, and the list of reports will display.



Create All Never Opened [MSS] (Desktop & Mobile)

144512: From the *Timesheets* report under *Pay By Period* or *By Week*, clicking on the *Create All Never Opened* button from the three-dot ellipses will allow all timesheets that have not been opened to be created depending on their selected filter options. The *Approval State* column status will change from *Never Opened* to *Open*.



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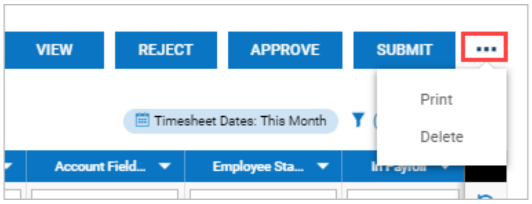
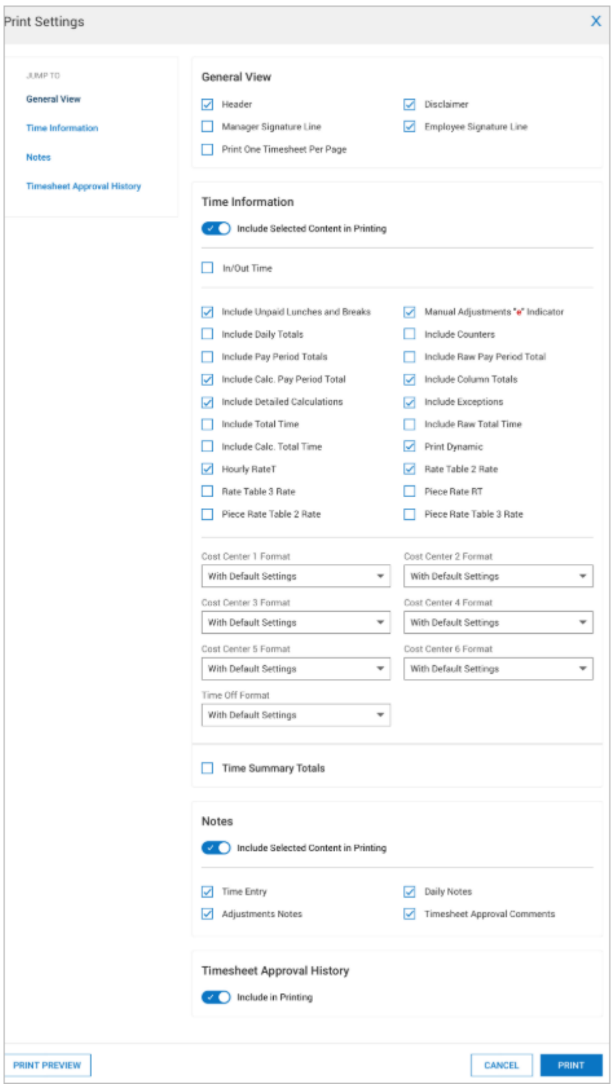
Delete or Print from Timesheets Report [MSS] (Desktop & Mobile)

138396, 138395: On the *Timesheets* report or from the *All Timesheets*, *By Pay Period*, *All Open*, *By Week*, *Current*, and *Pending Approval* reports, managers can delete or print an employee's timesheet by selecting the box next to the timesheet, then selecting the triple-dot ellipse icon at the top-right corner of the page. If a box next to a timesheet is not selected, the *Print* and *Delete* options will be grayed out.



If *Print* is selected, you will be able to configure the settings from the *Print Settings* pop-up window.



Click *Print Preview* to be taken to the *Print Preview* page.

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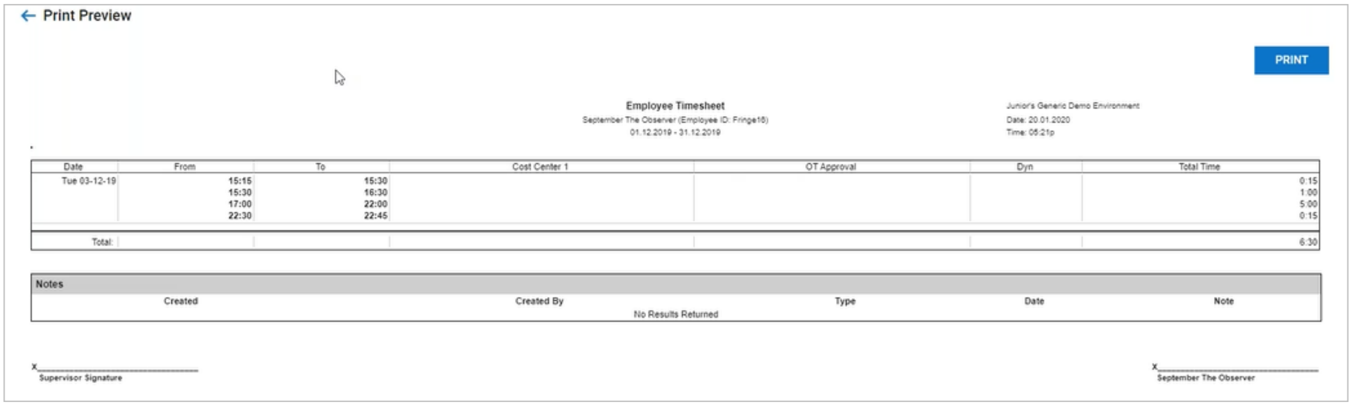
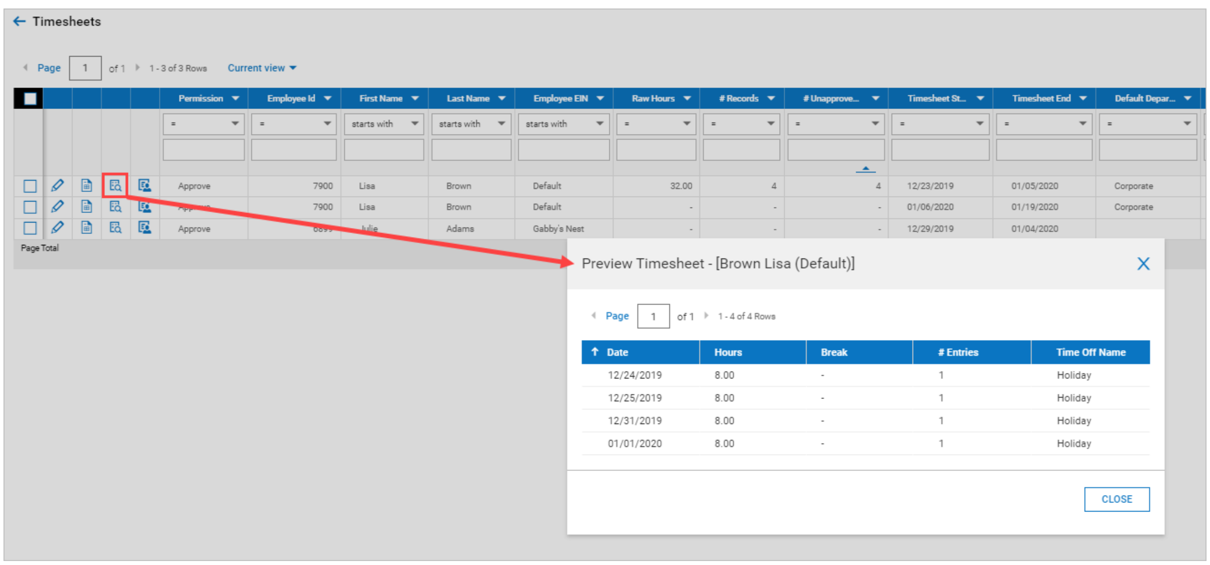


Pending Approval Page Deprecated [MSS] (Desktop & Mobile)

143816: For managers approving time offs, the *Pending Approval* page under *My Team* > *Time* > *Timesheets* > *Pending Approval* will no longer be supported, and all actions from this page will now be found in the *All Timesheets* report under *My Team* > *Time* > *Timesheets* > *All Timesheets.*

Preview Timesheet from Timesheet Reports [MSS] (Desktop & Mobile)

143852: From the *Timesheets* report, managers can select the preview icon to preview the employee's timesheet. The *Preview Timesheet* pop-up window will display the *Date*, *Hours*, *Break*, *# Entries* and *Time Off Name* columns.



Reject or Approve from Timesheet Reports [MSS] (Desktop & Mobile)

138393, 138392, 138389: From *Team* > *Time* > *Timesheets* > *Timesheets*, managers can reject or approve timesheets from the *Timesheets* report, or from the *All Timesheets*, *By Pay Period*, *All Open*, *By Week*, *Current*, and *Pending Approval* reports. Select the box next to the timesheet(s), then select *Reject* or *Approve*. If a box next to a timesheet is not selected, the *View*, *Reject*, *Approve* and *Submit* buttons will be grayed out.

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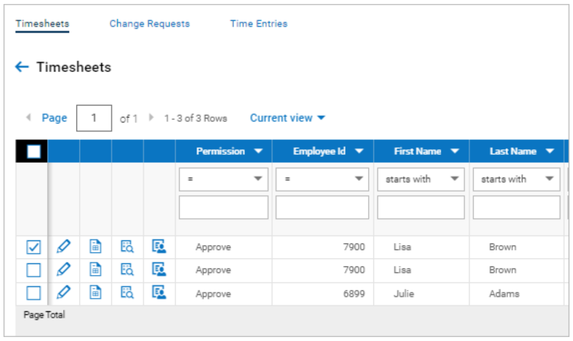
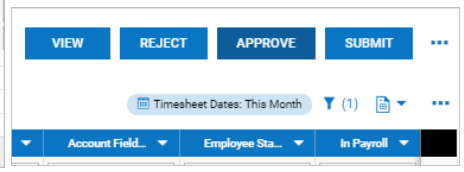




If you click *Approve*, a *Submit for Approval* pop-up window will display for confirmation and to leave a comment if needed.

New UI: Dashboard Time Statistics – Parent Time Off Can Now be Selected (Desktop & Mobile)

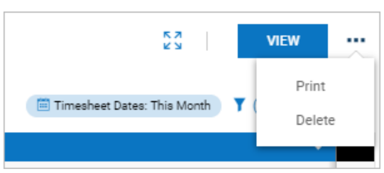
147523: The Time Off lookup will now allow you to select any time off, regardless of it being allowed for time allocation or being requestable. Previously, for some companies configuring the *Time Allocation* tile in the New UI Dashboard Profile with a parent PTO storing accruals, users were unable to select a parent PTO for the *Time Allocation* tile.

New UI: Historical Timesheets Report

For employees to be able to delete, print and view timesheets from the *Timesheets* report, security permissions must be set in the Security Profile. Within the *Time Tracking* widget under the *ESS* tab, enable *Access Personal Timesheets*. To delete, navigate to the *Time Editing/Approving Functionality* widget under the *TLM* tab and enable *Timesheets View/Edit*.

Delete, Print and View Timesheet from Timesheets Report [ESS] (Desktop & Mobile)

139970, 139969, 138373: From *My Info* > *My Time* > *Timesheet* > *My Timesheets*, employees can view, print and delete their timesheet from the *My Timesheets* report by selecting the box next to their timesheet(s). Either select the *View* button to view the timesheet, or to delete or print, select the three-dot ellipses icon at the top-right corner of the report, then select *Delete* or *Print*.



Submit for Approval from Timesheets Report [ESS] (Desktop & Mobile)

139963: If *Employee Needs To Submit Timesheet* is enabled within the *Employee Policies* widget in the Timesheet Profile, employees can submit their timesheet for approval. They can select the checkbox next to the timesheet then click *Submit*, and a *Submit timesheet(s) for approval?* pop-up window will display for confirmation and to leave a comment if needed.

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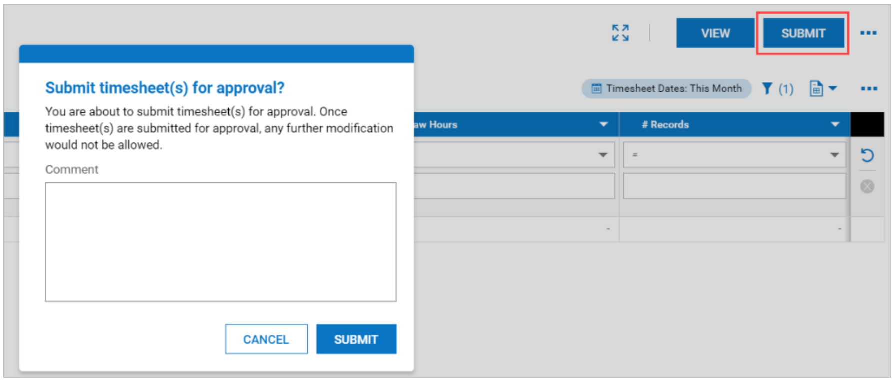
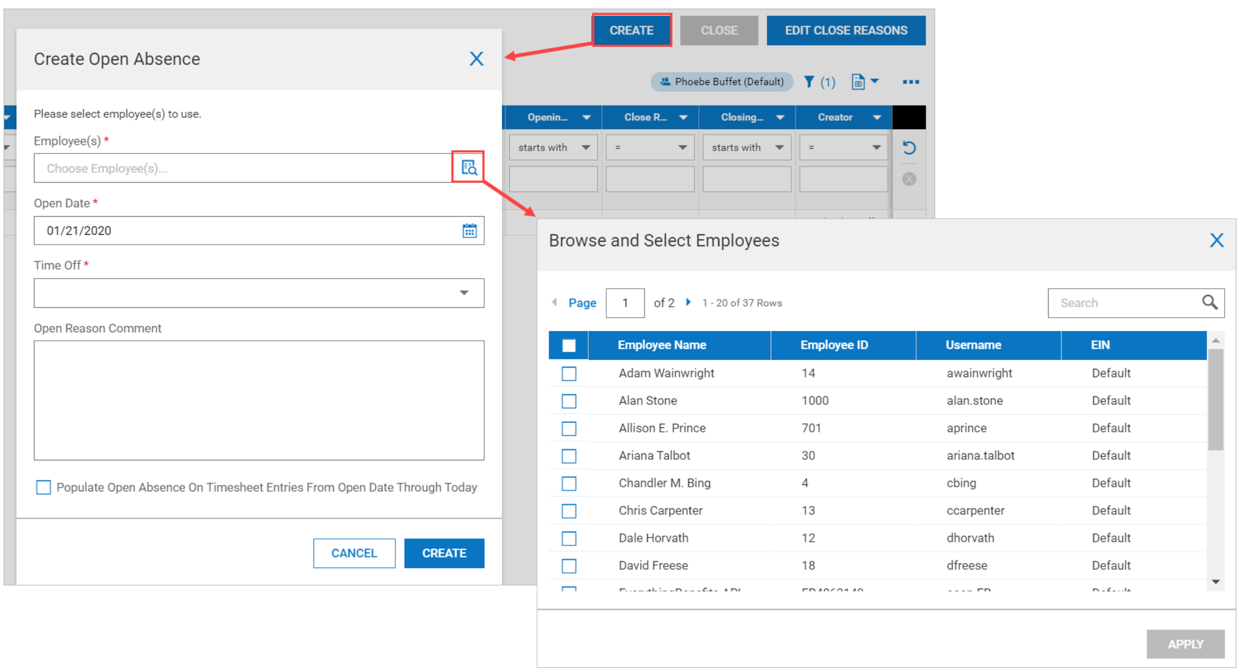


New UI: Open Absence

Create and Close (Desktop & Mobile)

147852, 140659, 139654: Creating and closing an open absence and viewing the open absence report is now available for employees and managers.

Managers can click *Create* and a *Create Open Absence* pop-up window will display where they can browse and select a specific employee(s) to create the open absence for.



- ESS: Navigate to *My Info > My Time > Time Off > Open Absences*
  - Security permission to view the *Open Absences* report: *ESS > View Open Absences*
  - *The Close button will display for employees with the following security permissions: ESS > Close Open Absences*
  - *The Create button will display for employees with the following security permissions: ESS > Create Open Absences*
- MSS: Navigate to *Team > My Team > Time > Time Off > Open Absences*
  - *Security permission to view the Open Absences* report: *TLM > View Open Absence Report*

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- *The Edit Close Reasons button will display for managers with the following security permissions: Security Profile > TLM > Open Absence Management: Edit Close Reasons*
- *The Close button will display for managers with the following security permissions: TLM > Close Open Absences*
- *The Create button will display for managers with the following security permissions: TLM > Create Open Absences*

Delete Open Absence (Desktop & Mobile)

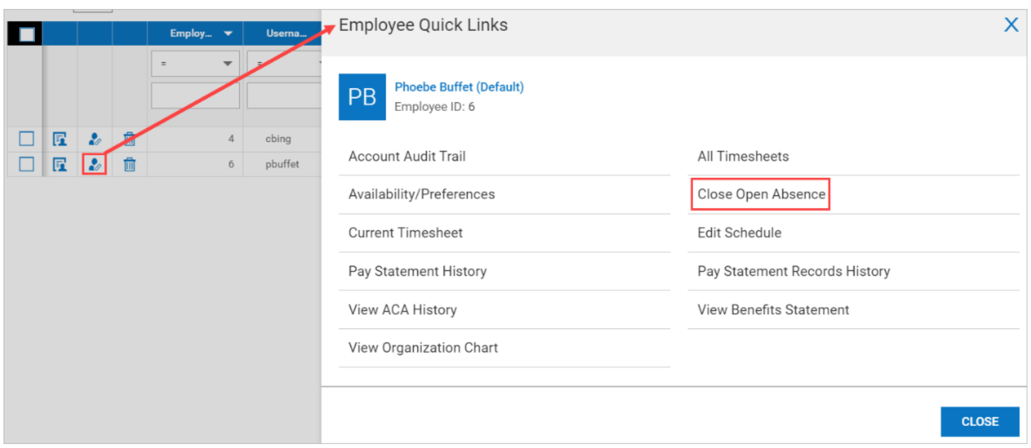
147754: Managers and employees can delete an open absence. The trash can *Delete Open Absence* icon will display next to the open absence if the following security permissions are enabled:

- ESS: *ESS > Create Open Absences*
- MSS: *MSS > TLM > View Open Absence Report*

Quick Links (Desktop & Mobile)

147843: The *Employee Quick Links* icon is available for managers to select. If the employee does not have an open absence, *Create Open Absence* will display as an option in the *Employee Quick Links* pop-up window. Clicking this link will take you to the page to create an open absence. If the employee already has an open absence, *Close Open Absence* will display as an option. The *Employee Quick Links* icon will display if the following security permissions are enabled for MSS:

- Create: *TLM > Create Open Absences*
- Close: *TLM > Close Open Absences*



New UI: Submitted On Date Now Matches the Time Zone Overtime Requester is Located In (Mobile)

142793: The *Submitted On* date under the *History* tab within *Overtime* will now display the correct date of when the employee submitted their overtime request. Previously, when an employee located in a different time zone submitted an overtime request, the *Submitted On* date under the *History* tab was displaying the date of the server time zone instead of the date of the time zone where the employee submitted the request from.

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New UI: Timesheet Auto Population Rule “Scheduled Hours” Ignored and Changed Partial Day Time Off Hours (Desktop & Mobile)

114052: A new version of the *Timesheet Auto Population Policy* rule, *Scheduled Hours*, is now available. For Start/Stop time entries, the difference between scheduled hours and time entries for the day will be counted and populated correctly. Previously, when a *Request a Partial Day (Stop/Stop)* Time Off was run with *From* and *To* times, the *Scheduled Hours* rule changed the Time Off calc hours to 0, and incorrectly populated all of the scheduled hours as bulk hours.

New UI: Time Off Request

Modify Time Off Request (Desktop & Mobile)

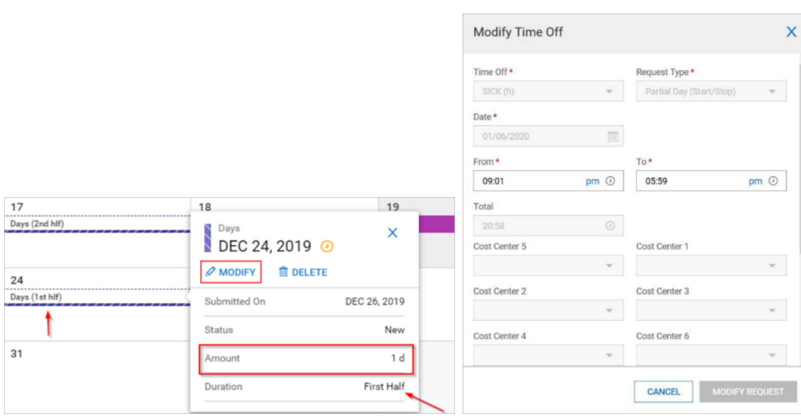
143945, 143862, 143878, 143871, 143947: When enabled from the *Time Off Request* profile, you can now modify a time off request for the following request types:

- *Dynamic Duration*
- *Multiple Days*
- *Partial Day (Bulk)*
- *Partial Day (Start/Stop)*

The following security permissions need to be set in order to modify a time off request.

- ESS: *Security Profile > ESS > Time Tracking: Request Time Off (Modify Request)*
- MSS: *Security Profile > TLM > Time Editing/Approving Functionality: Time Off Requests - View/Edit/Approve All*

Modify will display from the pending tooltip on the calendar. When *Modify* is selected, the *Modify Time Off Request* popup will display all time off request data.



The request details will be validated depending on the configuration for the following:

- Time Off Definition
- Time Off Request profile
- Time Off Planning profile
- Timesheet Rules (upon saving) related to time offs

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New UI: Workday Breakdown Profile

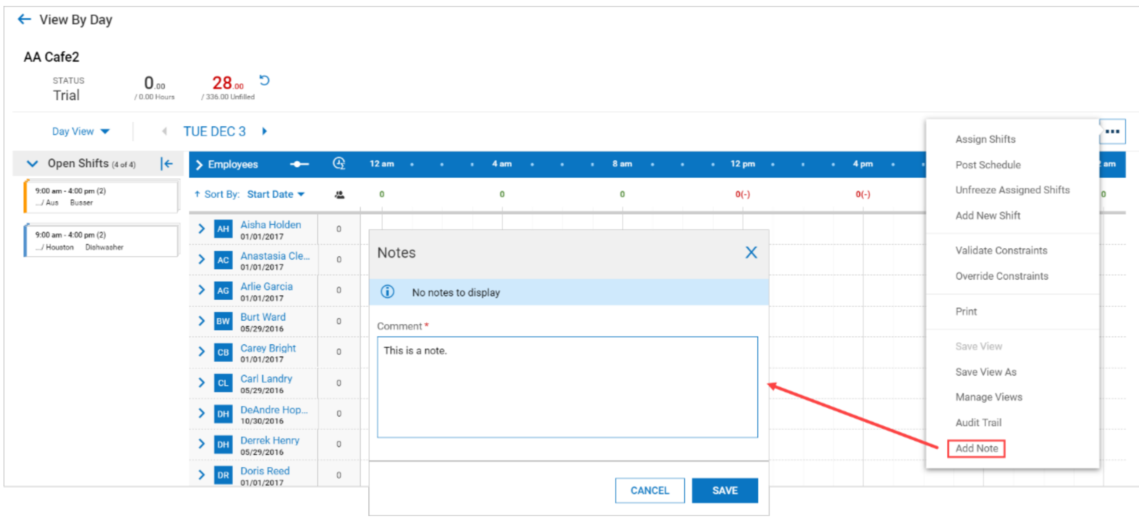
Effective Dating (Desktop & Mobile)

120924: Workday Breakdown profiles are now applied to the full timesheet based on what is assigned to the employee when the timesheet is saved. You will now be able to effective date the *Workday Breakdown* profile in *Employee Information*.

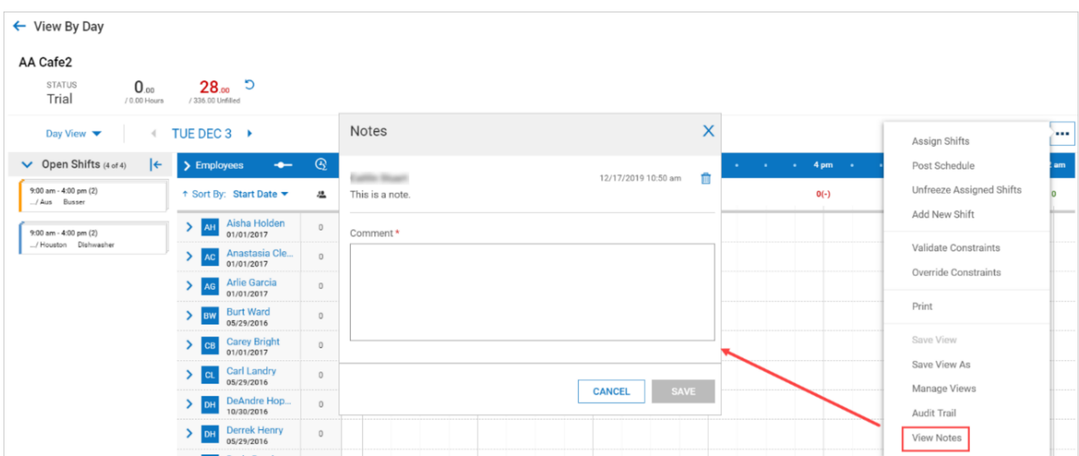
Scheduler

Added Schedule Notes to Schedule Views (Classic UI & New UI)

137442: As already available in the Classic UI, managers can now add notes to the schedule as a whole in the Day, Week and Month views in the New UI and the New Mobile App. On the *Schedules* page, you can add *Schedule: Notes* as a column via *Add/Remove Columns*. Once you are in the Day, Week, or Month view, click or tap the three-dot *Actions* ellipse icon, then select *Add Note*.



After saving your comment in the *Notes* window, you can then view the note, delete or add a new note by clicking or tapping the three-dot *Actions* ellipse icon, then selecting *View Notes*.



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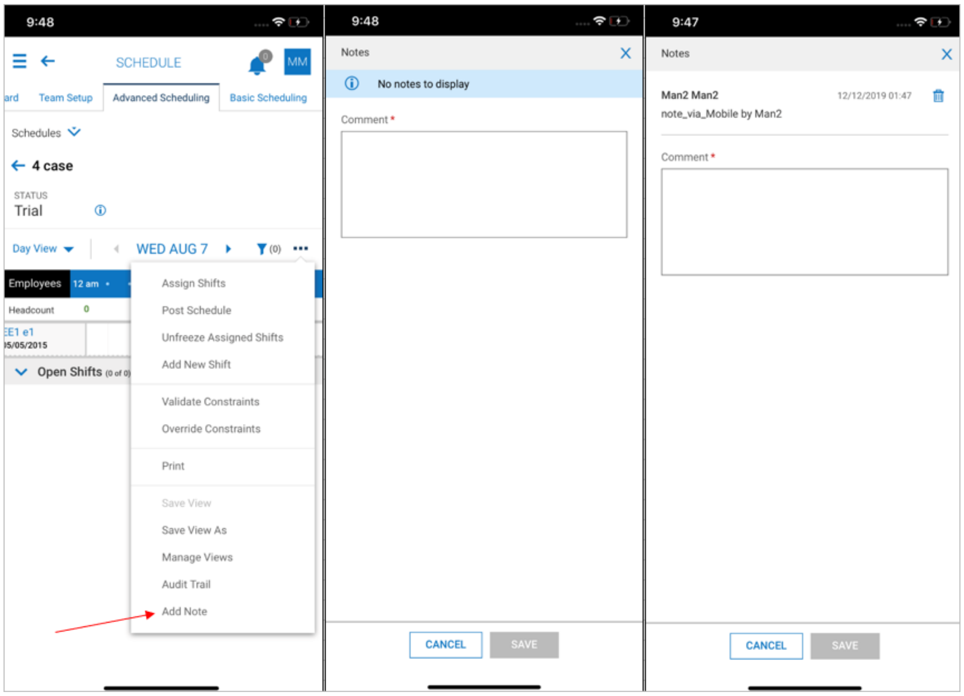
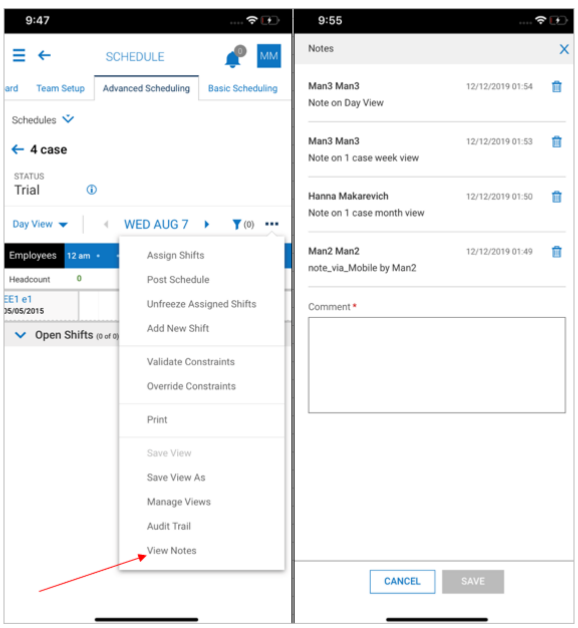
Below are examples from the New Mobile App.





Additional Cost Center Info in ESS/MSS Notifications (Classic UI & New UI)

140378: Additional information is now available in Cost Center tags for the following notifications:

- Shift Swap Request/Approval (ESS/MSS)
- Coverage Request/Approval (ESS/MSS)
- Schedule Request Peer Action (ESS/MSS)
- Schedule Request Withdrawn (ESS/MSS)

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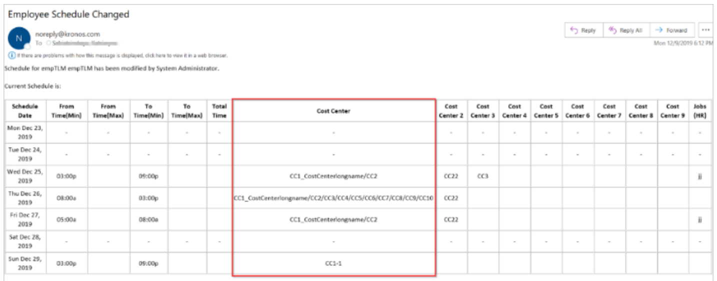
Display Full Path of Cost Center when Using Week_Schedule_With_CC_Table Tag (Classic UI & New UI)

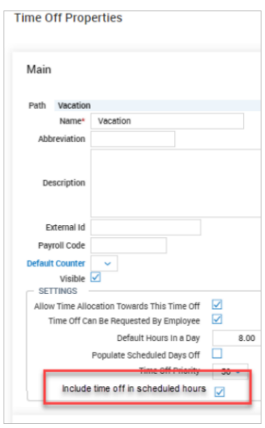
142323: When an *Employee Schedule Changed* notification is sent with the *WEEK_SCHEDULE_WITH_CC_TABLE* tag, the notification will now include the full path of the Schedulable Cost Center (up to the 10th child level) within the Schedule Table. Previously, only the last level of the Cost Center was included.



PTO Not Included in Scheduler Calculations (Classic UI & New UI)

101635: Previously, max hour constraints included all time off types towards schedule hours, which in turn violated schedule constraints. A new setting has been added, *Include time off in scheduled hours*, under *Time Off Properties* within the *Settings* widget. When enabled, certain time offs will be excluded from schedule totals.

NOTE: The Scheduler Engine must be enabled for this setting.



Removed Controls of View/Edit Shift and Delete Buttons in Scheduler Reports from Shift Premium Settings (Classic UI & New UI)

73472: Previously, the *View/Edit* shift and *Delete* buttons in *Summary By Employee*, *Open Shifts*, and *Roll Call* reports were controlled by *Shift Premiums* set in the Security Profile. These permissions have been moved to the *Schedules* permissions within the *Scheduler* widget within the Security Profile.

Schedule Calendar Sync (Classic UI & New UI)

136332: Previously available in the Classic UI, employees in the New UI can now sync their schedules to their calendar. Syncing only needs to occur once; all updates to posted schedules, as well newly posted future schedules, will automatically be synced to the employee's calendar.

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Outlook: Employees should login, navigate to *My Info* > *My Schedule* > *Schedule*, click the *Sync Schedule* button, then click the *Copy* button. In Outlook, right-click *My Calendar*, select *Add Calendar*, then click *Select From Internet*. Paste the link into the field, click *Ok*, then click *Yes*.

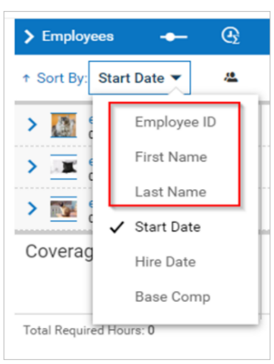
Google Calendar (Add Calendar though Import Option): Employees should login, navigate to *My Info* > *My Schedule* > *Schedule*, click the *Sync Schedule* button, then click the *Copy* button. Open a web browser and paste the URL into it, change the webcal to *http*, then press *Enter* on the keyboard. In Google Calendar, navigate to *Other Calendars* > *Import*. Select the saved calendar file, then click the *Import* button.

NOTE: Using the import file option to import the Calendar in Google will **NOT** automatically sync the calendar to the original calendar. In other words, any new update to the original calendar after the import will not be updated in Google Calendar.

New UI: Added First Name, Last Name and Employee ID as Sort Options in Schedule Views (Desktop & Mobile)

146769: In the schedule templates and the Day, Week and Month views, you can now sort by *Employee ID*, *First Name*, and *Last Name*. The selected option will be included if you save the view.

If *First Name* or *Last Name* is selected, the employee list will display in alphabetical order. If *Employee ID* is selected, the list will display in numerical order.



New UI: Added Full Screen Option to Schedule Views (Mobile)

146811: A new full screen icon has been added to the top-right of the *Schedules* screen for *View By Day*, *View By Week* and *View By Month*. When this icon is selected, the screen will switch to full screen mode, allowing more employees on the schedule to become visible. To exit full screen mode, select the icon again, or press the *Esc* key.

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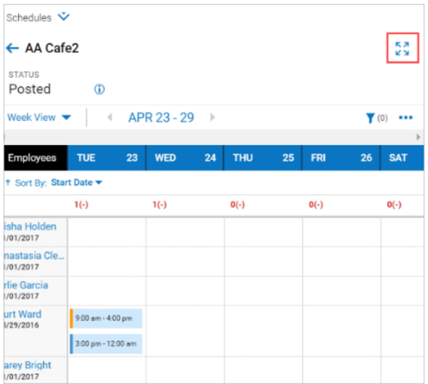
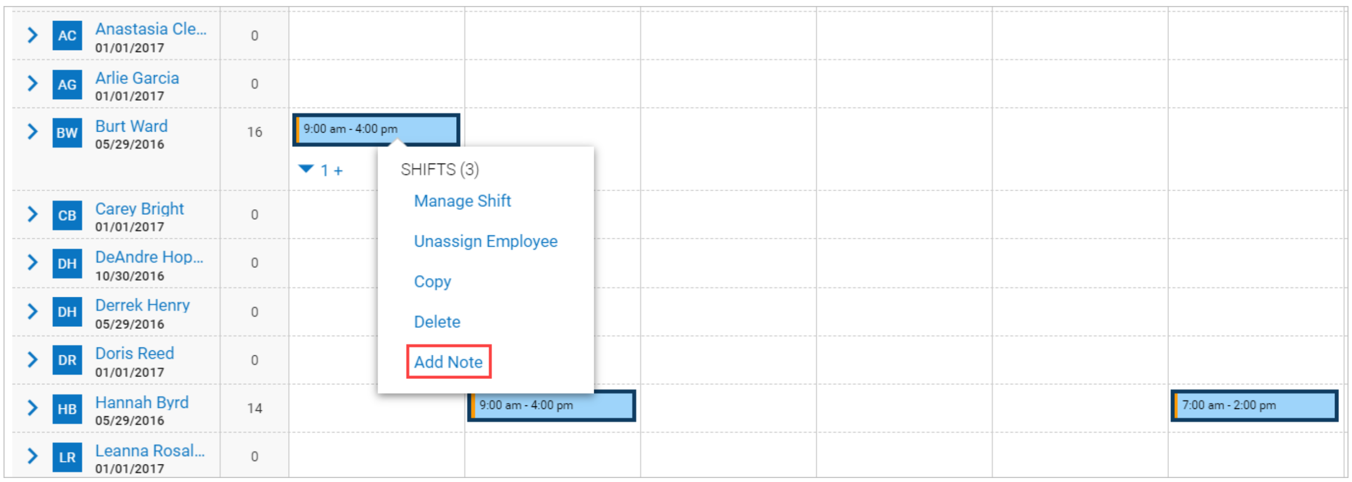


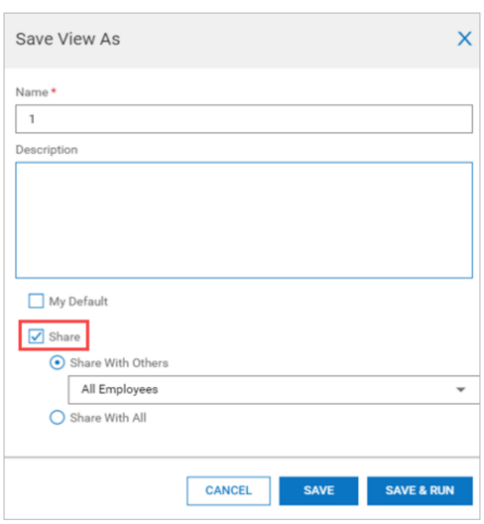
New UI: Added Note Option for Multi-Selected Shifts (Desktop & Mobile)

146777: An *Add Note* option is now available when shifts are multi-selected so that notes can be added to shifts in mass. Previously, notes could only be added to shifts that were selected one at a time.



New UI: Added Share Option to Save View Pop-Ups in View By Day/Week/Month (Desktop & Mobile)

143449: When saving a view of the Day, Week or Month view, a *Share* box is now available. You can then select who to share the view with, either *Share With All* or *Share With Others*, which you can select from the drop-down. Previously, this setting was not available.



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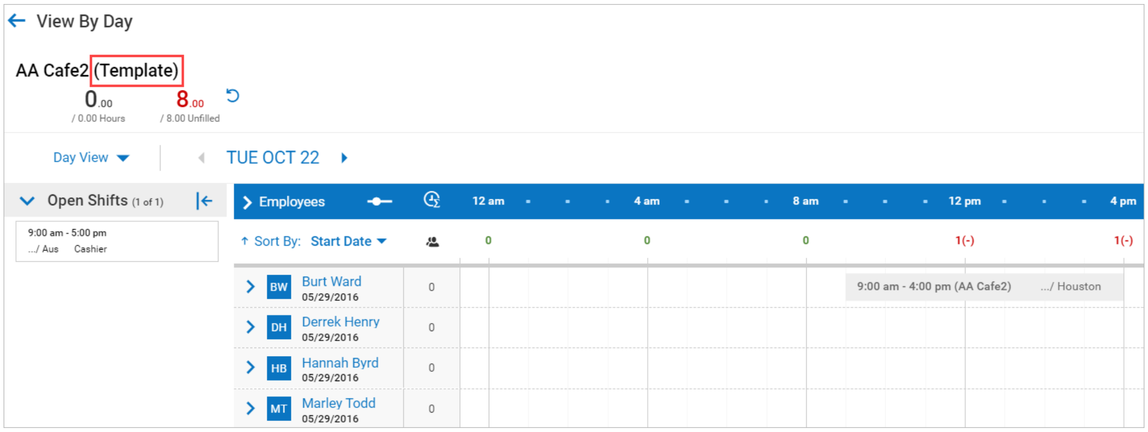
New UI: Added “Template” Text After Schedule Name in All Schedule Template Views (Desktop & Mobile)

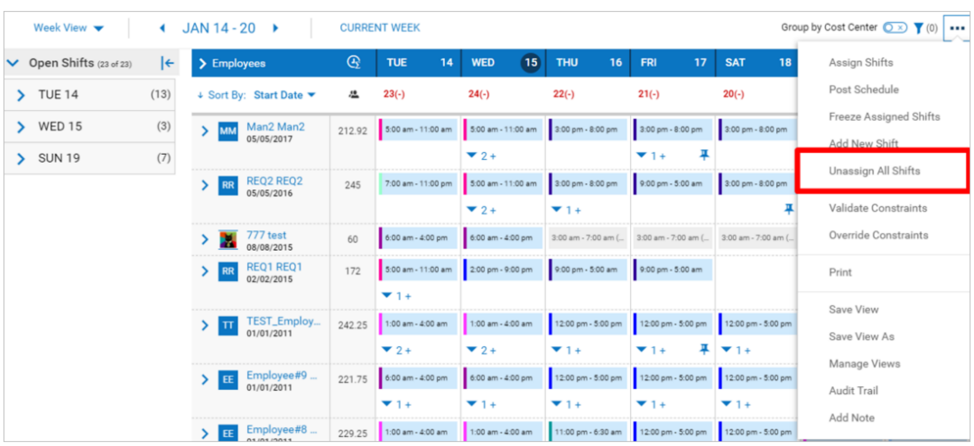
146759: In order to easily distinguish between working in a schedule versus working in a schedule template, *(Template)* was added to the top of the schedule template pages (*Schedule* > *Advanced Scheduling* > *Schedule Templates*) for Day View, Week View and Month View.



New UI: Added Unassign All Shifts Option to Schedule Actions (Desktop & Mobile)

146791: Managers can now mass unassign selected shifts from any of the schedule views or the schedule template. Select the three-dot ellipses at the top of the page, then select *Unassign All Shifts*. A warning pop-up will display to confirm the action before the system unassigns all shifts.

NOTE: The *Unassign All Shifts* action will not be available in posted status and shifts that are frozen will not be unassigned.



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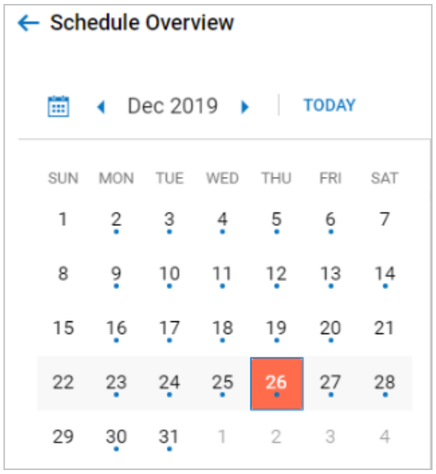
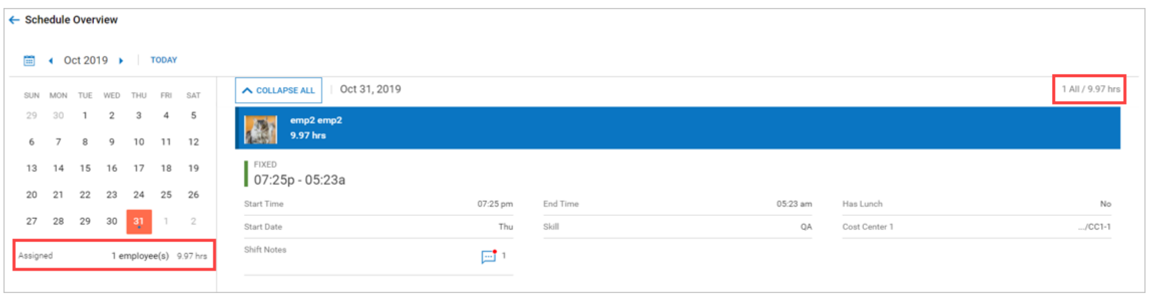
New UI: Days with Shifts Marked on Schedule Overview Calendar (Desktop & Mobile)

121226: On the Team *Schedule Overview*, the calendar will now display a blue dot underneath a date that has a scheduled shift.



The number of assigned employees and hours for that day will display underneath the calendar and at the top-right corner of the shift details. When a day from the calendar is selected, you can expand the shift to view the details.



New UI: Freeze Top Panel and Open Shifts Panel in Schedule Views (Desktop)

144548, 144551, 152387, 144550: The top panel (employees, weekday, filters, headcount) and *Open Shifts* panel of the schedule chart under *View By Day, View By Week and View By Month* will now remain in place when you scroll to the bottom of the screen.

New UI: Improved Open Shift Employee Qualification Checks (Desktop & Mobile)

141783: When managers view the *Manage Open Shifts* pop-up and click *Load Employees*, the resulting employees displaying in the list will, by default, be limited to 20 employees. If there are more than 20 employees, clicking *Show More* will display the next 20 employees.

New UI: Improved Shift Swap and Coverage Request Employee Qualification Checks (Desktop & Mobile)

141784: The engine will now by default return the first 20 options when loading candidates for *Shift Swap Request* and *Shift Change Request*. A *Show More* button will display at the bottom of the list to show additional results when applicable. Previously, users were experiencing latency when the engine checked for all employees on the schedule.

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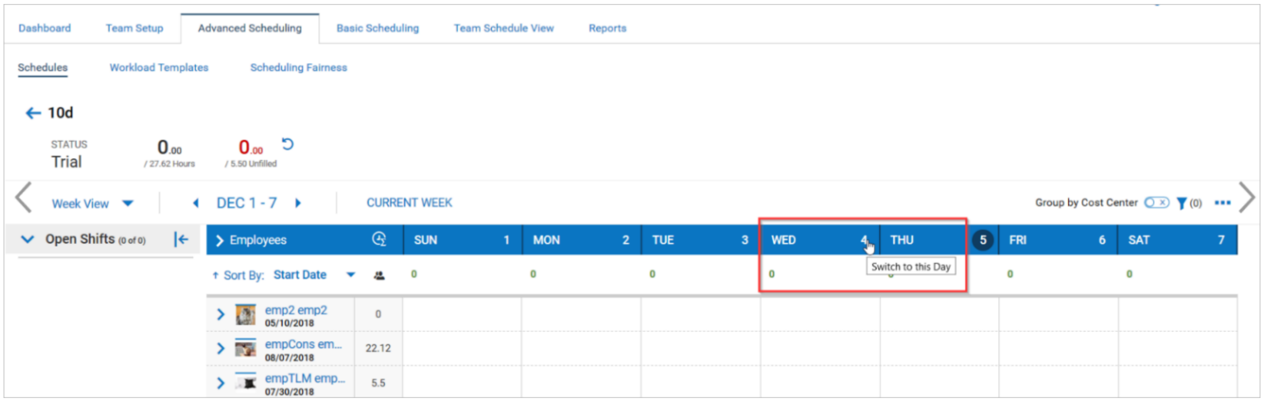
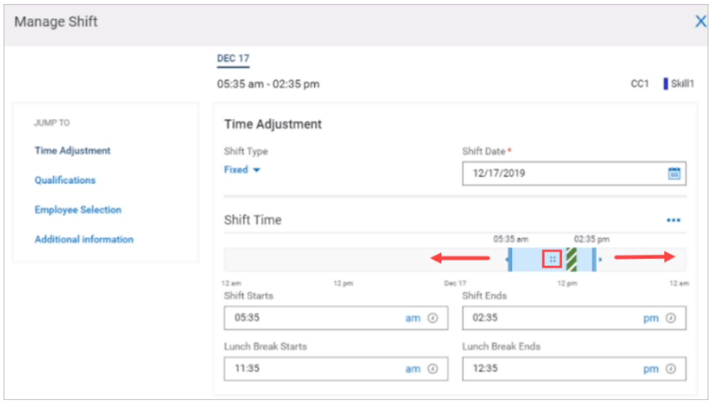
New UI: Link to Day View from Week View (Desktop & Mobile)

141776: From the *Week View*, you can now switch to the *Day View* by clicking any day of the week from the dates shown on the schedule chart.

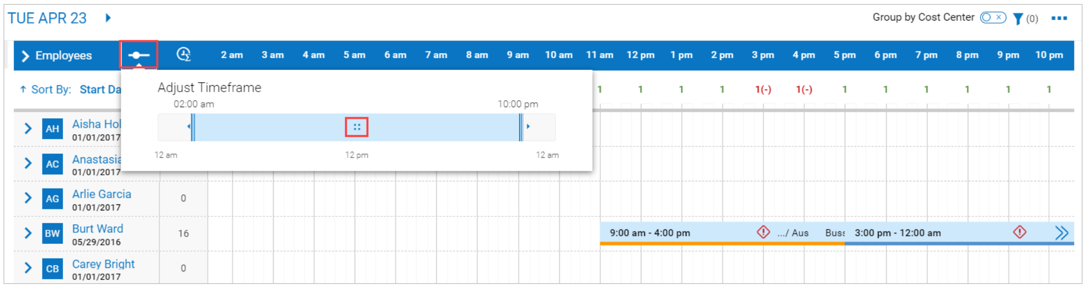


New UI: Manage Shift Time – Schedule Views (Desktop)

96232: For Day, Week and Month views, within *Manage Shift*, you can now easily change the time by clicking the four dots in the center, then dragging to the new shift time. If the shift contains a lunch break, the lunch break will adjust alongside the shift time change. The shift fields under *Shift Time* will adjust to reflect the new times.



You can also adjust the time from the schedule chart.



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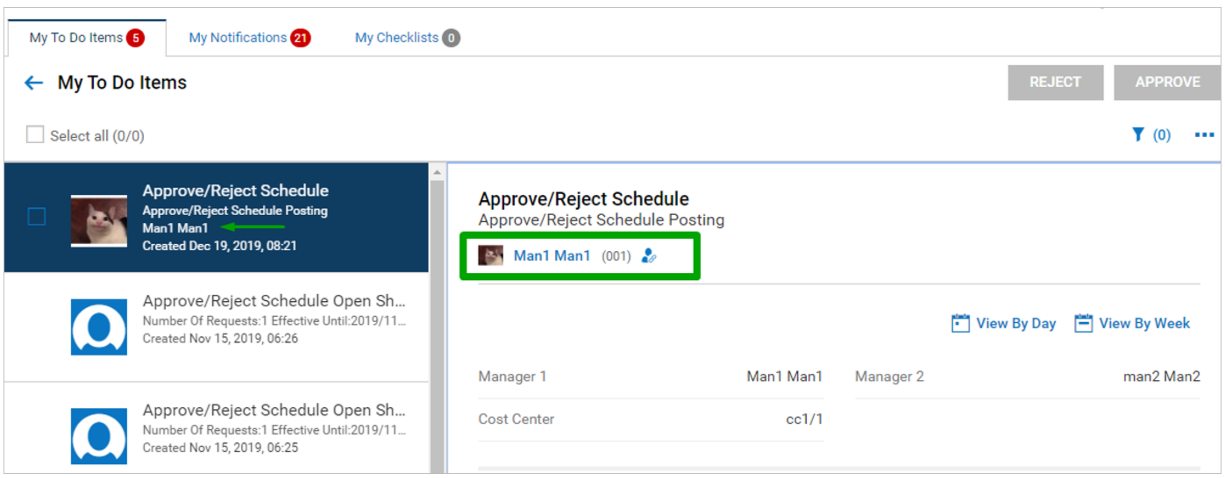
New UI: Scheduler Reports Now Filter Based on Manage Scheduled Cost Centers (Desktop & Mobile)

43300: For managers in Advanced Scheduler companies, schedules and shifts from their Managed Scheduled Cost Centers will now automatically be filtered in the *Open Shifts* report, *Summary by Employee* report, *Schedules* list page, *Schedule Templates* list page and the *Schedule Settings* list page. Previously, managers were able to view all employees and cost centers that were scheduled.

NOTE: The Scheduling Engine must be enabled in order for the system to filter.

New UI: Scheduler To-Do Created By (Desktop & Mobile)

140765: The user's name who created the schedule will now display in *My To Do Items*.



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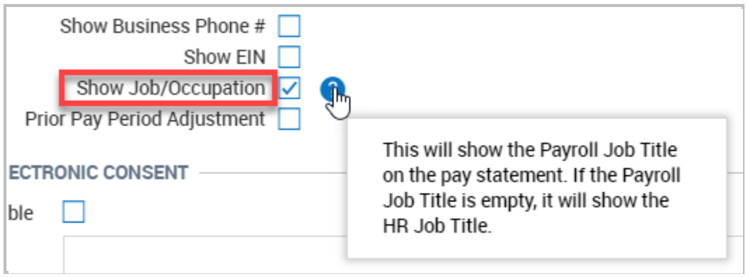
Payroll

Company Settings: Global Setup

Show Job/Occupation Option (Classic UI & New UI)

119372: Users can now choose to display the Job/Occupation on Pay Statements by enabling a new option, **Show Job/Occupation**, in the Include/Exclude and Format section under *Company Settings > Global Setup > Payroll* tab, in the Printed Pay Statement Options widget.

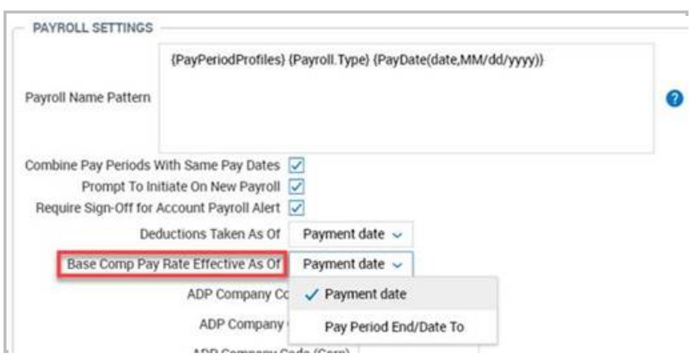


This option is disabled by default. A tooltip to the right of the option explains: *This will show the Payroll Job Title on the pay statement. If the Payroll Job Title is empty, it will show the HR Job Title*.

The Job/Occupation shows on all Pay Statements, displayed before Cost Center with a dash to separate the two. The data pulls from the Payroll Job Title, and if the Payroll Job Title is not populated, it pulls from the HR Job.

Base Pay Rate Effective on Pay Period End or Date To in Pay Statement (Classic UI & New UI)

138263: A new setting, **Base Comp Pay Rate Effective As Of**, has been added under *Company Settings > Global Setup > Company Setup > Payroll* tab, in the Payroll Settings widget. Users can select Payment date or Pay Period End/Date To as the effective date for the Base Comp Pay Rate.



When Payment date is selected, the system applies the rate as usual, based on the Pay Date of a payroll. If Pay Period End/Date To is selected, the system applies the rate as follows:

- When Date To is populated in the Pay Statement, it is used for determining the effective rate.
- When Date To is not populated, the Pay Period End Date for the current Payroll is used to determine the correct Base Comp Pay Rate.

A Pay Period End date should always be available for the current payroll.

If a rate is imported into the Pay Statement, the imported rate is used for determining the effective rate.

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Forms

Form 1099 MISC Boxes 16, 17, and 18 (Classic UI & New UI)

140456: For companies with employees in states that do not participate in the combined federal/state filing program (CF/SF), users can produce a Form 1099-MISC with the state wages for states that do **not** participate in the CF/SF. The state wages appear on the Form 1099-MISC whether or not the state participates in CF/SF. Boxes 16, 17 and 18 are editable so users can add state withholding for other taxes (where applicable) and provide accurate Forms 1099-MISC to their employees.

System logic is as follows:

- Box 16 populates with 1099 earnings for the 1099-MISC PA Tax or the 1099-MISC MA FLI tax amount(s). Tax withholding for any other jurisdictions is not supported in Box 16.
- Box 17 populates with the State and State Tax ID that the 1099 wages correspond to. If the state is not configured (*Company Settings > Payroll Setup > Company Taxes*), the Federal ID appears in Box 17 instead.
- Box 18 populates with the 1099 earnings amount for the state listed in Box 17.
- Boxes 16 and 17 are editable based on the user's assigned Security Profile. If the W2/1099 Information security permission is set to View/Edit on the HR tab in the Security Profile, the user can edit boxes 16 and 17. Box 18 can also be updated based on the View/Edit security setting for W2/1099 Information but can only be updated if the Rents or Nonemployee Compensation state boxes are updated. The sum of those values appears in Box 18 for that state.

MA FLI Tax Withholding on Form 1099-MISC (Classic UI & New UI)

124645: To accommodate updates from the Massachusetts Department of Family and Medical Leave, the system has been updated to withhold Massachusetts FLI tax from 1099 earnings.

PA Tax Withholding on Form 1099-MISC (Classic UI & New UI)

118544: The Pennsylvania 1099-MISC has been updated in compliance with the new withholding tax requirements for non-residents who have 1099 earnings in Pennsylvania.

State Specific W-4 Forms for 2020 (Classic UI & New UI)

134198: Version 2019 State Specific W-4 forms are available in ESS for users to complete in/for 2020. If a state has released a new 2020 form, we are actively working on getting the forms into the system.

2020 Federal W-4 (Classic UI & New UI)

119319, 148151, 145703, 149298: The IRS released a new version of Federal Form W-4 on December 31, 2019, and it is now available in the system as of January 16,.2020. The IRS made no changes to boxes or fields but did change some verbiage for instructions and the worksheet.

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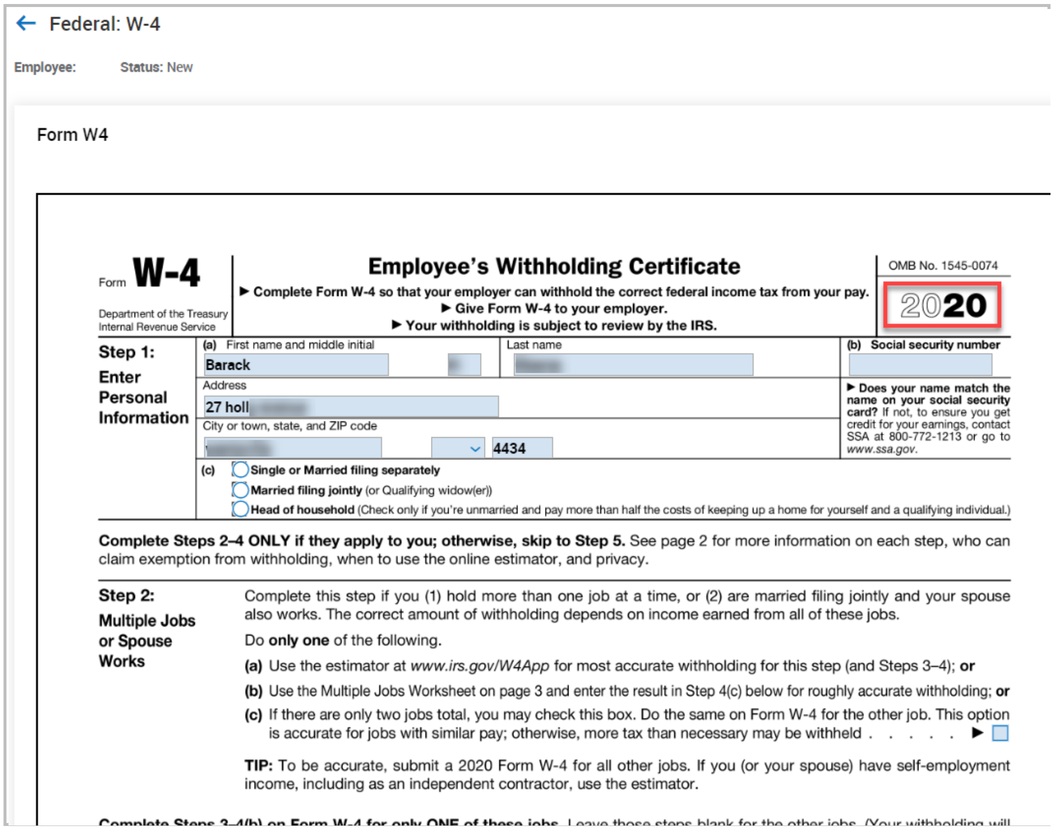


Federal: W-4

Employee: Status: New

Form W4

Form **W-4**

Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate

► Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
► Give Form W-4 to your employer.
► Your withholding is subject to review by the IRS.

OMB No. 1545-0074

2020

Step 1: Enter Personal Information

(a) First name and middle initial: Barack
Last name
(b) Social security number
Address: 27 holl
City or town, state, and ZIP code: 4434

► **Does your name match the name on your social security card?** If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

(c) **Single or Married filing separately**
Married filing jointly (or Qualifying widow(er))
Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do **only one** of the following.

(a) Use the estimator at *www.irs.gov/W4App* for most accurate withholding for this step (and Steps 3–4); **or**

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; **or**

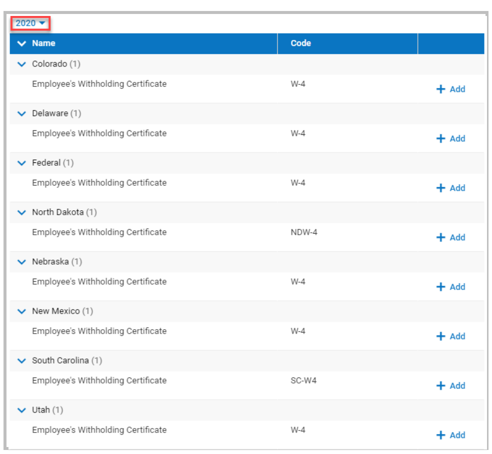
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld . . . . . . ►

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

The new Federal W-4 form is accessed from *My Info > My Pay > Forms > Withholding* and *Team > Payroll > Forms > Withholding* in the New UI and under *My Account > My Forms > Withholding* and *My Employees > Forms > Withholding* in the Classic UI.

As of January 9, 2020, additional work was completed in the New UI Mobile experience (.home) to allow users to use the 2020 Federal W-4 form and use the updated form in a new hire action. Employees are able to submit the new form within Employee Self Service (ESS) in .home and it will process correctly, and managers/admins are able to see the fields within .home (other income, 2 jobs etc.) on employee records.

133940: The 2020 Federal W-4 Form is also available in the system for use as the state withholding form for Colorado, Delaware, Nebraska, and South Carolina.



2020

Name	Code	
Colorado (1)		
Employee's Withholding Certificate	W-4	+ Add
Delaware (1)		
Employee's Withholding Certificate	W-4	+ Add
Federal (1)		
Employee's Withholding Certificate	W-4	+ Add
North Dakota (1)		
Employee's Withholding Certificate	NDW-4	+ Add
Nebraska (1)		
Employee's Withholding Certificate	W-4	+ Add
New Mexico (1)		
Employee's Withholding Certificate	W-4	+ Add
South Carolina (1)		
Employee's Withholding Certificate	SC-W4	+ Add
Utah (1)		
Employee's Withholding Certificate	W-4	+ Add

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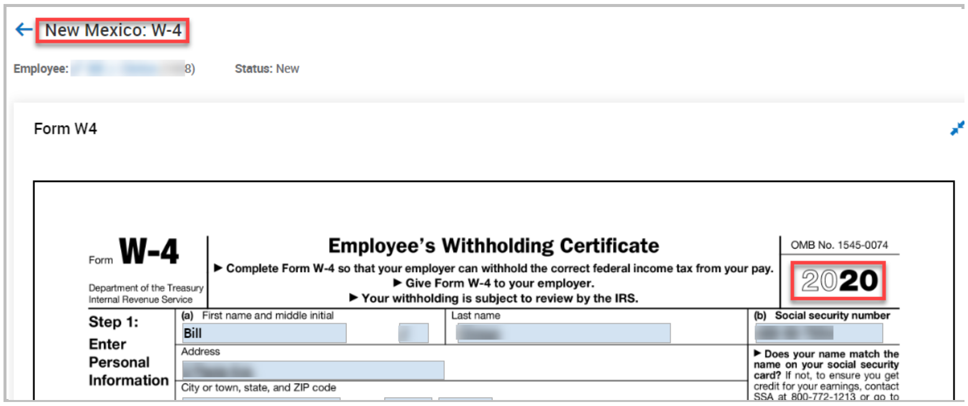
Colorado, New Mexico and North Dakota also have a new parameter, **2020 W4**, to identify if a 2020 W-4 Form has been submitted. If a state form is submitted through ESS, the new parameter will update to *True* automatically. If a form has been submitted outside of ESS, users can manually set it to *True*.

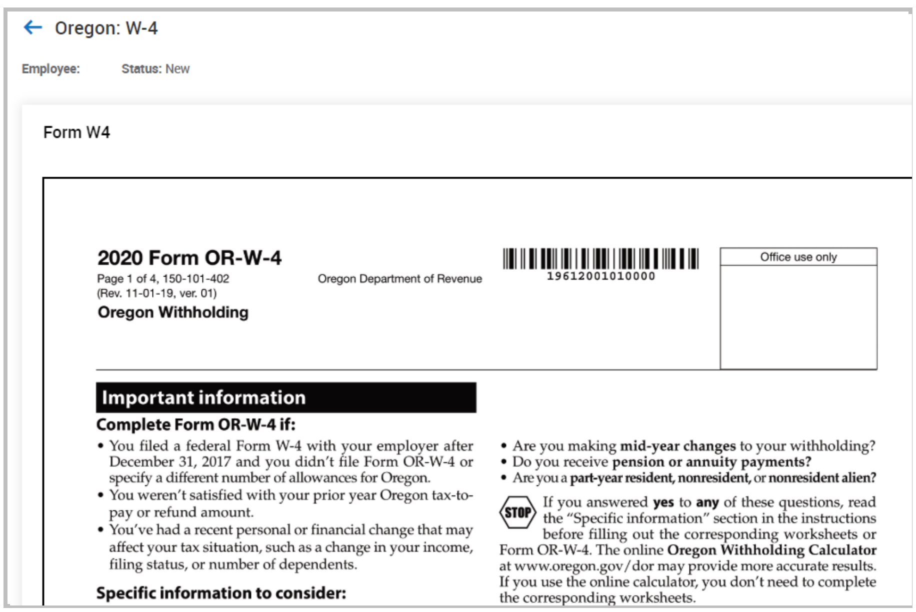
2020 W-4 Forms for North Dakota, New Mexico and Utah (Classic UI & New UI)

149036: The 2020 Federal W-4 Form is now available in the system for use as the state withholding form for New Mexico, North Dakota, and Utah.



2020 W-4 Form for Oregon (Classic UI & New UI)

148826 – Oregon has updated its state specific W-4 form for 2020, and it is now available in the system.



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Reports

Routing Number Type & Routing Number Columns in Bank Account Reports (Classic UI & New UI)

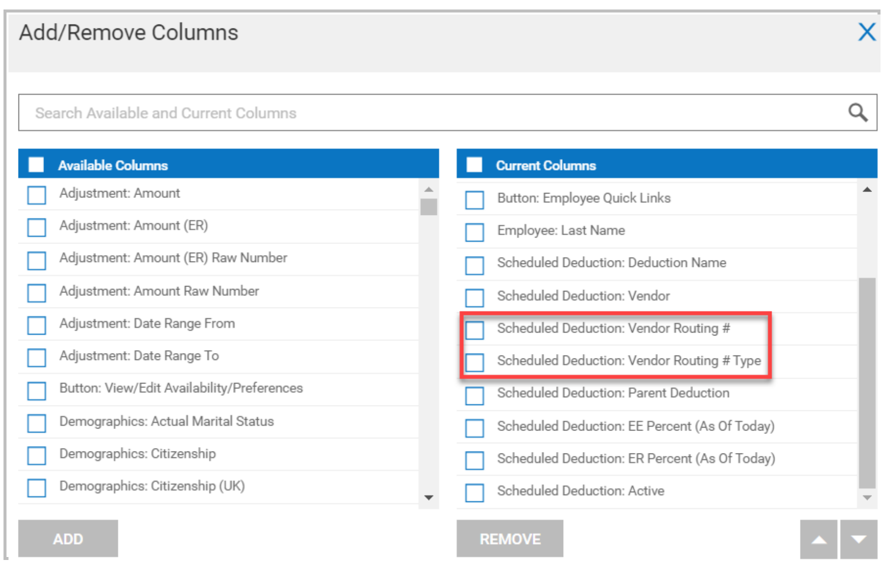
136491: The column label ABA # has been updated and now displays as **Routing #**. Additionally, a new column entitled **Routing # Type** is now available for inclusion in the reports regarding bank accounts.

The following reports are impacted:

- *Company Settings > Payroll Setup > Bank Accounts* (Classic and New UI))
- *Team > Payroll > Employee Payroll Maintenance > Direct Deposits* (New UI)
- *My Reports > System > Bank Account Transactions* (Classic UI)
- *My Info > My Reports > Payroll Reports > Payroll Funding > Bank Account Transactions* (New UI & Mobile)
- *Team > Payroll > Reports > Payroll Funding > Bank Account Transactions* (New UI & Mobile)
- *My Reports > Payroll > Payroll Funding* (Classic UI)
- *My Info > My Reports > Payroll Reports > Payroll Funding > Payroll Funding* (New UI)
- *Team > Payroll > Reports > Payroll Funding > Payroll Funding* (New UI)
- *My Info > My Reports > Payroll Reports > Payroll Funding* (Mobile)
- *Team > Payroll > Reports > Payroll Funding* (Mobile)
- *Maintenance > Configuration > Bank Accounts* (**ADMIN**)

Scheduled Deductions Report: Vendor Routing Number Updates (Classic UI & New UI)

132669: The Scheduled Deductions report (*Team > Payroll > Employee Payroll Maintenance > Deductions*) now displays the label for the Vendor ABA column as **Vendor Routing #**, which represents the bank account routing number of the vendor. In addition, the column **Vendor Routing # Type** is now available for inclusion in the Scheduled Deductions report and represents the routing number type (such as ABA).



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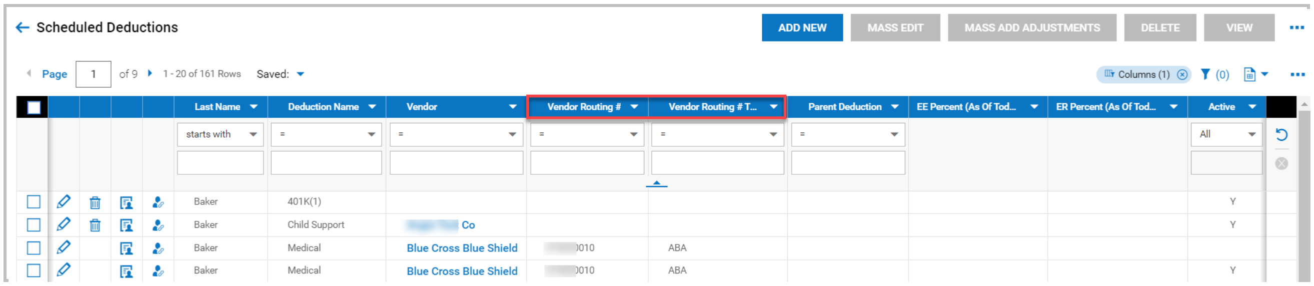
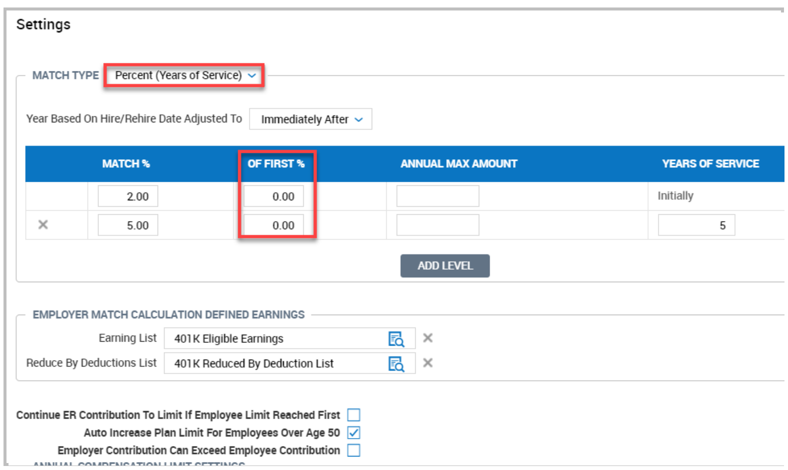


Retirement Plans

Retirement Plan Settings for Employer Contribution Only Plan Based on Employee's Years of Service (Classic UI & New UI)

132320: A Retirement Plan can now be configured with Employer Match only using the *Percent (Years of Service)* match type. The employer contribution in this case can exceed the employee contribution regardless of the configuration of the *Employer Contribution Can Exceed Employee Contribution* setting.

The appropriate *Match %* and corresponding *Years Of Service* should be entered, and the *Of First %* column allows for a $0.00 value if it is an Employer funded benefit. When the *Of First %* equals $0.00, the Employer Match amount calculates as a percent of the Earning List (and Reduce By Deduction List) within the *Employer Match Calculation Defined Earnings* widget.



This allows users to configure a Retirement Plan match that includes different percentages based on years of service for employer funded plans with no employee contribution, effectively eliminating the need for manual adjustments to the deduction percent when an employee's *Years Of Service* tier changes.

Retirement Plan Profile: Service Hours Worked Eligibility Requirement (Classic UI & New UI)

74237: Users have two options, **Based On Start Date** and a new **Based On Service Hours** option, to choose from in the *Define Eligibility* section when creating a Retirement Plan Profile. Users can enable and configure one or both as needed per their retirement plan(s).

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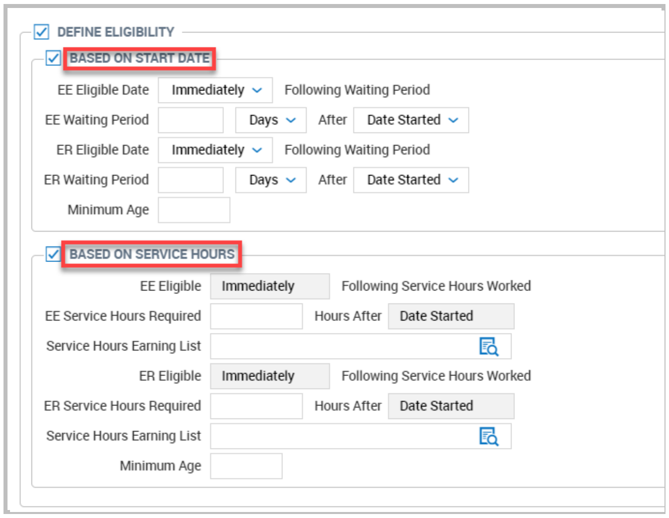
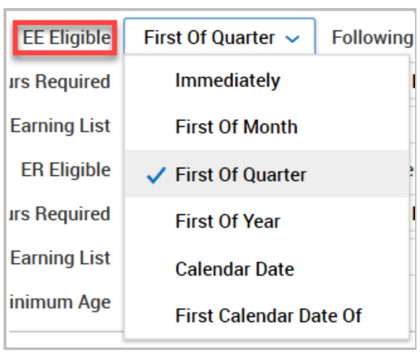
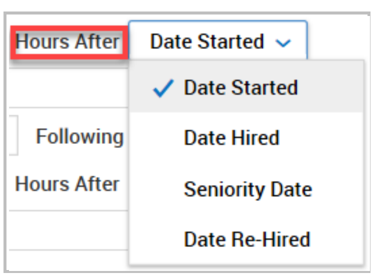


For the **Based On Service Hours** option, users can:

- Select the date the eligibility will be achieved based on the available options for **EE Eligible (_) Following Service Hours Worked**.



- Input the number of hours (**EE Service Hours Required**) that the employee must work before they are eligible to contribute to the retirement plan, and when (**Hours After**) the contribution can begin.



- Select the earnings list (**Service Hours Earning List**) to be used in the calculation of the service hours worked.
- Select the date the employer contributions will be achieved based on the available options for **ER Eligible (_) Following Service Hours Worked.**
- Input the number of hours (**ER Service Hours Required)** that the employee must work before they are eligible for the ER portion to begin, and when (**Hours After**) the contribution can begin.
- Select the earnings list (**Service Hours Earning List**) to be used in the calculation of the service hours worked for the eligibility for the employer portion of the plan.

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- Enter a **Minimum Age** requirement.

When the Retirement Plan Profile is assigned to the employees in the employee profiles, the deduction codes are automatically added to the employee Payroll tab. Once the required service hours are reached, the selected contribution amounts are calculated and deducted for both the employee and employer portions.

NOTE: When both options are enabled, the eligibility dates for the **Based On Service Hours** option are pre-populated based on what is selected for the **Based On Start Date** option.

New UI Updates – Table of Functionality Added to Pages

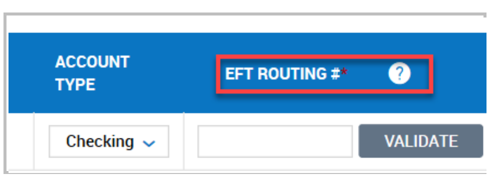
The table below shows the updates made within the New UI and the functionality added.

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
104373	Payroll	Scheduled Deductions	*Team > Payroll > Employee Payroll Maintenance > Deductions*	**Add New** scheduled deduction (Page Level Action) View Scheduled Deduction > **Save** (Page Level Action) **View**/Edit **Scheduled Deduction** (Row Level Action)	Yes	Yes

New UI: Direct Deposits

Routing Number Label (Desktop & Mobile)

150487: In the Employee Profile/Employee Information, the correct header/label displays for the routing number based on the address of the employee. For example, the label *EFT Routing #* displays as the column header if the employee is in Canada.



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