Software Release Notes

OnePoint Human Capital Management

August 2019

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Release Information

This document contains detailed descriptions of release notes for the release date/month shown above, as well as explanations of resolved issues.

Supported Operating Systems and Browsers

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

Supported Desktop and Mobile Operating Systems

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

Platform	OS Version
Desktop	
Windows	7, 10
Mac	10.13.4 (High Sierra)
Mobile	
iOS	11.4.1 -> latest
Android	6.0.1-> latest

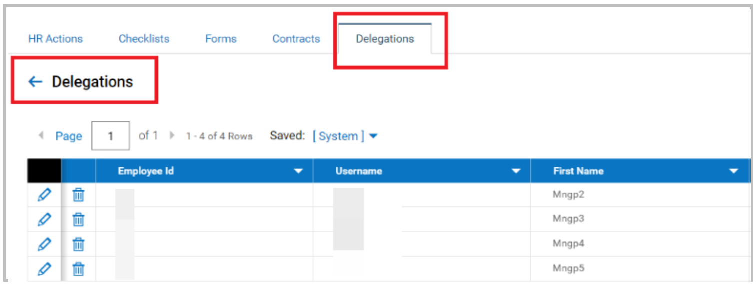
Supported Browsers for Desktop

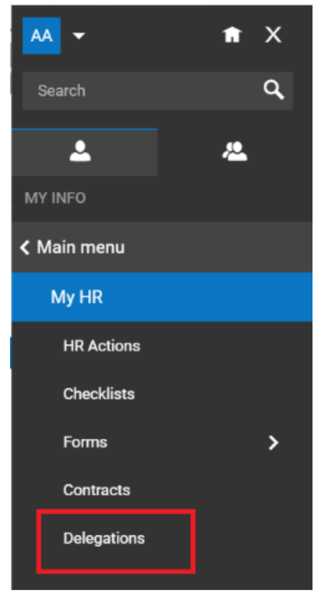
Browser	Version
Internet Explorer	11
Microsoft	Edge
Google Chrome	latest
Mozilla Firefox	latest
Safari	latest

Cross Product Enhancements

Delegations: Label Update (Desktop & Mobile)

109737: The label and menu path for Delegations has been updated in both the New UI Desktop environment and the Mobile App. The tab is now titled *Delegations*, and the menu path is *My Info > My HR > Delegations*.





Global: Confirmation of Unsaved Changes When Browser Page/Tab is Closed (Desktop)

78320: Users now receive a confirmation dialog popup when there are unsaved changes and they attempt to close a browser window. Standard browser functionality applies, and a message asks *You are about to leave this page. You have changes which are not saved. Do you want to proceed?.*

If a user clicks Yes and navigates away, no changes are saved. If a user clicks No and stays on the page, the changes can be saved.

My Mailbox: To Do Items Support (Mobile)

88220: Users now have access to a growing set of To Do Items from the *My Mailbox* page. Pages containing the links to additional information, forms or buttons that can be used to complete tasks can be accessed directly from the list on the *My To Do Items* tab on the My Mailbox page.

Approve and *Reject* buttons often appear in the To Do item details, enabling users to approve an item assigned to them in just two steps.

The types of To Do items that are supported on the *My To Do* tab are listed in the table below.

Workflow Type	To Do Type(s)	Release
Performance Review	Employee Sign Finalize Review Review Comments	June, 2019
Attestation	Question	June, 2019
Scheduler Coverage Request	Approve Coverage Request	June, 2019

	Reject Coverage Request	
Scheduler Shift Swap	Approve Shift Swap Request Reject Shift Swap Request	June, 2019
Timesheet Request	Auto Approve Timesheet Auto Reject Timesheet Approve Timesheet Reject Timesheet Approve Time Entries Reject Time Entries	April, 2019
Individual Data Removal	Approve Reject	April, 2019
Incident Types	Approver Sign Close Incident Employee Sign Approve / Reject Collect Note	February, 2019
Job Requisition	Approve/Reject	February, 2019
Questionnaire	Display Message Question	February, 2019
HR Action Request	Initiate HR Action Collect Note	February, 2019
Leave Of Absence Requests	Collect Note	February, 2019
Timesheet Request	Collect Note	February, 2019
Overtime Request	Activate Contract	February, 2019
Time Off Request	Activate Contract Collect Note	February, 2019
Virtual Code: Account Approval	Approve / Reject	February, 2019
HR Action Request	Approve/Reject Initiate HR Action Terminate	October, 2018
System Defined Workflow*	Form W4	December, 2018
System Defined Workflow*	Form I9	December, 2018
Timesheet Change Request	Approve / Reject Timesheet Change Request	2018

*A system-defined workflow will automatically trigger the creation of the To Do item following a user's action. For example, following creation of the form the To Do item for completion of the form is created.

New UI Navigation Changes

The following enhancements involve navigation updates in the New UI environment.

New UI Navigation: Change Password and Unlock Moved

The Classic UI manager settings of *Change Password* and *Unlock* the will now be handled within employee accounts in the New UI.

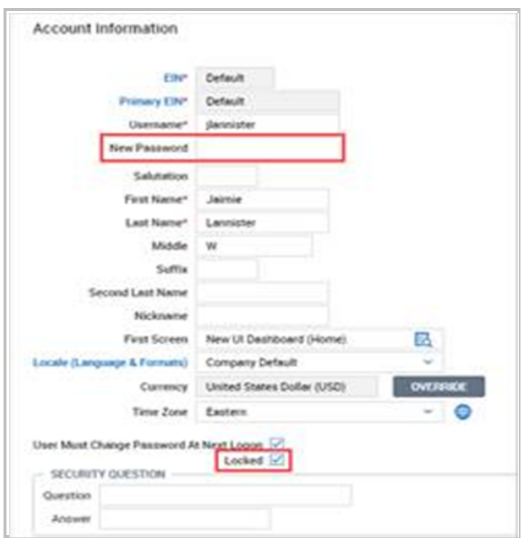
Classic UI:

- *My Employees > Change Password*
- *My Employees > Unlock*

New UI:

Changing or unlocking user accounts will be done within the *Account Information* widget of employee accounts.

- *Team > My Team > Employee Information*



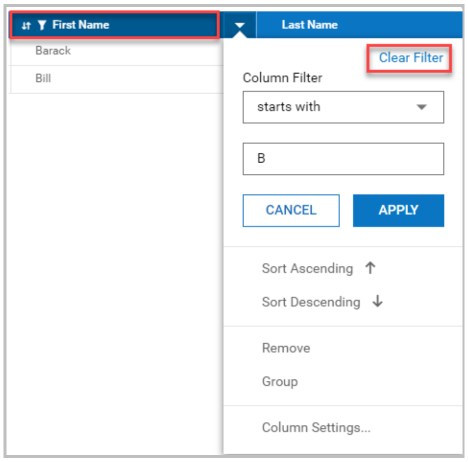
New UI Navigation: Marketplace Menu Moved

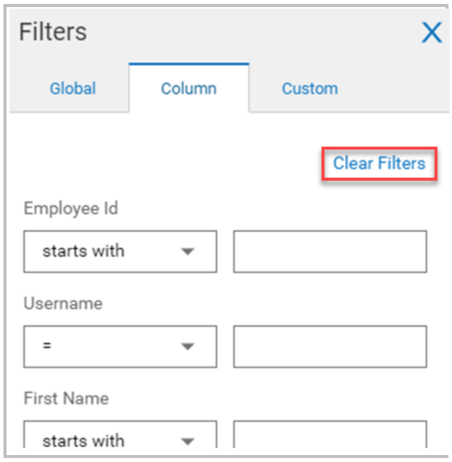
The Marketplace menu option in the New UI has been moved and will now be available as an Admin option under the *Company Settings* menu.

- **Classic UI**: *My Company > Marketplace*
- **New UI**: *Admin > Company Settings > Our Company > Marketplace*

Reports: Applied Column Filter and Clear Filter (Desktop)

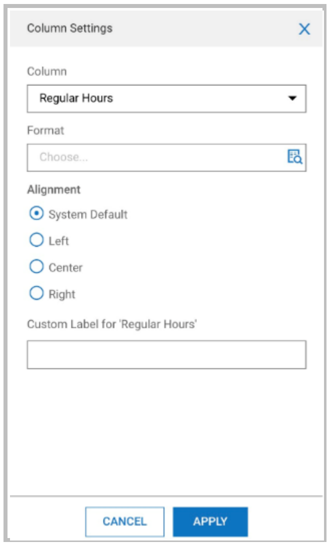
104505: The column filter has been adjusted to provide better visualization with slightly smaller arrows, a slightly larger filter icon, and the column header highlighted. Additionally, a *Clear Filter* option has been added to the column filter, and a *Clear Filters* option is now available on the global filters panel.





Reports: Column Settings (Mobile)

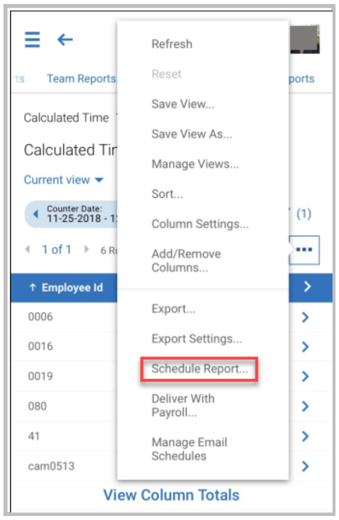
104865: Users can now modify the Format, Alignment, and Custom Label settings using the *Column Settings* within a report from the Mobile App. Users must first select the appropriate column for the Format, Alignment, and Custom Label settings to be displayed.



When a user navigates away and returns to the Column Settings dialog box where a format has already been set, if the user clicks the Format field to potentially change the format, the user must clear/erase the format value in the search field to be able to see the other values.

Reports: Schedule Report Action (Mobile)

104863: Users can now schedule reports for generation from a mobile device, allowing them to get report snapshots regularly from *My Info > My Reports > My Scheduled Reports*, using the Schedule Report action (...).



New UI Updates – 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
105969	Cross Product - Employee Self Service	Government Forms	My Info > My HR > Forms > Government Forms > Withholding My Info > My Pay > Forms > Withholding (View Withholding Form button under Actions)	W4 Withholding Form pages to view W4 forms via ESS.	Yes	Yes
105969	Cross Product – Manager Self Service	Government Forms	Team > HR > Forms > Government Forms > Withholding Team > HR > Forms > All Forms	W4 Withholding Form pages to view W4 forms via MSS.	Yes	Yes

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105969	Cross Product - Employee Self Service	Government Forms	My Info > My HR > Forms > Government Forms >1099s My Info > My Pay > Forms > 1099	1099 Form pages to view 1099s	Yes	Yes
105969	Cross Product – Manager Self Service	Government Forms	Team > HR > Forms > Government Forms > 1099 Team > HR > Forms > All Forms Team > Pay > Forms > 1099	1099 Form pages to view employee 1099s	Yes	Yes
105969	Cross Product - Employee Self Service	Government Forms	My Info > My HR > Forms > Government Forms > W2 My Info > My HR > Forms > All My Forms My Info > My Pay > Forms > W2 My Reports > Payroll Reports > Taxes > Form W2s (Summary)	W2 Form pages to view W2s	Yes	Yes
105969	Cross Product – Manager Self Service	Government Forms	Team > HR > Forms > Government Forms > W2s	W2 Form pages to View, Download PDF, and Mass	Yes	Yes

			Team > Pay > Payroll > Forms > W2s Team > Pay > Payroll > Reports > Taxes > Form W2s (Summary) [no action buttons]	Approve. In addition, options to Deliver Selected, View By State, and Preview		
105969	Cross Product – Manager Self Service	Government Forms	Team > HR > Forms > Government Forms > W2s Team > Pay > Payroll > Forms > W2s Team > Pay > Payroll > Reports > Taxes > Form W2s (Summary) [no action buttons]	W2 Form pages to view W2 Forms via MSS.	Yes	Yes
105969	Cross Product – Employee Self Service	Government Forms	My Info > My HR > Forms > Government Forms My Info > My HR > Forms > All Forms	I9 Form pages to view I9s	Yes	Yes
105969	Cross Product – Employee Self Service	Government Forms	My Info > My HR > Forms > Government Forms My Info > My HR >	I9 Form page actions to Submit I9, Download PDF, and View Instructions	Yes	Yes

			Forms > All Forms			
105969	Cross Product – Manager Self Service	Government Forms	Team > HR > Forms > Government Forms > I9s Team > HR > Forms > All Forms	I9 Form page actions to View, Edit, Delete, Verify I9, Download PDF, and View Instructions	Yes	Yes
105969	Cross Product – Manager Self Service	Government Forms	My Info > My HR > Forms > Government Forms My Info > My HR > Forms > All Forms	I9 Form pages to view I9s	Yes	Yes
106408	Cross Product – ACA	ACA (Import historical data)	Team > Benefits > ACA > Employee ACA Actions (Desktop Admin) Company Settings > Imports > Employee Setup	Import historic data via Employee ACA Actions or ACA Employee Data Import	Yes	Yes
106408	Cross Product - ACA	ACA Timeline	Team > Benefits > ACA > Employee ACA Actions > W-2 Safe Harbor	Employee ACA Actions - W-2 Safe Harbor [Calculates the affordability of insurance coverage offered by employer based on W-2 wages in	Yes	Yes

				box 1. Results are stored in the ACA Timeline (for one or more employee(s) and one or more year(s) based on who was selected for the calculation)]		
	Cross Product-ACA	ACA Timeline	Team > Benefits > ACA > Employee ACA Actions > Recalculate	Employee ACA Actions – Recalculate [(Calculates the ACA Timeline for one or more employee(s) for the current year, next year, and past years, as far back as 2015.)]	Yes	Yes
	Cross Product-ACA	ACA Timeline	Team > Benefits > ACA > Employee ACA Actions > Recalculate Combined ACA Timeline	Employee ACA Actions – Recalculate Combined ACA Timeline [(Calculates the Combined Status data in the ACA Timeline for one or more employee(s) in Multi EIN companies.)]	Yes	Yes

106408	Cross Product - ACA	ACA Data Detailed	Team > Benefits > ACA > ACA Data Detailed	ACA Data Detailed report	Yes	Yes
106678	Cross Product - ACA	ACA History	Team > Benefits > ACA > Employee ACA Actions Team > Benefits > ACA > ACA Data Detailed Team > Benefits > ACA > ACA Status Change	Employee ACA History	Yes	Yes
111681	Cross Product - ACA	ACA Actions	Team > Benefits > ACA > Employee ACA Actions	Employee ACA Actions – From Employee Quick Links, Choose View ACA History to edit employee history	Yes	Yes
111701	Cross Product ACA	ACA Status Change	Team > Benefits > ACA > ACA Status Change	Employee ACA Status Change	Yes	Yes
106138	Cross Product - Perspectives	Employee Perspectives	Team > Talent > Employee Perspectives > Perspectives Category and Perspectives Score	Employee Perspectives Categories and Perspectives Score	Yes	Yes

Deprecation of Functionality

The tables below document functionality that has been deprecated or is planned to be deprecated. These tables will be updated as needed with every system release.

Deprecation History

Product/ Component	Feature	Menu Path	User Experience	Reason	Deprecation Date
Scheduling/ Employee Profile	Schedule Availability Widget	Employee Profile > Schedule Availability	Classic	Maintaining the classic widget would cause compatibility issues with new functionality that has been introduced.	October 2018
Scheduling/ Employee Profile	Schedule Preferences Widget	Employee Profile > Schedule Availability	Classic	Maintaining the classic widget would cause compatibility issues with new functionality that has been introduced.	October 2018
Platform > To Dos	My Notifications (Mailbox)	My Information > My Notifications (Mailbox)	New UI	Employees have ability to view notifications within Mailbox experience. Centralization of experiences.	October 2018
Platform > To Dos	My To Dos Items	My Information > My To Do Items	New UI	Employees have ability to view notifications within Mailbox experience. Centralization of experiences.	October 2018
HR > General	Hire	My Team > HR > Manual Actions	New UI	Feature has been centralized with Employee Information page.	June 2019
HR > General	Terminate	My Team > HR > Manual Actions	New UI	Feature has been centralized with Employee Information page.	June 2019

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HR > General	Unlock	My Team > HR > Employee Maintenance > Account Settings	New UI	This feature is available in the employee profile. Will be added to Employee Information as a part of the roadmap to enhance feature with bulk edit capabilities.	June 2019
HR > General	Change Password	My Team > HR > Employee Maintenance > Account Settings	New UI	This feature is available in the employee profile.	June 2019

Planned Deprecation

Product/ Component	Feature	Menu Path	User Experience	Reason	Planned Deprecation Date
Recruitment > Applicant Portal	Classic Applicant Portal	.jobs	Classic	New Applicant Portal available with richer functionality- best of breed experience	TBD
HR > Expense Management	Expense Management	My Information > Expenses My Team > HR > Expenses	New UI	Certify remains a certified partner. Only deprecating the user interface integration due to lack of use.	TBD
HR > General	Reset Password	My Team > HR > Employee Maintenance > Account Settings	New UI	Will be added to employee profile and/or Employee Information	TBD

Scheduler > Schedule Templates	Schedule screen	Scheduler > Schedules > View by Employee	New UI	Replaced with new schedule views	TBD
Scheduler > Schedule Templates	Schedule screen	Scheduler > Schedules > View by Cost Center	New UI	Replaced with new schedule views	TBD
Scheduler > Schedule Templates	Schedule screen	Scheduler > Schedules > Schedule Table View	New UI	Replaced with new schedule views	TBD
Scheduler > Schedules	Schedule screen	Scheduler > Schedules > View by Employee	New UI	Replaced with new schedule views	TBD
Scheduler > Schedules	Schedule screen	Scheduler > Schedules > View by Cost Center	New UI	Replaced with new schedule views	TBD
Scheduler > Schedules	Schedule screen	Scheduler > Schedules > Schedule Table View	New UI	Replaced with new schedule views	TBD
Scheduler > Schedules	Schedule screen	Scheduler > Schedules Overview	New UI	Replaced with new schedule views	TBD

REST APIs

This section contains information and enhancements for REST API webservices. For full documentation, refer to the REST API guides for your region.

- US Rest Documentation
- European Rest Documentation
- Australian Rest Documentation

New/Updated APIs

Version 2 (V2) Profile Lookup APIs

103860: You can now lookup a list of Scheduler profiles and Work Scheduler profiles.

Version 2 (V2) Delete Payroll Batches Endpoint

110538: REST APIs (V2) now include an endpoint to delete payroll batches.

Changed Employees API - Changes for Terminated Employees

112145: The Changed Employees API has been enhanced to include an optional query parameter, *Termination Flag*, which allows users to optionally return the actual employee termination and any future rehire of the employee, but not other employee record changes.

Version 2 (V2) Skills API

111262: The Skills API has been updated to include a new IsSchedulable attribute for each skill. For full details, please refer to the online documentation.

Time and Labor Enhancements

Timesheet Profile Enhancements (Classic UI & New UI)

105025: In the New UI, two timesheet profiles will be available: Start/End (All Days) and Bulk Hours. In preparation for those changes, capabilities that are currently available in other profiles will be added to the Start/End (All Days) profiles and Bulk Hours profiles. The enhancements for this release are shown below. Employees will see these capabilities in both the Classic and New UI.

As new features are added in these timesheet profiles, older timesheet profiles will no longer be available when creating new timesheet profiles. For new employees, we recommend using the Bulk Hours or Start/End (All Days) profiles.

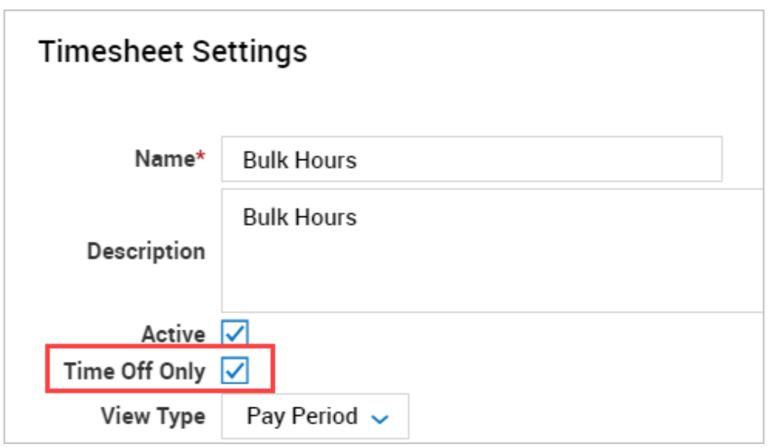
105565: The functionality from the following Timesheet Profiles has been consolidated into the Start/End (All Days) Timesheet Profiles type in the New UI:

- Small Business

NOTE: Existing Small Business timesheet profiles will not be affected.

Time Off Only Option in Bulk Hours Timesheet Profile (Classic and New UI)

105028: A *Time Off Only* option has been added to the Bulk Hours TS profile so the system can recognize the profile as time off only. When this option is checked, the timesheet will only accept time off entries. If a time entry is added without a time off category assigned, an error will appear and prevent the timesheet from being saved.



105566: The Time Off Only functionality has been consolidated into the Bulk Hours Timesheet Profiles type in the New UI. The Time Off Only Timesheet Profile will no longer be an option when adding new Timesheet Profiles.

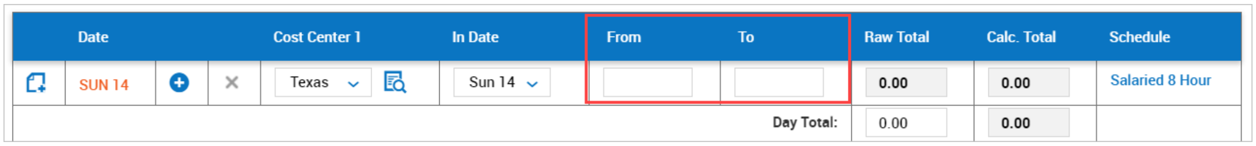
105568: The Graph Timesheet Profile Type will not be a supported timesheet type in the new UI. It will no longer be available as a timesheet option when creating new timesheet profiles.

Edit Personal Time in Start/End (All Days) Timesheets (Classic and New UI)

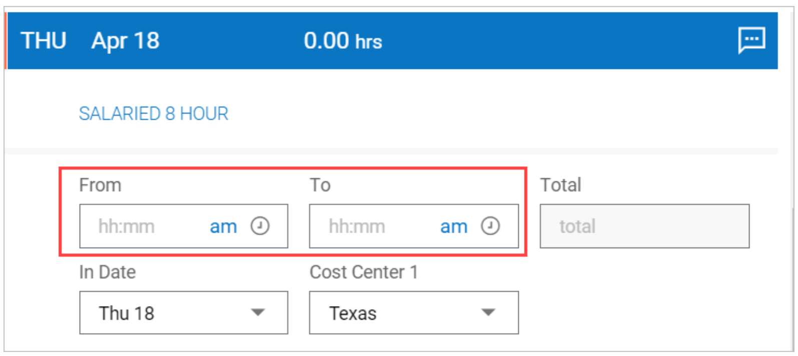
103108: In the *Timesheet Settings* widget of the Start/End (All Days) timesheet profiles, we have added the option for employees to enter start and stop times, bulk entries or both.

In the employees' timesheets, the *From* and *To* time entry fields can be edited. If the *Bulk* option in the Timesheet Profile is disabled, the *Raw Total* field on the timesheet is disabled in the Classic UI and the employee cannot edit it. In the New UI, the *Total* field is disabled.

Classic UI Time Entry with Start/Stop Enabled



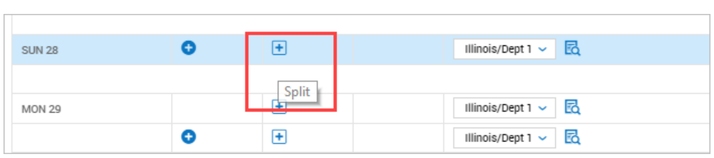
New UI Time Entry with Start/Stop Enabled



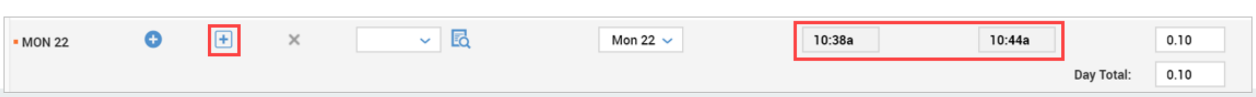
Frozen Punch Setting in Start/End (All Days) (Classic and New UI Desktop)

104009: The *Freeze Raw Punches* setting has been added to the *Timesheet Punch Settings* section of the Start/end (All Days) Timesheet Profile. When *Freeze Raw Punches* is enabled, employees' raw punch entry fields are disabled and the employees cannot edit them. If employees are able to edit their personal timesheets, they are still able to add new time entries manually.

Employees can split a shift, if needed, by clicking the *Split* icon.



When *Freeze Raw Punches* is enabled, the *Apply Frozen Punches to Managers* option can be enabled. When checked, this option will prevent managers from editing raw punch data for their employees, but like their employees, additional time entries can be added.



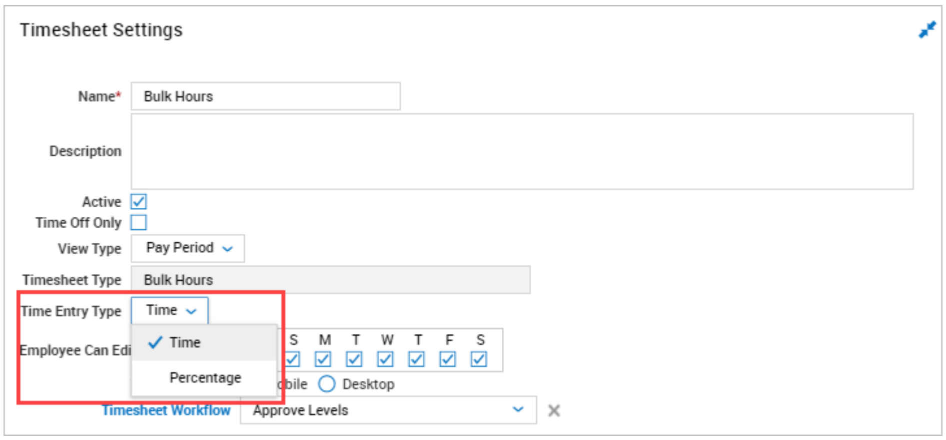
When raw punches are split across the day divide and the *Freeze Raw Punches* options are enabled, any raw punches that were automatically generated will be frozen.

This option does not apply to company or system administrators with full access to the system.

In this release, the options affect only the Classic UI. These options will be available in the mobile app in a future release.

Percent or Time Option in Bulk Hours Timesheet Profile (Classic UI and New UI Desktop)

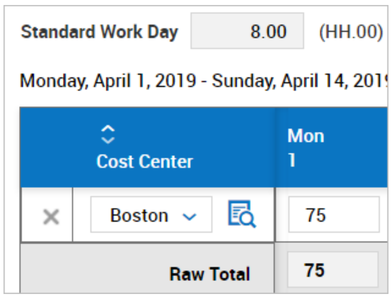
104109: To provide the same capabilities in the Bulk Hours timesheet that are available in the Bulk Hours (Percent) timesheet profile, we are adding a new *Time Entry Type* option to allow timesheet date to be entered in a time format or a percentage format.

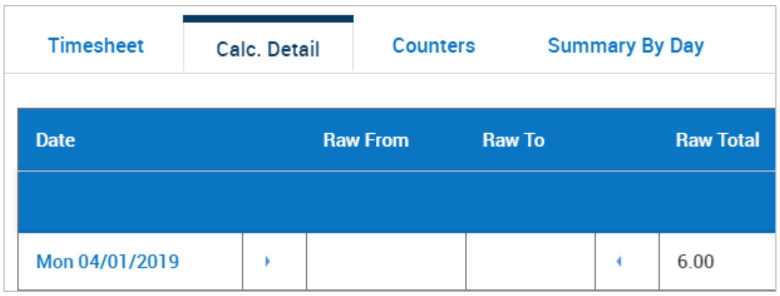


When the *Percentage* option is used, the time entered on the timesheet should be entered as a percentage. In calculated tabs, the percent value will be converted to time based on the percentage of the Standard Work Day. The employee's Standard Work Day is defined in the *Pay Information* widget of the employee's account page. If the employee's Standard Work Day is not set, the company default, on the *Company Configuration* tab of *Company Settings > Company Setup* page is used. If neither of these is set, the default of 8 hours is used.

For example, the Standard Work Day is set to 8.00 and Percentage is used. The user enters 75 on the timesheet, and the Calc. Detail tab shows that 6 hours were worked.

Classic UI





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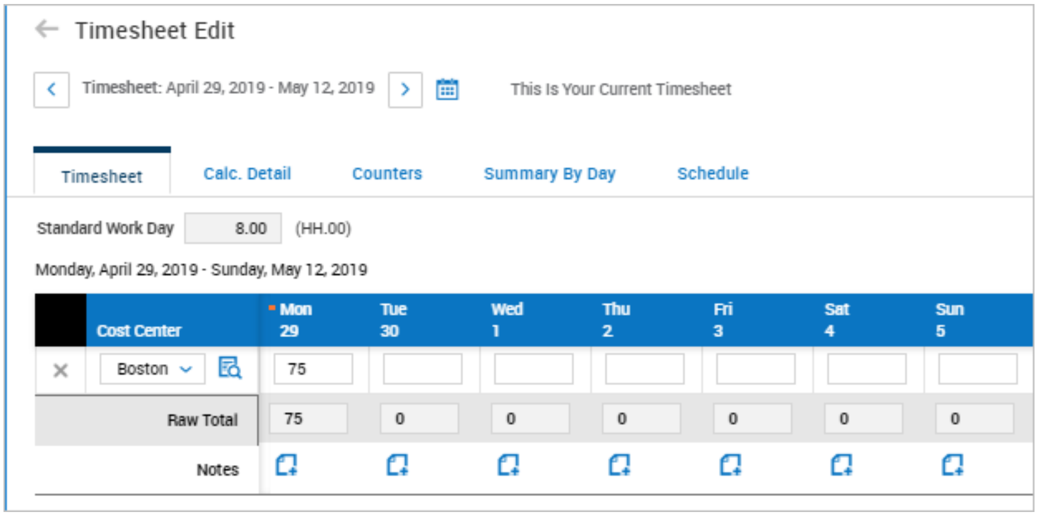
New UI (Desktop)



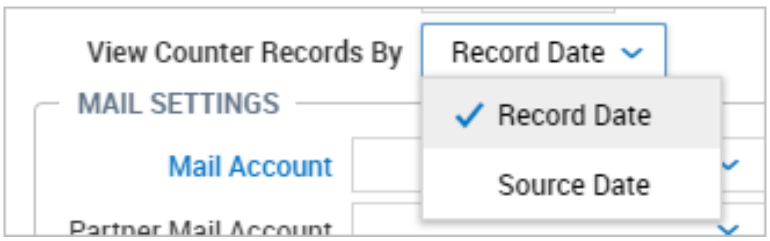
Pay Calculations

Overtime Discrepancy Between Summary By Day, Calc. Detail and Calc. Summary

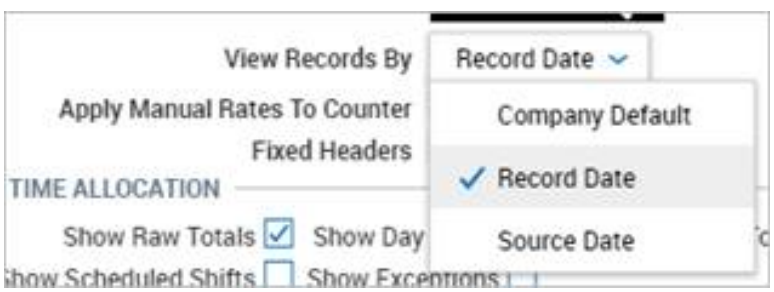
112732: For Pay Calculation 2.0 companies, counter records can be viewed on the timesheet's *Counters* tabs by *Record Date* or *Source Date*. The *Record Date* represents the date the counter record was created from Pay Calculations. The *Source Date* represents the date to which the counter refers. For example, when using a weekly overtime rule and distributing the overtime from first to last time entry, the counter for Weekly Overtime would have a Record Date of day 7 (or the date the weekly overtime resulted in hours being created in the counter.) The Source Date in this example would be day 1 (or the first date that the hours were applied to.)

The default company settings for *View Counter Records By* is defined at the company level from *Company Settings > Global Setup > Company Setup* on the *Company Info* tab. The default can be overridden in the *Extra Settings* widget of an employee's timesheet profile.

Company Info



Timesheet Profile



Previously, inconsistent totals appeared on the *Calc.Detail, Calc.Summary* and *Summary By Day* tabs under the following conditions:

- The Record Date and Source Date were not aligned.
- The overtime calculation crossed pay periods and the record date or source date fell outside of the pay period.
- The *View Counter Records By* field was set to *Source Date*.

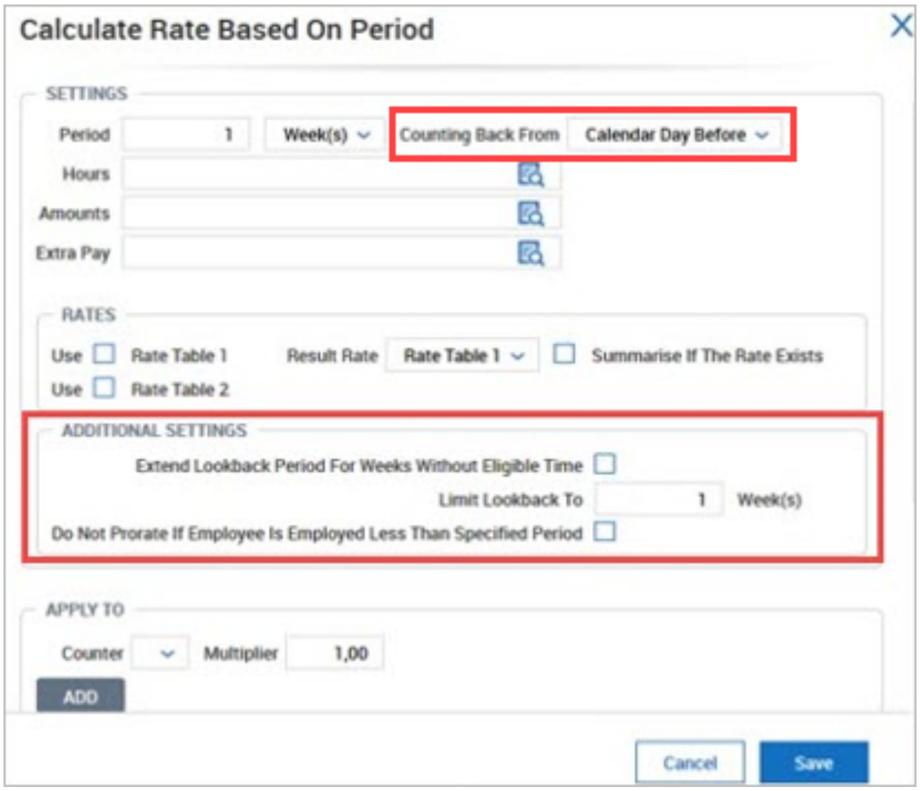
When this occurred, the totals on the *Calc Detail* and *Summary By Day* tabs were different than the totals on the *Calc Summary* tab. This inconsistency occurred because the *Calc Summary* tab ignored the *View Counter Records By* and *View Records By* settings and always used the Record Date. Totals on the

Calc Summary tabs are now calculated according to these settings; if *Source Date* is selected, it will be used in the calculation of totals.

This issue affected reporting but did not affect pay outs to any employees.

New Options in Calculate Rate Based On Period Rule

108099: Options in the Calculate Rate Based On Period rule have been added to provide more control over the time period and lookback used in the calculation of the average rate for a time period. Counter conditions have been added to this rule to allow the rule to be disabled based on the value of a specified counter. In addition, the rule can also be used to calculate holiday overlap with the employee's schedule.



Lookback periods can be defined in Day(s), Week(s), Months(s) and Pay Periods(s).

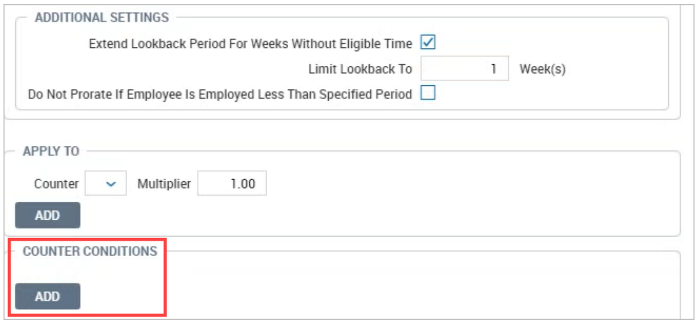
Previously, you could only count back from the Calendar Day Before the start of the lookback period. With this release, additional options have been added, counting back from:

- *Previous Week* (by the week day)
- *Calendar Day Before*
- *Pay Period Before*

Additional settings have been added:

- **Extend Lookback Period For Weeks Without Eligible Time** check box
  - Enabling this allows users to extend the lookback period to the week(s) before the chosen *Counting Back From* week if the week(s) had ineligible time.

- **Limit Lookback To _ Week(s)** field
  - You can set a limit to the number of weeks that the user can set the lookback. The maximum amount is 52 weeks.
- **Do Not Prorate If Employee Is Employed Less Than Specified Period** check box
  - Enabling this allows for the employee to be paid at the base rate and not the extended rate if they work less than the amount of time specified in the Period field. For example, if the Period is set to 12 weeks and the employee works for 6 weeks, instead of prorating the calculations based on the 6 weeks, the employee would be paid the base rate, not the extended rate.

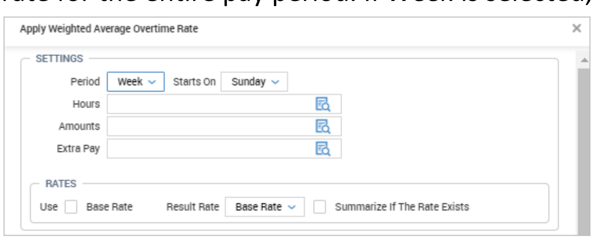


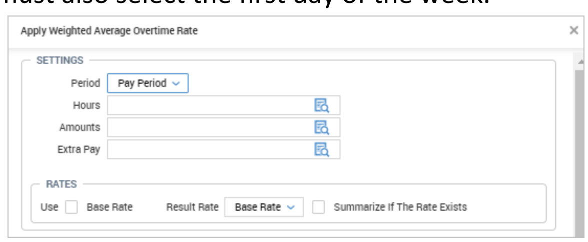
- **Counter Conditions** section – This can also be used to disable the rule based on the value of specific counters. For example, for users in the UK, employees get paid the extra amount for the first 20 occurrences of their vacation time off. This counter allows users to disable the rule if the number of vacation occurrences is tracked in a cumulative counter that is above or equal to 20.

WAOT – Pay Period Option (Pay Calculations 2.0)

108744: The *Apply Weighted Average Overtime Rate* rule in Pay Calculation 2.0 profiles calculates the average rates for employees who work in multiple jobs at different rates. Prior to this release, the average rates could only be used for the calculation of weekly overtime rates in order to support the United States Fair Labor Standard overtime laws. The rule has been enhanced to calculate average rates over the entire pay period to accommodate other scenarios where average rates over a longer period of time are required.

The *Period* option in the *Settings* section of the rule now includes the option to calculate the average rate for the entire pay period. If *Week* is selected, you must also select the first day of the week.





New UI Enhancements

Points Pages and Reports Navigation (Desktop & Mobile)

110874: Points pages and reports have been moved from the talent menu to the Time menu. You can find the pages here:

- *Time > Points > Custom Forms*
- *Time > Points > Balances*
- *Time > Reports > Points > Detailed Points Report*
- *Time > Reports > Points > Points History Report*

Managed Cost Centers

Manager Approval of Time Entries (Mobile)

99600: Prior to this release, managers could not approve or edit time entries for employees working in their managed cost centers from the New Mobile App. With this release, the ability for the MCC manager to approve time entries or edit the entries from the New Mobile App has been added.

10836: From the mobile app, the time entries status can now be reset. A new button *Reject* button is available in the Time Entries report under *TEAM > Time > Timesheets > Time Entries*, which resets the time entry's status to *New*.

Time Entry Approvals (New UI)

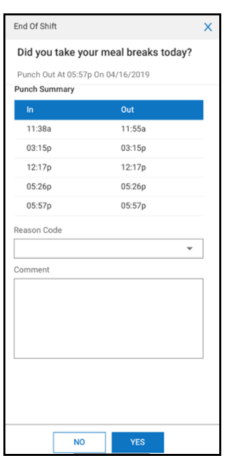
Show My Timesheets Only (Timesheets, All Time Entries Reports)

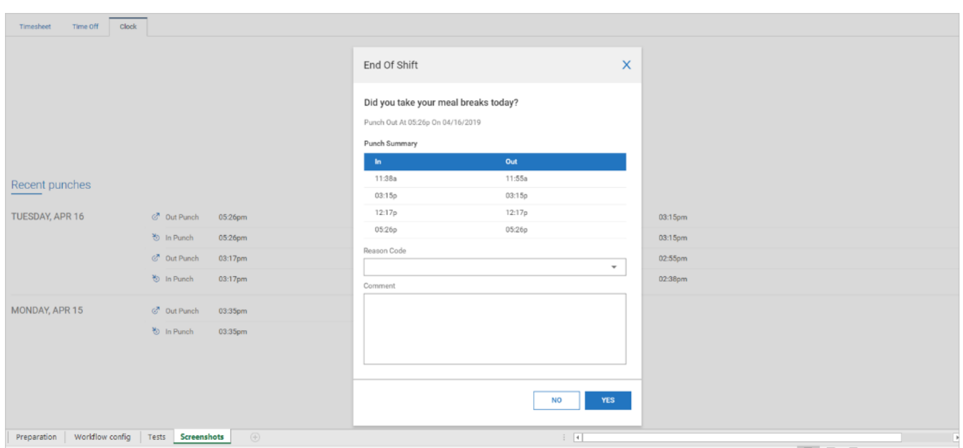
111865: A *My Timesheets Only* checkbox is now available under the *Global* tab within the *Filters* window for New UI users. When this setting is enabled, managers will see time data for their employees in timesheets and time entry reports.

Attestation Prompts (Desktop & Mobile)

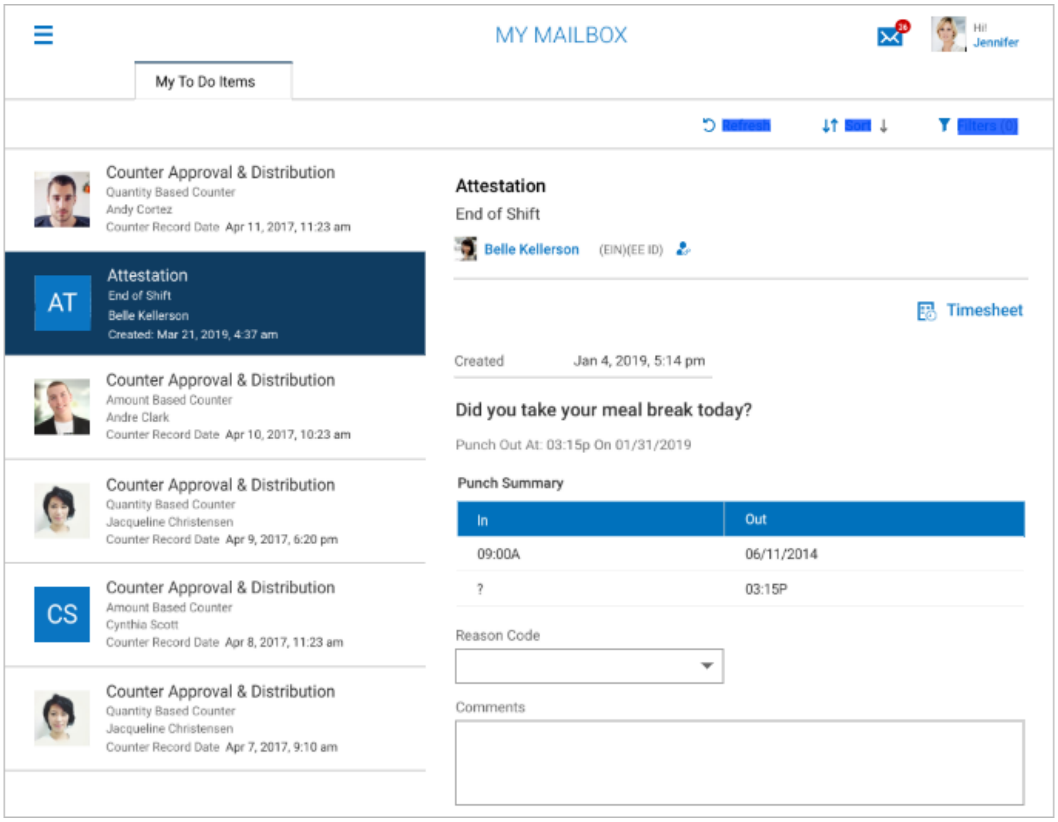
Daily Attestation Prompts

102413: In the New UI, users can attest to whether they have taken mandatory breaks or been injured. Upon logging out the employees can see the, punch type and punch time, provide answers to prompts or cancel the prompt. If configured in the Attestation Profile, comments and reason codes can be entered and the comments can be required.





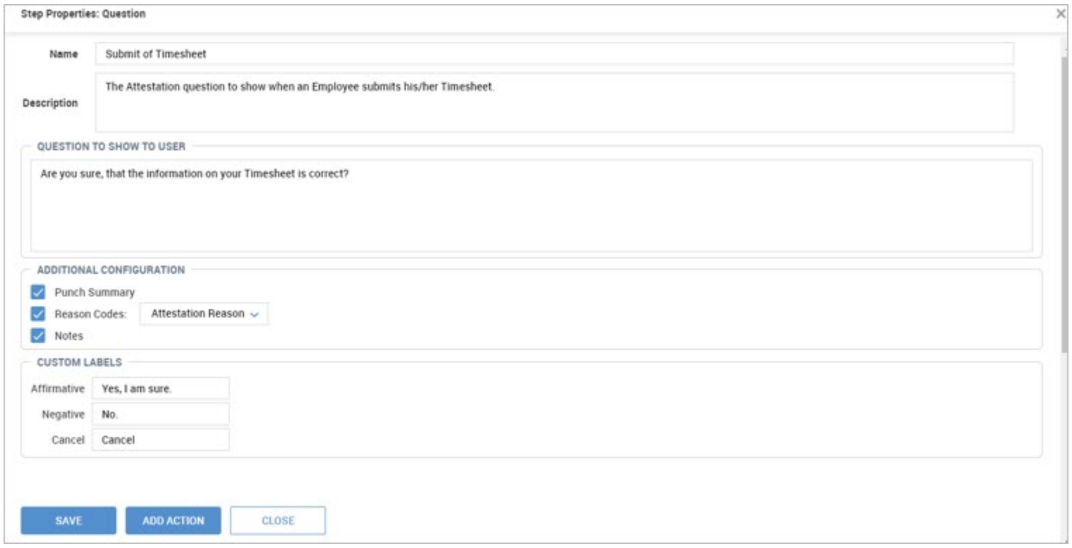
96339: If the employee does not respond to the prompt at the end of the day, it will remain in the employee’s mailbox, on the *My To Do Items* tab, and can be answered at a later time.



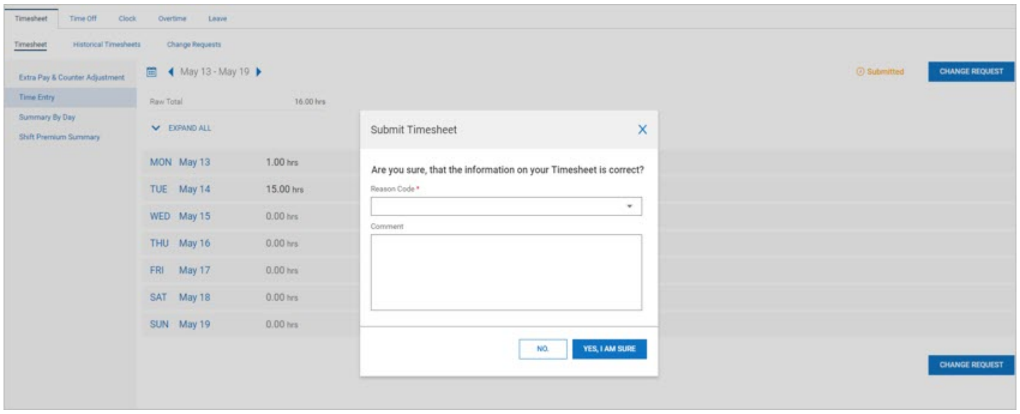
Timesheet Submit Attestation Prompt

102414: Through the *Workflow: Attestation Questionnaire*, users can create a prompt for employees to answer when they are submitting their timesheets.

Users can customize the *Name*, *Description* and *Question To Show To User* fields. There are also *Additional Configuration* and *Custom Labels* options available.



When an employee is ready to submit their timesheet at the end of the pay period, the created prompt will appear on the screen with the question and configuration that the user set up in the workflow.



Accruals - Earned and Taken Per Pay Period for Seattle

71450: Compliance support was added in Accruals and Pay Statements for the Seattle Paid Sick and Safe Time (PSST) state requirements. Employers are required to provide notification on pay statements of PSST hours for every time that wages are paid, including:

- PSST accrued since last notice
- PSST used since last notice

Accrued in Pay Period (*AIPP*) and Taken in Pay Period (*TIPP*) fields have been added to the Printed Pay Statement options.

Net Pay	**0.00**	**0.00**

Timesheet

	Time Off	In	Out	Total
Mon, 04/08/2019				9.00
Tue, 04/09/2019				9.00
Wed, 04/10/2019				9.00
Thu, 04/11/2019				9.00
Fri, 04/12/2019				9.00
Sat, 04/13/2019				7.00
Tue, 04/16/2019	Vacation1			7.70
Wed, 04/17/2019	Sick			6.50
Thu, 04/18/2019	Sick			4.00
Sun, 04/21/2019	Sick			4.00

Accruals 2

		Accrued	Bal.	Available	AIPP	TIPP
Sick	Hrs:	14.00	-0.50	-14.50	0.00	0.00
Vacation1	Hrs:	54.07	46.37	-7.70	0.00	0.00

Resolved Issues

The following issues have been resolved with this release.

Timesheet Change Request Total Time Not Displaying Accurately

109612: In the New UI and the New Mobile App, users can now expect the total calculated time from an approved timesheet change request to display accurately. Before, when employees submitted a timesheet change request and the manager approved the request, the total time did not reflect the correct amount.

Missing Data in Accrual Balances Report When Clicking Hyperlink Under "Hours Taken YTD"

107152: In the New UI, users can always see additional information when they click on a hyperlink that displays time under the *Hours Taken YTD* column within the *Accrual Balances* page. Previously, when users clicked on a hyperlink that displayed an amount of time taken if a Time Off was selected and the Time Off a child of another Time Off category in the Time Off tree, the Taken Hours pop-up would indicate, *No Data to Display*.

Shift Premium Rules Causing Extra Hour to be Added to the Timesheet

108752: Users can now expect Shift Premium rules to configure correctly on an employee's timesheet when overtime and double time overtime rules are configured for punches that are after midnight. Previously, with overtime rules configured for punches between 4:30p-6:00a Monday through Friday, as well as double time overtime configured for punches on Saturday after 12a, an extra hour was incorrectly added to the Regular Counters column. When the timesheet was saved again, the extra hour added to the Regular Counters column disappeared.

Approving One TOR Removes All Hyperlinks

110031: Users can now approve a time off request within the *All Open Time Off Requests* page, and still be able to see and click the hyperlink underneath *Date Requested* for the rest of the time off requests that were requested for the same day off. Previously, when there were multiple requests for time off on the same day and the user approved one of the requests, the hyperlinks for the other time off requests were removed.

Time Entry Notes Being Duplicated on Time Entries Report

113298: Users can now expect added notes to display in the *All Time Entries* report where the notes were originally added. Previously, in the *All Time Entries* report, notes displaying in the *Time Entry Note* column were duplicated in other entries.

Workflow Delegation Does Not Work Past Manager 1

110748: When a user enables a Workflow Delegation to another manager with the same security permissions, the manager would receive a Security Violation message, *Cannot approve one or more time sheets due to security or workflow settings,* after they attempted to approve a request in *My To Do*

Items. Going forward, the Workflow Delegation will work as expected for the manager assigned with these permissions.

Approve Time Off Requests Not Displaying in Managed Group

112018: *Approve Time Off Requests* will now display for the manager within the managed group *Permissions* column. Previously, when *Approve Time Off Requests* in the *Employee Time* widget was enabled for a manager, *Approve Time Off Requests* was not displaying in the *Permissions* column of the managed group.

Timesheet Note Entered on HCMtogo iPhone App is Blocked by Keyboard

115610: When users entered a Timesheet note on the HCMtogo iPhone app using the keyboard, the keyboard would cover the note so that users could not see what they were typing. If the keyboard was removed, users could then see the note. This issue has been fixed so that the keyboard will no longer cover the note section.

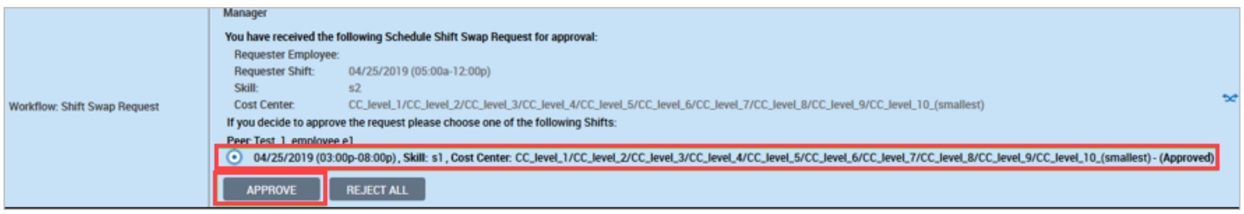
Scheduler

Added Employee Assigned Skills, Scheduled Cost Centers and Managed Scheduled Cost Centers to Reports (Classic UI, New UI & Mobile)

91401: Employee assigned skills (both schedulable and non-schedulable), scheduled cost centers, and managed scheduled cost centers data are now added to the *Employee Information* report page.

ESS Requested Notification to Show Full Cost Center Path (Classic UI, New UI & Mobile)

103979: Workflow requests messages and system notification messages can now display the scheduled Cost Center full path within the notifications.

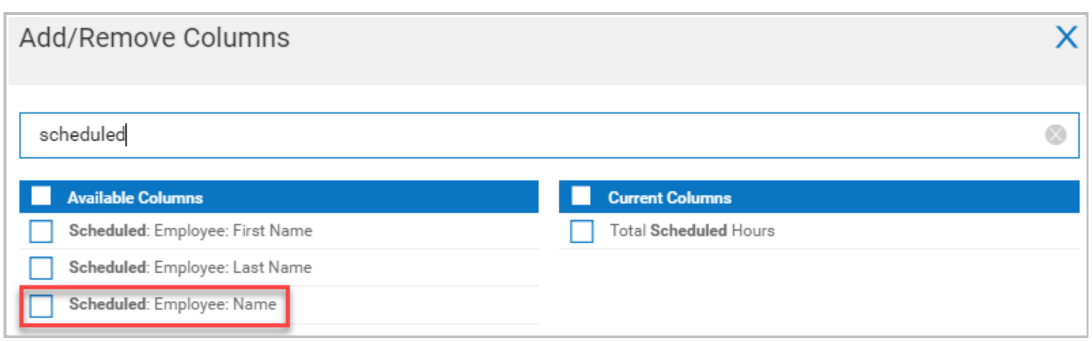


The Cost Center path will include the highest parent down to the level that is assigned to the shift. This will be an option for all Scheduler ESS notifications, which includes:

- Open shift
- Shift swap
- Coverage request

Reports: Scheduled Employee Name Column in Roll Call Report (Classic UI and New UI)

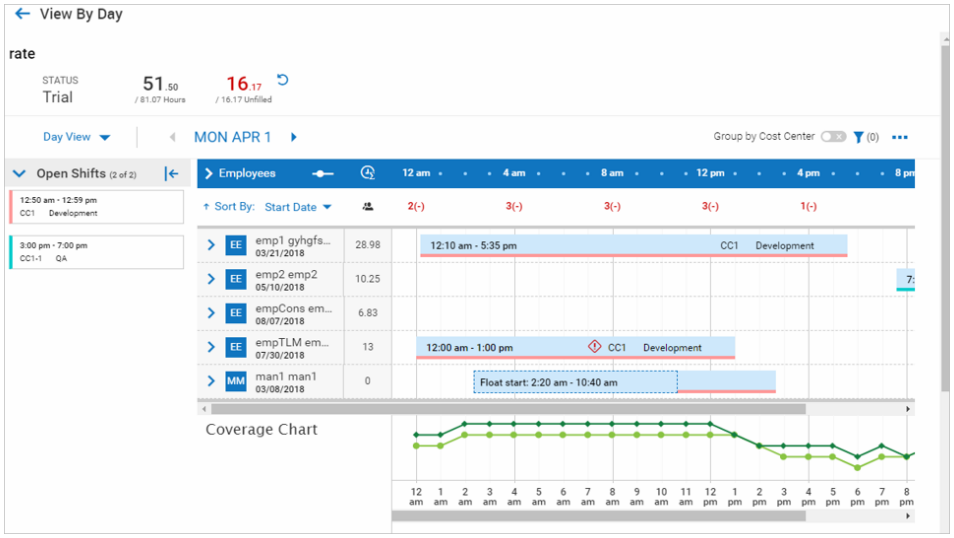
104570: The *Scheduled Employee: Name* column is now available for inclusion in the Roll Call report under *Team > Schedule > Reports > Attendance > Roll Call*. This column displays the name of the employee that is scheduled for the shift that the clocked-in employee is being matched to. When included, the *Scheduled Employee: Name* column is included in exported files.



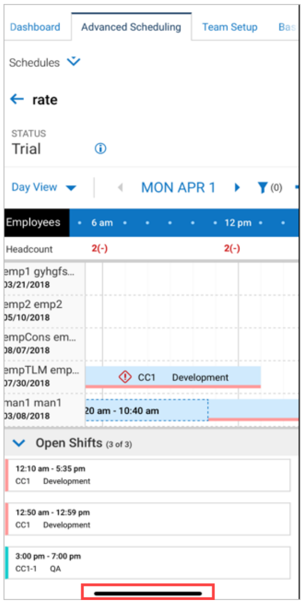
New UI Enhancements

Day View Horizontal Scroll (Desktop & Mobile)

111363: The *View By Day* page will continue to scroll horizontally in the desktop through the entire day schedule. Previously, users were unable to scroll through the schedule at some specific screen widths.



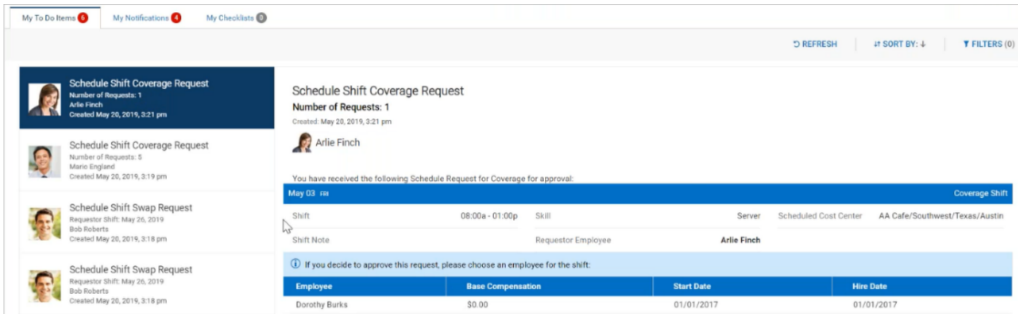
Users can scroll in the New Mobile App to view the entire day schedule.



Manager's My To Do Action Items

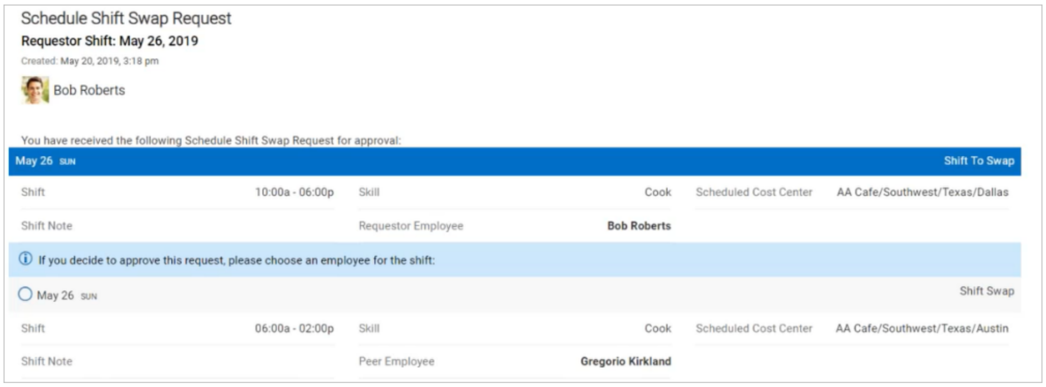
Coverage Request (Mobile)

109920: Managers can approve/decline coverage requests from the manager's *My To Do* action items. Details include the employee who submitted the request, the shift that they are requesting to be covered, and all employees who have been requested and accepted to cover this shift.



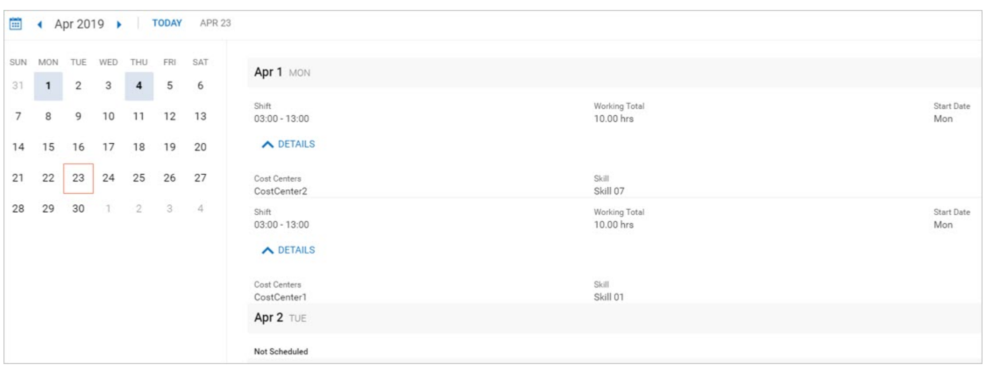
Shift Swap (Mobile)

109919: Managers can approve/decline shift swap requests from the manager's *My To Do* action items.



New First Screen Available: My Schedule (Desktop)

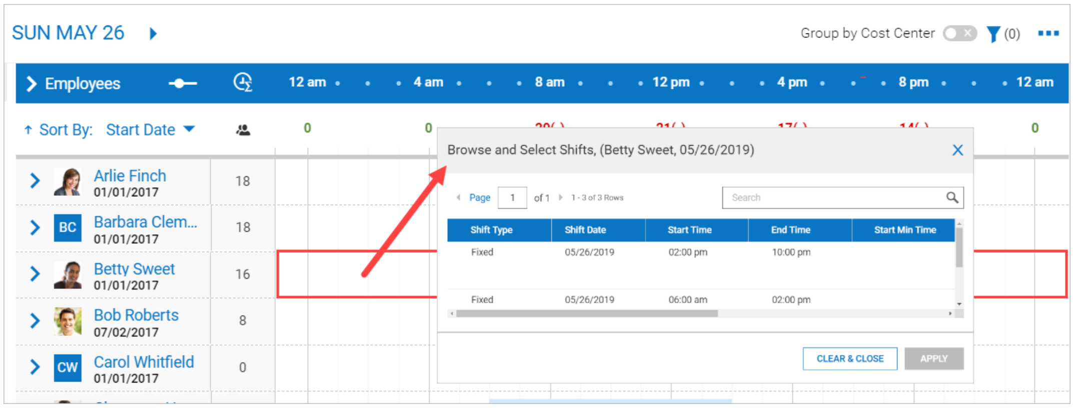
111524: Users can now set an employee's schedule as their first screen. Within the employee's *Security Profile*, click the search *List Available Screens* icon next to the *First Screen* field and select *Employee: My Schedule.* The employee's schedule will then display on their first page screen.



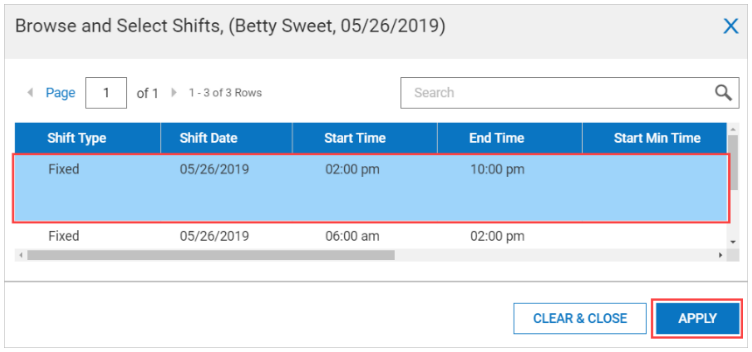
Schedule Day View and Week View

Clicking Employee Row to Assign Shifts (Desktop)

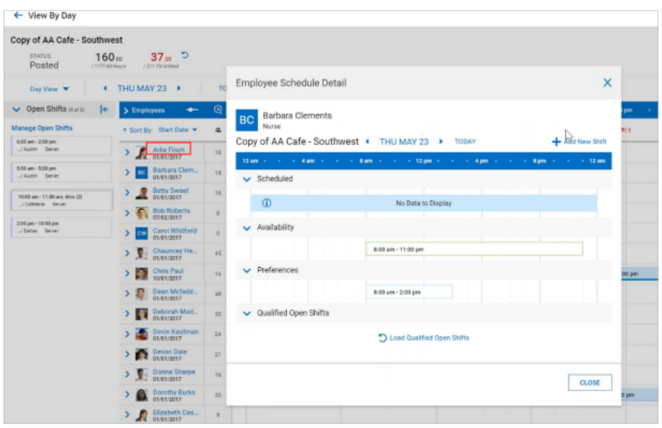
97803: Within the Day View and Week View, managers can now click on an employee's row within the schedule grid for the day, and a pop-up will display with qualified open shifts for that employee.



The manager can choose a shift and click *Apply*.

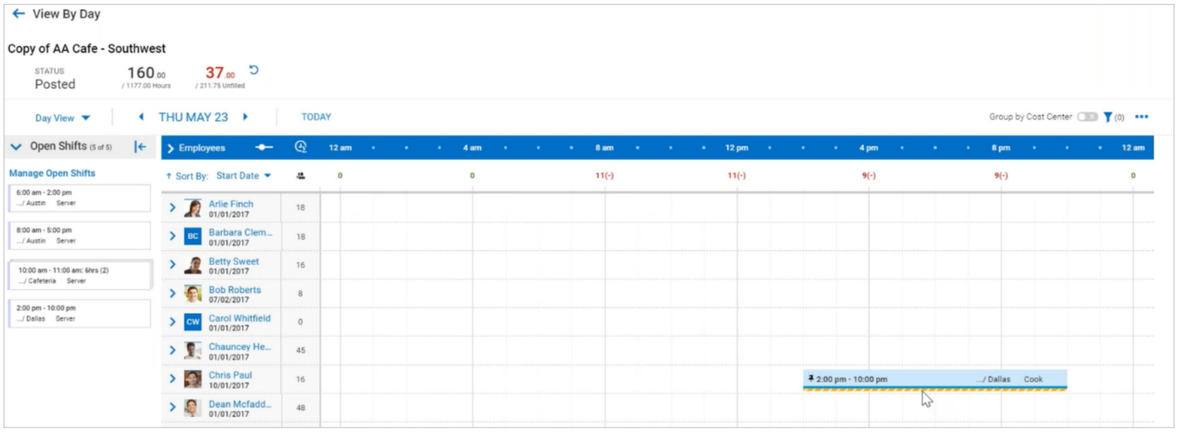


Managers can also click on the employee's name in the Day View, and an Employee Schedule Detail pop-up window will display the employee's scheduled shifts, availability, preferences, and their qualified open shifts. New shifts can be added from the pop-up as well.



Schedule Change Request (Day View and Week View) (Desktop)

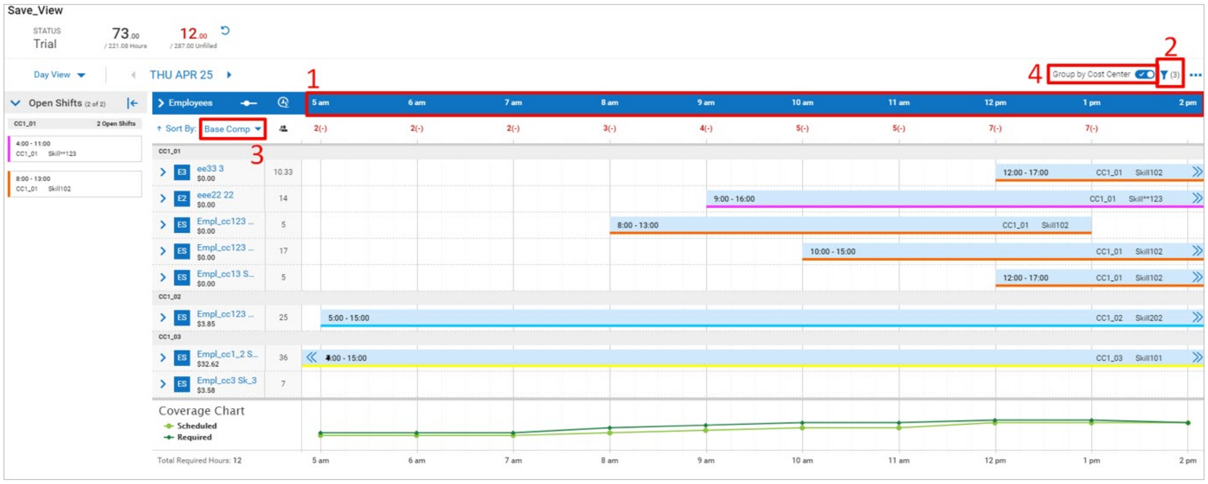
95745: On posted schedules that are configured to require approval from employees for any changes to the schedule, the change notification will be sent to the employee for their approval, and an orange dotted line will display underneath the pending shift until it is approved by the employee. Once approved, the dotted line will change to a solid blue line.



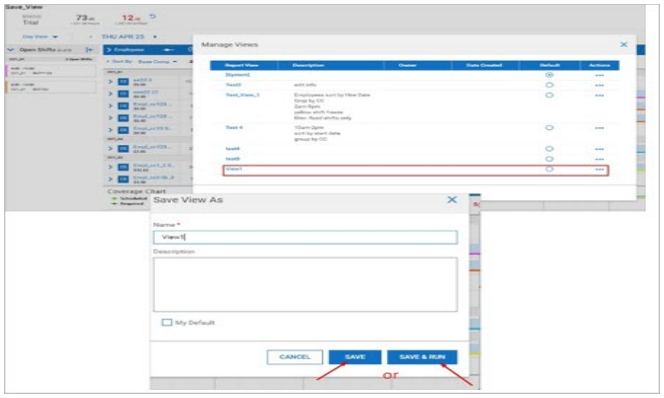
Saving Scheduler Day and Week View Settings (Desktop)

97937: Managers can now save views after adjusting the default view. The following can be saved in the view:

- Timeframe adjustments (1)
- Applied filters (2)
- Sorting (3)
- Grouping (4)



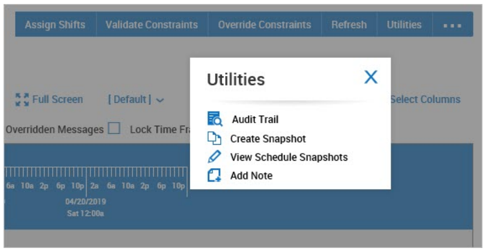
Users can manage the View settings within *Manage Views* and change the default View settings.



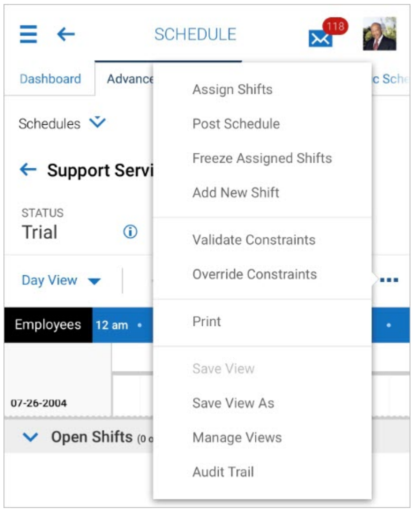
Audit Trail Now Accessible from Day and Week Views (Desktop & Mobile)

104244: Users can now access the *Audit Trail* report from the Week and Day View.

On the Desktop, click the *Utilities* button to access the *Audit Trail* report.



On the Mobile App, press the triple-dot icon.



Schedule Page Remains in Place After Save (Desktop & Mobile)

109845: After editing a shift and saving the changes, the Week View page will remain in the same place. This is helpful to managers working with many employees. In the past, after the changes were saved, the page reverted to the top, and managers had to scroll down to continue editing where they left off.

Benefits and ACA

ACA: ACA Timeline Recalculate (Classic UI & New UI)

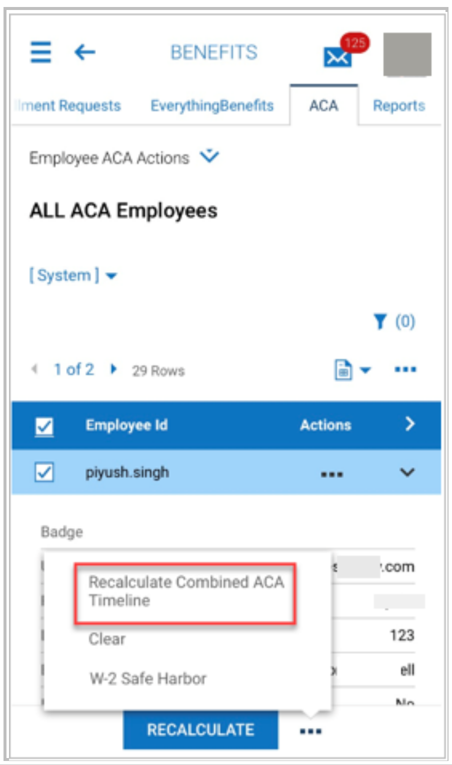
107979: For the system to properly recognize breaks in service for ACA calculations, the ACA Timeline should be recalculated between each change in status. As such, the ACA timeline is now recalculated automatically when a Re-Hired Date is entered in the ACA status widget.

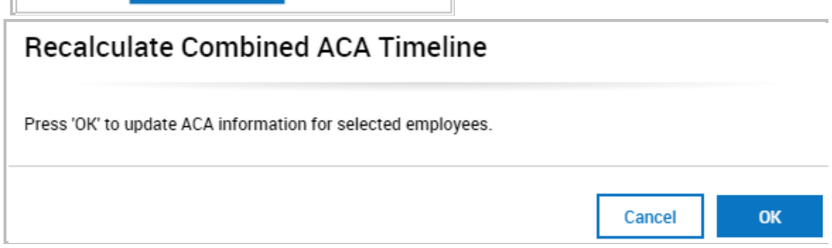
110876: Additionally, the ACA timeline is now recalculated automatically when a Termination Date is entered in the ACA status widget.

NOTE: If the Re-Hired Date or Termination Date is manually removed, the ACA Timeline must be manually recalculated.

ACA: Recalculate or Clear ACA Timeline (Desktop & Mobile)

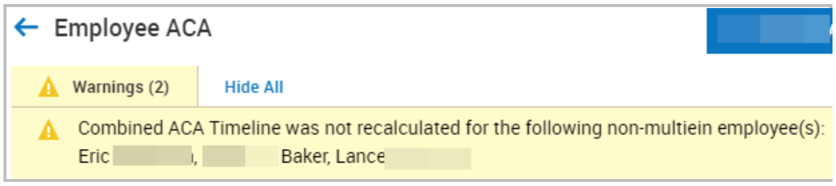
106410: Users with the appropriate security permissions to the *ACA (Affordable Care Act) Timeline* can now recalculate the ACA Timeline for one or more employees in a Multi-EIN company from Employee ACA Actions (*Team > Benefits > ACA > Employee ACA Actions*) using the *Recalculate Combined ACA Timeline option.*



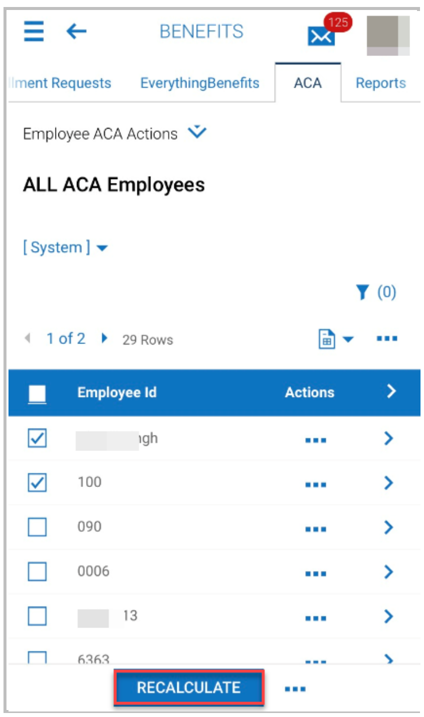


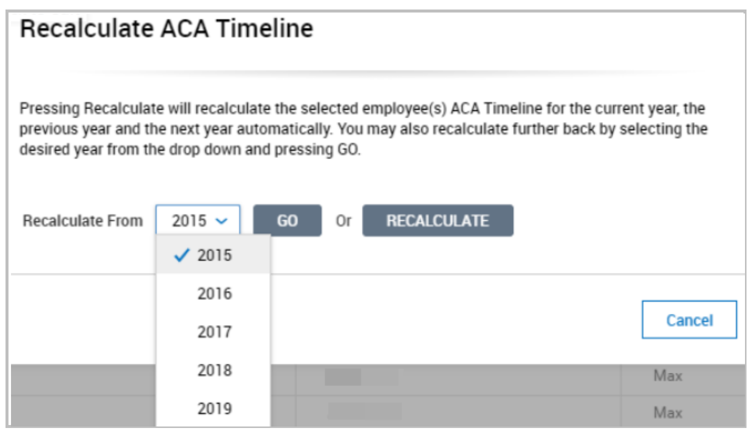
Actions such as *Recalculate Combined ACA Timeline* are disabled until at least one employee is selected via a checkbox in the report screen. Users should select one or more checkboxes for the listed employees and then click the *Recalculate Combined ACA Timeline* action.

For records not recalculated, users receive a warning that the *Combined ACA Timeline was not recalculated for the following non-multiein employee(s)… .*

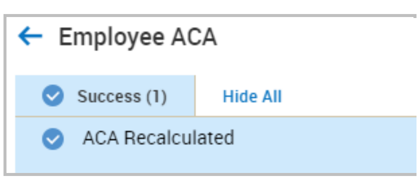


106407: Users with View/Edit security permissions for the *ACA (Affordable Care Act) Timeline* can also recalculate the ACA Timeline for one or more employees for one year or across multiple years from the Employee ACA Actions using the *Recalculate* option.

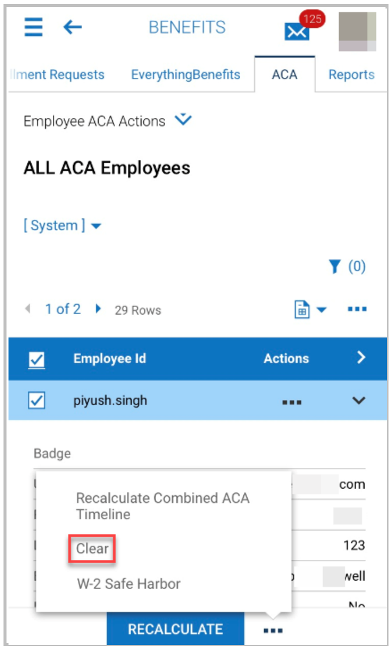


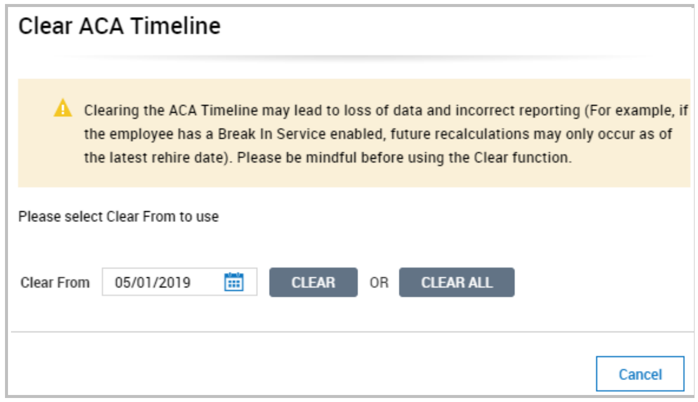


Once the Recalculate or Go action processes the employee's ACA Timeline, a success message appears.



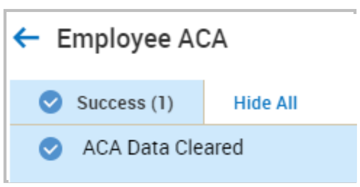
106680: Users with View/Edit security permissions for the *ACA (Affordable Care Act) Timeline* can also clear ACA Timeline data for one or more employees from a previous date to today from the Employee ACA Actions using the *Clear* option.





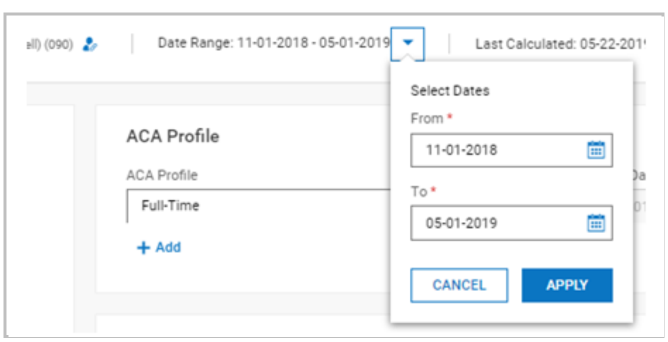
The *Clear From* date defaults to the current month.

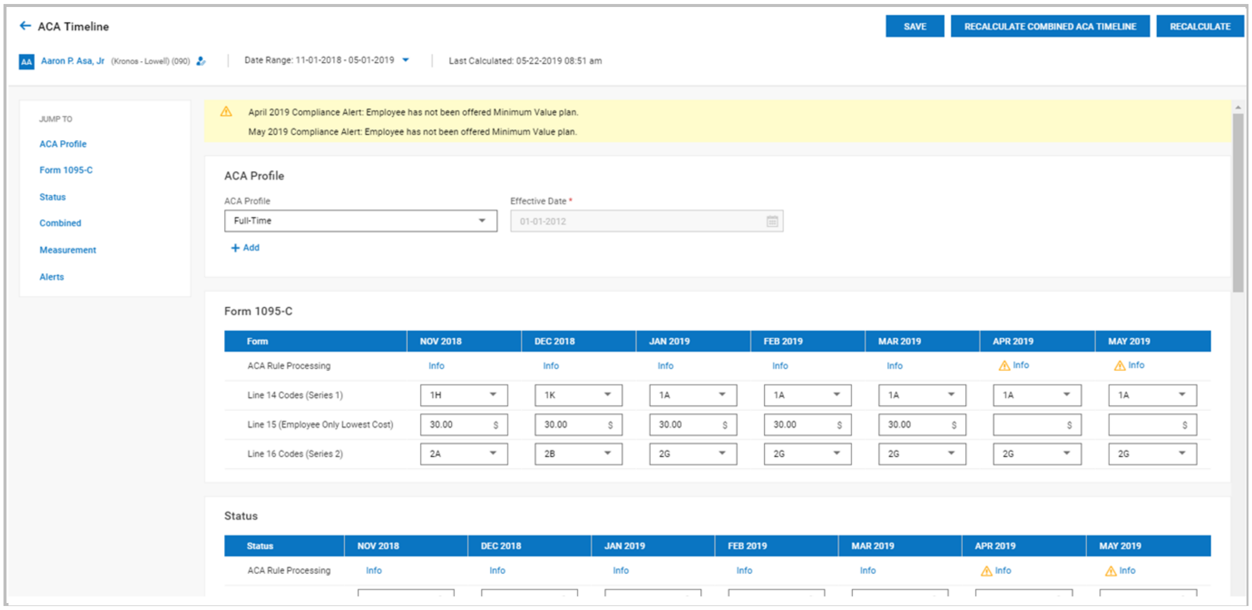
Upon clicking *Clear*, the employee's ACA Timeline data is cleared from the set date to the current month or to the last recalculated month (which could be a future date), and a success message appears.



ACA: View or Edit ACA History (Desktop & Mobile)

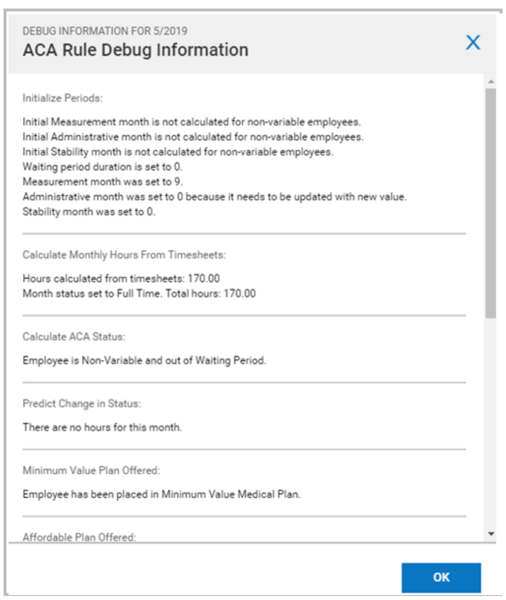
112831: Users with View/Edit security permissions for the *ACA (Affordable Care Act) Timeline* can view and edit the ACA Timeline data for an employee from several ACA report screens. Once the View ACA History action is clicked, a new screen appears with the employee's ACA Timeline data, and users can review or edit this data.





If an employee is tied to a compliance alert, an alert icon will appear to the left of the Info link for the one or more months in which a compliance alert was triggered. Each compliance alert is listed at the top of the page stating which month is affected.

By clicking the Info link for each month, an additional dialog box opens and displays the ACA rules tied to the line values. The ACA Rule calculation information is split into categories such as Initialize Periods, Calculate Monthly Hours from Payroll, Monthly Hours Imported or Manually Added, Calculate ACA Status, Affordable Plan Offered, Minimum Value Plan Offered, etc.

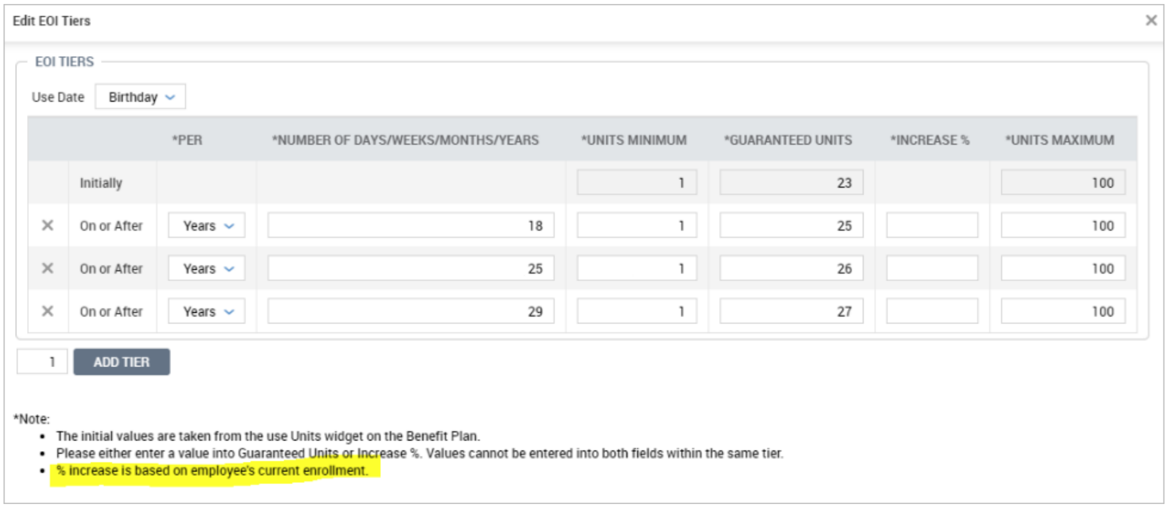


The order of categories and information is based on the order of calculation from the rules in the assigned ACA Profile.

38745 (Epic): Listed below are enhancements made to the Evidence Of Insurability (EOI) options within benefit plans. These enhancements are a result of Ideas from customer input.

EOI Tiers Based on Current Employee Enrollment (Classic UI & New UI)

91694 & 91144: Within benefit plans requiring Evidence Of Insurability (EOI), the percentage increases that are allowed without EOI is based on the employee's current enrollment. This was not clearly stated in the EOI Tiers widget and caused confusion. To help users understand, we have added a new note to explain this. The note states: *% increase is based on employee's current enrollment*.



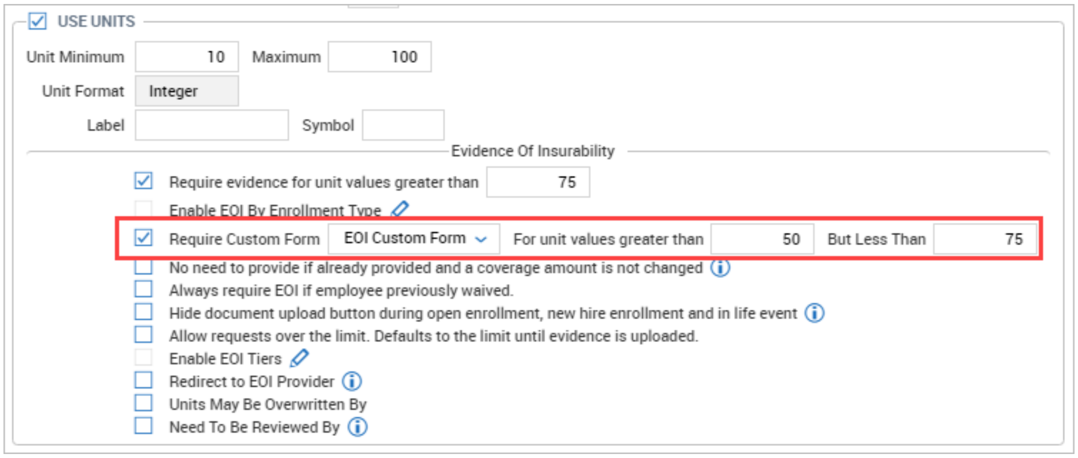
Additionally, original EOI tiers options were limited to yearly amounts. We have now added the options of Days, Weeks and Months.

EOI – Increments For EOI Ties Levels to Custom Form (Classic UI & New UI)

4202: For employees enrolling in benefit plans, there may be different levels of EOI that will need to be set within the plan. Coverage up to a certain level may not require EOI, but once the coverage reaches a specified level, EOI may be required. And once the coverage reaches a further level more extensive EOI may be required.

For example, with Supplemental Life Insurance, employees may not have to provide EOI if they opt for a coverage level that is one times their annual salary, yet if they opt for three times their annual salary they may need to fill out a questionnaire before the coverage is approved. Further still, if they opt for five times their annual salary they may need to provide a form that has information from their physician before the coverage is approved.

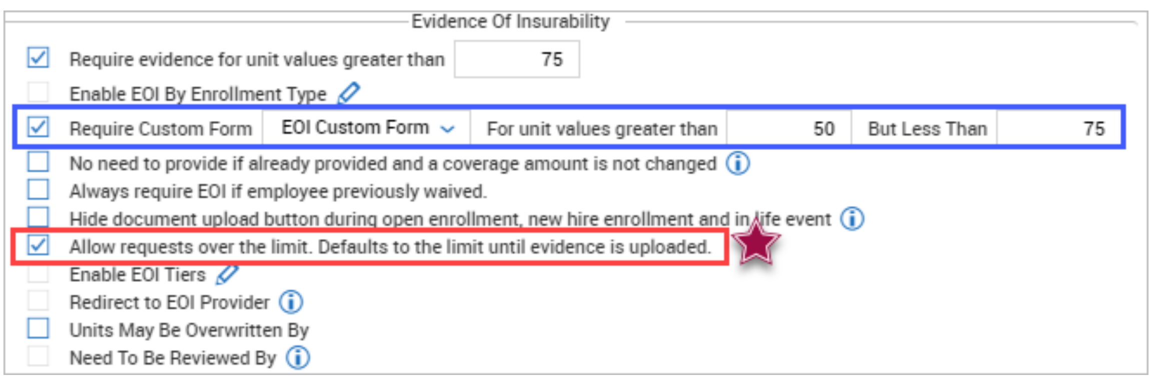
To accommodate these scenarios, we can now tie the configured EOI units to an EOI custom form. We have added a new EOI setting named *Require Custom Form*. This setting allows you to select the custom form, and then set a threshold for the unit values.



- Employees choosing a higher level of coverage that require an EOI custom form will see a message of the requirements and a link will be available. When clicking the link, they will be required to complete and submit the appropriate form.

- If the employee does not fill out and submit the custom form, (only allowed if the option *Allow requests over the limit. Defaults to the limit until evidence is uploaded* is enabled in the EOI benefit plan configuration) the system will show the requested amount as pending alongside the guaranteed amount just as it currently does when an EOI document is not uploaded and this setting is enabled.

  For example, the *Require Custom Form* setting is set for unit values greater than 50 but less than 75, and the *Allow requests over the limit* setting is checked. An employee selects 60 units but does not complete and submit the required form. The 60 units will display as pending and the selection will default to 50 units until the required form is submitted. Once the required form is submitted, the 60 units will show as the primary selection and will no longer display in a pending state.



- When managers assign a benefit plan to an employee either manually or through an HR Action and select units that meet the custom form requirements, a warning message requiring a custom form will display.

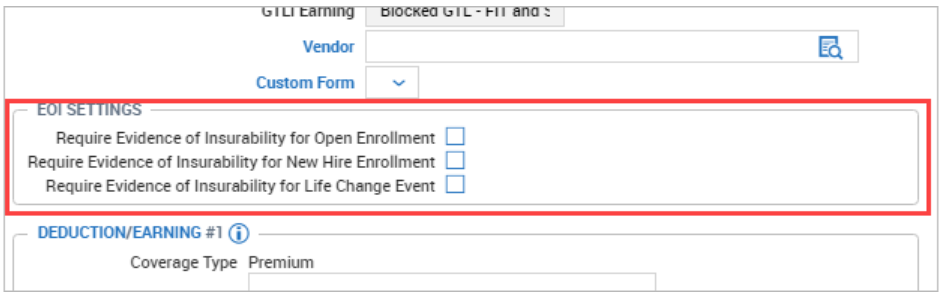
- The custom form feature is intended for use with Employee Self Service benefits enrollment. Custom forms are not able to be submitted on the employee's behalf by a manager so there could be issues with custom form EOI when the plan is manually added or imported.

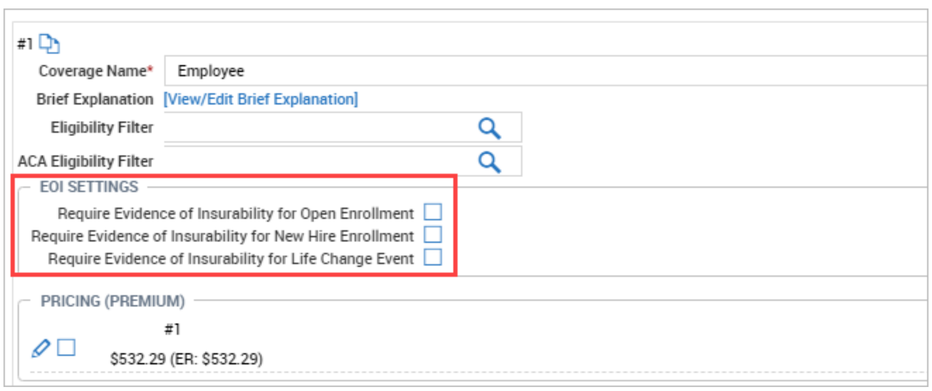
EOI For Benefit Plans w/o Units (Classic UI & New UI)

5488 & 109978: Evidence Of Insurability (EOI) is now available for benefit plans where Units are not enabled. For these types of plans, a new ***EOI Settings*** section will be available in the *Benefit Plan* configuration widget, and within the *Coverage Levels*.

The options available here will require EOI during open enrollment, new hire enrollment, or a life change event depending on the settings enabled for each.

- If any of the boxes are checked on a coverage level(s), the plan should require an EOI upload from an employee if they are enrolling in that coverage level(s) in using the enrollment type specified on the checkbox(es).
- If no boxes are checked on a coverage level, but there are boxes checked at the plan level, the boxes checked at the plan level will dictate EOI requirements for that coverage level.
- If there are boxes checked at both the plan and the coverage level, the boxes on the coverage level will dictate the EOI requirements for that coverage level - NOT the plan level checkboxes.





EOI Notifications

Notification for EOI Custom Form (Classic UI & New UI)

110376: When an EOI custom form is required during benefits enrollment, you can now create a notification to remind employees to complete the form. Within the notification, you can set how many days after the enrollment is submitted the email reminder will be sent, which benefit plan(s) the reminder applies to and set the recipients. A customized message can be created with available system tags and customized messages. This is available in both the Classic UI and New UI (Mobile and Desktop.)

The *EOI Custom Form Needed* notification is configured under *Company Settings > Global Setup > Notifications* and is under the *Benefits* category.

Notifications for Pending EOI (Classic UI & New UI)

35943: When a benefit plan requires Evidence Of Insurability (EOI) before employees can be approved for that benefit, the status can go to pending until the proper documentation is submitted. To prevent the process from stalling, we have now added notifications that will be sent to remind users of the EOI requirement.

The notifications must be configured under *Company Settings > Global Setup > Notifications*. In the *Benefits* category there are three EOI notifications available.

- **EOI Needed** - To be sent to the employee if they have not uploaded the required document yet.
- **EOI Needs Approval** - To be sent to the EOI approver if a document has been reviewed but has not yet been approved (as a cue to follow up with the benefits provider.)
- **EOI Needs Review** - To be sent to the EOI approver if a document that has been submitted is not showing as reviewed.

Within the notifications, you can set when the notification will be sent, who will receive the notification, and as with other notifications, you can define a customized message to the recipients. The email notification will be sent following the submission of the employee's enrollment. Within the notification, you can determine which EOI benefit plans are included. You can select all EOI benefit plans, or a specific plan.

	EOI Custom Form Needed	Send email when employee has not yet completed required EOI custom form for a benefit plan
	EOI Needed	Send email when employee has not yet provided required EOI for a benefit plan
	EOI Needs Approval	Send email when EOI submitted by employee has not been approved by designated person(s)
	EOI Needs Review	Send email when EOI submitted by employee has not been reviewed by designated person(s)

EOI Options By Enrollment Type (Classic UI & New UI)

93667: Historically, HR administrators have been able to set EOI rules for a benefit plan and those rules were applied to all enrollment types for the employee. However, there are cases where the EOI rules could vary by enrollment type.

For example, an employee opts to waive voluntary life during their new hire enrollment, but then choses to add it either through a life change event or their next open enrollment. Many plans require employees to submit EOI for election amounts that can be much lower than the guaranteed amount initially offered during new hire enrollment.

To account for these situations, we have added EOI enrollment types. A new *Enable EOI By Enrollment Type* checkbox is available in the *Evidence Of Insurability* section of the benefit plans. When the box is checked, and the edit icon clicked, you will be able to set units for each enrollment type listed; *New Hire Enrollment*, *Life Change Events*, and *Open Enrollment*. These settings are only valid for employees making selections via Employee Self Service (ESS).

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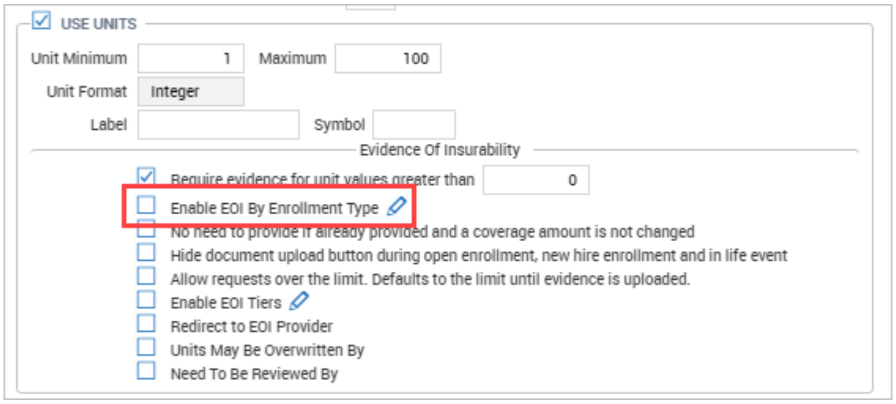
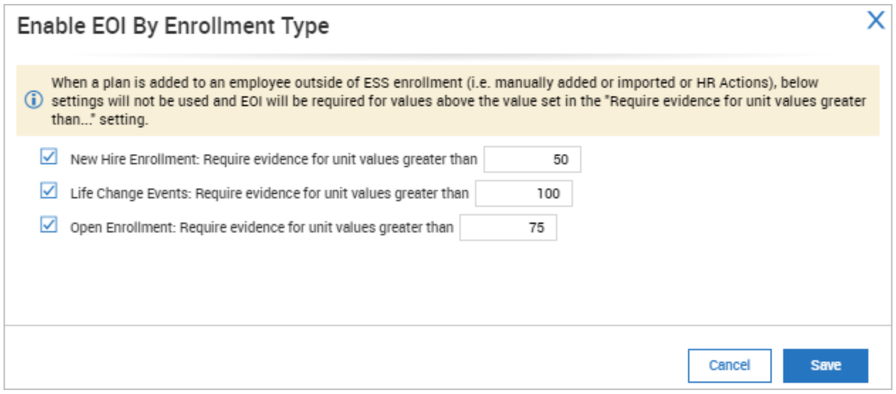
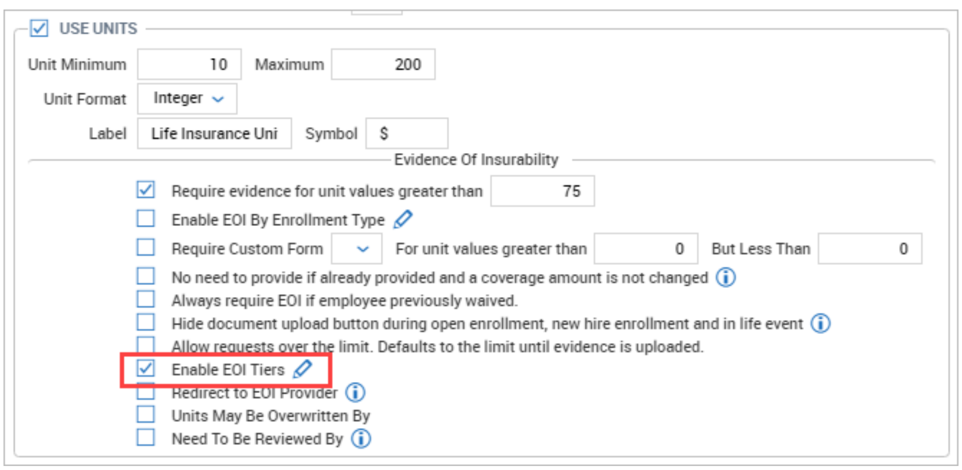




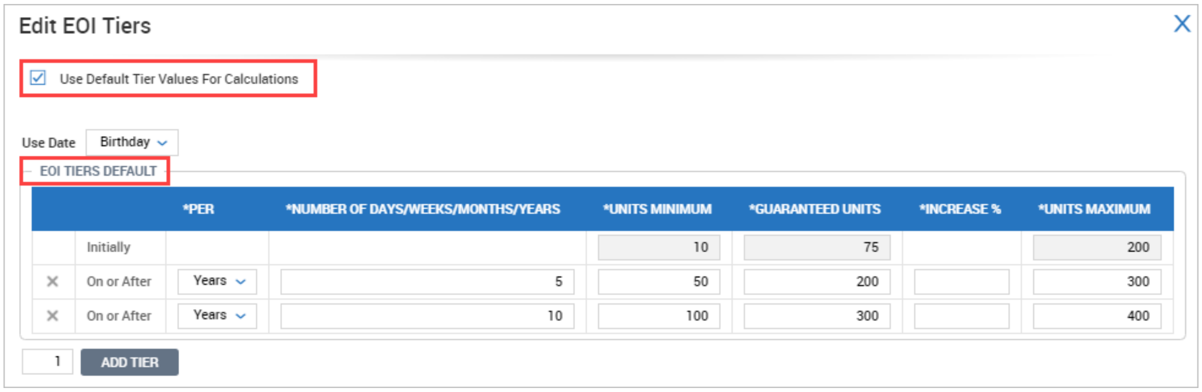
EOI Options By Enrollment Type for EOI Tiers (Classic UI & New UI)

108128: Just as EOI can be enabled by enrollment type (as shown in 93667), we have also added this ability to EOI tiers. By checking the *Enable EOI Tiers* checkbox and clicking the edit icon, you can add, remove and adjust the tiers by enrollment type.

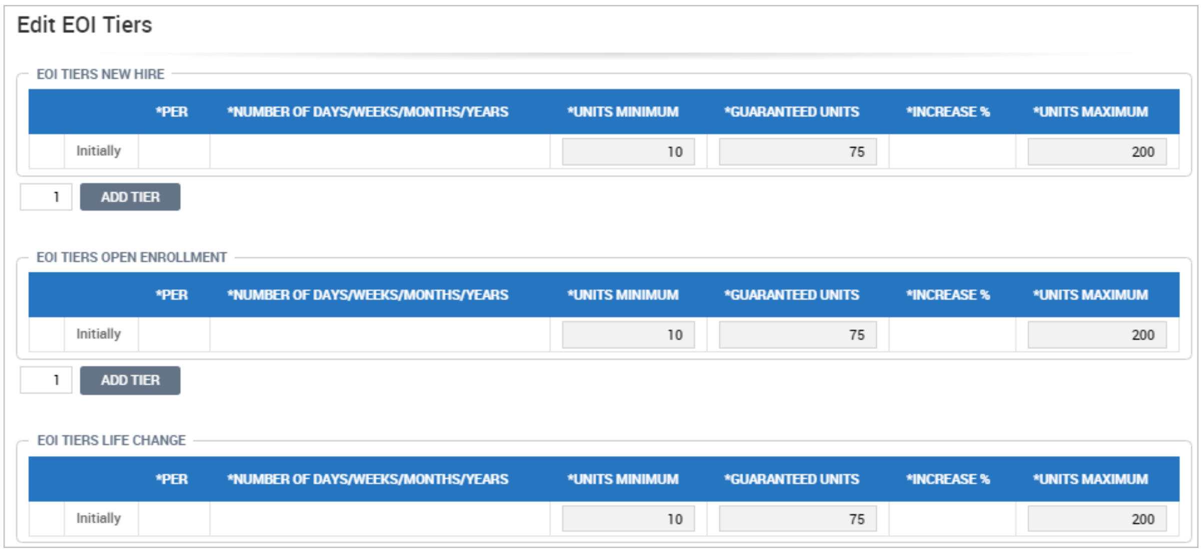


The EOI tiers edit page defaults to using the standard tier values for calculations. By unchecking the *Use Default Tier Values For Calculations* setting, the enrollment type tiers will become available. The default section will still be available and can be used after unchecking the setting.

The *Use Date* selected will apply to all the tier tables.



Options for adding tiers are available for enrollment types New Hire, Open Enrollment, and Life Change.

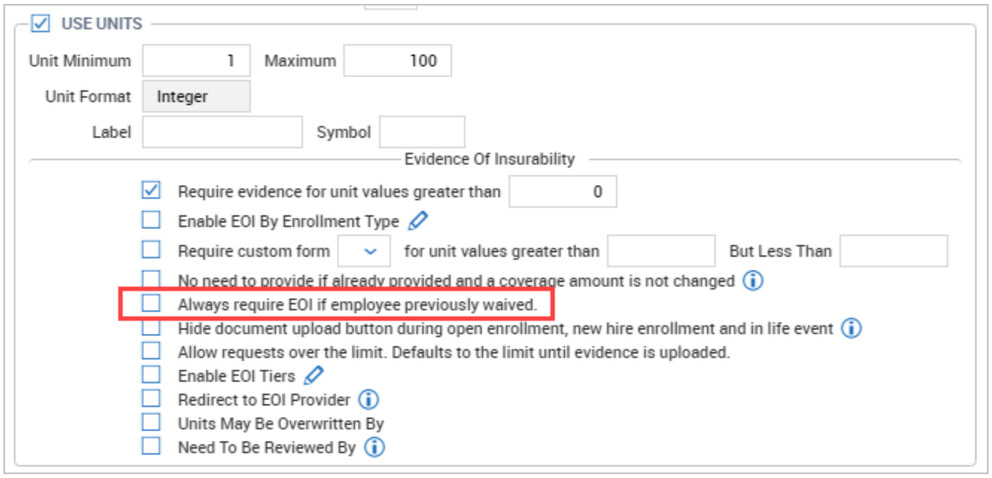


EOI – Always Require Option Added (Classic UI & New UI)

34194: A new ***Always require EOI if employee previously waived*** setting has been added to the list of options in the *Evidence Of Insurability* section of benefit plans. This setting defines the relationship between enrollment in a previously waived plan and will ensure that EOI will always be required for previously waived plans.

For example, if an employee is going through new hire enrollment and waives coverage in a plan with EOI enabled, and then later during open enrollment, the employee enrolls in that coverage but for an amount under the existing EOI provision, the employee may need to provide EOI because they initially waived the coverage but is now enrolling.

Here is another example with the new setting checked: An employee waives enrollment in supplemental life insurance when hired. During the next open enrollment period, the employee enrolls in supplemental life for $5,000. This falls outside the provisions for the plan which states if coverage is increased by $10,000 during open enrollment, an EOI form must be provided. Even though the $5,000 is below the threshold for providing an EOI form, the coverage was previously waived, the employee is now enrolling, so EOI must be provided.



Self Service Enrollment Option to Re-Select All Current Benefit Plans

69230: For employees going through benefits enrollment, a new option is available that will allow employees to select all their current plans for the new enrollment period and allow them to bypass the reviewing and re-selection process.

A new tab titled, *All Current Benefit Enrollments*, will now display current benefit selections for the employees. Within this tab, a new *Select All Current Plans For The New Enrollment Period* checkbox is available. When checked, all other selections on the remaining tabs will be grayed out and employees will be re-enrolled in their current plans. They can then submit their selections without making any further edits.

This checkbox is useful for companies who have not changed their benefit plans and for employees who do not wish to make any changes to their coverage.

If any of the employee's current plan elections have been removed from the new enrollment period, i.e., your company no longer offers the plan or coverage level the employee is currently enrolled in, the checkbox on the new tab will be grayed out and a message will be displayed on the tab stating: *This option has been disabled due to changes in your employer's benefit offerings for this enrollment period*. The employee will then need to make new selections on the other tabs.

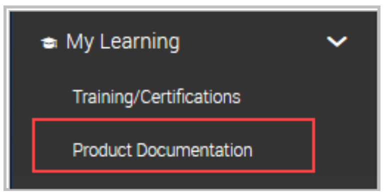
If an employee does make changes to their current enrollment selections and then later decides to check the new setting to stay enrolled in their current plans, a warning message stating *Warning: Checking this box will delete all selections made during this enrollment. Do you want to proceed?* will display. If they proceed, the new checkbox will override their edits and re-enroll them in their current plans.

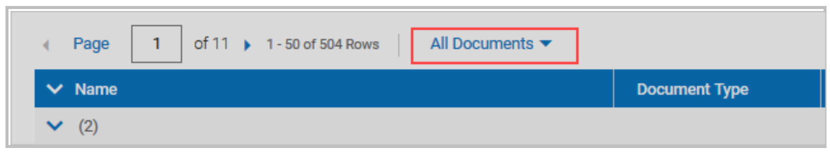
Human Resources

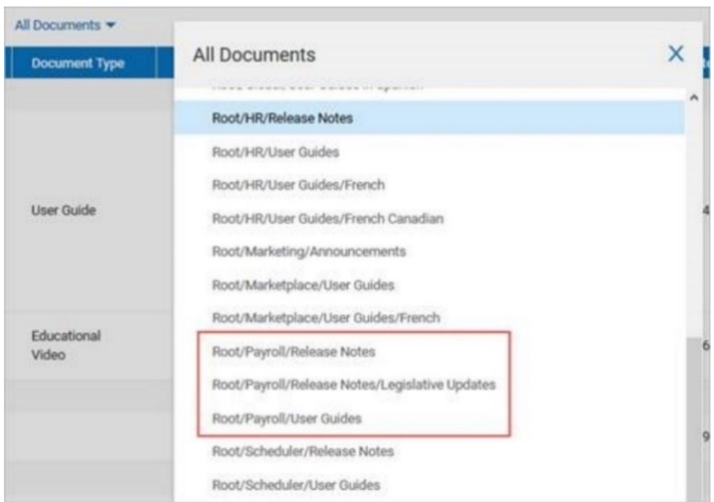
Downloading Documents in the New UI

Product documentation, including user guides and release notes, is a key piece of learning, and as such, is now grouped with training documents under *My Info > My Learning > Product Documentation*. This change affects company employees who use the New UI. Company employees who use the Classic UI will continue to download documents from *Our Company > Service Provider Documents*.

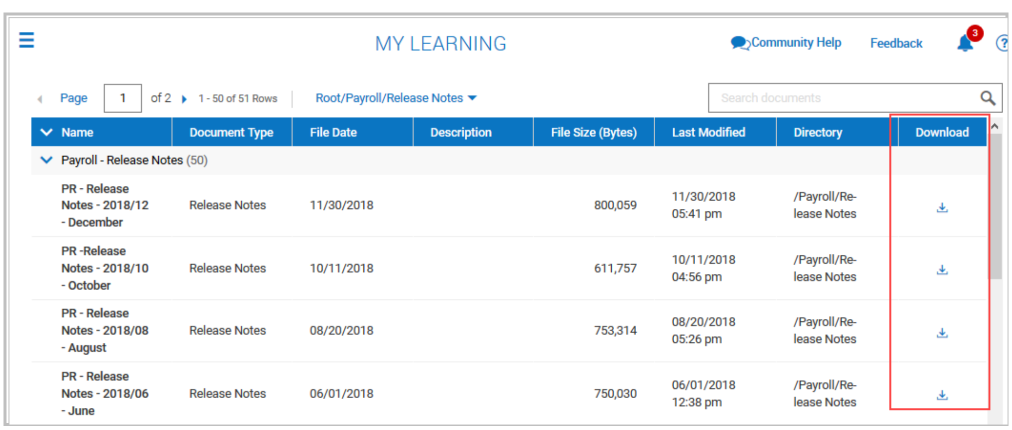
On the *My Learning* page, the *All Documents* drop-down allows you to select a document from the appropriate group for download. For example, payroll users may want to narrow the list to Release Notes, Legislative Updates or User Guides.







Once selected, a list is displayed showing all available documents, and the documents can be downloaded by clicking the *Download* icon on the right.

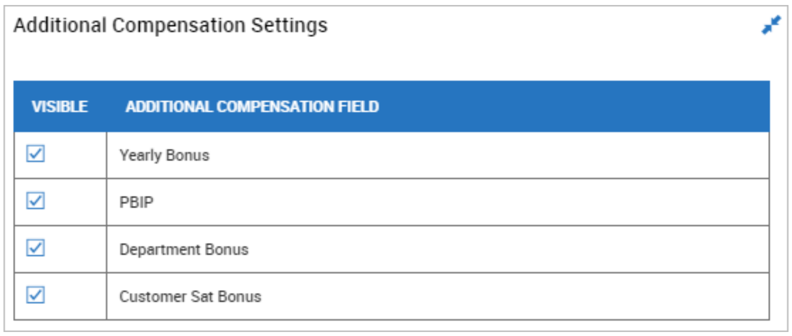


NOTE: For partners, documents are still available in both the New UI and Classic UI from *Distribution > Tools > Download Documents*.

Additional Compensation

Additional Compensation Settings Widget Added to Employee Account Mass Edit (Classic UI)

98968: A new ***Additional Compensation Settings*** widget is available to be added to the mass edit screen when updating employee accounts. This widget will allow managers and administrators the ability to exclude or include certain types of compensation. For example, if employees 1-5 should not have the *Customer Sat Bonus*, you can select employees 1-5 in the mass edit page and de-select that compensation type and run the update. Having this ability prevents users from having to manually update each affected employee record.



Audit Information Added to Additional Compensation HR Action Item (Classic UI & New UI)

98392: When building an HR Action containing the Additional Compensation HR Action item, once the action is submitted and users receive a To Do Item, those users will now have audit information available via a hyperlink.

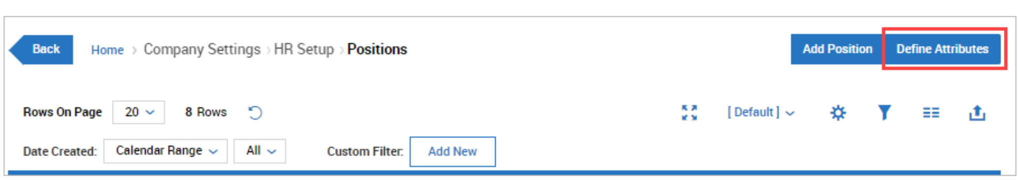
Position Management

Custom Position Attributes (Classic UI & New UI)

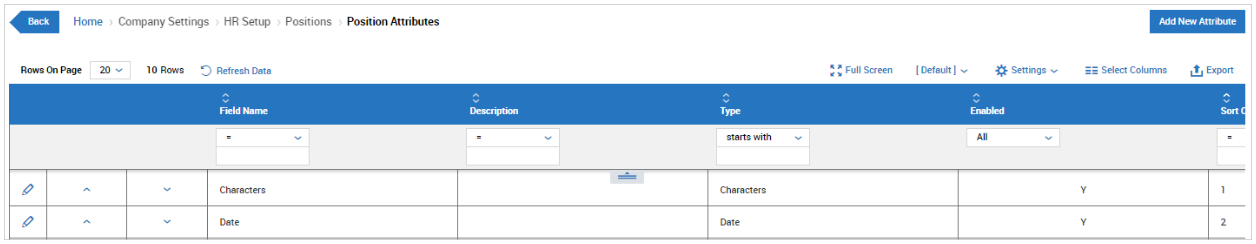
99858 (EPIC): We have added custom fields functionality to positions. This will allow system administrators and managers the ability to define company specific custom fields to record respective types of data, maintain their history and retrieve the custom fields data in position reports.

A new *Define Attributes* button has been added to the *Positions* page, located under *Company Settings > HR Setup > Positions*. When clicking the button, you will be directed to a screen that works in a similar manner to the *Jobs* page. From this page, you can add a new attribute by clicking the *Add New Attribute* button. The new attributes can be configured and will appear on all the positions, whether new or existing.

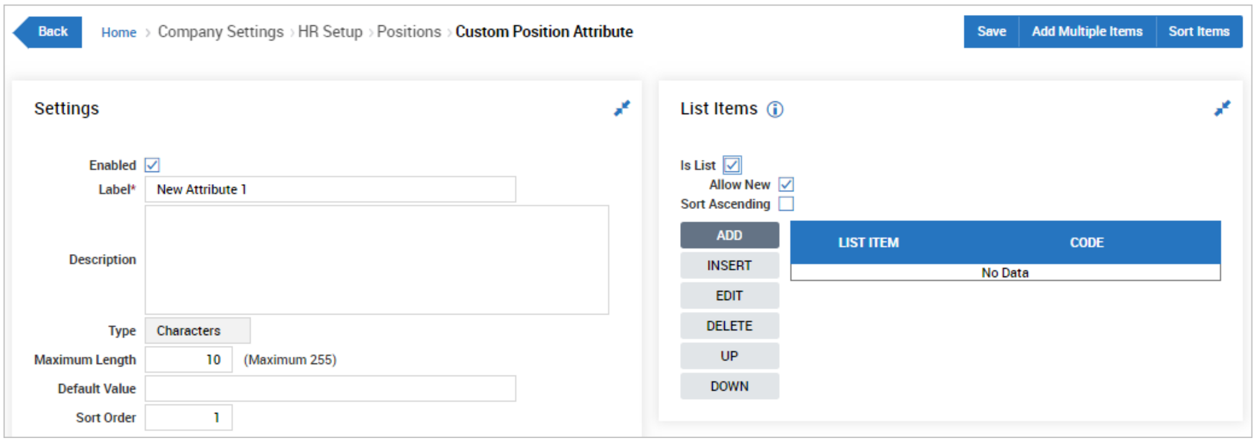
When editing or adding position, a *Position History* button is available. When accessing this option, customized attributes will display in the history audit list.



On the *Position Attributes* page, new customized attributes can be added and edited. Directional arrows in the columns next to the edit icon can be used to move the entries in the list. The *Sort Order* column will dynamically change according to where the entry is moved.



Define the custom attribute and optionally add list items to each entry. The attributes will be disabled by default. To activate them, check the *Enabled* checkbox. Once defined, the attributes will be available to all positions.



Back on the *Positions* page, select a position with the edit icon. A new *Position Attributes* widget will be available on each existing and new position. From this widget, you can define customized attributes for the selected position.

A *Define Attributes* link is available in this widget. When clicked, the *Position Attributes* page will open where attributes can be added, or existing entries edited.

When custom attributes have been added to positions, they can be included in position reports when adding columns to the report.

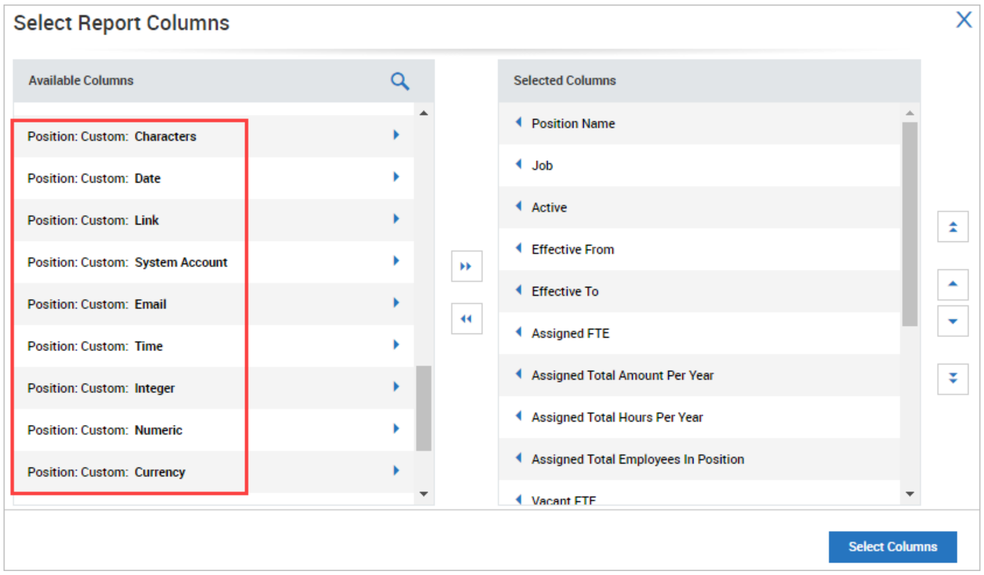
The following pages/reports are affected as a part of this enhancement:

Classic UI:

- *Position Headcount Detail* report under *My Reports > HR > Position Management > Position Headcount Detail*.
- *Employee Assignments* report under *My Reports > HR > Position Management > Employee Assignments*.

New UI:

- *Position Headcount Detail* report under *Team > My Team > Reports > Position Headcount Detail*.
- *Employee Assignments* report under *Team > My Team > Employee Assignments*.



EIN Field Added to Employee Assignment Report Page(Classic UI & New UI)

110634: For Multi EIN companies. we have added a new ***Employee: EIN*** column to the Employee Assignments report page. This column can be added to help managers and administrators easily identify the EIN to which their employees are assigned.

- **Classic UI** : *My Reports > HR > Position Management > Employee Assignments.*
- **New UI (Desktop & Mobile):** *Team > My Team > Employee Assignments.*

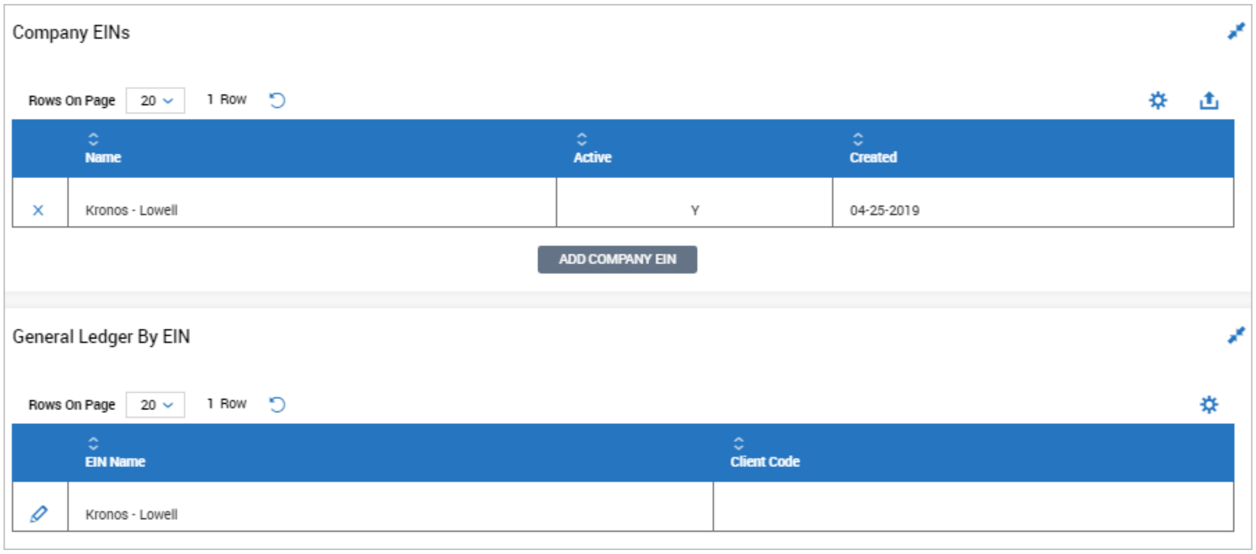
General Ledger (GL) Code Added to Positions (Classic UI)

63988: When Payroll Administrators run a payroll, they need the system to automatically assign in the General Ledger (GL) which accounts should be charged for wages, deductions, taxes, etc. Up to now, this could be done on the Job level only. Without the ability to assign GL mapping to Positions required manual rework for the Payroll staff. In this release, we are now providing this ability in Positions, both existing and new.

For companies using both the HR and Payroll modules, a General Ledger code can be assigned based on the Job added to the Position. We have created a new general ledger widget where you can now set a General Ledger code on the Position. Position maintenance is located under *Company Settings > HR Setup > Positions*.

The widget will not display until the *Jobs (HR)* field is populated and the position saved.

In a Multi EIN company, you will need to select one or more EINs in the *Company EINs* widget. After doing this, the enabled EINs will display in the *General Ledger By EIN* widget, where the entries can then be edited.



Clicking the edit icon will result in a pop-up where a general ledger code can be added. Special characters are supported, leaving the field blank is supported, and the maximum field length is 70 characters. If the Position is cloned, the GL code will not carryover to the new Position.

The following verifications have also been done to ensure proper GL coding:

- When a GL Format is set to *Jobs(HR) Level 2*, or *Jobs (HR) Last*, the GL code assigned to the Position is picked up in GL reporting. General Ledger Formats are set in the *Formats* section under *Company Settings > Payroll Setup > General Ledger > Settings*. (112560)
- When a *GL Override* is set with a filter that is based on a Position within the *Default Jobs (HR)* option, the GL code assigned to the Position is picked up in the GL reporting. The GL overrides are located on the *General Ledger Settings* page, located under *Company Settings > Payroll Setup > General Ledger > Settings*. (112563)

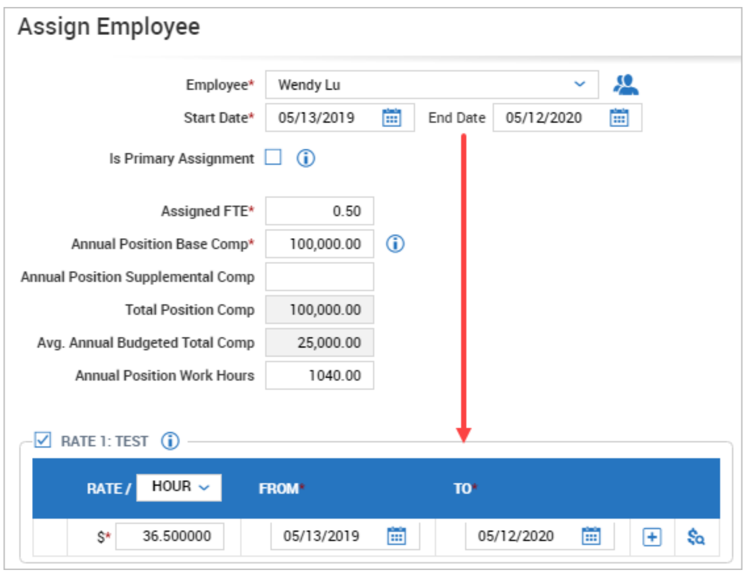
Non-Primary Rates – To and From Field Updates (Classic UI & New UI)

111234: Over the last two releases, we added the ability to enter a rate for non-primary position assignments. These assignments then automatically create a new entry in employee personal rate tables.

Originally, when the assignment was created, the *From* column in the *Rate* section of the assignment populated with the same *Start Date* of the assignment. If, however, a user entered an *End Date* for the assignment and did not manually update the *To* date in the *Rate* section, saving the assignment resulted in an error. To correct the error, users had to manually update the *To* date.

To make the process easier, we have changed some of the behavior. The *To* date within the *Rate* section will now populate with the date entered in the *End Date* of the assignment. This will only occur when the *End Date* for the *Rate* section has not been previously specified (i.e. shows default date of 12/31/9999).

If the *End Date* contains a value other than the default date, the *To* date may need to be manually edited if those dates should be different. The *End Date* cannot be less than the *To* date.

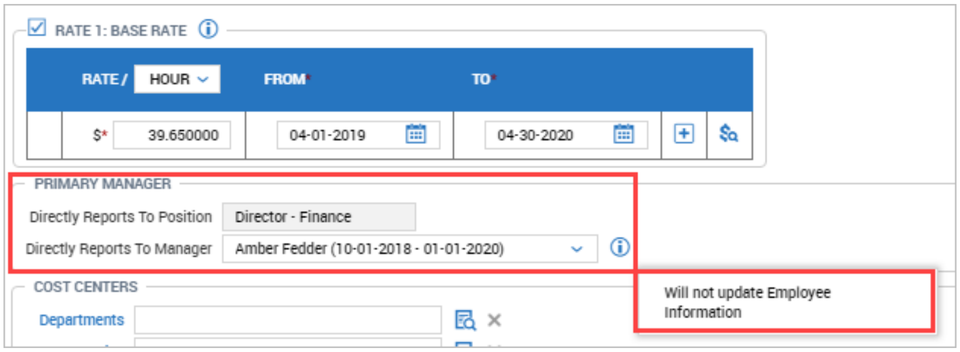


Primary Manager Assignment Added to Employee Assignments (Classic UI & New UI)

90191: We have added a *Primary Manager* section to the *Assign Employee* pop-up when assigning employees to a Position. This section allows users to easily view the direct reports coming from settings within a position definition.

These fields will be available to new and existing assignments via the *Add Assignment* and *Edit Assignment* options. If a primary manager is updated in the Position, these fields will update accordingly.

In the New UI, this is available for both the mobile and desktop experiences.



Primary Manager Settings

- The *Directly Reports To Position* field will be auto-populated from the Position definition. The system populates from the *Directly Reports To Position* setting in the *Reports To* section of the Position definition. If the Position definition does not contain this value, it will be blank in the employee assignment page and cannot be added. To update the position hierarchy, navigate to the Position setup page or the Position Hierarchy Chart in the New UI.
- The *Directly Reports To Manager* field will allow for a selection from a drop-down. This field indicates the individual who will be the employee's primary manager in this position relationship.

  The options available here are pulled from employee accounts where employees have an assignment to the Position.

  When an assignment is being entered, the system looks to the position selected and the Start Date, and will then provide the name, employee ID, and dates of assignment for any employee assigned to that *Directly Reports To Position* during that time period. The options are actually based on the position assignments themselves. When an assignment is being edited, the same logic is used. For example, Amber Fedder is assigned to the *Accounting Manager* position. When *Accounting Manager* is the *Directly Reports To Position* for another position, Amber and any other employees with the same assignment will be available in the drop-down.

  For Multi EIN companies, the drop-down will display employees in each EIN, resulting in multiple employee names in the list of the same employee, but identified by EIN.

  The dates shown next to the employee name will correlate with the assignment dates for the manager and will be formatted according to the *Locale* set in Company Setup.

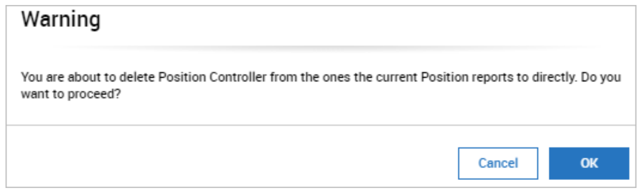
Directly Reports To Options Availability Locations

- The *Employees Assigned To The Position* widget located under *Company Settings > HR Setup > Positions* (Classic UI & New UI).
- The *Employee Assignments* page located under *Team > My Team > Employee Assignments* (New UI), or *My Reports > HR > Position Management > Employee Assignments* (Classic UI).
- The *Assignments To Positions* widget in employee accounts located under *Team > My Team > Employee Information* (New UI), or under *My Employees > Employee Information* (Classic UI).

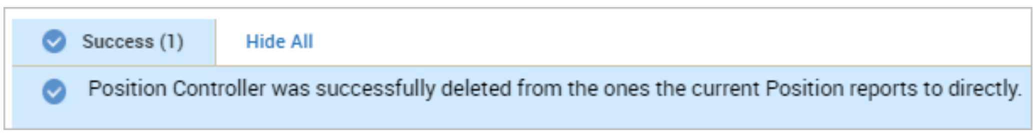
Message When Editing Primary Manager

111935: Administrators or managers with access to assign employees to Positions, will be prompted before changing Positions of someone who is included in the *Directly Reports To Manager* position for another employee. This will help the manager know to update that other employee if needed. This warning will only apply for existing Positions, not new ones.

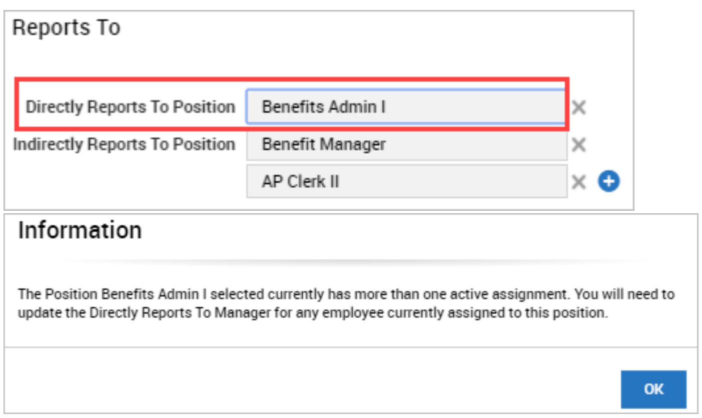
The *Directly Reports To Position* field within the *Reports To* widget on the Position page, located under *Company Settings > HR Setup > Positions*. When the user clicks on the X icon at the end of the field, the user is then presented with a warning.



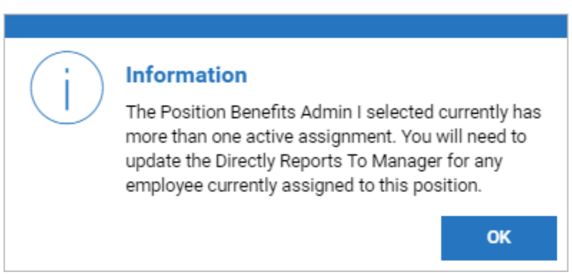
If the user clicks on OK, the system updates and the user is presented with a Success message.



When adding a Position in the *Directly Reports To Position* field, if the Position has more than one active assignments, an Information pop-up will display informing the user they will need to update the *Directly Reports To Manager* field for any employee currently assigned to the selected Position.



Additionally, within the Position Hierarchy Chart, when selecting the *Update Directly Reports To* option, if the Position selected has more than one active assignment, a similar Information message pop-up will display.



Primary Manager Behavior When Positions are Edited

111957: When edits are made to the Positions themselves, the following behavior can be expected.

EDIT	RESULT
Directly Reports To Position is blank.	*Directly Reports To Position* field is blank. *Directly Reports To Manager* is greyed out.
Directly Reports To Position is edited. New Position does have an active and effective assignment.	*Directly Reports To Position* field is populated. *Directly Reports To Manager* displays a drop down with employees assigned to *Directly Reports To Position*. If new Position has multiple assignments, a drop-down will become available and a selection can be made.
Position in the *Directly Reports To Position* field is made Inactive.	N/A since the Position in the *Directly Reports To Position* cannot be made Inactive because there is a reporting relationship (i.e. another Position reports to it either directly or indirectly.)
Position in the *Directly Reports To Position* field is deleted.	N/A since the Position in the *Directly Reports To Position* cannot be made Inactive because there is a reporting relationship (i.e. another Position reports to it either directly or indirectly.)
Directly Reports To Manager field if employee assignment is in the past.	Lookup will be blank for both Primary and Non-Primary assignments.
Directly Reports To Manager field if employee assignment is current.	Will populate all the entries of the manager that are active and effective as of today.
Directly Reports To Manager field if employee assignment is in the future.	Will populate all active and effective entries as of the Start Date of employee assignment.

Primary Manager Behavior When Employee Assignments are Edited

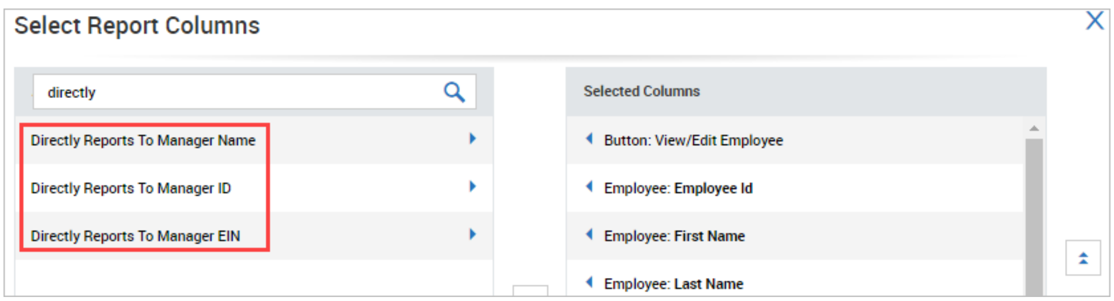
112291: When edits are made to Employee Assignments, the following behavior can be expected in the Primary Manager fields.

EDIT	RESULT
Position A reports to Position B Jon is assigned to Position A Jon is assigned the Primary Manager from Pos. B	No change in existing assignment of Primary Manager for Position A. Select Primary Manager for new Position. Each Position can have its own Primary Manager.

Add another position to Jon and make that assignment Primary.	
Position A reports to Position B Jon is assigned to Position A Jon is assigned the Primary Manager from Pos. B Edit assignment and change assignment End Date to a date in the past.	Primary Manager field will become blank and disabled.
Jon is assigned to Position A Position A reports to Position B Jon has assignment dated in the past. Remove/blank out End Date of assignment	Position B assignments will populate the *Directly Reports To Manager* field. If Position B has one valid assignment, drop-down will show a blank and the one assignment. If Position B has multiple valid assignments, drop-down will show all those entries.

The Options in Report Pages

112538: In the report page/widget locations listed above, ***Directly Reports To Manager*** columns can be added. These options are available in the Classic UI and the New UI, in both desktop and mobile.



Users can save a version of the *Employee Assignments* report page where the filters are set for *Directly Reports To Manager* is null and find anyone missing a primary manager.

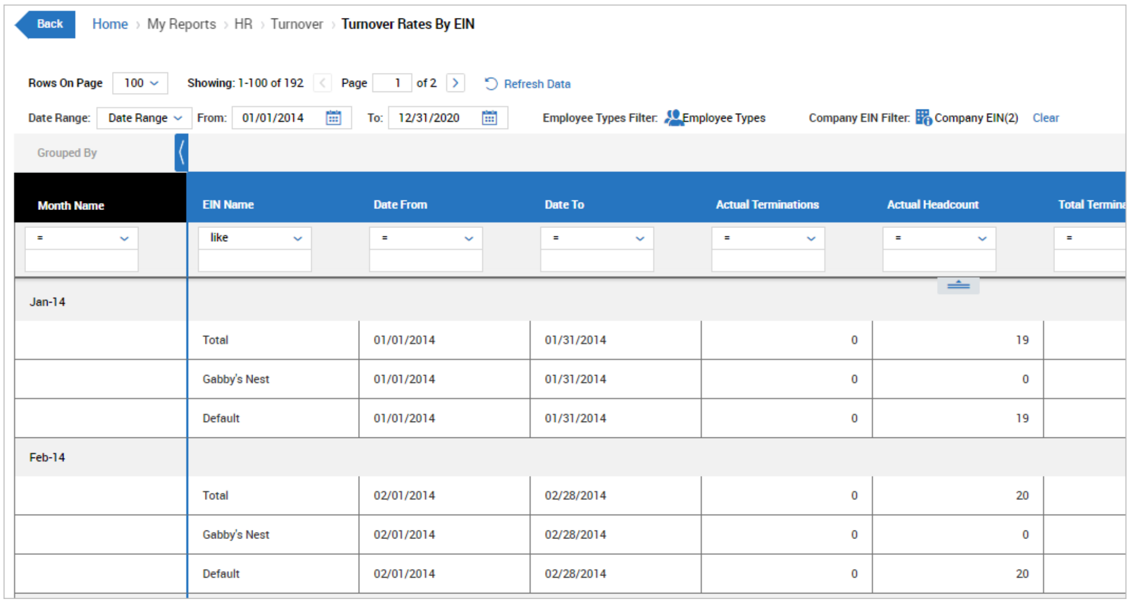
Position Id	Directly Reports To Manager Name	Directly Reports To Manager ID	Directly Reports To Manager EIN
=	=	=	=
00000023	Wade Wilson	191	Default
00000015	Henry McCoy	154	Default
00000017			
00000008			

Reports

Turnover Rates By EIN Report - Added to Multi EIN Companies (Classic UI)

106099: A new *Turnover Rates By EIN* report has been added to Multi EIN companies and will allow managers and administrators to view their turnover grouped by EIN. The report has a Company EIN Filter, which can be used to select the EINs to be included in the report. Date ranges and employee filters are also available to further define the included data. This report is not available to single EIN companies.

Classic UI: *My Reports > HR > Turnover > Turnover Rates By EIN*

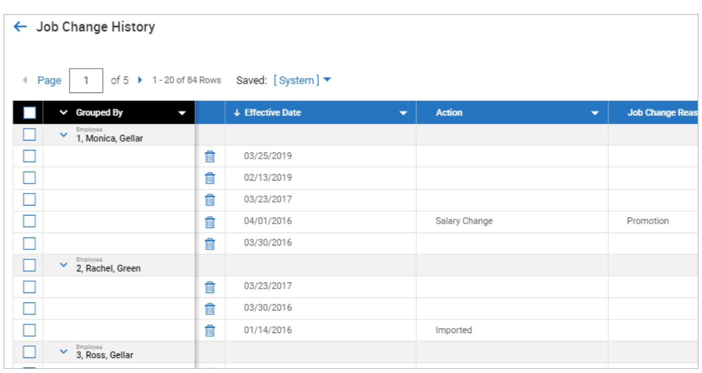


Job Change History Report – Multiple Deletion Allowed (Classic UI & New UI)

101464 & 101466: Administrators and managers who have permission to delete line items in the *Job Change History* widget in employee accounts can now delete multiple items for multiple employees from one page in the *Job Change History* report. A delete icon will display next to each entry for each employee. Click the icon to delete the item. A confirmation will display prior to completing the deletion.

Classic UI: *My Employees > Employee Maintenance > Job Change History*

New UI: *My Info > My Reports > HR Reports > Employee Maintenance > Job Change History*



Years of Service Column Added to Reports (Classic UI & New UI)

112012: A new ***Years Of Service*** column is available to be added to reports containing employee data through the *Select Columns* option. Previously, an *Employment Length* column could be added to reports that contains employee data for continuous employment, but this column was not able to add up employment periods when there was a break in service.

This new column will give administrators and managers more accurate information in environments where employees are frequently hired, terminated, and re-hired.

Note that this column is available in any report or report page throughout the system where *Employment Length* columns can be added.

This option is available in both the Classic UI and New UI (desktop and mobile.)

Username	First Name	Last Name	Years Of Service	Se
vallery	Valley	na	14 Years, 2 Months, 17 Days	Ad
kathy	Kathy	Watts	14 Years, 2 Months, 7 Days	Ad
JSutherland	Jack	Sutherland	17 Years, 4 Months, 5 Days	Ma
bill	Bill	Young	14 Years, 1 Month, 28 Days	30
JohnLewis	John	Lewis	7 Years, 6 Months, 6 Days	Ad
antoniabond	Antonia	Bond	11 Years, 4 Months, 2 Days	Ma
allison	Allison	on	17 Years, 2 Months, 4 Days	Ad

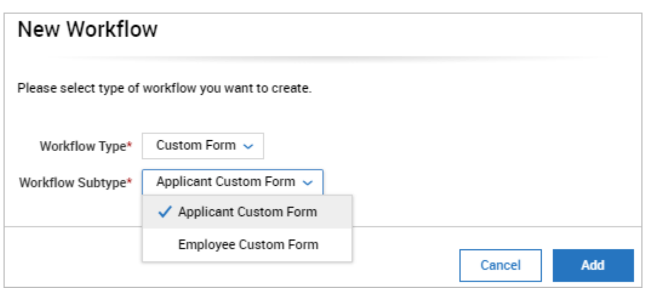
Workflows

New Custom Form Workflow Added for Applicants & Employees (Classic UI & New UI)

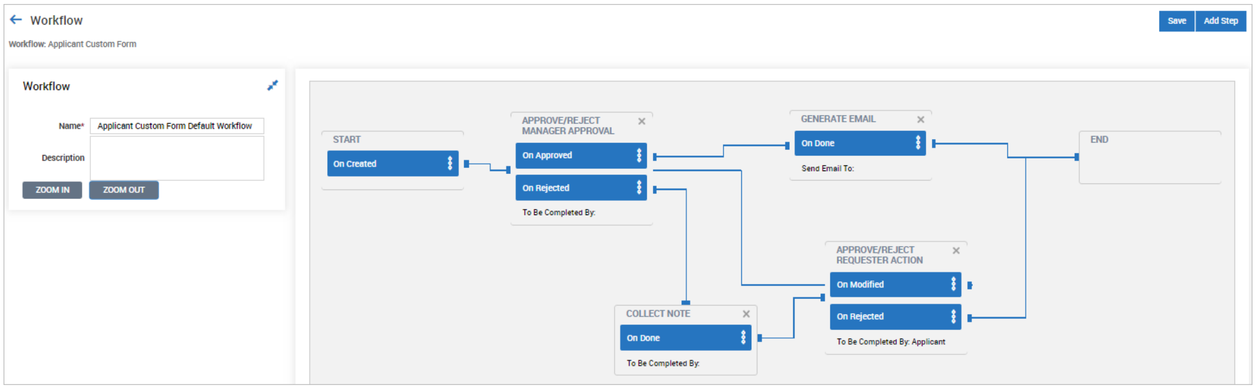
50149 & 102965: A new **Custom Form** workflow has been added to the available workflows located under *Company Settings > Global Setup > Workflows*. This workflow is available for applicants and employees and gives users the ability to complete a custom form and follow a workflow outside of an HR Action, allowing users to receive notifications based on the current status of the workflow.

- The workflow contains the same steps and items as the HR Action workflow with the exception of the Split, Join and Terminate steps.
- The workflow is available as a default workflow or it can be user-defined.
- In the *Approve Automatically* step and the *On Approved* action of the *Approve/Reject* step, an *Update Checklist Item* checkbox is available. When checked, the checklist will be updated when the custom form is approved.

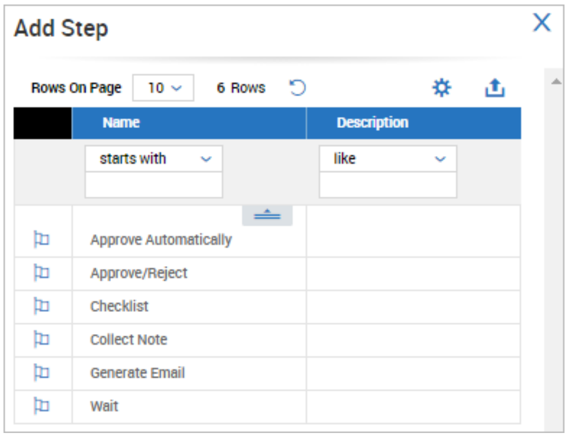
When adding the new workflow, a *Workflow Subtype* is required. Options are: *Applicant Custom Form* and *Employee Custom Form*.



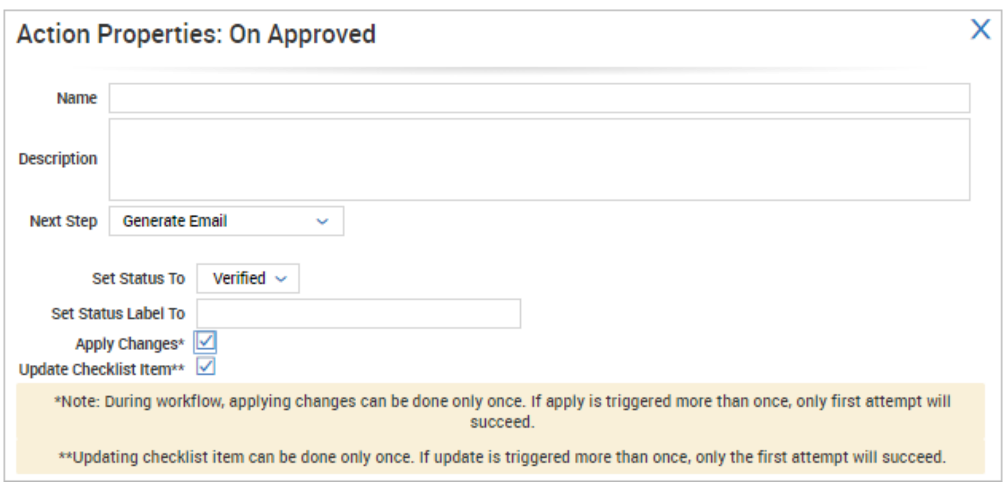
Both default workflow subtypes look like the example below.



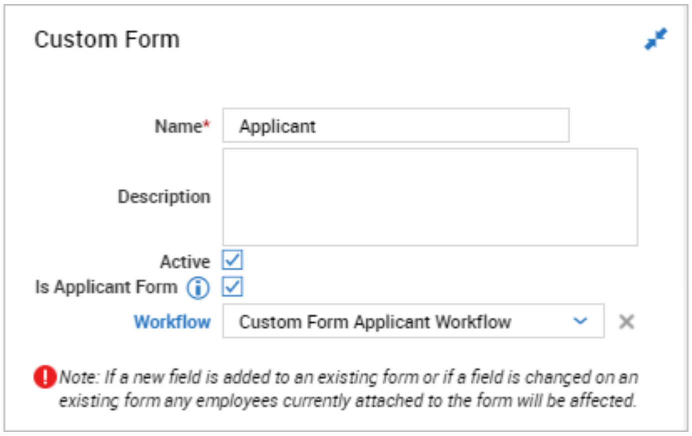
Additional steps can be added to the workflows. The Applicant workflow contains the Checklist step. The Employee workflow does not contain this step.



The *On Approved* action step will default to a *Set Status To* of *Verified*. Other options of *New*, *Submitted*, *Modified*, *Approved*, and *Rejected* are also available. Notes for the *Apply Changes* and *Update Checklist Item* settings explain that multiple triggers of this action will result in only the first attempt succeeding.



The workflow can be added to the Custom Form page, located under *Company Settings > HR Setup > Custom Forms*.



New UI Enhancements

New UI Updates – Functionality Added to Pages

The table below shows the updates made within the New UI and the functionality added. Many of these additions are simply converting Classic UI functionality into the New UI.

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desktop	Mobile
101413	HR	Learning Training/ Certifications	*My Info > My Learning > Training/Certifications*	View/Add New/ Delete/Mass Edit/ View History, View/Edit/Delete Training View Expired, View Enrollment, View Courses Add History, View/Edit/Delete History, Mass Add Training/Mass Delete (for managers) Enroll Session Hyperlink to Course	Yes-& Prev. Avail.	Yes
89659	HR	Recruitment Applicant Information Widgets Adding Applicants	*Team > Recruitment > Candidates > Applicants*	Notes Widget Documents Widget Professional References Widget Other Skills Widget Objective/ Summary Widget	Yes	Yes

				Character Traits Widget Applications Widget Vehicle Widget Education Widget Personal Information Widget Applicant Communication Widget Interviews Widget View Applicants on Map iCalendar Attachment		
99031	HR	Recruitment Applicant Forms Custom Forms Added for applicants	*Team > Recruitment > Pre-boarding > Applicant Forms*	Available tab Open tab Submitted tab All Forms tab	Yes	Yes
102142 & 104381	HR	Recruitment Applicants/Applicant Information	*Team > Recruitment > Candidates > Applicants*	Add New Applicant Email Selected iCalendar Attachment Send Applicants Edit Selected Send Selected View Applicant View Text Resume	Yes	Yes

				View Selected (Edit/Save) View Selected Applicants on Map Delete Applicant		
102512	HR	Performance Performance Reviews	*Team > Talent > Performance > Performance Reviews* *My Info > My Career > Performance > Performance Reviews*	View, Add, Initiate, Edit, Delete, Mass Add, Mass Edit, Mass Delete List Report Page Finalize/ Unfinalize Upload Document Skip/Unskip Tabs Added (Instructions, Info, Entry, Notes, Summary, Perspectives) Copy Personal Goals from Master Review Save/Submit Reject/Utilities (Print Preview, Download PDF, View Profile Sign (Reviewer & Finalizer) List Report Page To Do Items To Do Items - Employee Sign	Yes	Yes

				To Do Items – Finalize To Do Items - Create Goals		
104323	HR	Succession Planning	*Team > My Team > Talent > Succession Planning > Succession Plans*	Add New View/Edit	Yes	Yes
104361	HR	Workflow Questionnaires	*Team > HR > HR Maintenance > Workflow Questionnaires*	View Workflows (Desktop Only), Delete, Assign	Yes	Yes
89933	HR	Employee Maint. Opt-Out Agreements	*Team > HR > Employee Maintenance > Opt-Out Agreements*	View Download	Yes	Yes
78038	HR	Position Management Position Hierarchy Chart	*My Info > My Company > Position Hierarchy > Position Hierarchy Chart*	Chart in New UI	Yes	Yes

New UI: Custom Form Usage Updated (Mobile & Desktop)

112040: The use of custom forms in the New UI has been updated to be responsive and interactive.

For managers and employees with edit permissions for custom forms, an interactive preview form will display along with the form fields. As fields are selected or edited in one panel, the corresponding field in the other panel will highlight to show the active field. If a custom form has imbedded images as well as fields, the image will display with the fields overlaid on top and will populate in real time.

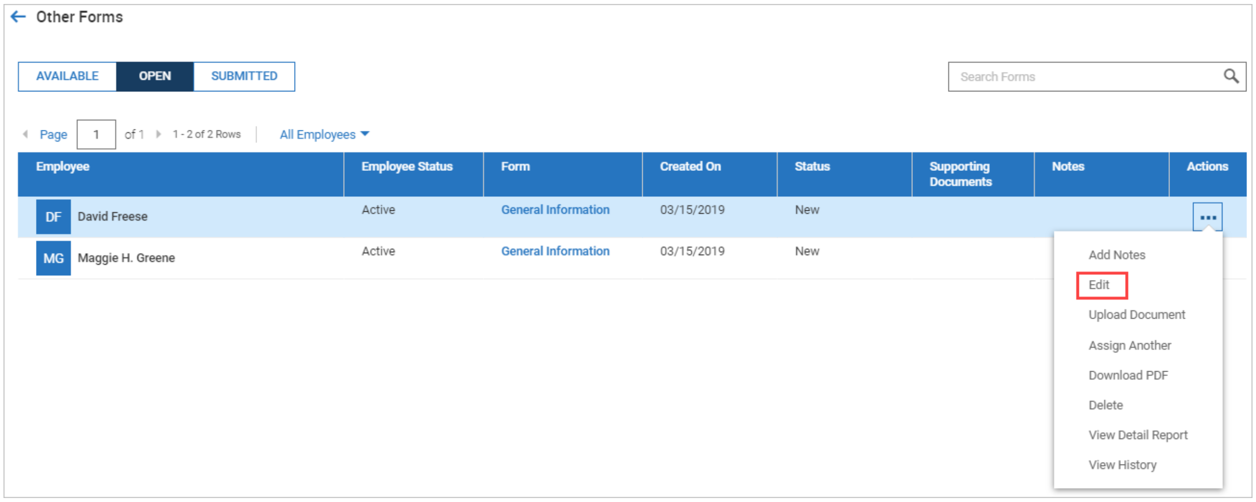
From the edit page, managers and users can save and submit their edits and also add notes, upload additional documents supporting the form, and download the form in PDF. Zoom In/Out options are available when working with a form in edit mode. The *Reset* option will return the page to its default size.

- Managers can access custom forms under *Team > HR > Forms > Other Forms*.
- Employees can access custom forms under *My Info > My HR > Forms > Other Forms*.

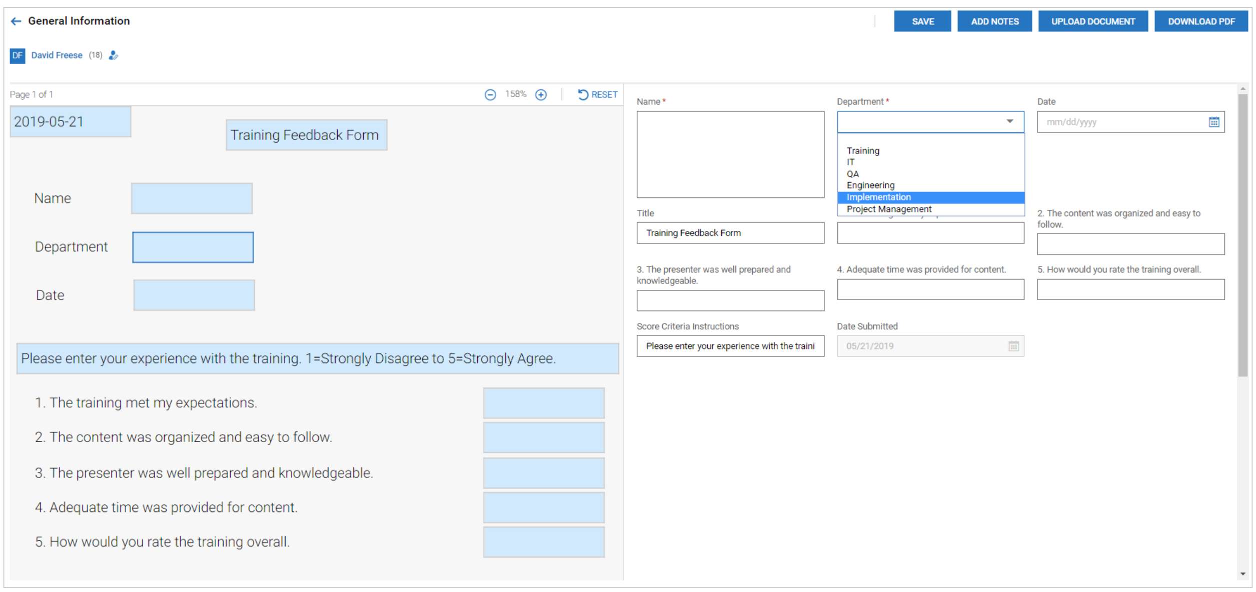
For both managers and employees accessing custom forms from these menu paths, the experience is the same depending on security permissions.

The interactive custom forms can also be attached to HR Actions, Checklists, and Benefit Enrollment. These features can be used in the New UI in both the desktop and mobile experiences.

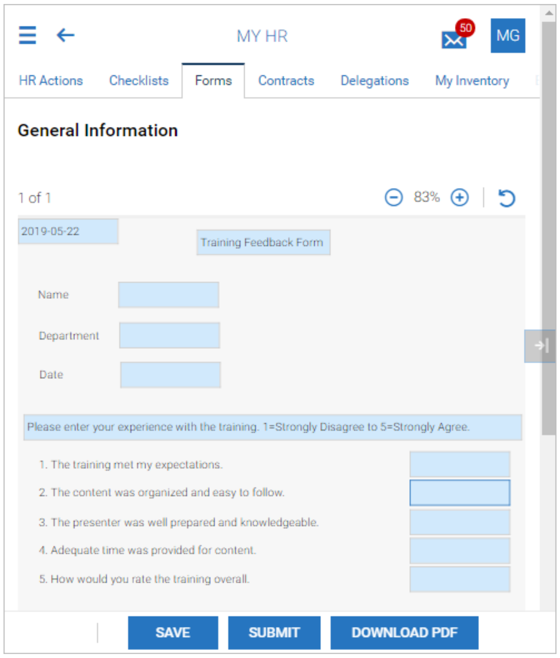
- In the desktop experience, since there is more space, both panels will display side-by-side.
- In the mobile experience, a navigation arrow will display, and users can toggle between the panels with the highlighted/active field still selected.

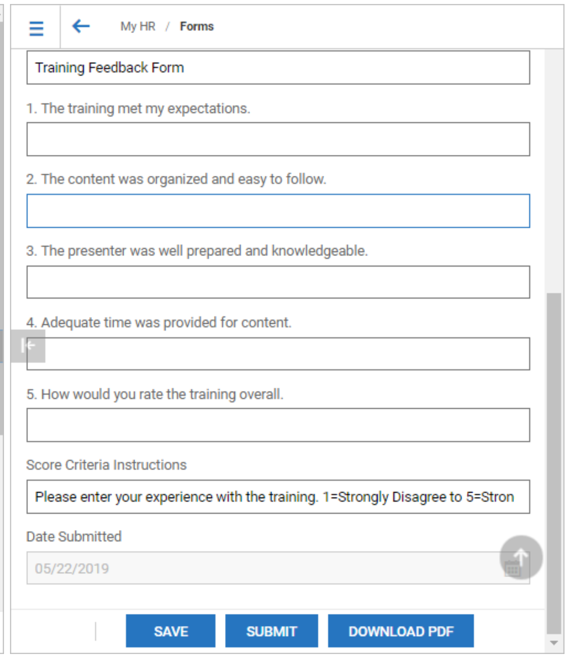


Desktop



Mobile





New UI: HR Actions

HR Action Item – Autopay Schedule in Base Compensation (Mobile & Desktop)

96411: When adding the *Base Compensation* HR Action Item to an HR Action, if your company also uses the Payroll module, the *Autopay Schedule* field in the *Base Compensation* widget of employee accounts will be populated as the action is processed. The *Autopay Schedule* field is populated from *Company Settings > Payroll Setup > Autopay Schedules*.

This is valid for *My Employee Action Request* using sub-types Regular, Hire, Re-Hire, and Termination. In the New UI Mobile environment, this is also supported in the manual hire process.

HR Action Item – CMS Pay Code Type (Mobile & Desktop)

96424: For companies using the CMS Staffing Data Submission marketplace product, the ***CMS Pay Type Code*** action item can now be added to HR Actions.

This is valid for *My Employee Action Request* using sub-types Regular, Hire, Re-Hire, and Termination. In the New UI Mobile environment, this is also supported in the manual hire process.

HR Action Item – Employee Perspectives Profile (Mobile & Desktop)

96421: The ***Employee Perspectives Profile*** action item can now be added to HR Actions.

This is valid for *My Employee Action Request* using sub-types Regular, Hire, Re-Hire, and Termination. In the New UI Mobile environment, this is also supported in the manual hire process.

HR Action Item – Second Last Name (Mobile & Desktop)

96222: For HR companies who also have the Payroll sub-system enabled, the *Second Last Name* field entered in the *Account Information* widget of employee accounts will be supported when using the *Name* action item for HR Actions.

The *Second Last Name* field will display in employee accounts when the *Has Employees in Puerto Rico* checkbox is checked in the *Payroll Settings* widget of *Company Setup*.

The *Name* action item is valid for *My Information Action Request* and *My Employee Action Request* using sub-types Regular, Hire, Re-Hire, and Termination. In the New UI Mobile environment, this is also supported in the manual hire process.

HR Action Item – Earnings (Mobile & Desktop)

78428: The ***Earnings*** HR Action Item is now available and supported in the New UI. This is valid for *My Employee Action Request* using sub-types Regular, Hire, Re-Hire, and Termination.

This action item will update the *Earnings* widget in employee accounts.

New UI: HR I9 Forms

Re-Verify Option Added to I9 Forms (Mobile & Desktop)

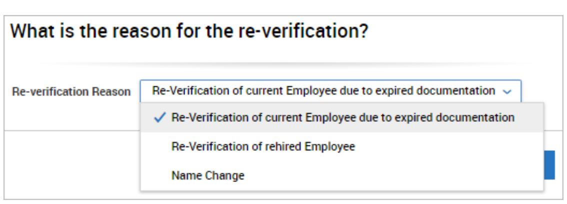
109453: A new ***Re-Verify I9*** option has been added to employee I9 forms. The option will only work for I9 forms that have previously been verified. Reverification is a compliance requirement in certain cases.

- **Classic UI**: *Added in April 2019 release*
- **New UI**: *Team > HR > Forms > Government Forms > I9s*

- Older forms cannot be re-verified. An error message will display explaining the form is expired.
  - Current forms eligible for re-verification are set to expire on 8/31/19.
  - Older forms not eligible for re-verification expired earlier than 7/17/17.
- When clicking the button, the system will perform a check on the employee's citizen status. Re-verification is never required for U.S. citizens and non-citizen nationals. If selecting an employee who does not qualify for re-verification, a message will display.

To use the option, select an employee and click the *Re-Verify I9* button. If the employee is eligible, a re-verification reason will then be presented. After selecting the reason, a page will display containing the form, an area to add notes, supporting documents, and an audit report.

The form can be edited depending on the selected reason.

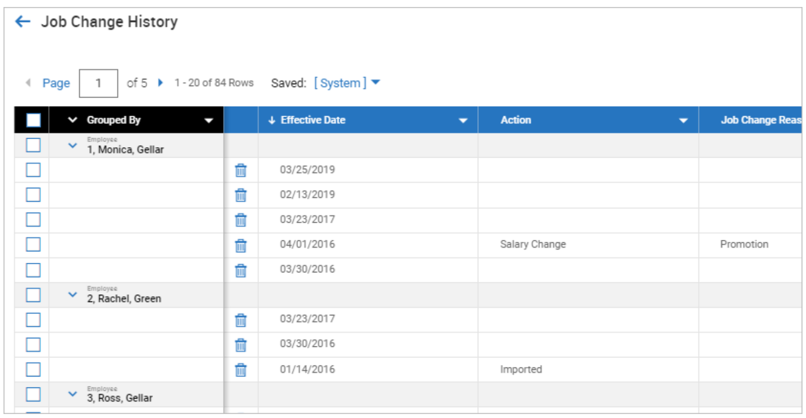


- **Name Change** – Opens only the name fields in Section 3 and signature fields for editing.
- **Expired Documents** – Opens only the document fields and signature fields for editing.
- **Rehire** – System will look for termination date. If later than 3 years, a whole new form will be required and no Re-Verify button will be available. If less than 3 years ago, the *Date of Rehire* field and signature fields will open for editing and a Re-Verify button will be available.

New UI: Job Change History Report

Multiple Delete Options Available (Mobile & Desktop)

101466: Managers with access to delete line items on an employee Job Change History widget will now have the ability to perform multiple deletions for one or more employees at a time within the Job Change History report page, which is located under *My Info > HR > Reports > Employee Maintenance > Job Change History*.



New UI: Manual Hire

Manual Hire (Mobile & Desktop)

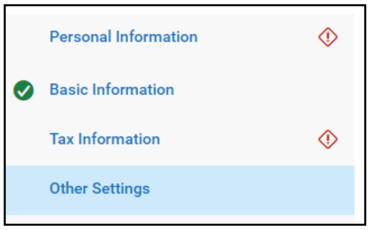
In the February 2019 system release, we added basic hire functionality when manually hiring employees in the mobile version of the New UI. In the April 2019 system release, we added more functionality and supported the manual hire process in the desktop version of the New UI.

The new hire functionality is located under *Team > My Team > Employee Information*. Options to *Hire*, *Terminate*, *Rehire*, and *View Selected* are available.

In this release, more functionality has now been added when manually hiring employees.

Add Employee Button Availability (Mobile & Desktop)

110092 & 11760: When manually hiring an employee, the *Add Employee* button will always be available whether using the widget links or the *Continue* button, as long as all required fields are completed. When the button is clicked, it marks all widget links without issues with a green checkmark and those widget links containing issues with a red error symbol.



If the employee's tax information is incorrect a warning message will display. The message states: *Your tax configuration is not correct, please review unemployment and tax setup*.

Hiring Via HR Actions (Mobile & Desktop)

97890: If manually hiring employees via an HR Action, the following action items can now be added to the HR Action, dependent on the sub-systems enabled in your company. These action items are created with the *My Employee Action Request*, and are available for sub-types *Regular*, *Hire*, *Re-Hire*, and *Termination*. More will be added in future releases.

- Leave of Absence Profile
- Attestation Profile
- Succession Profile

Manager Permissions and Access to Employee Information Page in Manual Hire (Mobile & Desktop)

101715: When a manager manually hires a new employee, who will belong to a certain group, but the manager normally doesn't have access to employees in that group due to group permissions, temporary permission to hire the employee will be granted.

However, when filling out the employee's information, if the manager leaves the page, returning to the page will not be an option since doing so would require the manager to access the employee's account in Employee Information; and the manager does not have permission to the employee. In cases where this occurs, the manager will receive a warning message stating that returning to the page will not be allowed.

If the manager leaves the page after acknowledging the warning message, the manager will be redirected to the Employee Profile page, rather than the employee's account in Employee Information.

Termination Warning Added (Mobile)

110899: When manually terminating an employee in the New UI Mobile Experience, a new warning message has been added to inform users that the termination date cannot be earlier than the hire date.

Terminate Status (Mobile & Desktop)

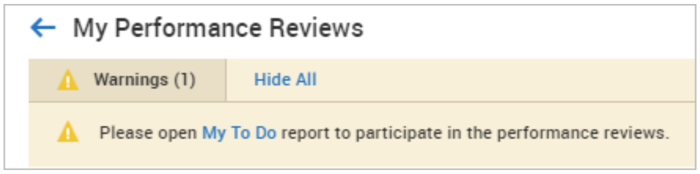
111661: When terminating an employee and setting the *Account Status* to *Terminated*, which is a system default setting for terminations, the only options that will be available in the drop-down are those user-defined statuses configured as *Is Terminated*. Statuses are configured under *Company Settings > Global Setup > Global List Definitions > Account Status Definitions*.

New UI: Performance

My To Do Link Warning Added to Performance Reviews (Desktop)

102795: On the employee Performance Review page, located under *My Info > My Career > Performance > Performance Reviews*, a warning message has been added to direct users to their My To Do Items. The message states: *Please open My To Do report to participate in the performance reviews*. A link to the My To Do report will be available in the message, and when clicked, will take users to their To Do Items where they can then locate and respond to their performance review.

NOTE: This warning will be added to the mobile experience in a future release.



New UI: Position Management

Assign Employee – Base Comp Populates Assignment (Mobile)

107841: For the New UI Mobile Experience, when a user navigates to *My Team > Employee Assignments* and clicks the *Add New* button to create a new employee assignment, a pop-up opens. On this page, when an employee is selected from the drop-down, the *Annual Position Base Comp* for that employee will now be populated if the Base Compensation for that employee is set in the employee's account.

Rate Section Moved on Assignment Pop-Up (Mobile & Desktop)

110887: When assigning position assignments, the pop-up has the option to add rates to non-primary positions. In the New UI, both desktop and mobile, we have moved the *Rates* section below the *Compensation* section for a better user experience. Previously, the *Rates* section was located above the *Compensation* section.

New UI: Recruitment

Conversion Tracker Widget Added to Recruitment Configuration Page (Mobile & Desktop)

107097: In the New UI, a new ***Conversion Tracker Company Vendors*** widget is available to be added to the *Configuration* page of the Recruitment module. This widget allows companies to enable and track the top recruitment vendors by listing their tracking ID number. This list shown is not configurable. The vendors shown are currently the only ones supported.

When using one of the vendors, a unique Id number is generated by the vendor for your account with them. You can then add this number to the new widget for quick reference.

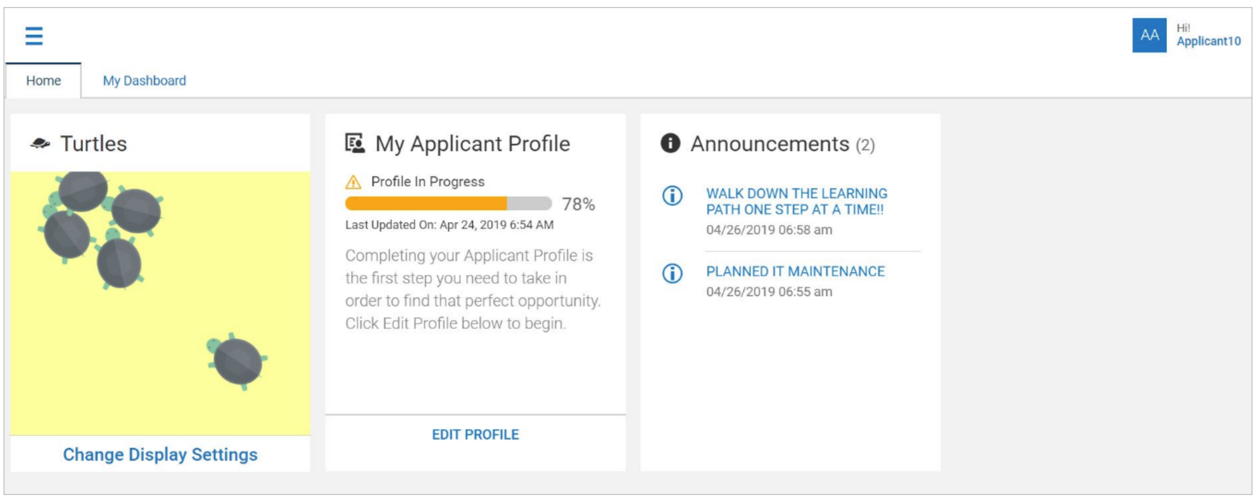
This widget is added via the *Edit Tabs* link under *Admin > HR Setup > Applicant Tracking/Recruitment > Configuration*. Once added, and the *Enabled* checkboxes are checked, the *Conversion Tracking Id* information will be required.

Conversion Tracker Company Vendors

Sequence	Enabled	Name	Conversion Tracking Id
1	☑	Indeed	ADF338483
2	☑	ZipRecruiter	HUR934894
3	☑	GlassDoor	NVW994732

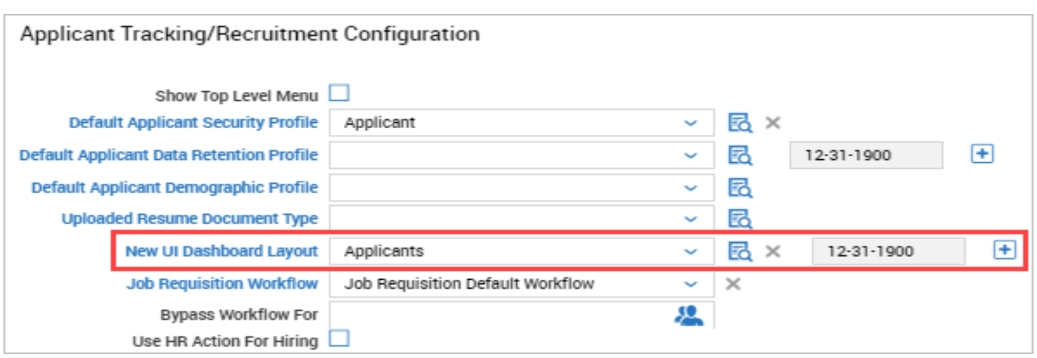
Default Dashboard Profile for Applicants (Mobile & Desktop)

62171: Up to this release, applicants were tied to the initial New UI Dashboard Layout Profile created for a company. Because this profile may not be appropriate for applicants, we have created a new default dashboard profile for applicants. When an applicant is created, they will automatically be assigned to the Applicants profile.



We do provide an option to override the applicant default profile if another is preferred. If the field is cleared, the company's default profile will display for the applicant.

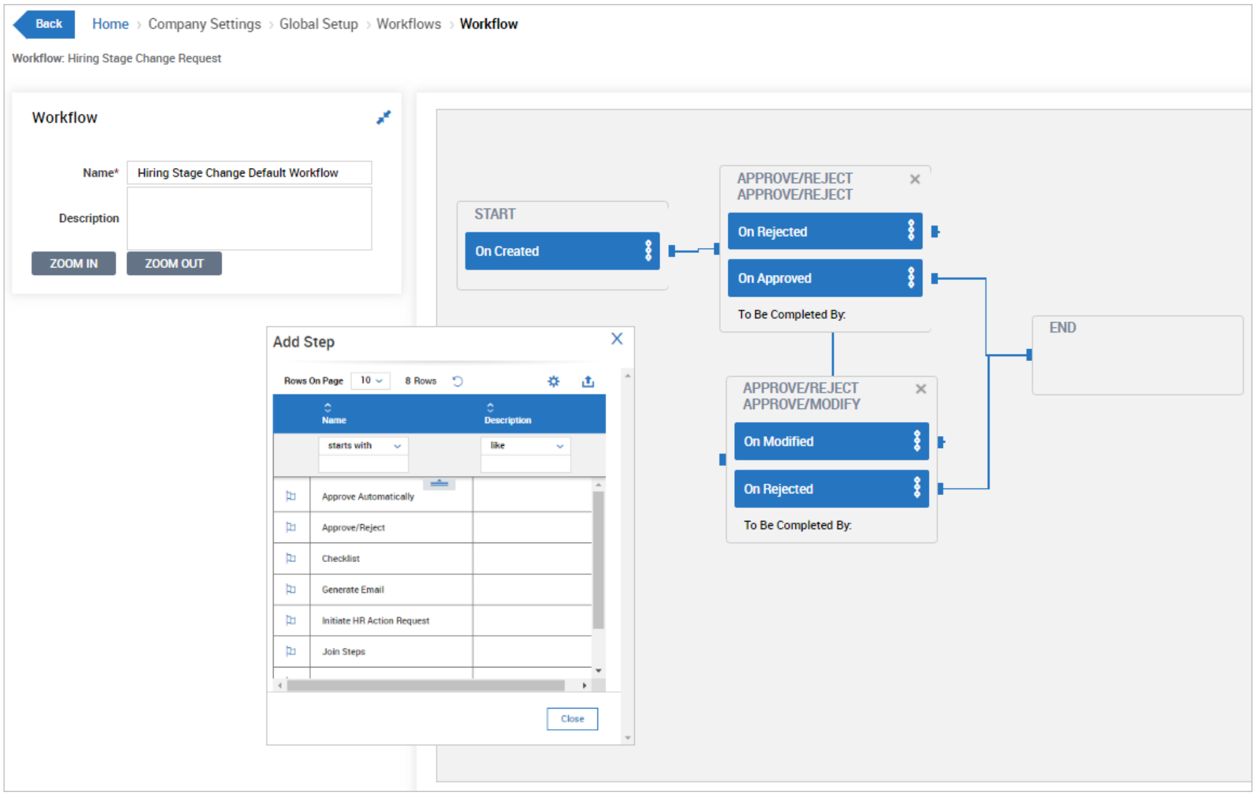
This setting is located on the *Configuration* page under *Company Settings > HR Setup > Applicant Tracking/Recruitment*. This profile setting is effective-dated which allows for more than one profile to be added and will take effect as of the date listed.



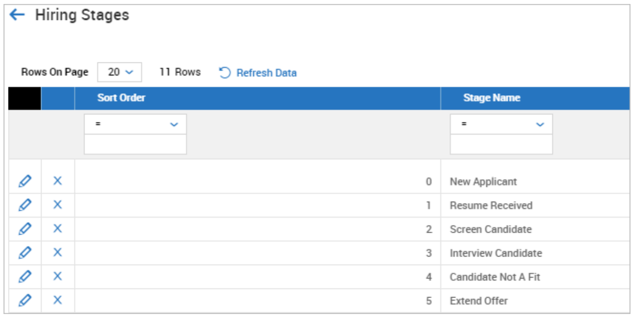
Hiring Stage Workflow Integration (Mobile & Desktop)

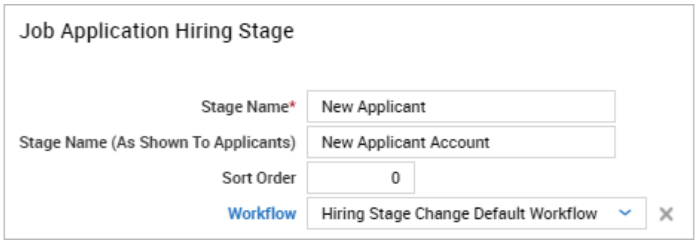
108139: While previously available in the Classic UI, we have now enabled the *Hiring Stage Change Request* workflow to be available in the mobile and desktop experiences of the New UI. This workflow integrates into job application hiring stages to ensure the proper steps and approvals have been completed throughout the hiring process.

The *Hiring Stage Change Request* workflow is located under *Company Settings > Global Setup > Workflows*. A default workflow is available, or you can build a user-defined workflow. Additional steps can be added to the default workflow to customize it. The workflow can be assigned to individual hiring stages.

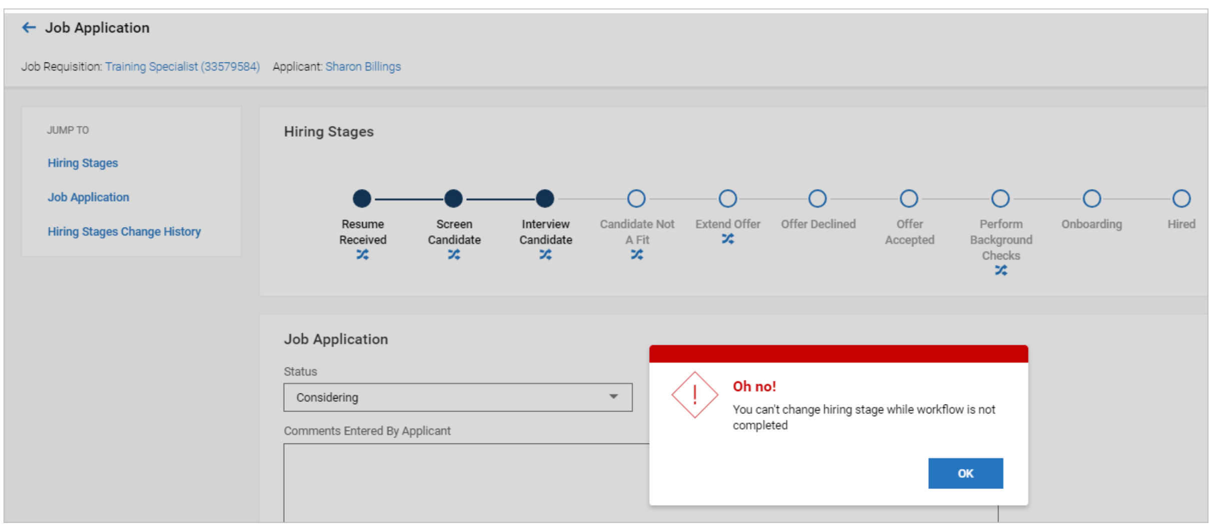


Workflows are added to hiring stages under *Company Settings > HR Setup > Applicant Tracking/Recruitment > Hiring Stages*. Each defined stage can have a workflow attached.

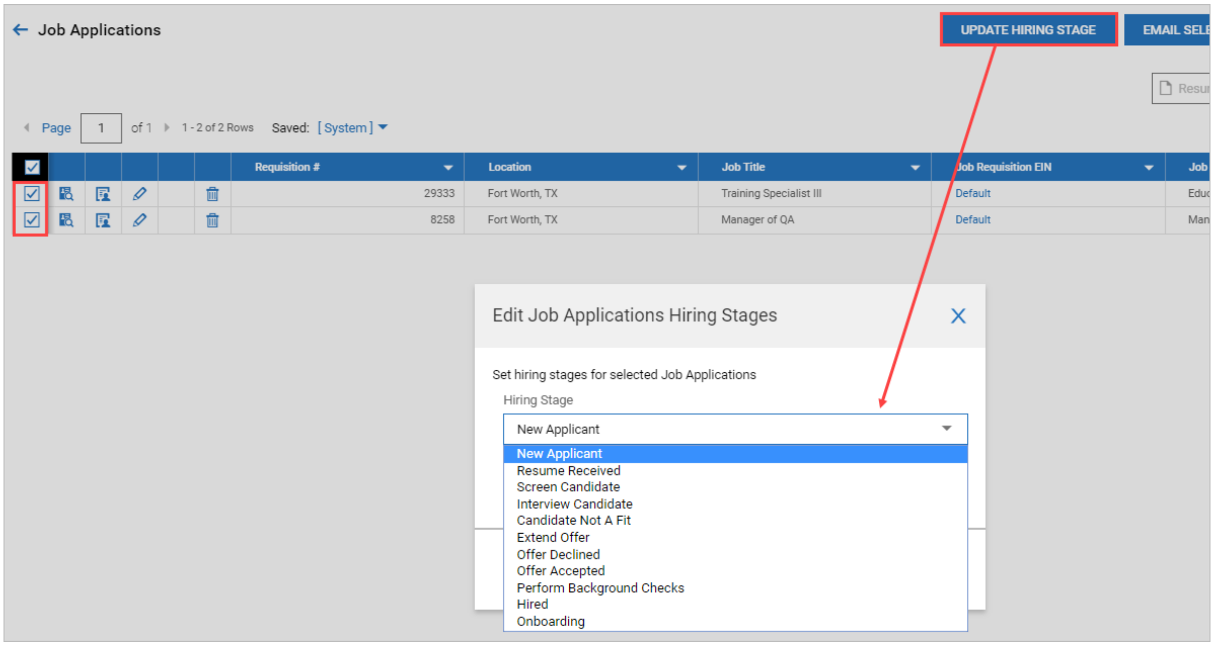




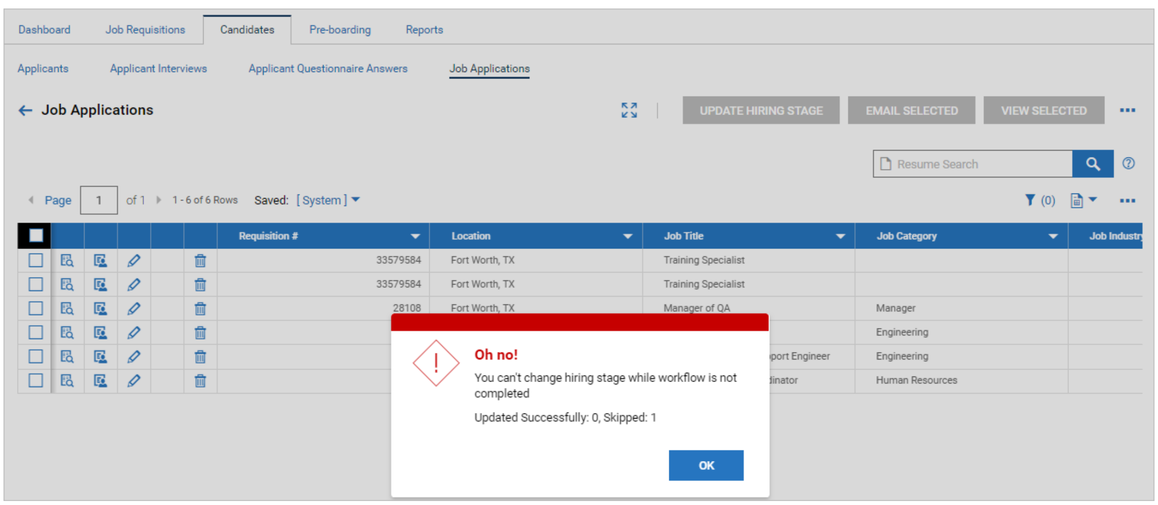
In the New UI, managers can process hiring stages and workflows under *Team > Recruitment > > Candidates > Job Applications* then viewing a job application. If a hiring stage has a workflow attached to it, a workflow icon will display under that stage.



Hiring stages without a workflow assigned can be updated by selecting one or more entries and clicking the *Update Hiring Stage* button.

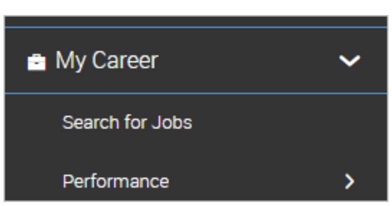


Hiring stages with workflows may result in an error message if hiring stages are manually updated without first completing the workflow steps.



New UI Navigation: Change in Clicks for Search For Jobs Menu (Mobile & Desktop)

116779: An extra click has been removed when selecting *Search For Jobs* under the *My Career* menu, located under *My Info > My Career > Search For Jobs*. The option will now be a top-level menu item under *My Career*.



Resolved Issues

The following issues have been resolved with this release.

Employee Visa Information Removed After Leaving the Page

108678: Users can now expect an employee's visa information to be saved within their *Employee Information* profile. Previously, under the *Account Demographic* widget within the *Edit Employee* page, when a selection was chosen and saved from the *Visa Type* field as well as the expiration date, the *Visa Type* information did not save when the user left the page.

Cannot Hire Applicant after Previous Rejection

108117: Users are now able to successfully hire an applicant through an HR Request if the same applicant has been rejected in the past. Before, when a user rejected an applicant through an HR Action and then the user attempted to hire the applicant for the same job requisition through a new HR Action, the approval from the *Workflow: HR Action Request* would not save, and would instead display an error message, *This Applicant has been completed for hire.*

Incorrect Age Displaying on "Employee Information" Report

107676: On the *Employee Information* report, the employee's age was displaying incorrectly under the *Age* column, while displaying correctly within the *Dates* widget on the *Employee Information* profile page. Going forward, the employee's age will display accurately on the *Employee Information* report.

Error Message Generated When Attempting to Delete Employee Training/Certification

106574: Users can now delete a training or certification from the *Training/Certifications* widget that was assigned through an *Employee Information* profile. Before, when a user attempted to delete a training or certification that was assigned through the *Employee Information* profile, the training/certification would not delete from the *Training/Certifications* widget, and the following error message displayed, *Could not delete* (employee's name and training). *It is used in Training Profile.*

Category Added Through Account Extra Field Does Not Show Filter Options in Report

106391: Time-related categories added through *Account Extra Fields* will now display filter options in the column underneath the category on an employee's report. Previously, employee reports such as *Calculated Time By Employee* were not displaying specific filter options underneath a time-related category that was added through the *Account Extra Fields*.

Unable to Save Employee Directory Report

75760: Users can now save *Employee Directory* reports. Previously, when users saved a report under the settings of the *Employee Directory*, the report would not save, and there was also no error message.

Cannot Use a Filter Value in Trainings/Certifications Report

109745: Users can now expect values that are saved in the *Custom Label* fields next to *Current Completed Date* and *Current Source* within *Custom Settings: Trainings/Certifications* under *Column Settings* to filter correctly without an error message on the *Trainings/Certifications* report. Previously, values imputed and saved from *Current Completed Date* and/or *Current Source* would display an error message, *Invalid filter value "internal".*, when the user selected "Internal" as the filter value, then refreshed the page.

Multi-EIN: Consolidated EEO-1 Form Tied to Non-Default EIN

107965: For multi-EIN companies, when selecting a specific EIN for the *Default Company EIN* field under the *Company Info* tab within the *Company Address* widget, the consolidated EEO-1 form report displayed the *EIN* column with an EIN company that was not originally selected as the *Default Company EIN*. Going forward, the *EIN* column will display the correct company EIN that was selected within the *Default Company EIN* field.

Performance Reviews Not Auto-Initiating

82951: Employee Performance Reviews were not auto-initiating. Going forward, the auto-initiating functionality will now work as expected.

Cost Center Change Not Showing in "HR Action Audit Report"

110021: Users can now expect to see *Changed* on the *HR Action Audit Report* next to the updated Cost Center name. Before, when users created an *HR Action Request* to change the employee's default Cost Center, then the manager clicked on the *HR Action* hyperlink link in the *All To Do Items* page, the *HR Action Audit Report* page did not display *Changed* next to the new Cost Center name.

Wiki Not Displaying for Some HR Companies

72256: For some companies with an HR Sub-System enabled, *Wiki* was not displaying in the Dashboard. Going forward, all new companies or full copied companies with an HR Sub-System enabled will have *Wiki* available to them.

Custom Form in HR Action Configuration Deleted if Sort Order is Changed

111418: Users can now change the sort order of a Custom Form within an *HR Action* without losing the Custom Form. Previously, when users changed the sort order by moving the Custom Form using the arrow buttons, the Custom Form was deleted from the *HR Action Items*.

Security Violation Message When Accessing Inventory Profile

112522: Users could not access *Inventory Profiles* through *My Saved Reports* without receiving a security violation message, *You do not have access to this functionality*. Going forward, users will be able to access the Inventory Profiles without receiving a security violation message.

Performance Reviews Creating Multiple Steps Under Review Summary

110276: Duplicate steps will no longer be created under the *Review Summary* within the *Performance Reviews* page. When a manager saved in the *Action Properties: On Reviewed* step of a *Performance Reviews* workflow, a new step would create under the *Summary* tab in *Review Summary* within the *Performance Review* page.

Job Requisition Applicant Visibility Date

110045: Users can now expect active job requisitions to remain posted until 11:59 p.m. of the *Active_To* date. Previously, the system was pulling active job requisitions before the midnight refresh.

Protected Veteran Status Being Left Off Applicant PDF

108884: If the *Are You A Protected Veteran* field is selected as *No* within the *Applicant Demographics* widget, and then users download the PDF, this field will display on the PDF export. Previously, within the *Applicant Demographics* widget under the *Applicant Information Edit* page, when *Are You A Protected Veteran* was marked as *No* and then the user downloaded the PDF, the *Are You A Protected Veteran* field did not display on the PDF export. When this same question was marked as *Yes*, the field did appear on the PDF.

Filtering for Disability in Applicants Report Causing Errors

113707: When the *Disability* column was applied as a filter within the *Applicants* report, an error message displayed, *Difficulty retrieving data, please try again later*. Going forward, the Disability filter will work correctly.

Unable to Delete Additional Compensation Field Labels

97241: There is now a *Delete All Records and Reset Type* functionality that can be enabled in the security profile within the *Global* tab under *Company Setup*. If this is enabled, a *Delete/Reset* button will display in the *Additional Compensation Fields* widget under *Company Settings*. Previously, when users added *Additional Compensation* fields in *Company Setup* under the *Company Config* tab, the fields would become grayed out, and users were unable to edit or delete the fields.

Applicant Report Column “Last Applicant Step” Displaying Incorrect Value

100575: The *Last Application Step* column within the *Applicants* page was not displaying the correct status as the applicant went forward with the job application process in *My Applicant Profile*. For example, when an applicant saved their resume in the *Resume* section, the column would then display *Cover Letter & Apply* instead of *Resume*. Going forward, the correct status of the application will display in the *Last Application Step* column.

Internal Employees Can View External Only Job Requisitions

113963: Internal candidates who are rejected through the knockout questions will no longer able to see job requisitions that users selected as *External* in the *Type* field within the *Job Requisition* page. Previously, when internal candidates were rejected through the knockout questions, they were then able to see external jobs.

Bypass Workflow for Job Requisition Not Working with Cloned Job Requisition

108883: Users can expect the *Bypass Workflow For* filter to trigger properly when cloning a Job Requisition. Previously, when a Job Requisition with an employee selected in the *Bypass Workflow For* filter was cloned, the *Submit* button still displayed at the top of the *Job Requisition* page.

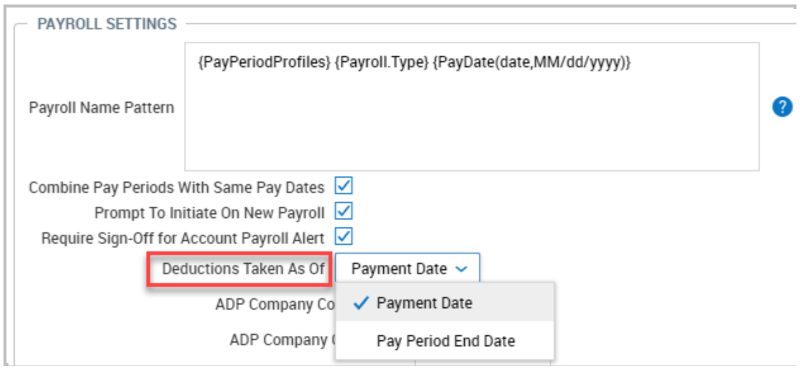
Full Pathway is Displayed Near View Workflow Button in Performance Review Report

109380: If the column *Button: View Workflow* was selected from the *Select Report Columns* pop-up window; the full pathway would display underneath the workflow button on the *Performance Review* report page. This issue has been fixed, and users can now expect to only see the button, not the full pathway.

Payroll

Global Setup: Deductions Taken As Of Payroll Setting (Classic UI & New UI)

A new Payroll Setting, *Deductions Taken As Of*, now exists under *Company Settings > Global Setup > Company Setup*, in the *Payroll Settings* on the *Payroll* Tab. Users can configure the new setting so that employee deductions are taken as of either the Pay Period End Date or the Payment Date (the system default).



For example:

The Pay Period is from 5/26/2019 – 6/1/2019 with a Payment Date of 6/6/2019. If the Effective Date of an employee deduction is 6/2/2019, then:

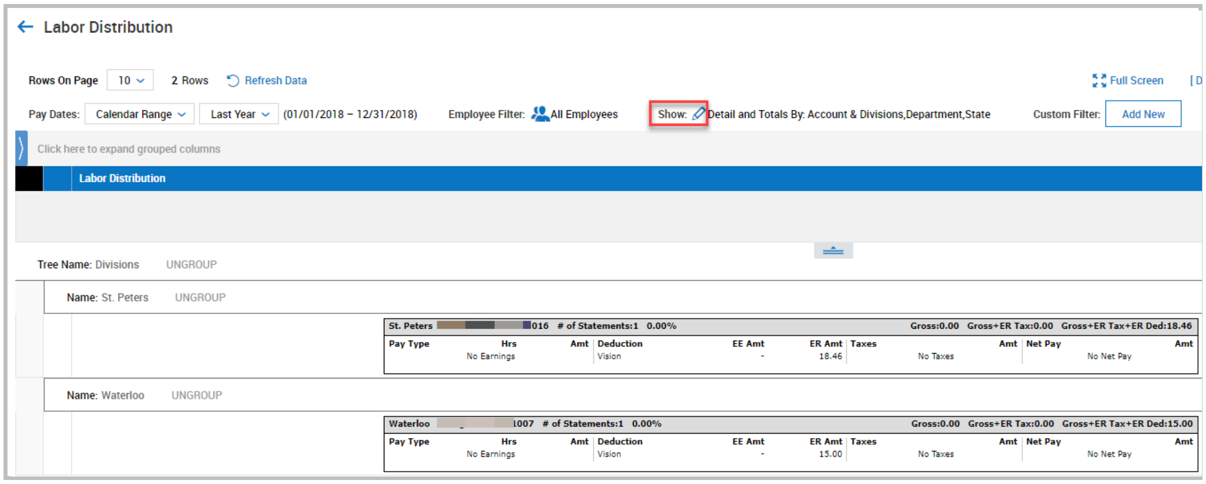
- If the *Deductions Taken As Of* setting is set to Payment Date, then the deduction **is** withheld on the 6/6/2019 pay statement because it was active prior to or on the Payment Date.
- If the *Deductions Taken As Of* setting is set to Pay Period End Date, then the deduction is **not** withheld on the 6/6/2019 pay statement because it was not active as of the Pay Period End Date.

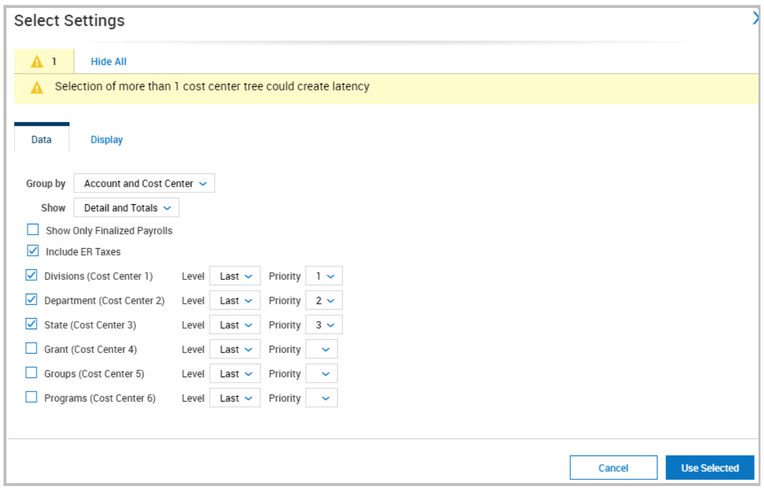
NOTE: This is a company setting that applies across all EINs for Multi-EIN companies.

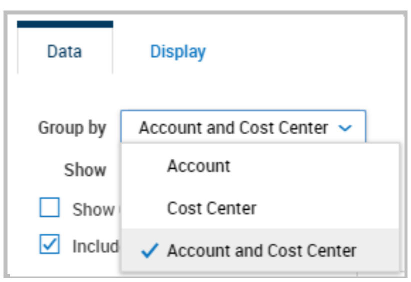
Labor Distribution: Additional Labor Levels in Labor Distribution Report (Classic UI & New UI)

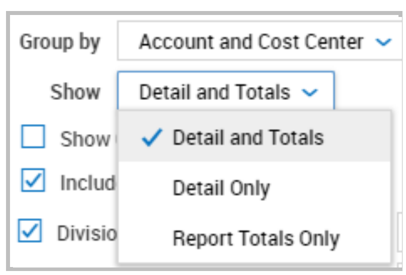
Users can now select and prioritize more than one cost center when using the Labor Distribution reports under *My Reports > Payroll Reports > Labor Distribution*. The settings for what to *Show* in the report can be used to select up to a maximum of 3 desired cost centers as well as set the priority for each. This is available in the following reports:

- PST View By CC
- PST View By Account Within CC
- PST View By CC Within Account



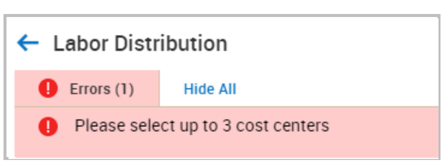






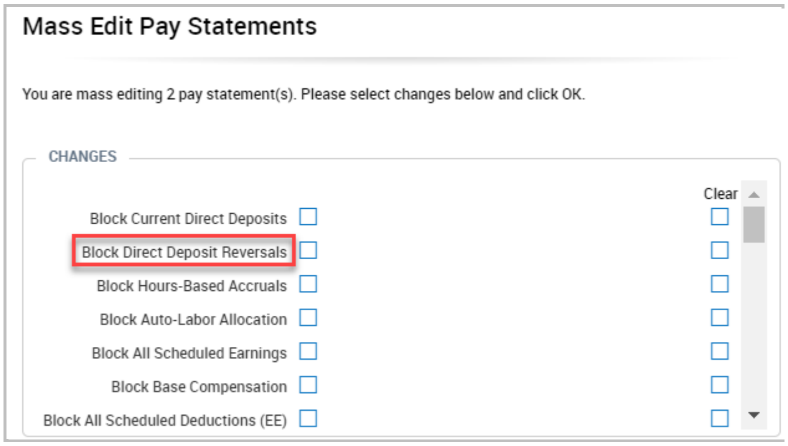
An alert indicating that selecting these additional fields could create latency when the report is populating displays within the Settings dialog box.

If a user attempts to select more than 3 cost centers to group by at a time, an error message displays explaining that only up to 3 cost centers should be selected at a time.



Mass Edit: Mass Edit Block Direct Deposit Reversal (Classic UI & New UI)

Users now have the option to *Block Direct Deposit Reversals* on multiple Pay Statements at once via Mass Edit under *Team > Payroll > Process Payroll > View/Edit Employee Statements > Utilities > Mass Edit Selected Pay Statements* (New UI) or *Manage Payroll > Manage Payrolls > View All Payrolls > Pay Statements > Utilities > Mass Edit Selected Pay Statements* (Classic UI).



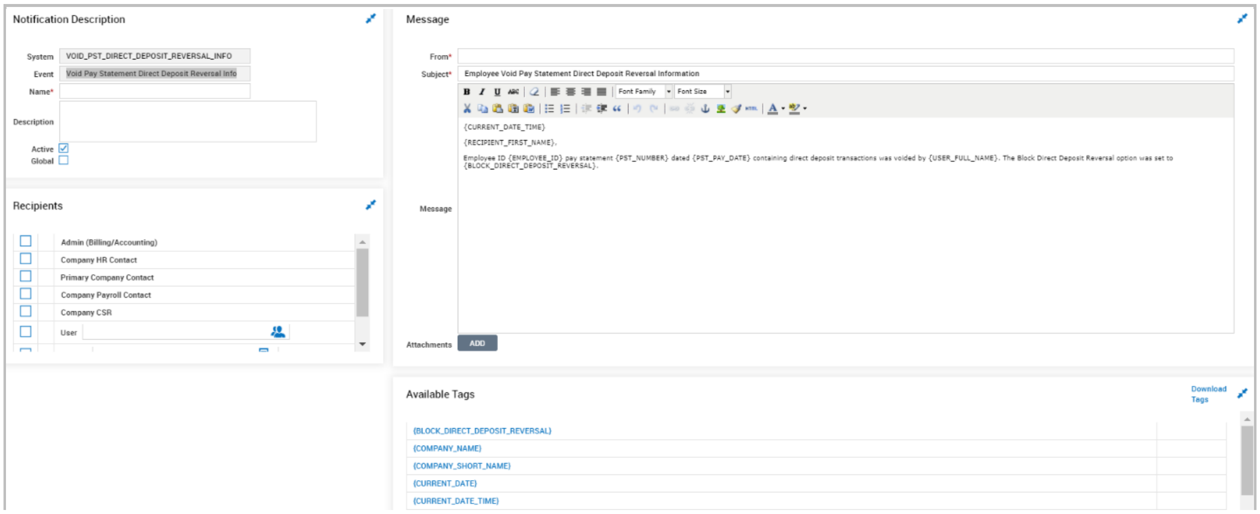
When a user enables the *Block Direct Deposit Reversals* option and has selected a Void pay statement that includes direct deposits, the system will enable the *Block Direct Deposit Reversals* option in *Edit Pay Statement > Utilities > Options*. If the user marks the *Clear* option for the *Block Direct Deposit Reversals* option, the system will disable the *Block Direct Deposit Reversals* option in *Edit Pay Statement > Utilities > Options*.

If the user marks the *Block Direct Deposit Reversals* option or the *Clear* option for *Block Direct Deposit Reversals* and has selected a Void pay statement that does **not** contain direct deposits, the system will make no updates.

NOTE: When a user marks the *Block Current Direct Deposits* option or the *Clear* option for *Block Current Direct Deposits* and has selected a Void pay statement that contains direct deposits, the option does **not** affect the Void pay statements.

Notifications: Void Pay Statement Direct Deposit Reversal Information (Classic UI & New UI)

A new notification, *Void Pay Statement Direct Deposit Reversal Info*, is now available under *Company Settings > Global Setup > Notifications* (*Maintenance > Admin Company> Notifications* for Admin companies). This notification can be configured to generate when a Pay Statement containing any direct deposit transactions is voided.

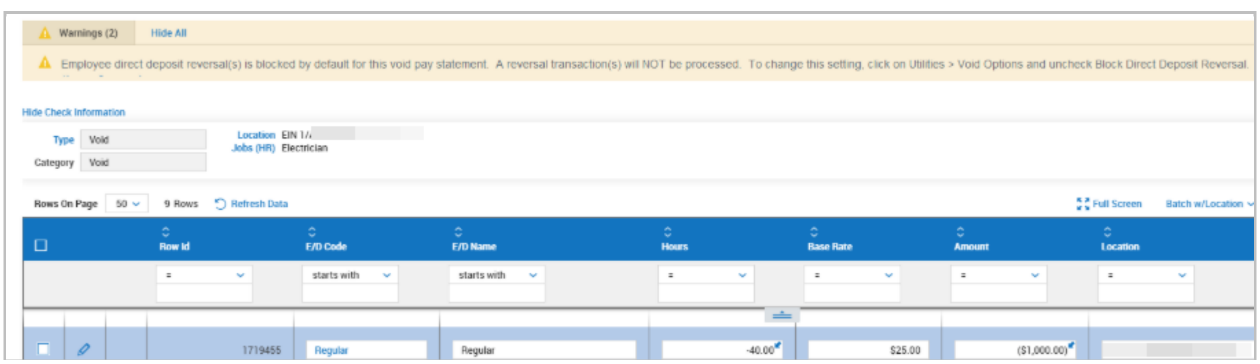


This notification is generated immediately when a Void Pay Statement is saved in an open payroll.

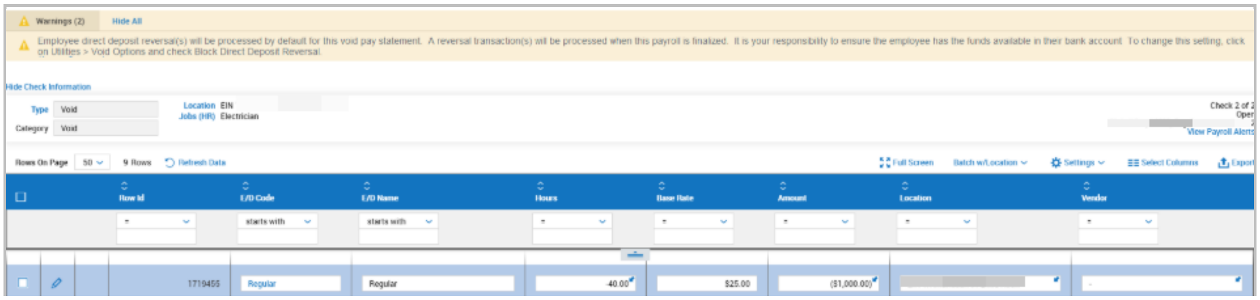
Pay Statements: Warning Message - Pay Statement With Direct Deposit Voided (Classic UI & New UI)

When a user saves a Void pay statement that includes a Direct Deposit, a warning message now displays on the Edit Pay Statement page. The verbiage in the warning message depends upon whether the *Block Direct Deposit Reversal* option from the Void Pay Statement Type or Pay Statement Options is enabled.

If the *Block Direct Deposit Reversal* option from the Void Pay Statement Type or Pay Statement Options is enabled, the warning message reads: *Employee direct deposit reversal(s) will be blocked by default for this void pay statement. A reversal transaction(s) will NOT be processed. To change this setting, click on Utilities > Void Options and uncheck Block Direct Deposit Reversal*.



If the *Block Direct Deposit Reversal* option from the Void Pay Statement Type or Pay Statement Options is **not** enabled, the warning message reads: *Employee direct deposit reversal(s) will be processed by default for this void pay statement. A reversal transaction(s) will be processed when this payroll is finalized. It is your responsibility to ensure the employee has the funds available in their bank account. To change this setting, click on Utilities > Void Options and check Block Direct Deposit Reversal*.

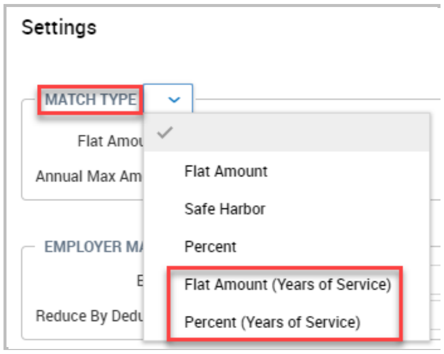


The warning message will always be available, even if the user refreshes or navigates away from and back to this page.

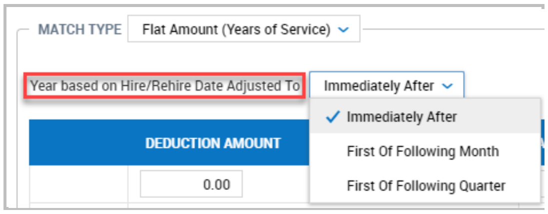
Retirement Plan: Years of Service for Employer Match Calculation (Classic UI & New UI)

Employers can have tiered matches based on years of service or employee contribution levels. The functionality to add years of service employer matches to the Retirement Plan has been added to the system.

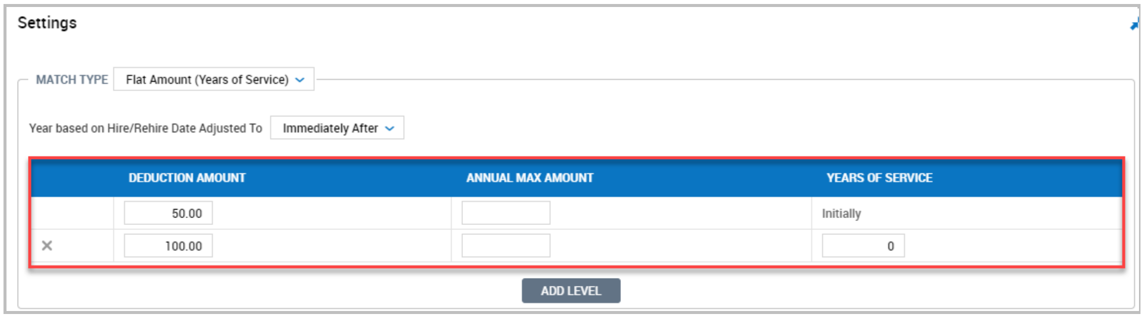
Within the *Settings* widget of the Retirement Plan, two new options in Match Type for *Flat Amount (Years of Service)* and *Percent (Years of Service)* are now available.



Once a user selects the appropriate Match Type, employment length can be defined using the *Year based on Hire/Rehire Date Adjusted To* options for *Immediately After*, *First Of Following Month*, and *First Of Following Quarter*.

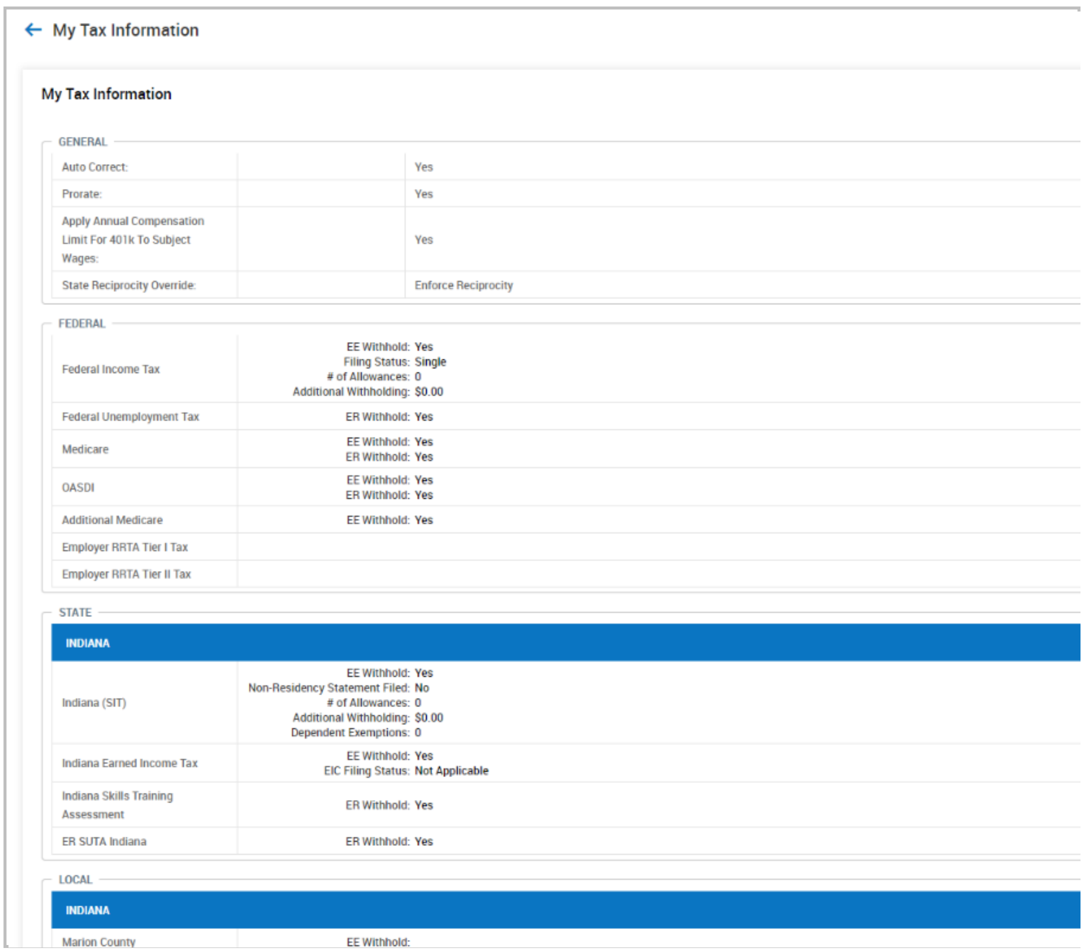


Additionally, users can configure appropriate values for the *Deduction Amount*, *Annual Max Amount*, and *Years Of Service* for each level. The first level is automatically set to *Initially* for *Years Of Service*.



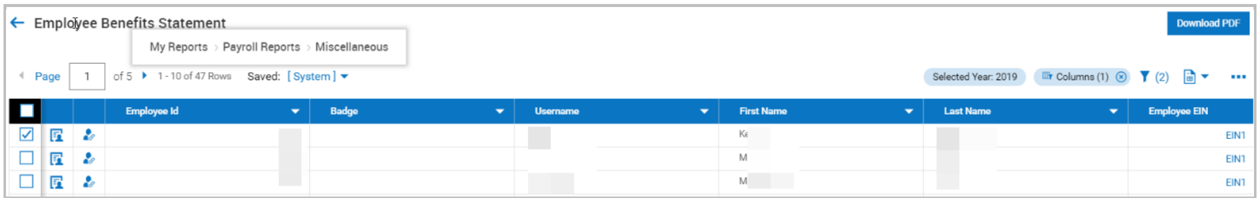
Employee Self Service: Tax Information (Desktop & Mobile)

The My Tax Information page is now available within the New UI Desktop and the Mobile App under *My Info > My Pay > Tax Information*. Employees can access this read only page to view sections for *General*, *Federal*, *State*, and *Local* tax information. This data is based on the employee tax profile, and if an employee makes any changes to their taxes, this page will update to the most current tax settings.



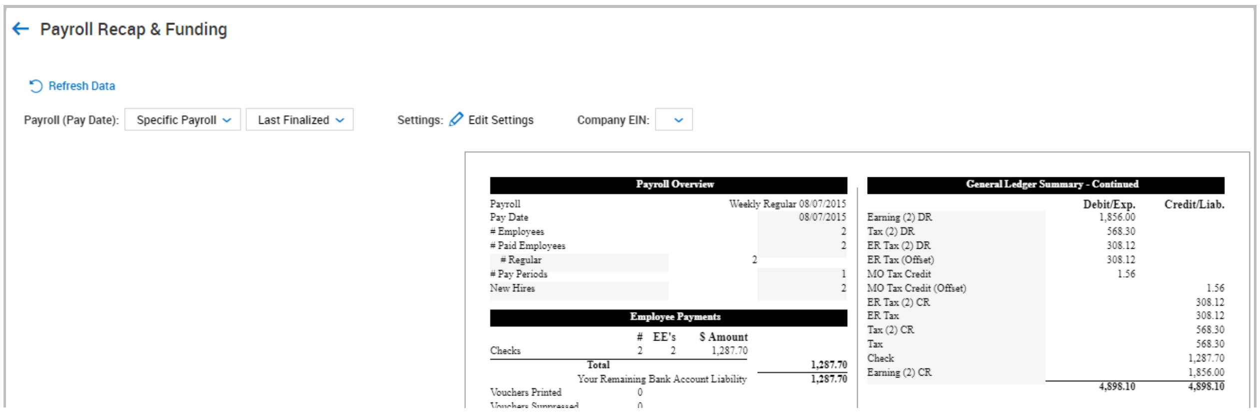
Reports: Employee Benefits Statements (Desktop & Mobile)

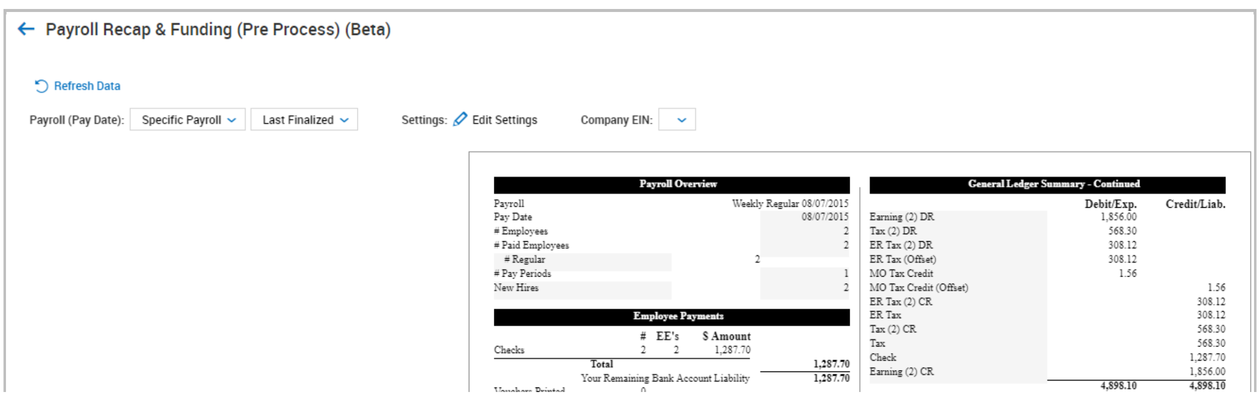
Employees can now view their Employee Benefits Statement (*My Info > My Reports > Payroll Reports > Miscellaneous > Benefits Statements*) within the New UI Desktop environment and mobile application.



Reports: Payroll Recap & Funding (Desktop & Mobile)

Users can now access the Payroll Recap & Funding report and the Payroll Recap & Funding (Pre Process) (Beta) report under *My Info > My Reports > Payroll Funding* within the New UI Desktop environment and mobile application.



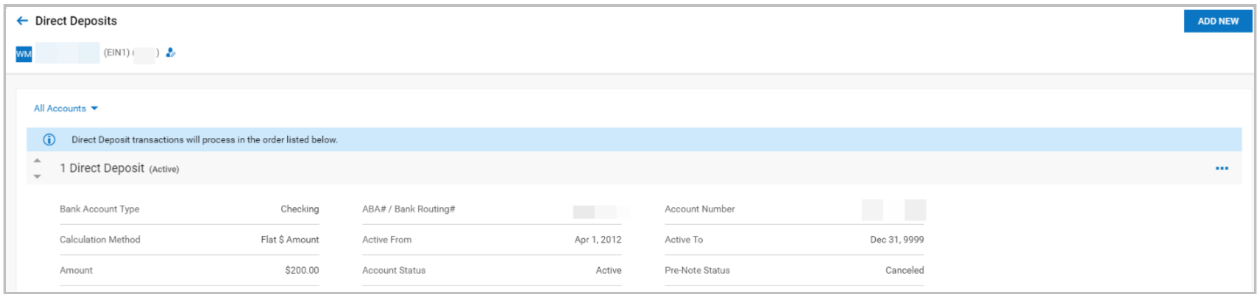


New UI Updates – Functionality Added to Pages

The table below shows the updates made within the New UI and the functionality added. Shown below are example screenshots of the View/Edit pages that are representative of most areas within the product. The design on these pages has been updated to provide a clean, easy to use experience.

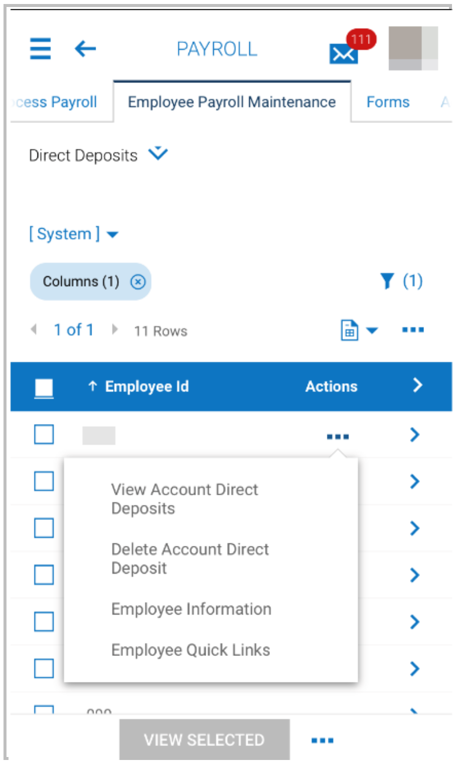
Desktop – View/Edit Page Example

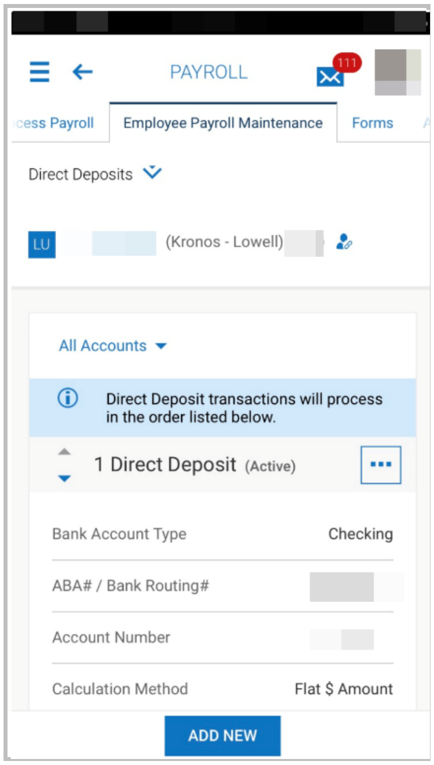
In this view, many pages will display jump links in the left panel. When clicked, these links will move you to that widget, shown on the right side of the page. Many pages will also have additional tabs across the top of the header. The tabs will also display jump links and widgets.



Mobile – View/Edit Page Example

In the mobile view, options will be selected from the Actions menu. Where applicable, when selecting the View option, the widgets will be available and can be opened for viewing/editing. Other options such as uploading documents and adding notes will be available at the bottom of the page.





Product	Component	New UI Menu Path	Functionality Added	Desktop	Mobile
Payroll	View/Edit Payroll - Payroll Quick Links	Team > Payroll > Process Payroll > Payroll Quick Links	View/Navigate to Payroll Quick Links (Select icon to navigate to Payroll Quick Links)	Yes	Not yet
Payroll	View/Edit Batches	Team > Payroll > Process Payroll > View/Edit Batches	View/Edit Batches (Select icon to navigate to Payroll Batches)	Yes	Yes
Payroll	View/Edit Employee Pay Statements	Team > Payroll > Process Payroll > View/Edit Employee Statements	View/Edit Pay Statements (Select icon to navigate to Employee pay statements)	Yes	Yes
Payroll	View Errors and View Warnings	Team > Payroll > Process Payroll > View Errors (Button/Column) Team > Payroll > Process Payroll > View Warnings (Button/Column)	Use icons/columns/buttons to navigate to Payroll Messages report	Yes	Yes
Payroll	View Employee Scheduled Earnings	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings > View Selected	View Selected Scheduled Earnings (Page level action)	Yes	Yes
Payroll	View (Edit) Employee Scheduled Earnings	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings > View Scheduled Earnings	View (Edit) Scheduled Earnings (Row level action)	Yes	Yes
Payroll	Delete Scheduled Earnings	Team > Payroll > Employee Payroll Maintenance > Earnings >	Delete (Row level action)	Yes	Yes

		Scheduled Earnings, Delete			
Payroll	Mass Delete Scheduled Earnings	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings, Select appropriate rows/Scheduled Earnings	Mass Delete (Page level action)	Yes	Yes
Payroll	Employee Scheduled Earnings page/report	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings	View and configured Schedule Earnings page/report	Yes	Yes
Payroll	Scheduled Earnings > Upload Document & Add Note	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings	Upload Document and Add Note (page level actions)	Yes	Yes
Payroll	Scheduled Earnings > Select EIN, Multiple Employees	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings	Select EIN > Multiple Employees (page level action)	Yes	Yes
Payroll	Scheduled Earnings > Mass Edit	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings, Mass Edit option	Select the appropriate rows/earnings, Mass Edit option (page level action)	Yes	Yes
Payroll	Scheduled Earnings > Add New	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings, Add New option	Add new Scheduled Earnings (page level action)	Yes	Yes

Payroll	View Selected Scheduled Earnings > Save	Team > Payroll > Employee Payroll Maintenance > Earnings > Scheduled Earnings	Select the appropriate row(s)/earnings, View Selected, Edit earnings and Save (page level action)	Yes	Yes
Payroll	Payroll Quick Links	Team > Payroll > Process Payroll > Payroll Quick Links icon	Use Payroll Quick Links to access: Retirement Plan Report, Employees Not Paid, Check Payroll Totals, View Pay Statement Records, General Ledger (Summary), System-Generated Retro, Labor Distribution, Garnishment Calculation Details, Child Support Calculation Details, View Pay Statements Audit, View Payroll Manual Edits, Funding, Vendor Payments (Accrued and Paid), Payroll Batches, View Pay Statements	Yes	Yes
Payroll	Payroll Quick Links	Team > Payroll > Process Payroll > Payroll Quick Links icon: Payroll Recap & Funding (Pre Process) (Beta) Payroll Recap & Funding	Payroll Recap & Funding (Pre Process) (Beta) and Payroll Recap & Funding (rows)	Yes	Yes

Resolved Issues

The following issues have been resolved with this release.

Printed Pay Statement and PDF Missing D from Days in Accruals Section

Within the Pay Statement Preview, when you clicked on *Download PDF* or printed the Pay Statement, the *D* from the word *Days* in the *Accruals* section of the Pay Statement was missing. Now the letter *D* in *Days* in the *Accruals* section of the PDF and printed Pay Statement.

Employee Deductions Duplicated on E/D/T Listing Report

The Earning/Deduction/Tax Listing report no longer displays duplicate deductions when goal columns are added, and the report is filtered by a Specific Payroll or Date Range.

2018 District of Columbia Form D-4 in ESS

The 2018 District of Columbia D-4 withholding form (D-4 DC Withholding Allowance Certificate) is now presented to employees under *My Account > My Forms > Withholding*.

Minimum Wage Makeup Earning Calculation on Salaried Employees

When an employee had an Auto Pay earning set to pay both the amount and hours, and the Base Compensation was being reduced by a Time Off earnings code, the Minimum Wage Makeup earnings code erroneously calculated the difference between the base comp reduction and the minimum wage amount instead of calculating nothing as expected.

Now and moving forward, the Minimum Wage Makeup earning is **not** calculated if:

- The employee has a minimum wage makeup earning.
- The base rate in Bate Compensation is more than the Minimum Wage Makeup earning.
- An earnings code with the setting ‘Reduce Base Compensation’ =’YES’ is added to the Pay Statement.

Payroll Legislative Updates

State and Local Legislative Updates

Kentucky

- The Bath County, Kentucky, Occupational License Fee Rate will increase to 2% for Resident and Nonresidents, effective 1 July 2019.
- The Montgomery County, Kentucky, Occupational License Fee Rate will increase to 2% for Resident and Nonresidents, effective 1 July 2019.
- The Simpson County, Kentucky, Occupational License Fee Rate will increase to 1% for Resident and Nonresidents, effective 1 July 2019.

Massachusetts

- The Massachusetts contribution rate for paid family and medical leave, previously scheduled to be 0.63% on 1 July 2019, will now be increased to 0.75% on 1 October 2019. (The medical leave contribution has increased to 0.62% and the family leave contribution has increased to 0.13%).

  The Tax will be levied based on Regular and Supplemental Wages, will not be reduced by any Benefit Contributions and will have the same Wages Base as FICA, which is $132,900 for the year 2019.

New Jersey

- The New Jersey Waterfront Percentage of Payroll Taxes Rate will decrease from 1.84% to 1.80%, effective 1 July 2019.

New York

- The New York Waterfront Percentage of Payroll Taxes Rate will decrease from 1.84% to 1.80%, effective 1 July 2019.

Ohio

- The Bethel, Ohio, City Tax will be reinstated with a Rate of 0.5% for Residents and Nonresidents, effective 1 July 2019.
- The Bratenahl, Ohio, City Tax Rate has been updated to 2% for Residents and Nonresidents, effective 1 June 2019.
- The Coshocton, Ohio City Tax, 39-000-1056840-CIT-000, Tax Credit has been updated to 50% and the Credit Limit has been updated to 1%, effective 1/1/2016.
- The Covington, Ohio, City Tax Credit Limit has been updated to 0.5% for Residents and Nonresidents, effective 1 January 2019.
- The Gahanna, Ohio, City Tax Rate will be updated to 2.5% for Residents and Nonresidents, the Tax Credit will be updated to 100%, and the Credit Limit will be updated to 2.5%, effective 1 July 2019.

- The Mogadore, Ohio, City Tax Rate will be updated to 2.5% for Residents and Nonresidents, and the Credit Limit will be updated to 2.5%, effective 1 July 2019.
- The Navarre, Ohio, City Tax Rate will be updated to 1.75% for Residents and Nonresidents, and the Credit Limit will be updated to 1.75%, effective 1 July 2019.
- The South Euclid, Ohio, tax credit and credit limit have been removed (tax credit decreased from 75% to 0% and credit limit decreased from 1% to 0%), effective 1 March 2019.
- The Springdale, Ohio, City Tax Rate will be updated to 2% for Residents and Nonresidents, effective 1 July 2019.

Pennsylvania

- The Armagh Borough, United School District, Indiana County, Pennsylvania, Local Services Tax will increase to $10 ($5 Municipal Local Services Tax + $5 School District Local Services Tax), effective 1 July 2019.
- The Brush Valley Township, United School District, Indiana County, Pennsylvania, Local Services Tax will increase to $10 ($5 Municipal Local Services Tax + $5 School District Local Services Tax), effective 1 July 2019.
- The Girardville Borough, North Schuylkill School District, Schuylkill County, Pennsylvania, Local Services Tax will increase to $10 ($5 Municipal Local Services Tax + $5 School District Local Services Tax), effective 1 July 2019.
- The Keating Township, Smethport Area School District, McKean County, Pennsylvania Local Service Tax Rate has been updated to $52 a year, effective 1 January 2019.
- The Philadelphia Wage Tax Rate will decrease from 3.8809% to 3.8712% for residents of Philadelphia and from 3.4567% to 3.4481% for non-residents, effective 1 July 2019.
- The Rankin Borough, Woodland Hills School District, Allegheny County, Pennsylvania, Resident EIT Tax Rate will decrease from 1.6% to 1.1%, effective 1 July 2019.
- The Towamencin Township, North Penn School District, Montgomery County, Pennsylvania, Non-Resident EIT Tax Rate will increase from 0.50% to 1.00%, effective 1 July 2019.

Washington, D.C.

- Documentation for the DC ER_FLI (Employer Family Leave Insurance) has been added to all guides. The tax is effective 1 July 2019

Federal

- Corrected the values returned for Gross Subject and Subject Wages for Employer FICA, FICA, Additional Medicare and Medicare, 00-000-0000-ER_FICA-000, 00-000-0000-FICA000, 00-000-0000-MEDI2-000 and 00-000-0000-MEDI-000, which were being returned as Zero when the taxes had been marked as Exempt. This has been corrected so that these are now returned with the values that would have been used had the Employee not claimed Exempt.

State

American Samoa

- Updated the Allowance Values used in the calculation of the American Samoa, Guam, Northern Marianas Islands and Virgin Islands Territory Taxes, 60-000-0000-SIT-000, 66000-0000-SIT-000, 69-000-0000-SIT-000 and 78-000-0000-SIT-000, for the years 2016-2019. When these Territory taxes had been updated to match Federal for these years, the Allowance Values had not been updated. These will now use the Federal Allowance Values for these years.

Kentucky

- The logic in the Engine for the Boyd County, Kentucky OLF, 21-019-0000-OLF-000, and the Ashland City, Kentucky OLF, 21-000-486092-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Ashland City, only the Ashland City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Ashland City OLF Tax will be withheld.
- The logic in the Engine for the Boyd County, Kentucky OLF, 21-019-0000-OLF-000, and the Catlettsburg City, Kentucky OLF, 21-000-489094-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Catlettsburg City, only the Catlettsburg City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Catlettsburg City OLF Tax will be withheld.
- The logic in the Engine for the Clark County, Kentucky OLF, 21-049-0000-OLF-000, and the Winchester City, Kentucky OLF, 21-000-506924-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Winchester City, only the Winchester City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Winchester City OLF Tax will be withheld.
- The logic in the Engine for the Daviess County, Kentucky OLF, 21-059-0000-OLF-000, and the Owensboro City, Kentucky OLF, 21-000-500082-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Owensboro City, only the Owensboro City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Owensboro City OLF Tax will be withheld.
- The logic in the Engine for the Franklin County, Kentucky OLF, 21-073-0000-OLF-000, and the Frankfort City, Kentucky OLF, 21-000-517517-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Frankfort City, only the Frankfort City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Frankfort City OLF Tax will be withheld.
- The logic in the Engine for the Graves County, Kentucky OLF, 21-083-0000-OLF-000, and the Mayfield City, Kentucky OLF, 21-000-497715-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Mayfield City, only the Mayfield City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Mayfield City OLF Tax will be withheld
- The logic in the Engine for the Henderson County, Kentucky OLF, 21-101-0000-OLF-000, and the Henderson City, Kentucky OLF, 21-000-494023-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Henderson City, only the Henderson City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Henderson City OLF Tax will be withheld.

- The logic in the Engine for the Madison County, Kentucky OLF, 21-151-0000-OLF-000, and the Richmond City, Kentucky OLF, 21-000-506924-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Richmond City, only the Richmond City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Richmond City OLF Tax will be withheld
- The logic in the Engine for the Madison County, Kentucky OLF, 21-151-0000-OLF-000, and the Berea City, Kentucky OLF, 21-000-486894-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Berea City, only the Berea City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Berea City OLF Tax will be withheld.
- The logic in the Engine for the McCracken County, Kentucky OLF, 21-145-0000-OLF-000, and the Paducah City, Kentucky OLF, 21-000-500106-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Paducah City, only the Paducah City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Paducah City OLF Tax will be withheld.
- The logic in the Engine for the Montgomery County, Kentucky OLF, 21-173-0000-OLF-000, and the Camargo City, Kentucky OLF, 21-000-488655-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Camargo City, only the Camargo City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Camargo City OLF Tax will be withheld.
- The logic in the Engine for the Montgomery County, Kentucky OLF, 21-173-0000-OLF-000, and the Jeffersonville City, Kentucky OLF, 21-000-512986-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Jeffersonville City, only the Jeffersonville City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Jeffersonville City OLF Tax will be withheld.
- The logic in the Engine for the Pike County, Kentucky OLF, 21-195-0000-OLF-000, and the Coal Run City, Kentucky OLF, 21-000-1699786-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Coal Run City, only the Coal Run City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Coal Run City OLF Tax will be withheld.
- The logic in the Engine for the Pike County, Kentucky OLF, 21-195-0000-OLF-000, and the Elkhorn City, Kentucky OLF, 21-000-491688-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Elkhorn City, only the Elkhorn City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Elkhorn City OLF Tax will be withheld.
- The logic in the Engine for the Pike County, Kentucky OLF, 21-195-0000-OLF-000, and the Pikeville City, Kentucky OLF, 21-000-510155-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Pikeville City, only the Pikeville City OLF tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Pikeville City OLF Tax will be withheld.
- The logic in the Engine for the Shelby County, Kentucky OLF, 21-211-0000-OLF-000, and the Shelbyville, Kentucky OLF, 21-000-487744-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Shelbyville, only the Shelbyville tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Shelbyville OLF Tax will be withheld.

- The logic in the Engine for the Warren County, Kentucky OLF, 21-227-0000-OLF-000, and the Bowling Green, Kentucky OLF, 21-000-487744-OLF-000, has been updated. After thorough research, it was discovered that when there are wages set in Bowling Green, only the Bowling Green tax would need to be withheld. The Engine has been corrected so that when the conditions above are met, only the Bowling Green OLF Tax will be withheld.

New Jersey

- Set default logic for the New Jersey State Income Tax, 34-000-0000-SIT-000, when no FILINGSTATUS or RATETABLE are passed into the Engine. The Default has been set to match the values from the Federal Parameters entered into the Engine. If the employee has claimed Single or Married but withhold at a higher rate for Federal, the STE will use Single and use Rate Table A. If the employee claims Married for Federal, the STE will use Married and Rate Table B. This is set to account for scenarios where an employee has not submitted their New Jersey Form NJ-W4.

Ohio

- The Coshocton, Ohio, City Tax Credit Limit has been updated to 1%, effective 1 January 2016. This is a correction to the 0.5% Credit Limit change made in STE Release 2019-R6.