



Software Release Notes

OnePoint Human Capital Management

December 2019

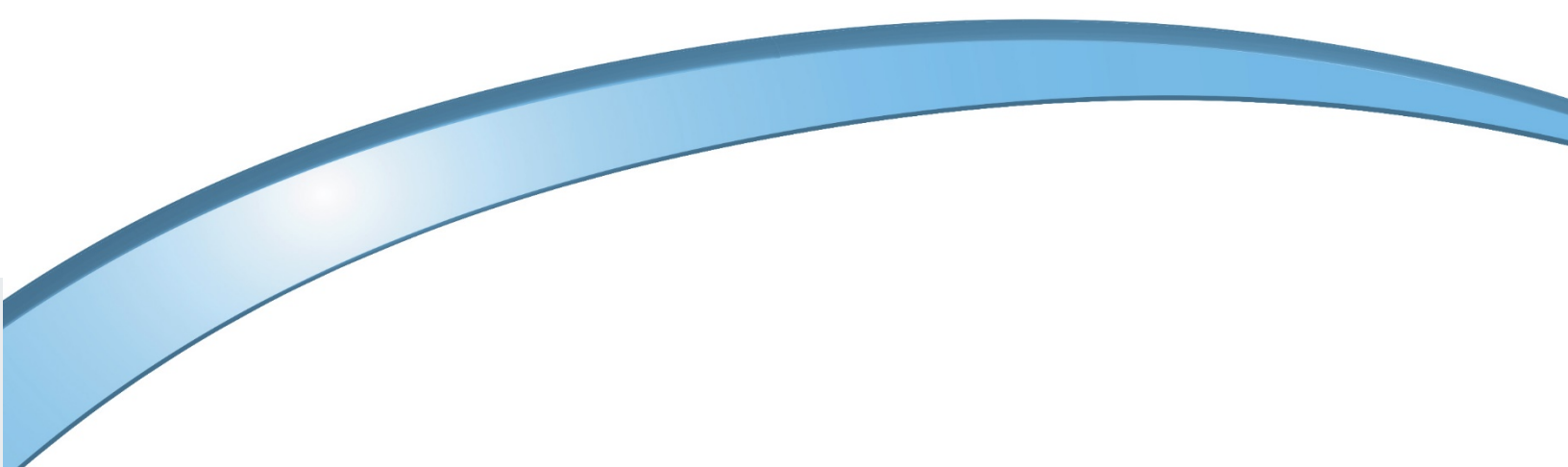
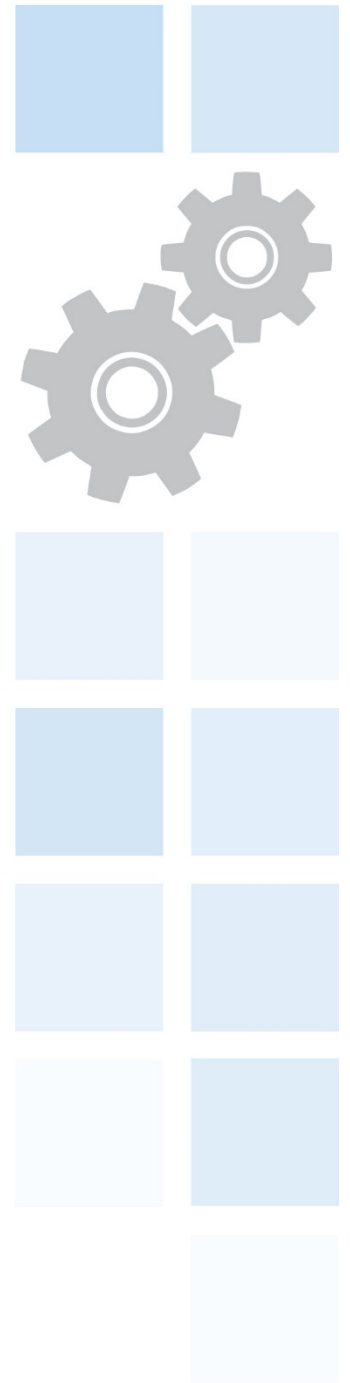


Table of Contents

Table of Contents.....	2
Release Information.....	6
Supported Operating Systems and Browsers	6
Downloading Documents in the New UI	6
Human Resources	8
Benefits.....	8
Benefit Plans: Redesign of PDFs (Classic UI & New UI)	8
Employee Information.....	9
Security Settings Added to Base Compensation & Rate Table Settings (Classic UI & New UI)	9
New UI Desktop & Classic UI: Base Compensation Widget	9
New UI Mobile Experience: Base Compensation Widget	11
Base Compensation Reports.....	11
New Security Setting for Rate Tables.....	11
E-Verify	12
Delete E-Verify Request Button Removed from E-Verify Requests Report (Classic UI & New UI).....	12
Hiring, Rehiring & Terminating Employees.....	12
Options Added to Require HR Action for Hire, Re-Hire, and Terminate (Classic UI & New UI)	12
Hire HR Action to Allow Option to Require Applicant Selection (Classic UI & New UI)	13
Multi EIN.....	14
Creating Employees and Applicants in Classic UI.....	14
Primary National ID Field - 'No ID Needed' (Classic UI & New UI)	14
HR Actions.....	14
Using an HR Action with Old National ID Fields.....	14
Custom Forms.....	14
HR Actions & Custom Forms.....	15
Position Management.....	16
Assignment Numbers: Backward Compatibility (Classic UI & New UI)	16
Assignment Number Added to Editing Pop Up (Classic UI & New UI)	16
Employee Assignments Report Page: Assignment Numbers Added (Classic UI & New UI)	16
Employee Assignments Report Page: Pay Grade / Annual Base Comp Columns Added (Classic UI & New UI) ..	16
Employee Assignments Report Page: Jobs (HR) Column Added (Classic UI & New UI)	17
HR Actions: Position Assignments and Hire/Rehire HR Actions (Classic UI & New UI)	17
Imports: Assignment Number Added to Employee Position Assignments Template (Classic UI & New UI)	17
Security: Position Assignment History Security Setting Moved (Classic UI & New UI)	18
Recruitment	19

Applicant Portal: Hiding DBA/Company Name on Log In Page (Classic UI & New UI)	19
Degree Type Requirement Added for Applicants (Classic UI & New UI).....	19
Reports	19
Security Profile Update for All HR Action Request Report (Classic UI & New UI)	19
Workflows	20
Workflows: Cost Center Manager Added to Hiring Stage Change Request Workflow (Classic UI & New UI)	20
To Do Items: Reallocation of Manager Change (Classic UI & New UI).....	21
Workflows: Initiate Form Step Added to Hiring Stage Change Request Workflow (Classic UI & New UI).....	21
New UI Enhancements.....	21
New! Performance Management Peer Feedback – New UI.....	21
New UI: Benefits Enrollment	21
‘Guaranteed At’ Functionality Added to New UI (Mobile & Desktop)	21
New UI: E-Verify & I9 Forms	22
Options Added to Require I9 Document Upload & Prompt for E-Verify (Mobile).....	22
E-Verify User Prompt & I9 Forms (Mobile)	23
How the new E-Verify settings work.....	23
New UI: Everything Benefits.....	23
Menu Moved from Team to Company Settings (Mobile & Desktop)	23
New UI: Recruitment	24
Applicant Information: Mini Header Option Added (Desktop)	24
Applicant Selection Pop Up Updated (Mobile & Desktop)	24
Job Requisitions: Data Tags Added to Applicant Communications (Mobile & Desktop)	24
Job Requisitions: Internal Applicant Questionnaire Added (Mobile & Desktop).....	25
Resume Widget and Link Added to View Job Application Page (Mobile & Desktop)	26
New UI: Reports	26
Report Moved & Security Setting Added for Job Info History Report (Mobile & Desktop)	26
Reports Moved & Security Settings Added for Position History Reports (Mobile & Desktop)	26
New UI: Succession Plans	27
Icon Changes for Current and Historical in Succession Plans Report Page (Mobile & Desktop).....	27
User Interface Updates in Succession Plans Report Page (Mobile & Desktop)	27
New UI: Terminations.....	27
Required Manager Fields During Termination (Mobile & Desktop)	27
New UI: To Dos	27
Mass Approve / Reject Support Added (Mobile).....	27
Time and Labor	29
Accruals Setting Added to Maximum Accrued Amount (Classic UI & New UI).....	29

Allow Timesheet Approval before Time Entry Approval (Classic UI & New UI).....	29
Global Notifications – Points – {Points_Detail} Tag Per Category when “Category List” Condition is Used (Classic UI & New UI).....	29
Overtime Distribution for Semi-Monthly Pay Period (Classic UI & New UI).....	29
New UI	30
New UI Updates – Table of Functionality Added to Pages	30
New UI: Accruals.....	34
Details/Summary Toggle Added to Accrual History Report for Employees (Desktop & Mobile).....	34
Details/Summary Toggle Added to Accrual History Report for Managers (Mobile).....	34
New UI: Added “Value Calculation” to Calculated Time Summary Report Charts (Desktop & Mobile).....	34
New UI: Configuration Option for Comments in Time Off Requests (Desktop & Mobile)	35
New UI: Converted Employee Profile Schedule Widget (Desktop & Mobile).....	35
New UI: Geo-Fencing – Override Based on Separate Cost Center (Mobile).....	36
New UI: Geo-Fencing – “Use Employee Address as Work Address” (Mobile).....	36
New UI: To Dos	37
Added Mass Approve / Reject Support (Mobile)	37
New UI: Time Off Request	37
TOR Calendar Now Utilizes Raw Time (Desktop & Mobile)	37
Scheduler	38
Added “Clopening” Rule to Schedule Fairness Act (Classic UI & New UI)	38
Added Constraint Violations to Summary by Employee Report & Credentials and Certifications to Scheduler Reports (Classic UI & New UI).....	38
Added Quick Links to Employee Schedule Details Window (Classic UI & New UI).....	38
Engine Now Favors Primary Skills and Home Cost Center (Classic UI & New UI).....	39
Open Shifts Posted Notification Now Includes Additional Cost Center Info (Classic UI & New UI).....	39
Pop-Up Warning Message After Clicking Assign Shifts (Classic UI & New UI)	40
New UI Enhancements	40
Added Shift Multi-Select (Mobile)	40
New UI: Converted Employee Profile Schedule Widget (Desktop & Mobile).....	40
New UI: Deprecate Schedule Overview Pages (Desktop).....	40
NEW **Month View of Schedule**	41
Month View of Schedule (Desktop & Mobile)	41
Coverage Calendar (Desktop & Mobile)	42
New UI: To Dos	43
Added Mass Approve / Reject Support (Mobile)	43
Payroll	45
Company Settings.....	45

Pay Statement Hours Decimal Places (Classic UI & New UI)	45
Company Taxes.....	45
US Taxes Unavailable in Non-US EINs (Classic UI & New UI)	45
Earnings Codes	46
Earnings Code Multiplier Decimal Places (Classic UI & New UI)	46
General Ledger	46
General Ledger PDFs Redesigned (Classic UI & New UI).....	46
Reports	47
Reports: Tax Variance Report Availability (Classic UI & New UI)	47
New UI Enhancements	47
New UI Updates – Table of Functionality Added to Pages	48

Release Information

Supported Operating Systems and Browsers

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

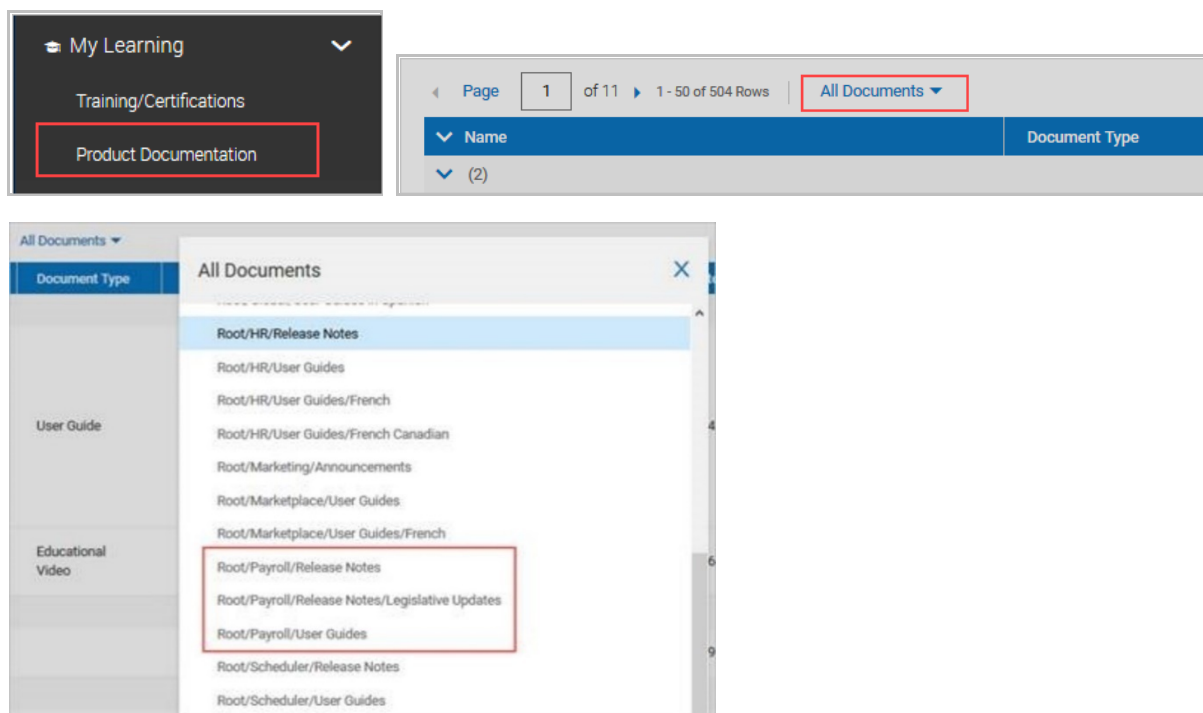
NOTE: The list shown in the table below are operating systems we support, though they may not be actively tested.

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

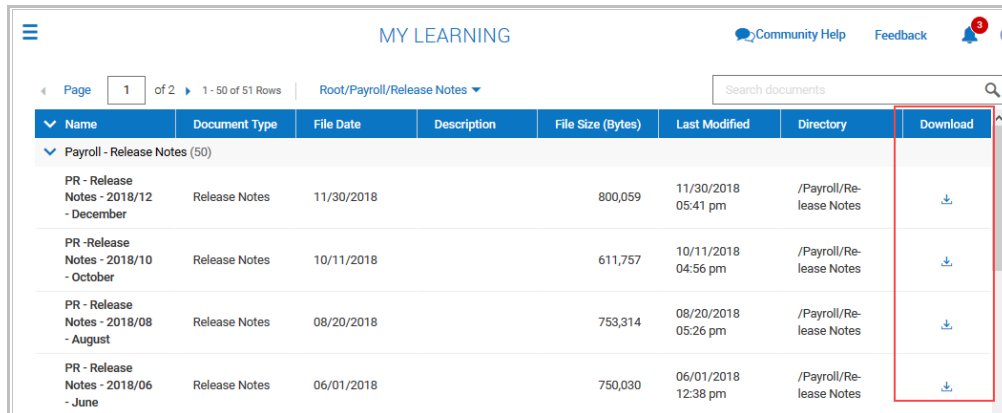
Downloading Documents in the New UI

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.



The screenshot shows a web interface titled "MY LEARNING". At the top, there are links for "Community Help", "Feedback", and a notification bell with a red circle containing the number "3". Below the header, there is a navigation bar with "Page 1 of 2" and "1 - 50 of 51 Rows". A dropdown menu shows "Root/Payroll/Release Notes". A search bar labeled "Search documents" is on the right. The main content is a table with the following columns: Name, Document Type, File Date, Description, File Size (Bytes), Last Modified, Directory, and Download. The table lists four documents under the "Payroll - Release Notes" category. A red box highlights the "Download" column, which contains download icons for each document.

Name	Document Type	File Date	Description	File Size (Bytes)	Last Modified	Directory	Download
PR - Release Notes - 2018/12 - December	Release Notes	11/30/2018		800,059	11/30/2018 05:41 pm	/Payroll/Release Notes	
PR - Release Notes - 2018/10 - October	Release Notes	10/11/2018		611,757	10/11/2018 04:56 pm	/Payroll/Release Notes	
PR - Release Notes - 2018/08 - August	Release Notes	08/20/2018		753,314	08/20/2018 05:26 pm	/Payroll/Release Notes	
PR - Release Notes - 2018/06 - June	Release Notes	06/01/2018		750,030	06/01/2018 12:38 pm	/Payroll/Release Notes	

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

Human Resources

The following enhancements have been added to this release. These updates will affect the Classic UI, and in some cases will affect both the Classic and New UI. Those cases will be notated.

Benefits

Benefit Plans: Redesign of PDFs (Classic UI & New UI)

135789 & 125831: The Benefit Plans PDF (*Company Settings > Profiles/Policies > Benefits > Plans > Download Selected To PDF*) has been redesigned. The Header and Footer of the document have been updated and a cover page has been added. Additional updates to the alignment and formatting of the PDF have been made.

The PDF can also be downloaded within the plan after clicking the edit icons.

Company Configuration: Benefit Plans

Customer Name:

Source:

Generated:

10/29/2019 09:44a

Generated By:

System Administrator

HR

Benefit Plans

Company Settings > Profiles/Policies > Benefits > Plans

Benefit Plan Details

Benefit Type	Name	Currency
Basic Life	Basic Life	United States Dollar (\$)
Basic Life	EE Life Ins	United States Dollar (\$)

Benefit Plan: Basic Life

Dates

Effective From	Effective To	Description	Active	Downloaded
03/17/2014	03/16/2015	Company provided Life Insurance - 1.5x annual base salary	Yes	Yes
03/17/2015	12/31/9999	Company provided Life Insurance - 1.5x annual base salary	Yes	Yes

03/17/2014 - 03/16/2015

General Info

Coverage Levels			
#1 Namw1			
Premium			
08/12/2019			
Option	Enabled	Additional Info	
Show Employer Contribution	Yes		
Identify Spouse	Yes	Required:	Yes
		SSN Required:	Yes
		BSN Required:	Yes
		SIN Required:	Yes
		NIN Required:	Yes
		Birthday Required:	Yes
Identify Children	Yes	Maximum Children	20
		At least Required	14
		Child Premium Calculation	Yes
		SSN Required:	Yes
		BSN Required:	Yes
		SIN Required:	Yes
		NIN Required:	Yes
		Birthday Required:	Yes
Identify Beneficiaries	Yes	Maximum Beneficiaries	20
		At least Required	14
		SSN Required:	Yes
		BSN Required:	Yes
		SIN Required:	Yes
		NIN Required:	Yes
		Birthday Required:	Yes
Identify Contingent Beneficiaries	Yes	Maximum Beneficiaries	20
		At least Required	14
		SSN Required:	Yes
		BSN Required:	Yes
		SIN Required:	Yes
		NIN Required:	Yes
		Birthday Required:	Yes

Employee Information

Security Settings Added to Base Compensation & Rate Table Settings (Classic UI & New UI)

134092: A new **Limited View** option has been added to the *Base Compensation* security setting. This is located in the *Employee* section of the *HR* tab in security profiles. The setting will limit users so they can only see certain fields within the Base Compensation widget of employee accounts.

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

Additional Compensation Settings	View/Edit	
Base Compensation	View/Edit	(<input checked="" type="checkbox"/> Limited View)

New UI Desktop & Classic UI: Base Compensation Widget

User has *View/Edit* permission to *Base Compensation* security permission. *Limited View* is unchecked.

Base Compensation

CURRENT COMPENSATION

	Amount \$	Hours
Annual	81,650.00	2080:00
Pay Period	3,140.38	80:00
Hourly	39.25	

	AMOUNT \$	PER	HOURS	PER	PP IN YEAR	ANNUAL \$	EFFECTIVE FROM	
	81,650.00	Year	2080:00	Year	26	81,650.00	12/31/1900	+

RATE TABLES

Rate 1: Rate Table 1	Personal	EDIT
Rate 2: Rate Table 2	Personal	EDIT
Rate 3: Rate Table 3	Personal	EDIT

When *Limited View* is checked, only the following fields will be visible. Users with *View/Edit* permission can still edit the visible fields.

- Amount \$
- Per (applicable to the preceding *Amount \$* field)
- PP In Year
- Effective From

The following fields will be hidden.

- Hours
- Per (applicable to the preceding *Hours* field)
- Annual \$ / Hourly \$ drop-down selector
- Autopay Amount Earning (if applicable)
- Autopay Type (if applicable)
- Autopay Schedule (if applicable)
- The fields within *Current Compensation* will also be hidden from view

Base Compensation

	AMOUNT \$	PER	PP IN YEAR	EFFECTIVE FROM
<div> <div></div> <div></div> </div>	81,650.00	Year	26	12/31/1900

RATE TABLES

Rate 1: Rate Table 1

Personal

EDIT

Rate 2: Rate Table 2

Personal

EDIT

Rate 3: Rate Table 3

Personal

EDIT

New UI Mobile Experience: Base Compensation Widget

The screenshot shows a mobile interface for 'Base Compensation'. It features a header with a building icon and the title 'Base Compensation'. Below this is a section titled 'Compensation Changes'. The first entry is 'Effective From 11/04/2019' with a blue expand/collapse icon. It lists 'Compensation' as '\$21 / Hour' and '# Of Pay Periods' as '26'. A 'Show Less' link is below. The second entry is 'Effective From 12/31/1900' with a similar expand/collapse icon. It lists 'Compensation' as '\$20.25 / Hour' and '# Of Pay Periods' as '26'. A 'Show Less' link is also present.

Base Compensation Reports

The *Limited View* setting will affect user's ability to view report data. Any report in the system where Base Compensation can be viewed will be controlled by this setting.

Base Compensation History Reports

- *My Info > My Reports > HR Reports > Employee Maintenance*
- *Team > HR > Reports > Employee Maintenance*
- *Company Settings > Imports > Employee Setup*

New Security Setting for Rate Tables

A new **Rate Tables** security option has been added and is located in the *Employee* section of the *HR* tab in security profiles. This setting splits off from the *Base Compensation* permission and creates a separate security setting for access to employee rate tables. Options include *View*, *View/Edit* and *View/Edit (Custom)*.

The screenshot shows a security profile configuration for 'Rate Tables'. It includes a dropdown menu currently set to 'View/Edit (Custom)' with a downward arrow. To the right is a button labeled 'PERMISSIONS'.

The *View/Edit (Custom)* setting allows you to set permissions for each rate table. They can be set to *View* or *Edit*, or both.

The screenshot shows a table titled 'HR: Employee: Rate Tables'. It has two columns: 'View' and 'Edit'. There are five rows, each representing a rate table. Each row has checkboxes for both 'View' and 'Edit' permissions.

	View	Edit
Rate Table 1	<input type="checkbox"/>	<input type="checkbox"/>
Rate Table 2	<input type="checkbox"/>	<input type="checkbox"/>
Rate Table 3	<input type="checkbox"/>	<input type="checkbox"/>
Rate Table 4	<input type="checkbox"/>	<input type="checkbox"/>
Rate Table 5	<input type="checkbox"/>	<input type="checkbox"/>

NOTE: We have provided backward compatibility for these split settings. Any previous security profile set for *Base Compensation* that had *View* or *View/Edit* will have *View* or *View/Edit* for *Rate Tables*.

E-Verify

Delete E-Verify Request Button Removed from E-Verify Requests Report (Classic UI & New UI)

139632: E-Verify v.30 does not support the deleting of requests, even for draft cases. As such, we have removed the *Delete E-Verify Request* button from the E-Verify Requests report page. It will not be available as a row icon and has also been removed from *Add/Remove Columns*.

Hiring, Rehiring & Terminating Employees

Options Added to Require HR Action for Hire, Re-Hire, and Terminate (Classic UI & New UI)

87812: New options have been added to Company Setup to enforce the use of HR Actions when hiring, re-hiring or terminating employees. These options are located in the *HR Settings* widget under *Company Settings > Global Setup > Company Setup*. These options require the HR module to be enabled for your company.

- Use HR action for Hire
- User HR action for Re-Hire
- User HR action for Terminate

The screenshot shows the 'HR Settings' widget. It contains several configuration options: 'Treat Pay Grade Violation As' (Warning), 'Manager To Use For Organization Chart Generation' (Manager), 'Manager To Use For Compensation Trees' (dropdown), 'Document Type Required' (checkbox), 'Bypass HR action For' (text field with a user icon), and three checkboxes: 'Use HR action for Hire' (checked), 'Use HR action for Re-Hire' (checked), and 'Use HR action for Terminate' (checked). These three checkboxes are highlighted with a red box. At the bottom, there is a checkbox for '19 Document Upload Required'.

When one, or any combination of these settings are checked, the Hire/Re-Hire/Terminate options in Employee Information, when selected, will present a pop-up with a list of available HR Actions. Users can select one of the options and will then be directed to that HR Action where they can complete the action. Access to the HR Actions in the pop-up and fields within are according to the user's security permissions.

The screenshot shows a pop-up window titled 'HR Hire Actions' with a close button (X). It contains two options: 'HIRE Applicant' (with a pencil icon) and 'Hire' (with a pencil icon).

The options in Company Setup have also been added to the *HR Settings* section of the *Company Settings* import template on the *Instructions* tab. The import template is located under *Company Settings > Global Setup > Imports*, in the *Company Setup* category.

Field Name	Required	Valid Formats	Example
WC Carrier Custom 3 Label			
Treat Pay Grade Violations As		Ignore, Warning, Error	
Manager To Use for Org Chart		Manager 1 - 6	Manager 1
I9 Document Upload Required		Y/N	
Use HR action for Hire		Y/N	Y
Use HR action for Re-Hire		Y/N	N
Use HR action for Terminate		Y/N	Y

Additionally, the **Bypass HR Action For** field is a filter that allows for the selection of employees. The employees included in this filter can use the Hire/Re-Hire/Terminate options outside the HR Action.

HR Settings

Treat Pay Grade Violation As: Warning

Manager To Use For Organization Chart Generation: Supervisor

Manager To Use For Compensation Trees: Supervisor

Document Type Required: ☐

Bypass HR action For: Employees (3)

Use HR action for Hire: ☒

Use HR action for Re-Hire: ☒

Use HR action for Terminate: ☒

I9 Document Upload Required: ☐

Hire HR Action to Allow Option to Require Applicant Selection (Classic UI & New UI)

134084: Currently when hiring an employee through a Hire HR action (My Employee Action Request, HR Action Sub Type of Hire), employees could be hired without having to select an applicant. We now have added an option to these HR Actions to restrict hiring to applicants only.

For companies that have the Recruitment module enabled, a new **Require Selection of Applicant** checkbox has been added that will require hiring managers to select an applicant. Configuration of HR Actions are located under *Company Settings > HR Setup > HR Actions*.

When the HR Action is started, this will become a required field and cannot be left blank.

HR Action

Name*:

Type*: My Employee Action Request

Approver Security For Apply Changes: ☐

Require Selection of Applicant: ☒

Workflow*:

Hire Applicant Only

Choose Applicant *:

Job Application:

Effective From *: 10/25/2019

CANCEL CONTINUE

Multi EIN

Creating Employees and Applicants in Classic UI

139133 & 136027: Previously, when creating employees or applicants in the Classic UI, the old National ID fields were used for validation.

In this system release, validation will occur within the framework of the Primary National ID functionality. If the *Primary National ID is Required* setting is selected and an account is saved with empty ID fields, the following error message displays, “*At least one National ID is required*”.

Primary National ID Field - ‘No ID Needed’ (Classic UI & New UI)

In the event an employee is hired without an assigned Primary National ID number, the system assigns *No ID Needed* to that employee. The system does not assign *No ID Needed* by default except for in a few cases. It generally has to be explicitly set. Previously, managers could override this field in employee accounts, or through the Hire HR Action. To provide more flexibility, in this release, we are allowing the Primary National ID field to be edited in the following areas.

HR Actions

130963 & 136890 & 137878: The ID field can be updated via the *My Information*, *My Employee Information (Regular)*, and *My Employee Information (Re-Hire)* HR Actions. This allows both employees and managers to update the field.

- This applies to single and multi EIN companies.
- If a Primary National ID number is changed via an import, and then changed again with an HR Action, the HR Action will take priority and the imported value will become secondary.

Using an HR Action with Old National ID Fields

If an employee record contains *No ID Needed* in the Primary National ID field, and an HR Action using the old National ID fields is used to change their information, the *No ID Needed* value will be changed to the type that was entered as primary. If one of the old fields is filled out, that will be primary. If there are multiple ID fields filled out it will set based on the default type set on the company level.

- Scenario: If the HR Action is submitted, and the effective date is set for the future and the primary type is changed from *No ID Needed* to any type of Primary National ID within this period of time, the change will still be applied.
- Result: The type specified in the HR Action will become primary, and the type that was set before the HR Action was applied will become secondary.

When Company Setup is configured with Primary National ID Type is Required/Unique, the system validates on these settings and there will be no validation link with the old settings.

Custom Forms

135042: Users are now allowed to override the *No ID Needed* primary type anytime a custom form is completed for that employee and contains a National ID number.

If a custom form is submitted with several numbers:

- This applies to single and multi EIN companies.
- If there are multiple ID fields filled out it will set based on the default type set on the company level. Otherwise the established hierarchy will be used (SSN, SIN, NIN, BSN).

HR Actions & Custom Forms

133520: In cases where an HR Action is configured with both new and old National ID fields, an error message will be generated when saving new HR Actions, or upon assigning/submitting existing HR Actions.

- *Wrong HR action configuration - HR action cannot include both old SSN/NIN/BSN/SIN fields and new National ID component. Please change the configuration or contact your administrator*

133519: It is possible to have a Custom Form item and other National ID items attached to an HR Action. Since Custom Forms can be configured with National ID fields, this can cause a clash with the other National ID items. In such cases, when new HR Actions are saved, or upon assigning/submitting existing HR Actions, an error message will be generated.

- *Wrong HR action configuration - both HR action and Custom form include National ID fields. Please change the configuration or contact your administrator.*

Position Management

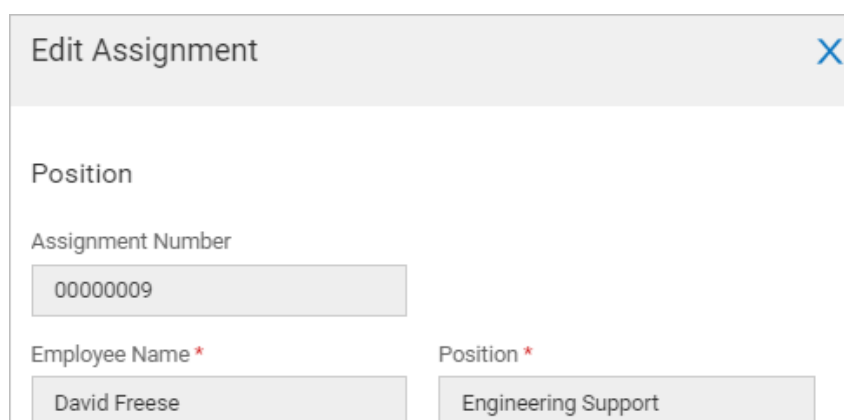
Assignment Numbers: Backward Compatibility (Classic UI & New UI)

135254: With the addition of Assignment Numbers in Position Management, we will provide numbers for existing assignments.

For any existing Position Assignments (i.e. active assignments, inactive assignments, assignments for terminated employees, etc.) we will auto-populate the Assignment with the next available value, in alphanumeric format. Deleted assignments will not be included.

Assignment Number Added to Editing Pop Up (Classic UI & New UI)

135250: The Assignment Number will now display in the editing pop-up on the Employee Assignments report page. It will not display when creating new assignments, as the system has not yet assigned the number.



Employee Assignments Report Page: Assignment Numbers Added (Classic UI & New UI)

135253: The Assignment Number used for Position Assignments has now been made available to be added as a column to the Employee Assignments report page. This is a system generated number.

- New UI: *Team > My Team > Employee Assignments*
- Classic UI: *My Reports > HR > Position Management > Employee Assignments*

Employee Assignments Report Page: Pay Grade / Annual Base Comp Columns Added (Classic UI & New UI)

136105: Two new columns are available to be added to the Employee Assignments report page.

- **Annual Base Comp (\$)** – The value will populate with the Annual Amount shown within the Current Compensation widget on the Employee Profile. The amount to be displayed will be the Annual amount as of the system date and cannot be effective-dated.
- **Employee: Pay Grade** – The value displayed is according to the current system date and cannot be effective-dated.

Employee Assignments Report Page: Jobs (HR) Column Added (Classic UI & New UI)

130310: The **Jobs (HR)** column is now available to be added to the Employee Assignments report page.

- **Jobs (HR)** - When added, the column will populate with the Job associated with the Position shown on the same row. For example, if Rob is assigned to Position A and Position A is associated with the Job *Cook*, this new column will display *Cook* in that row.

HR Actions: Position Assignments and Hire/Rehire HR Actions (Classic UI & New UI)

141859: A system check has been put into place to prevent double-hiring of employees, resulting in inconsistent data and multiple assignments to the same position.

For example, a Rehire HR Action is created and saved for an employee, but not submitted. Later, another Rehire HR Action is created for the same employee and submitted. If a user were to go back to the first saved action and submit it, the employee could have multiple position assignments, plus be hired twice in the system.

In such scenarios, we will now present users with a ***This employee has already been hired*** error message.

Imports: Assignment Number Added to Employee Position Assignments Template (Classic UI & New UI)

135353 & 135364: The Assignment Number used in Position Assignments is now included as the first column in the **Employee Position Assignments** import template. The import template is located in the HR category under *Company Settings > Imports > Overview* and will update position assignments.

The employee and position themselves cannot be changed via this import, but all other fields should be able to be updated. If an Assignment Number is entered on the import template, the system will not validate any assignee or position information entered in that same row. The Assignment Number already validates the user and position.

If the Assignment Number in the import is NULL, the import will work as it does currently by creating a new position assignment, performing validations, and providing error messages if there are any violations.

If the Assignment Number in the import is not NULL AND does not match an existing Assignment Number in the company, the following error message will be generated.

"The Assignment Number on [Line#] does not match any in the system. No updates were performed. Please adjust accordingly and import again."

If the Assignment Number in the import is not NULL AND does match an existing Assignment Number in the company, the values on the assignment that matches the Assignment Number will be updated.

If the criteria in Step 3 are met **AND** the user has included values in columns R (Rate/Hour), S (Rate Effective From), or T (Rate Effective To), the rest of the items in the row will be processed (provided they pass all existing validations) and the following message will display.

"The rate information provided for the Assignment Number on [Line #] has not been updated. Please adjust this manually on the assignment."

Security: Position Assignment History Security Setting Moved (Classic UI & New UI)

140768: The Assignment History Report was added in the October 2019 release. A security option was included with the introduction of this report and was grouped with the other Position Management Reports under the Reports tab of security profiles.

It was discovered that user profiles where this setting was unchecked were still able to access the report. To prevent this from happening, we have moved the security setting to the Audit Reports section of the Reports tab of security profiles.

Recruitment

Applicant Portal: Hiding DBA/Company Name on Log In Page (Classic UI & New UI)

133167: In a previous release, we added a *Hide DBA/company name* checkbox in the *Job Search Page Configuration* section of *Applicant Tracking/Recruitment Configuration*. When checked, this setting would hide the DBA name of a company on the job search pages of the applicant portal.

Functionality has now been introduced where the *Hide DBA/company name*, when enabled will also hide the DBA name from applicant login pages.

For Multi EIN Companies - After clicking **Create New Account**

- The applicant log in page shows the DBA name based on the *Hide DBA/company name* setting and *Company EIN* is set to *Default* (*Job Search Page Configuration* section of *Applicant Tracking/Recruitment Configuration*.)
- The careers job search page also shows the DBA name based on whether *Company EIN* is set to *Default*. Therefore, to hide the DBA name from the above pages, be sure to enable (check) the *Hide DBA/company name* in the Default EIN (*Company EIN* drop-down.) Other show job pages and general applicant login pages will pull the setting to *Hide DBA/company name* from the respective EIN's in the drop-down.

Degree Type Requirement Added for Applicants (Classic UI & New UI)

20273: In the Recruitment module, under the Applicant Profile Setup (*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Profile Setup*), *Degree* has been added under the *Education* tab. This field is enabled by default and can also be marked as required by checking the *Required* checkbox in the Applicant Profile Setup. Degree selections available to the applicant populate based on the code for the degree that is defined under *Company Settings > HR Setup > Education > Degrees*.

Once required, applicants must select a degree type from the selections when indicating they have a degree.

Reports

Security Profile Update for All HR Action Request Report (Classic UI & New UI)

134547: During the week of October 28, 2019, a new *All HR Action Requests* security setting was added to help control user access to the All HR Action Requests report. The setting is located in the *Employee Information Reports* section of the *Reports* tab.

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

Security Items

Full Access ☐

HR Reports ESS

EMPLOYEE INFORMATION REPORTS

☒ All HR Action Requests

Workflows

Workflows: Cost Center Manager Added to Hiring Stage Change Request Workflow (Classic UI & New UI)

137022: Within the *To Be Completed By* field of the *Hiring Stage Change Request* workflow, the additional option of **Cost Center Manager** has been added.

- The *Cost Center Manager* option was added to the following steps:
 - Approve/Reject
 - Checklist
 - Generate Notification
 - Initiate HR Action Request

When selecting *Cost Center Manager*, additional fields will display allowing you to select the *Cost Center* and *Manager* of the cost center. If selecting this option, a *Step Backup User* will be required.

The *Use New Cost Center Manager* option can be selected as a way to ensure a newly selected cost center manager will receive the workflow's To Do Item if that manager is changed before the job requisition closes.

Checking the *Use New Cost Center Manager* option will spin off another setting; *If Manager was changed use the following Action*, which will allow for a selection of *On Approved* or *On Rejected* (only for the Approve/Reject step - for the Checklist, Generate Notification, or Initiate HR Action Request steps – only the *On Done* option is available.)

NOTE: For applicants to function properly, the *Use New Cost Center Manager* is required.

NOTE: In the October 2019 release, under 102918, *Cost Center Manager* was added to *Employee Custom Form* workflows.

To Do Items: Reallocation of Manager Change (Classic UI & New UI)

137783: In *Hiring Stage Change Request* workflows, if recipients of the resulting To Do Item change the existing manager to the Cost Center Manager, an overnight system task will run and update the manager and move the To Do item.

Workflows: Initiate Form Step Added to Hiring Stage Change Request Workflow (Classic UI & New UI)

137608: Within the *Hiring Stage Change Request* workflow, a new Initiate Form step has been added that allows a step in the workflow where recipients will add the form set here.

NOTE: Both Government and Custom Forms can be assigned via this process.

This step also contains the *Cost Center Manager* option in the *To Be Initiated By* field and works the same as it does in the other steps of the workflow.

New UI Enhancements

New! Performance Management Peer Feedback – New UI

New functionality within the Performance Management module will now allow you to request and receive peer feedback for your employees. This will allow managers and system administrators to gather different perspectives of an employee's overall performance throughout the performance review cycle.

Collecting additional feedback through an employee's peers allows managers to take into consideration the thoughts and perspectives of several individuals and then provide a more holistic view of their employees' performance. Managers are then able to better assess an employee's overall progress toward their goals and offer development opportunities when needed.

This functionality is only available in the New UI and Performance Management must be activated within your company. Peer Feedback can be launched independently of performance reviews.

There are multiple roles involved in this process.

- **System Administrators** – Responsible for configuring the elements of Peer Feedback.
- **Managers** – Request feedback and can approve/reject/modify list of feedback providers identified by employees and then view the resulting feedback.
- **Employees** – Can identify/nominate peers for feedback. May be able to view feedback to provide insight of strengths and weaknesses.
- **Feedback Provider** – Provides requested feedback on employee's strengths and weaknesses during performance cycle. Can accept/decline peer feedback requests.

New UI: Benefits Enrollment

'Guaranteed At' Functionality Added to New UI (Mobile & Desktop)

125853: When coverage levels within benefit plans are defined with the *Guaranteed At* settings, these settings will now be carried over to employee benefit enrollment.

- The *Guaranteed At* settings allow a benefits administrator to restrict certain coverage levels in a plan based on a time interval. For example, you can set one coverage level in a plan that an employee is always eligible for and another coverage level that is only guaranteed 6 months after the employee's date of hire.
 - When a user selects a coverage level during ESS enrollment that is restricted by the *Guaranteed At* settings in the plan, they should see the coverage level and premium amounts for that coverage level as *Requested* and the amounts for the coverage level they are currently eligible for as *Guaranteed*. This was not happening in the New UI.

Moving forward, when employees request benefit enrollment through the New UI, the system will show the employee the amounts associated with the coverage level they are eligible for, along with the *Guaranteed vs Requested* amounts and a warning message will be displayed.

New UI: E-Verify & I9 Forms

Options Added to Require I9 Document Upload & Prompt for E-Verify (Mobile)

134083 & 134088: A new ***I9 Document Upload Required*** option has been added to Company Setup to prompt users to upload supporting documents upon saving an I9 form.

This option is located in the *HR Settings* widget under *Company Settings > Global Setup > Company Setup > HR tab*.

NOTE: For New UI users, this functionality is initially being released for the (.home) mobile experience only. In a future release, it will be made available for the (.hcm) desktop experience as well.

The screenshot shows the 'HR Settings' widget. It contains several configuration options:

- Treat Pay Grade Violation As: Warning (dropdown)
- Manager To Use For Organization Chart Generation: Manager (dropdown)
- Manager To Use For Compensation Trees: (empty dropdown)
- Document Type Required: (checkbox, unchecked)
- Bypass HR action For: (text field with a user icon)
- Use HR action for Hire: (checkbox, unchecked)
- Use HR action for Re-Hire: (checkbox, unchecked)
- Use HR action for Terminate: (checkbox, unchecked)
- I9 Document Upload Required: (checkbox, checked)** - This option is highlighted with a red box.

I9 forms in the *Employee Completed* status will generate a pop-up prompting the upload of supporting documents upon saving the I9 form.

- If a value other than N/A is selected in the List A field, users will be prompted to upload a single document.
- If a value other than N/A is selected in the List B or List C fields, users will be prompted to upload two documents.

The screenshot shows the 'Form I-9' verification screen for Betty Crocker. A 'Verify - Upload Documents' pop-up is displayed in the center, prompting the user to 'Upload Document' with a 'CHOOSE' button. The background shows the 'USCIS Form I-9' document with fields for 'Last Name (Family Name)' and 'Address (Street Number and 4 Digit Zip Code)'. The 'SAVE AND VERIFY' button is visible in the top right corner.

E-Verify User Prompt & I9 Forms (Mobile)

For companies using E-Verify, you can have your managers complete the I9 process in the system and then enforce a step ensuring the completed I9 is sent to E-Verify. We have added new settings for each hiring state that can control the prompting of users in submitting I9 forms to E-Verify.

We have added an **Override Use Online Form I9** column in the *Hiring Sites* section of the E-Verify Marketplace Product Settings. This column contains a drop-down for each state added. Options include **Optional**, **Always**, and **Never**. Note that these are the same options available in the *Use Online Form I9* drop-down in the E-Verify Configuration section but are now offered at the state level.

We have also added an **E-Verify Required** checkbox for each state listed.

State	# Hiring Sites	E-Verify Required	Override Use Online Form I9
Texas	1	<input checked="" type="checkbox"/>	Always
Alabama	2	<input type="checkbox"/>	Optional
Arizona	1	<input checked="" type="checkbox"/>	Always

ADD HIRING STATE Arizona

How the new E-Verify settings work

- States set as required/always will prompt the user, after completing the I9, and be presented with a pop-up to proceed with E-Verify.
- When a new state is added, the *E-Verify Required* checkbox will be automatically checked for that state if any other states are set as required. If no states are set as required, the newly added state will be unchecked/unrequired, and options can be adjusted accordingly.
- For any states set as required, the override column will be set to *Always* and cannot be changed unless the required checkbox is unchecked.
- If the user was forced to upload documents (see above), once uploaded, they will then proceed to E-Verify based on state's settings.

New UI: Everything Benefits

Menu Moved from Team to Company Settings (Mobile & Desktop)

131015 & 140006: The Everything Benefits report page, located under the Team menu has been moved under the Company Settings menu with the other Marketplace report pages.

- Old location: *Team > Benefits > EverythingBenefits*
- New location: *Company Settings > Marketplace > EverythingBenefits*

All pages and associated menu items for EverythingBenefits have been moved to the new location.

Additionally, the warning message informing users of menu move located under *Team > Benefits > EverythingBenefits* has been removed, as the move is complete as of this release.

New UI: Recruitment

Applicant Information: Mini Header Option Added (Desktop)

127224: The Applicant Information page will now minimize the header space to allow for a more streamlined process when scrolling through the list of jobs. The header will collapse to a mini-header when users scroll down the page. When users scroll back up toward the top section, a break point will return the header to full size.

Applicant Selection Pop Up Updated (Mobile & Desktop)

127608: When assigning a form to an applicant, the selector icon opens to a list of applicants from which to choose. This pop-up has been updated to include *Username* and the *Applicant ID* number, along with first/last names. The addition of the *Username* and *Applicant ID* numbers allow users to differentiate between applicants with the same name. The pop-up has a *Search* feature that will search all columns on the pop-up. Users can then click the applicant name and click *Apply* to select the correct applicant

This applicant pop-up selector has been standardized and will be available anywhere applicants can be selected.

Browse and Select Applicant			
Page 1 of 1		1 - 7 of 7 Rows	
		Search	
First Name	Last Name	Username	Applicant Id
Jason	Jones		8305489
Jason	Macy		2713859
John	Anson		8305490

Job Requisitions: Data Tags Added to Applicant Communications (Mobile & Desktop)

126366: Both custom and standard fields from Job Requisitions have been added to communication templates, application communications and the *Generate Notification* step of the *Hiring Stage Change Request Workflow* as tags that can be brought in to the message. These tags will allow HR/Recruitment users to customize communications including pertinent information from Job Requisitions.

Since they are tied to the job requisition, these Job Requisition tags are intended for Job Application communications and Hiring Stage Change Request Workflow notifications. Tags will be blank if used/sent from the applicant screen since the applicant is not tied to the Job Requisition (as the Job Application and Hiring Stage Change Request are.) A tooltip explaining this has been added to the Job Requisition tags.

They have been added to the *Email/Mailbox Message* and *SMS* widget of *Applicant Communication Templates* (*Company Settings > HR Setup > Applicant Tracking/Recruitment > Communication Templates*) and application communications.

Email/Mailbox Message

Enabled☒

From*humanresources@kronos.com

Subject*Intent of Offer from Kronos, Inc.

B*B* | UU | ABC | ↶ ↷ ↺ ↻ ⌂ ☰ ☱ ☲ ☳ ☴ ☵ ☶ ☷

Font Family ▾ Font Size ▾

A row of standard rich text editor icons including bold, italic, underline, link, unlink, bulleted list, numbered list, indent, outdent, undo, redo, find, replace, print, and save.

(CURRENT_DATE_TIME)
Dear {ACCOUNT_FIRST_NAME},

After interviewing you and several other candidates, we are pleased to extend our intent to offer you the position for which you applied. Someone from our office will be in touch with you within 3 business days to discuss the details. If you are still interested and communicate your intent to accept this offer, you will be sent a formal offer via email. This email will contain instructions on how to proceed in accepting the offer and will also cover the onboarding process. We look forward to having you on our team.

Message
Congratulations!

Human Resources Department

TAGS

Download Tags

{HCM_LOGIN}

{JOB_REQUISITION_AVERAGE_BONUS}

{JOB_REQUISITION_AVERAGE_COMMISSION}

{JOB_REQUISITION_BASE_PAY_FROM}

{JOB_REQUISITION_BASE_PAY_TO}

{JOB_REQUISITION_CONTACT_EMAIL}

{JOB_REQUISITION_CONTACT_NAME}

{JOB_REQUISITION_CONTACT_PHONE}

They have also been added to the *Generate Notification* step of the Hiring Stage Change Request Workflow (*Company Settings > Global Setup > Workflows.*)

SMS

☒

Send SMS Communication

Message limit: 1400 characters, remaining: 1078

Hi {ACCOUNT_FIRST_NAME},

Congratulations! Your application has progressed to the interview stage for the position {JOB_REQUISITION_TITLE}



Please click {JOB_REQUISITION_CUSTOM_FIELD_1} to select an available interview date

ADD TAGS

Job Requisitions: Internal Applicant Questionnaire Added (Mobile & Desktop)

20238: Applicant questionnaires have historically been available to be added to Job Requisitions. However, only one could be added at a time and was visible to all applicant types, both internal and external. For situations where a separate questionnaire should be available for external or internal candidates, two separate Job Requisitions were required.

To solve this issue, only in the New UI, we have changed the *Applicant Questionnaire* section of Job Requisitions and have added a separate *Internal Applicant Questionnaire* field.

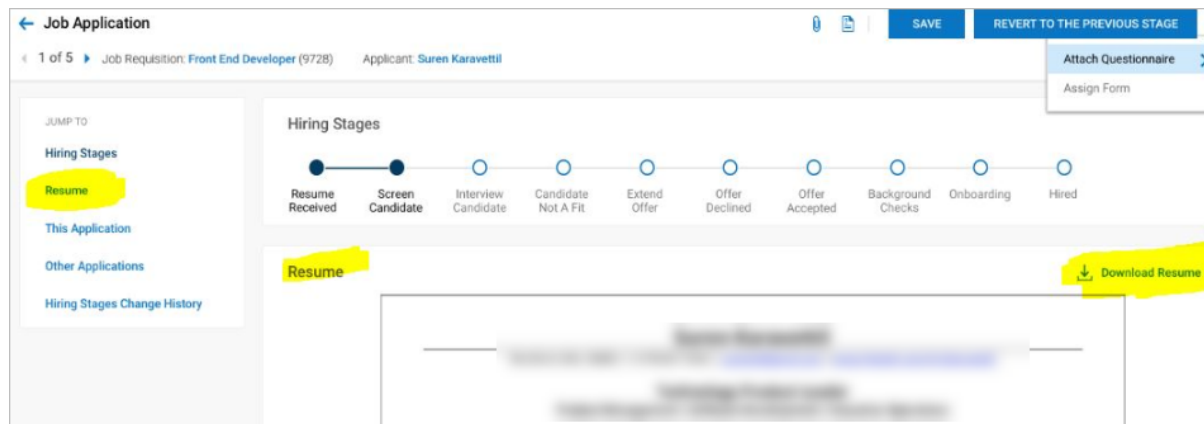
Applicant Questionnaire		Internal Applicant Questionnaire	
External Applicant Questionnaire <div>New Job Requisition Questionnaire </div>		<div>Manager Questionnaire </div>	
Questionnaire Tab Name * <div>Job Related Questions</div>			

- **Internal Applicant Questionnaire** – Is only visible to internal candidates.
- **External Applicant Questionnaire** – Is visible only to external candidates. The hyperlinked field name will open the maintenance page for questionnaires.

NOTE: The *Job Type* field in the *Job Details* section determines internal or external candidates.

Resume Widget and Link Added to View Job Application Page (Mobile & Desktop)

119713: To reduce the number of clicks and assist users in reviewing resumes while processing job applications, we have added a **Resume** widget and corresponding jump link to the View Job Application page in the New UI. This is accessed under *Team > Recruitment > Candidates > Job Applications* and then clicking the *View Job Application* icon for the selected candidate. Resumes can then optionally be downloaded via the *Download Resume* link. Depending on the uploaded format, certain styling, alignment, images and/or zooming may have some limitations in the resume preview itself.



New UI: Reports

Report Moved & Security Setting Added for Job Info History Report (Mobile & Desktop)

126337: In a previous release, we added the Job Info History Report as an Admin report with the Audit Trail reports. As an Admin report, users could not save and retrieve their reports under My Saved Reports. In this system release, we are moving the report to *My Info > My Reports > HR Reports > Employee Maintenance* which will allow users to save and access their saved reports.

Additionally, we have added a security setting to control user access to this report. The setting is located in the *Employee Information Reports* section of the *Reports* tab of security profiles.

Reports Moved & Security Settings Added for Position History Reports (Mobile & Desktop)

136045 & 126211 & 140768: In previous system releases, we added two new Position Management reports:





- ***Position History** – Originally added to the Audit Trail reports and no security permission was added to control access to the report.
 - In this system release, the report has been moved under *Team > My Team > Reports > Position History* and we have also added a security setting to control access to the report. The setting is located in the *Position Management Reports* section of the *Reports* tab of security profiles.
- **Position Assignment History** – Added to the *Assignment To Positions* widget in employee accounts and links out to *My Info > My Reports > System Reports > Audit Trail > Position Assignment History*. This report was also added without security.
 - In this system release, we have added a security setting to control access to the report. The setting is located in the *Audit Reports* section of the *Reports* tab of security profiles.

*Within the *Employees Assigned To The Position* widget from *Team > My Team > Employee Assignments*, the report that displays is the one located under *Team > My Team > Reports > Position History*. Ensure the security profiles for managers is set appropriately as described above.

New UI: Succession Plans

Icon Changes for Current and Historical in Succession Plans Report Page (Mobile & Desktop)

122101: Formerly, the Edit icons for current and old plans in the Succession Plans report page were the same, making it visually difficult to determine which icon controlled the plans. We have created a new Edit icon for the historical succession plans that now shows a pencil/clock image. This is located under *Team > Talent > Succession Planning > Succession Plans*.

<input type="checkbox"/>	Employee 15, Yadier, Yadier Molina, Molina, 3046330						
<input type="checkbox"/>	History Succession Profile Succession Profile 1						
<input type="checkbox"/>			09/25/2017	Succession Profile 1	High	Ready Now	
<input type="checkbox"/>	Employee 18, David, David Freese, Freese, 3046333						
<input type="checkbox"/>	History Succession Profile Succession Profile 1						
<input type="checkbox"/>			09/25/2017		Medium	Ready 1-3 Years	
<input type="checkbox"/>		 	09/25/2017		Medium	Ready 1-3 Years	

User Interface Updates in Succession Plans Report Page (Mobile & Desktop)

116320: A few usability updates have been added to the Succession Plans Report page.

- *Add New* will now read *Add New Succession Plans*
- *View Selected* will now read *View Selected Succession Plans*
- *Assign A Succession Plan To Employees* will now read *Assign a Succession Plan to Employees* (lower-case letters swapped for 'A' and 'To'.
- When adding a new plan, the pop-up formerly read *Save*. It will now read *Add*.

New UI: Terminations

Required Manager Fields During Termination (Mobile & Desktop)

101711- In the New UI termination process, when at least one manager is required, there is improved highlighting/marking behavior for indicating the required manager termination fields left blank by the user.

New UI: To Dos

Mass Approve / Reject Support Added (Mobile)

132923, 132931, 132941, 32464, 132936, 132957, 132952, 132946: The mass approve/reject functionality in *My To Do Items* is now available in the New Mobile App for the following requests:

- Checklist Item
- Compensation Proposal
- Discipline Incident

- HR Action
- Leave of Absence
- Overtime
- Time Off
- Job Requisition
- Benefit Enrollment
- Schedule
- Schedule Change Request (ESS)
- Timesheet
- Timesheet Change Request

Time and Labor

Accruals Setting Added to Maximum Accrued Amount (Classic UI & New UI)

44485: A new setting has been added to *Extra Settings* within the *Benefit Accruals Rule (Tenure)*. From *Edit Extra* settings within the *Maximum Accrued Amount (Per Accrual Year)* section, enable *Include Carry Over Transactions from Previous Accrual Year* if the Carry Over setting is set to apply on the *Beginning of Last Accrue Period*. Previously, accruals were going over the maximum accrued amount.

Edit Extra Settings

Tenure Changes Break Point on Exact Date (Note: Breaks Accrual Period) ▾

Rounding Round To None ▾ Increment, Round None ▾ (Excl.)

MAXIMUM ACCRUED AMOUNT (PER ACCRUAL YEAR)

Not Enabled

Extended (Includes: Imported, Carry Over, Manual Changes, etc.) ☒

Include Carry Over Transactions from Previous Accrual Year ☐ ?

MAXIMUM

Not Enal

Subtract Sch

Over Maximum Zero Out Move To

BALANCE MOVE

After Balance Reaches 0.00 (HH.00)

Allow Timesheet Approval before Time Entry Approval (Classic UI & New UI)

134200: A workflow can now be configured to have timesheet approval steps occur before time entry approval steps. Prior to this, a time entry approval had to occur first before the timesheet could be approved.

Global Notifications – Points – {Points_Detail} Tag Per Category when “Category List” Condition is Used (Classic UI & New UI)

142328: If the *Category List* condition is used, the *Points_Details* tag within a Points notification will now only display information related to individual point categories within the selected list. If a condition other than *Category List* is selected, or if a condition is not selected, the *Points_Details* tag will display point information related to all point categories.

Overtime Distribution for Semi-Monthly Pay Period (Classic UI & New UI)

122891: For Pay Calc 2 companies with semimonthly pay periods with overtime distribution rules, a new version of the *Allocate Regular Hours* rule, called *Allocate Regular Hours v.2*, can now ignore hours in the previous pay period.

New UI

New UI Updates – Table of Functionality Added to Pages

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

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desktop	Mobile
115187	TLM Accruals	Accrual Balances Report	<i>Team > Accruals > Balances</i>	<ul style="list-style-type: none"> Report Added to New UI View Employee Information row level icon View Accruals row level icon Delete row level icon to delete transactions in report Zero out Accrual balances Change the Update to Date Move balances from one Accruals policy to another Change remaining Accrual balances Accrual Balances Lite report available 	Yes	Yes

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
				<ul style="list-style-type: none"> Edit Accrual balances at row level Rollback Accruals row & page level action Execute Accruals row & page level action icon 		
136297	TLM Accruals	Accrual History Report	<i>Team > Accruals > Balances</i>	View the timesheet	Yes	Yes
105969	Leave	Forms	<i>[MSS] Team > Forms > WH-381</i>	Form WH-381 [Notice of Eligibility Rights & Responsibilities (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[ESS] My Info > My Time > Leave > Forms > WH-381</i>	Form WH-381 [Notice of Eligibility Rights & Responsibilities (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[MSS] Team > Forms > WH-381-E</i>	Form WH-381-E [Certification of Health Care Provider for Employee's Serious Health Condition (Family and Medical Leave Act)]	Yes	Yes

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
105969	Leave	Forms	<i>[ESS] My Info > My Time > Leave > Forms > WH-381-E</i>	Form WH-381-E [Certification of Health Care Provider for Employee's Serious Health Condition (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[MSS] Team > Leave > Forms > WH-381-F</i>	Form WH-381-F [Certification of Health Care Provider for Family Member's Serious Health Condition (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[ESS] My Info > My Time > Leave > Forms > WH-381-F</i>	Form WH-381-F [Certification of Health Care Provider for Family Member's Serious Health Condition (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[MSS] Team > Leave > Forms > WH-382</i>	Form WH-382 [Designation Notice (Family and Medical Leave Act)]	Yes	Yes

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
105969	Leave	Forms	<i>[ESS] My Info > My Time > Leave > Forms > WH-382</i>	Form WH-382 [Designation Notice (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[ESS] My Info > My Time > Leave > Forms > WH-384</i>	Form WH-384 [Certification of Qualifying Exigency for Military Family Leave (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[MSS] Team > Leave > Forms > WH-384</i>	Form WH-384 [Certification of Qualifying Exigency for Military Family Leave (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[ESS] My Info > My Time > Leave > Forms > WH-385-V</i>	Form WH-385-V [Certification for Serious Injury or Illness of a Veteran for Military Caregiver Leave (Family and Medical Leave Act)]	Yes	Yes
105969	Leave	Forms	<i>[MSS] Team > Leave > Forms > WH-385-V</i>	Form WH-385-V [Certification for Serious Injury or Illness of a Veteran for Military Caregiver Leave (Family	Yes	Yes

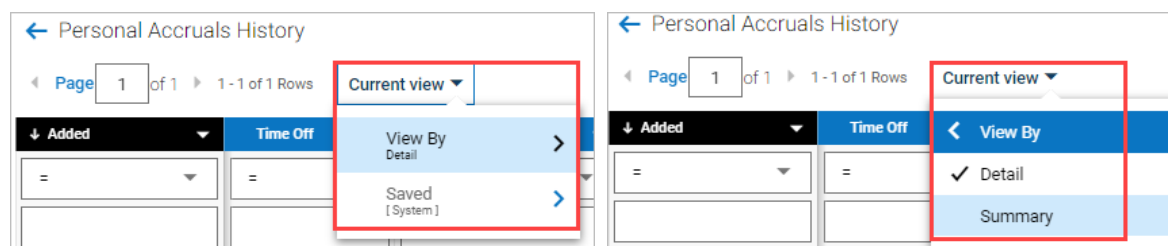
Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desktop	Mobile
				and Medical Leave Act)]		

New UI: Accruals

Details/Summary Toggle Added to Accrual History Report for Employees (Desktop & Mobile)

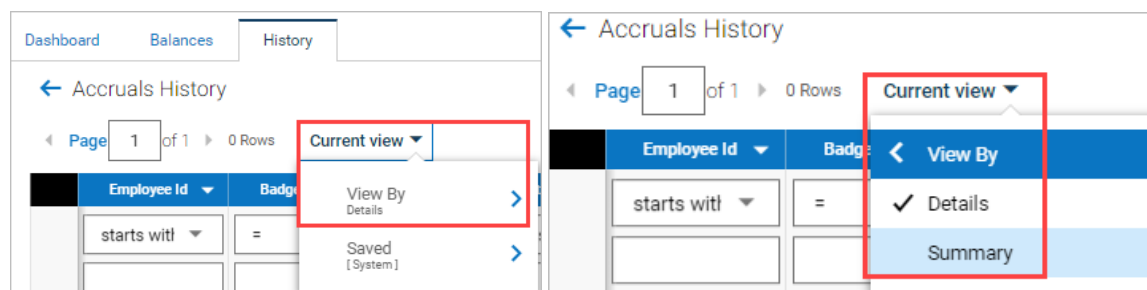
136670: Within the Accruals History report under *My Info > My Time > Time Off > History*, employees now have the option to alternate between a summary or detailed view of the report.

NOTE: Employees must have the *View Accruals History* security permission set under the ESS tab of their security profiles.



Details/Summary Toggle Added to Accrual History Report for Managers (Mobile)

136670: Within the Accruals History report under *Team > Accruals > Balances*, managers now have the option to alternate between a summary or detailed view of the report.



New UI: Added “Value Calculation” to Calculated Time Summary Report Charts (Desktop & Mobile)

104370: Previously, the *Value Calculation* drop-down was not available within *Add Chart* in the *Calculated Time Summary* report. Going forward, the *Value Calculation* drop-down will now be available for charts in the *Calculated Time Summary* report.

New UI: Configuration Option for Comments in Time Off Requests (Desktop & Mobile)

113699: In the New UI, New Mobile App and for InTouch devices, a new option has been added to the *Time Off Request Profile* page, *Employees Can Enter Comments*. This option will be enabled by default, but you can disable this option so that the comment field will not be available for employees or users on behalf of employees submitting time off requests.

New UI: Converted Employee Profile Schedule Widget (Desktop & Mobile)

111948: The existing *Schedule* widget under *Employee Information* has been converted in the New UI Desktop Experience and the New Mobile App. All behavior will remain the same as in the Classic UI: for Advanced Scheduler users, the *Schedule* widget is available as read only, and for TLM Basic Scheduler users, edits can be made to the employee's shift.

New UI: Geo-Fencing – Override Based on Separate Cost Center (Mobile)

131144: Users can now enable a new setting, *Override Geofencing*, within a cost center's settings, which will allow for an employee to be able to punch in if they are beyond the location set in the geo-fencing restrictions, with geo-fencing restrictions still set in other cost centers. For example, if an employee punches in for "travel time" in Cost Center 2 and is beyond the location limits of the address in Cost Center 1, then the geo-fencing will be overridden for Cost Center 1 if *Override Geofencing* is enabled in Cost Center 2.

New UI: Geo-Fencing – "Use Employee Address as Work Address" (Mobile)

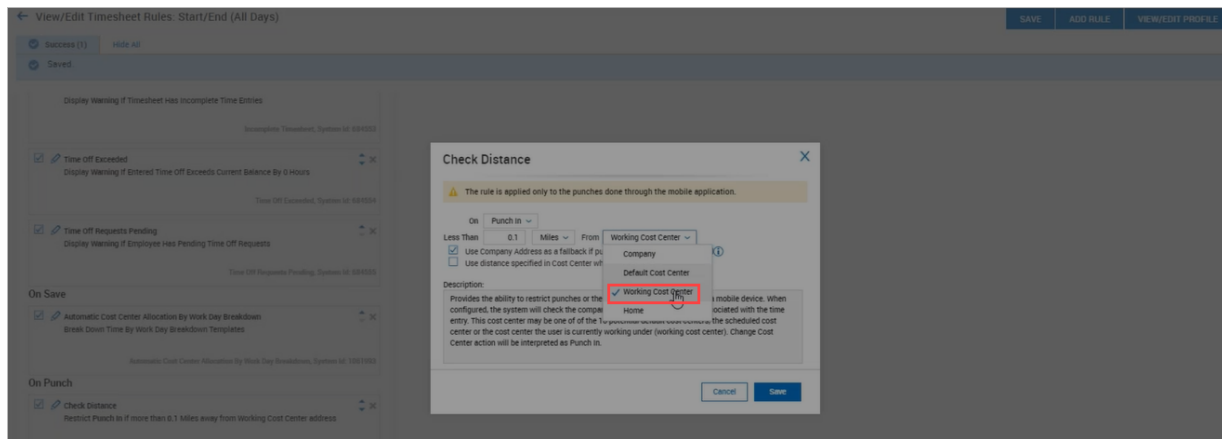
107967: Taxes can now be taken out based off an employee's home address, while still allowing employees to be able to punch in from multiple cost center locations without geo-fencing blocking the time entries. Previously, when an employee's home address was configured to have taxes taken out, geo-fencing would block any submitted time entries that were outside of their home address locale.

Enable the setting *Use Employee Home Address As Work Address For Taxes* under *Cost Center Properties* for the employee's home address.

The screenshot shows the 'Cost Center Properties' form. At the top, there are buttons: SAVE, DELETE, MOVE, ADD NEW (SAME LEVEL), and ADD NEW (CHILD). Below these are status indicators: Success (1) and Hide All, and a Saved message. The main section is titled 'Contacts' and contains an 'ADDRESS' form. The form has two columns. The left column contains fields for Country (United States), Company Name, Street (101 West Washington St.), Zip (46202), City (Indianapolis), and State (Indiana). The right column contains fields for Address (101 W Washington St, Indianapolis, IN 46204, USA), Address Accuracy (8 - Address), Latitude (39.7666114), Longitude (-86.1603663), State (Indiana (18)), Override Locals (unchecked), County (Marion (97)), City (Indianapolis city (balance) (2522603)), and GNIS (2395424). Below the address fields is a checkbox labeled 'Use Employee Home Address As Work Address For Taxes' which is checked. At the bottom, there is a section for 'ENABLE GEO-FENCING (MOBILE)' with a checkbox that is checked and a note: 'If value is not defined, distance limit will be taken from the timesheet rule.' Below this is a field for 'Distance for Geo-Fencing' set to 0 KM.

If the employee works from multiple cost center locations and you want geo-fencing to track where the employee is punching in from, select *Working Cost Center* from the *Check Distance* rule under *Timesheet Rules*.

If the employee needs to be geo-fenced based off their home address, *Home* has been added as a new option to select from the *Check Distance* rule



New UI: To Dos

Added Mass Approve / Reject Support (Mobile)

132923, 132931, 132941, 32464, 132936, 132957, 132952, 132946: The mass approve/reject functionality in *My To Do Items* is now available in the New Mobile App for the following requests:

- Checklist Item
- Compensation Proposal
- Discipline Incident
- HR Action
- Leave of Absence
- Overtime
- Time Off
- Job Requisition
- Benefit Enrollment
- Schedule
- Schedule Change Request (ESS)
- Timesheet
- Timesheet Change Request

New UI: Time Off Request

TOR Calendar Now Utilizes Raw Time (Desktop & Mobile)

123300: The *Time Off Request* calendar will now pull data from raw time entries on the timesheet. This will allow for all time offs to display on a selected day, and the time off entries will each show as a single entry. As a result, the Calc time offs will no longer be displayed on the calendar view, and dynamic duration time offs will no longer display the hours value in the tooltip and will instead show the duration type.

Scheduler

The following enhancements have been added to this release. These updates will affect the Classic UI, and in some cases will affect both the Classic and New UI.

Added “Clopening” Rule to Schedule Fairness Act (Classic UI & New UI)

135225: For companies with employees who are scheduled to work two shifts over two calendar days when the first shift ends the day and there are less than X hours between shifts (usually involving closing and opening the establishment), known as “clopening”, the employer will be required to pay the employee a premium pay. To accommodate this, a new field, *Minimum time between shifts*, has been added to the Schedule Fairness Act in order to define the extra amount of pay when an employee is not given “X” amount of time off between shifts within the span of two days.

Added Constraint Violations to Summary by Employee Report & Credentials and Certifications to Scheduler Reports (Classic UI & New UI)

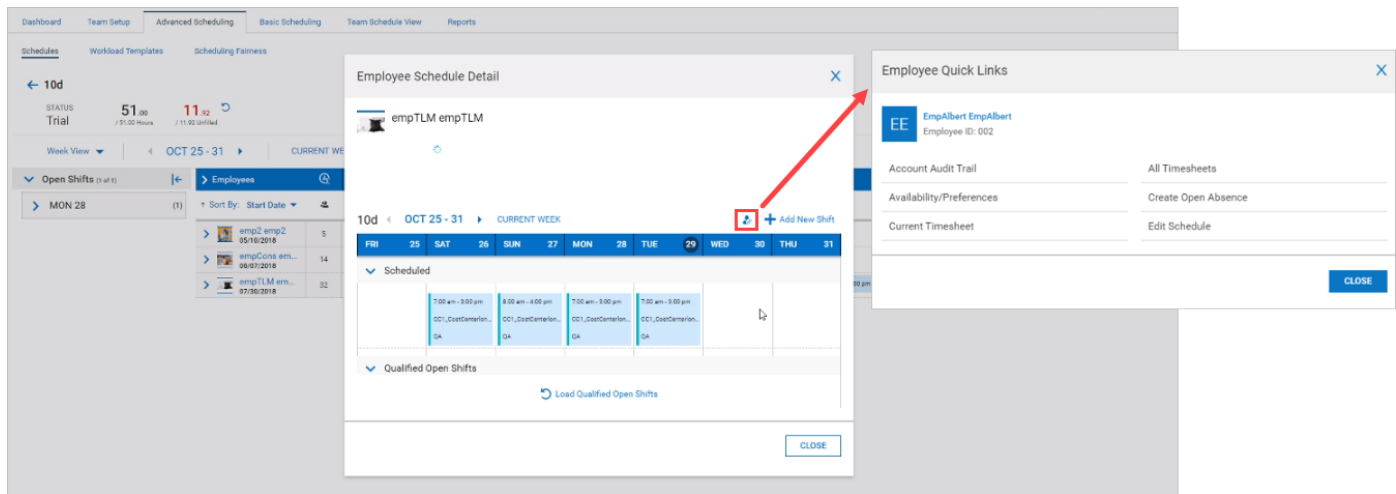
136335, 135641: For companies with **HR** and **Scheduler** enabled, users can now add credentials and certification data to the *Summary by Employee* and *Open Shift* reports. The credentials and certification data assigned to shifts will display in the report when the columns are added.

Constraint violation data will now be added to the new *Constraint Violations* column within the *Summary by Employee* report. This column will list all constraints associated with the shift violations.

Grouped By	Date	Schedule No.	Approved Sta.	Start	End	Total Sched.	Start Stop	Shift Type	Shift	AA Demand	Time Off Hrs.	Time Off	Constraint Viol.	Certifications	Credentials
Adrian Finch	11/01/2019	AA Cafe Texas	Posted	06:00a	02:00p	8.00	06:00a - 02:00p	Fixed	Manager		-	-	-	-	-
	11/02/2019	AA Cafe Texas	Posted	06:00a	02:00p	8.00	06:00a - 02:00p	Fixed	Server		-	-	Not Available for time frame	-	-
	11/03/2019	AA Cafe Texas	Posted	06:00a	02:00p	8.00	06:00a - 02:00p	Fixed	Server		-	-	Not Available for time frame	-	-
	11/04/2019	AA Cafe Texas	Posted	06:00a	04:00p	10.00	06:00a - 04:00p	Fixed	Manager		-	-	Minimum Hours Between Shifts Violated	-	-
	11/05/2019	AA Cafe Texas	Posted	06:00a	02:00p	8.00	06:00a - 02:00p	Fixed	Manager		-	-	Minimum Hours Between Shifts Violated	-	-
	11/06/2019	AA Cafe Texas	Posted	08:00a	02:00p	6.00	08:00a - 02:00p	Fixed	Manager		-	-	Does not have the required Certification	Drivers License	Passport
	11/07/2019	AA Cafe Texas	Posted	06:00a	02:00p	8.00	06:00a - 02:00p	Fixed	Manager		-	-	Violates employee availability	-	-
	11/08/2019	AA Cafe Texas	Posted	06:00a	05:00p	11.00	06:00a - 05:00p	Fixed	Manager		-	-	Violates Maximum Hours Per Day	-	-
	11/09/2019	AA Cafe Texas	Posted	08:00a	04:00p	8.00	08:00a - 04:00p	Fixed	Manager		-	-	Minimum Hours Between Shifts Violated	-	-
	11/10/2019	AA Cafe Texas	Posted	06:00a	05:00p	11.00	06:00a - 05:00p	Fixed	Manager		-	-	Violates Maximum Hours Per Day	-	-
	11/11/2019	Secord Rehab - All Locations	Posted	02:00p	10:00p	8.00	02:00p - 10:00p	Fixed	Nurse		-	-	-	-	-
	11/12/2019	Secord Rehab - All Locations	Posted	02:00p	10:00p	8.00	02:00p - 10:00p	Fixed	OTD		-	-	-	-	-
	11/13/2019	Secord Rehab - All Locations	Posted	02:00p	10:00p	8.00	02:00p - 10:00p	Fixed	OTD		-	-	-	-	-
	11/14/2019	Secord Rehab - All	Posted	02:00p	10:00p	8.00	02:00p - 10:00p	Fixed	OTD		-	-	-	-	-

Added Quick Links to Employee Schedule Details Window (Classic UI & New UI)

136498: Already available in the Classic UI and now available in the New UI, an employee’s schedule details can be accessed through quick links in the *Day View*, *Week View* and *Month View*. Click the employee’s name, and the *Employee Schedule Detail* pop-up window will display. Click the *Employee Quick Links* icon. From the *Employee Quick Links* pop-up window, you will be able to access the employee’s *Current Timesheet*, *Availability/Preferences*, etc.



Engine Now Favors Primary Skills and Home Cost Center (Classic UI & New UI)

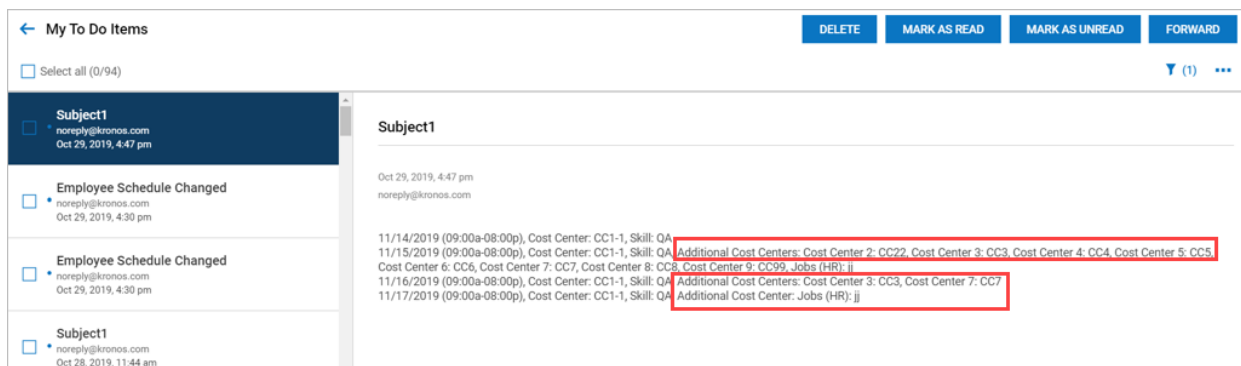
136899: When auto-assigning, the Scheduler Engine will assign employees in the following logic:

- If an employee is assigned to minimum hours in a primary skill constraint, then satisfying this constraint will take priority over home cost center optimization.
- If an employee is not assigned to a minimum hours skill constraint, then the home cost center optimization will take priority over the primary skill.

The Scheduler Engine will favor the primary skill and home cost center of a shift for employees who are qualified with a configured primary skill and cost center.

Open Shifts Posted Notification Now Includes Additional Cost Center Info (Classic UI & New UI)

133710: When using the *OPEN_SHIFTS_DESCRIPTION* tag to send posted open shifts notifications, the tag will now include in the notification *Additional Cost Centers* information if applicable, along with the scheduled Cost Center.



Pop-Up Warning Message After Clicking Assign Shifts (Classic UI & New UI)

135258: Upon clicking the *Assign Shifts* button in *View By Day*, *View By Week* (Classic UI and New UI) or *View By Month* (New UI), a pop-up warning message will display, *You are about to run auto shift assignments. Do you want to continue?*, allowing you to continue or cancel.

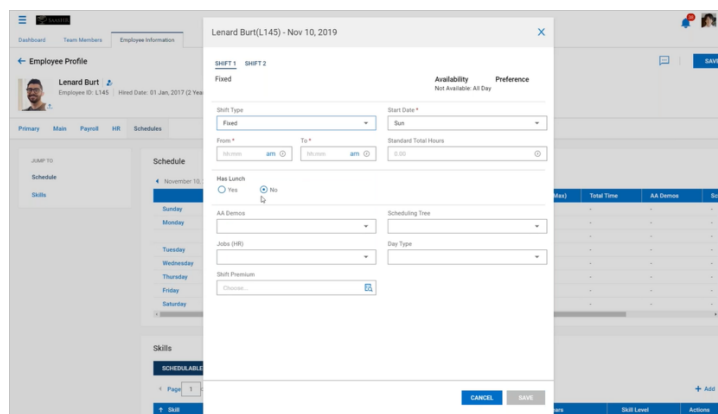
New UI Enhancements

Added Shift Multi-Select (Mobile)

125688: As available in the New UI Desktop Experience, you can select multiple shifts at one time in the Day View and Week View in the New Mobile App. To select multiple shifts, press one shift and hold until the multi-shift is triggered, let go and then tap the shifts that you want included. After selecting multiple shifts, a pop-up window will display *Manage Shift*, *Unassign Employee*, *Copy*, and *Delete*. You can manage multiple shifts by switching between shift tabs.

New UI: Converted Employee Profile Schedule Widget (Desktop & Mobile)

111948: The existing *Schedule* widget under *Employee Information* has been converted in the New UI Desktop Experience and the New Mobile App. All behavior will remain the same as in the Classic UI: for Advanced Scheduler users, the *Schedule* widget is available as read only, and for TLM Basic Scheduler users, edits can be made to the employee's shift.



New UI: Deprecate Schedule Overview Pages (Desktop)

140804: The following pages are being deprecated from the New UI, but will remain available in the Classic UI:

- *Schedule > Overview > Overview*
- *Schedule > Overview > Overview (monthly)*
- *Schedule > Overview > Overview (weekly)*

NEW **Month View of Schedule**

Month View of Schedule (Desktop & Mobile)

122112: You can now access employee schedules through the new view, *View By Month*. This view is available in the *Schedules list* page, and the *Schedule Templates list* page. Add the *View By Month* button via *Add/Remove Columns*.

The screenshot shows the 'Schedules' list page with a table of schedule entries. A red arrow points to the 'View By Month' button in the table's action column. Below the table, the 'Add/Remove Columns' dialog is open, showing a list of available and current columns. The 'Button: View By Month' option is checked and highlighted with a red box.

Name	Start Date	End Date	Approval State	Schedule Status
start	=	=	starts with	=
31 day	10/30/2019	11/29/2019		
15 days	10/21/2019	11/04/2019	Posted	
3 weeks	10/01/2019	10/21/2019	Posted	

Add/Remove Columns

Search Available and Current Columns

Available Columns	Current Columns
<input type="checkbox"/> Button: View Workflow	<input type="checkbox"/> Button: View By Day
<input type="checkbox"/> Schedule Setting: Cycle Length	<input type="checkbox"/> Button: View By Week
<input type="checkbox"/> Schedule Setting: Description	<input checked="" type="checkbox"/> Button: View By Month
<input type="checkbox"/> Schedule: Automatically Post	<input type="checkbox"/> Schedule Setting: Name
<input type="checkbox"/> Schedule: Employees Scheduled	<input type="checkbox"/> Schedule: Start Date
<input type="checkbox"/> Schedule: Notes	<input type="checkbox"/> Schedule: End Date
<input type="checkbox"/> Schedule: Schedule Managed By	<input type="checkbox"/> Schedule: Approval State
<input type="checkbox"/> Schedule: Schedule Managed By (Cost Center)	<input type="checkbox"/> Schedule: Schedule Status
<input type="checkbox"/> Time Zone	<input type="checkbox"/> Schedule: Created
	<input type="checkbox"/> Created Local Time Zone

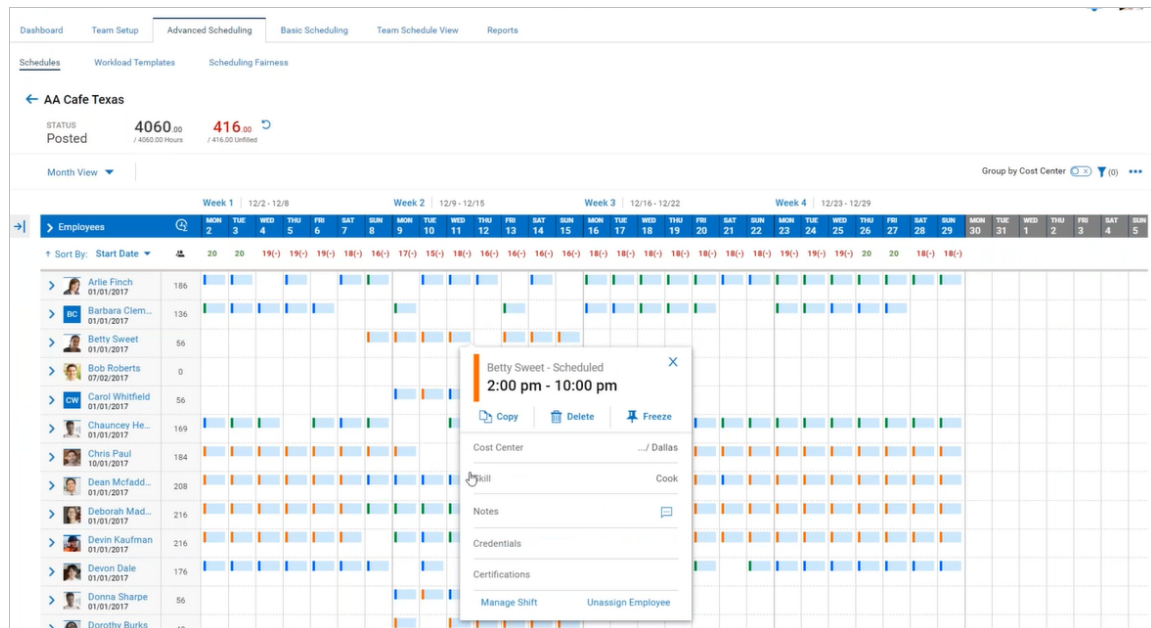
ADD REMOVE

MANAGE CUSTOM COLUMNS CANCEL APPLY

Available functionality in *View By Month* includes:

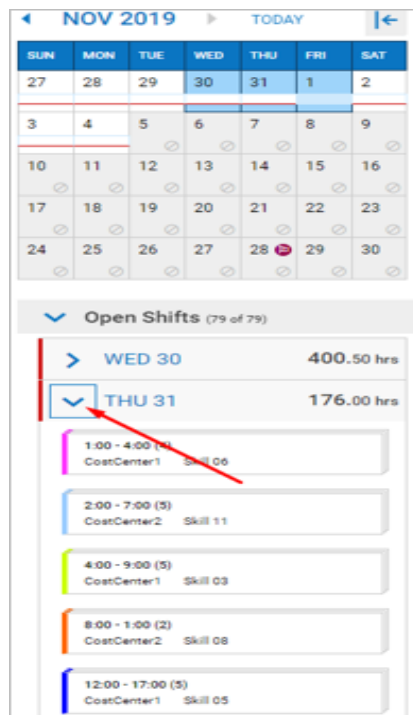
- Schedule with Employees and Shifts
- Shift Details and Actions pop-up windows
- Employee Schedule Detail pop-up window
- Browse and Select Shifts (Qualified Open Shifts) pop-up window
- Schedule Summary (Metrics)
- Multi-select shift
- Group by CC
- Employee sorting

- Schedule filters
- Schedule actions

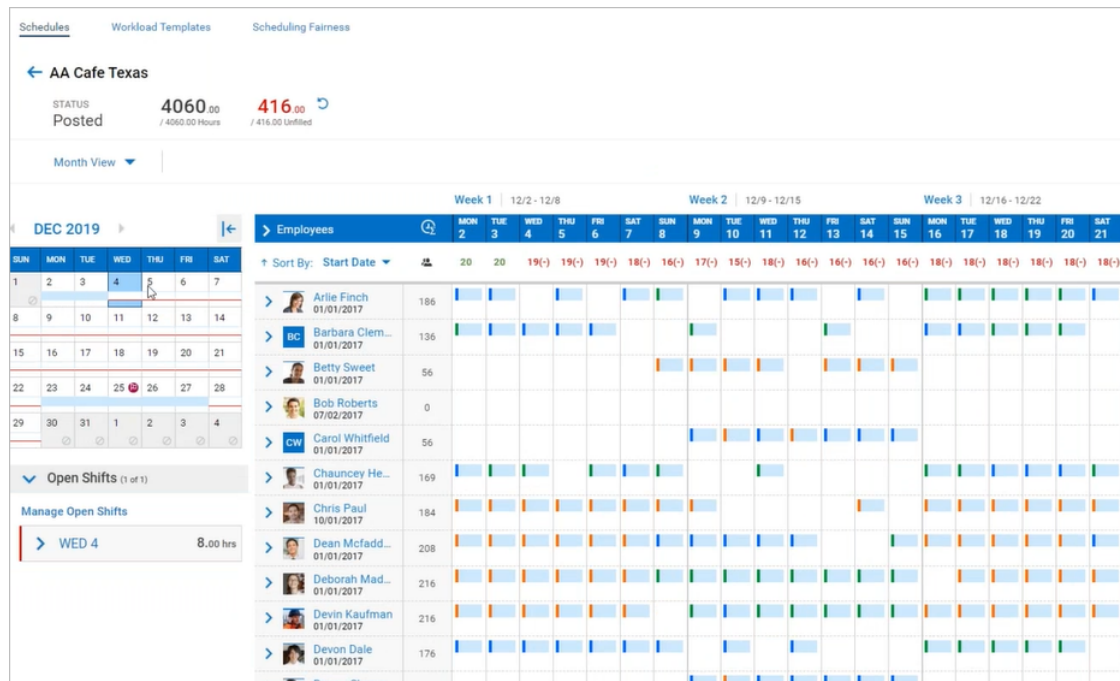


Coverage Calendar (Desktop & Mobile)

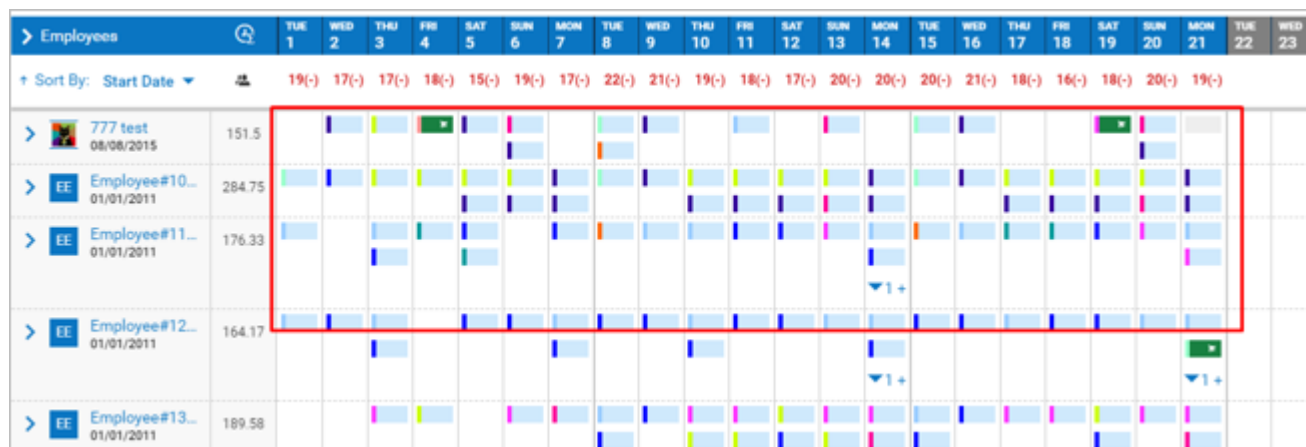
133606, 133605: For those using the New Mobile App, a calendar will display for the *View By Month* view. Days with open shifts are marked with a red line; days with no open shifts are marked with a blue line. When the calendar day is selected, details for the day will display. You can then navigate to the day view of the selected days.



In the Desktop Experience, the calendar and *View By Month* view is available.



In both the Desktop Experience and the New Mobile App you can view open shifts, add new shifts, manage shifts and assign shifts in the Month View. *Open Shifts* are grouped by day and will appear under the calendar for the selected days.



New UI: To Dos

Added Mass Approve / Reject Support (Mobile)

132923, 132931, 132941, 32464, 132936, 132957, 132952, 132946: The mass approve/reject functionality in *My To Do Items* is now available in the New Mobile App for the following requests:

- Checklist Item
- Compensation Proposal

- Discipline Incident
- HR Action
- Leave of Absence
- Overtime
- Time Off
- Job Requisition
- Benefit Enrollment
- Schedule
- Schedule Change Request (ESS)
- Timesheet
- Timesheet Change Request

Payroll

The following enhancements have been added to this release. These updates will affect the Classic UI, and in some cases will affect both the Classic and New UI.

Company Settings

Pay Statement Hours Decimal Places (Classic UI & New UI)

125740: A new option, **Display Pay Statement Hours With __ Decimal Places**, can now be used to change the number of decimal places for hours on the Pay Statement (for the HH.00 Time format). This option is available in the Include/Exclude And Format section of the Printed Pay Statement Options widget under *Company Settings > Global Setup > Company Setup*, on the *Payroll* tab.

INCLUDE/EXCLUDE AND FORMAT

Pad Check Amount With *

Pages To Print When Delivered w/Payroll 1

Check Headers Shading White Text On Black Background

SSN Format Do Not Display

Direct Deposit Account # Format Display Last 4

Employee Can View Pay Statements 2 Days Prior To Pay Date

Display Pay Statement Rate With 2 Decimal Places

Display Pay Statement Hours With 2 Decimal Places

Overtime Rate Display Options 2

Show Punch Detail ☒

Show YTD ☒

Show Goal Info ☒

Show Rates ☒

Show Total Hours Paid ☐

This option can be set to 2, 3, 4, or 5 decimal places.

Company Taxes

US Taxes Unavailable in Non-US EINs (Classic UI & New UI)

115733: Payroll Administrators are able to add United States tax entities to US EINs for the purposes of processing United States payroll. With Multi-EIN globalization, there can now be non-US EINs in the same company with US EINs, but US taxes cannot be added to non-US EINs.

When a user clicks **Add Tax Code** on the Company Taxes screen (*Company Settings > PR Setup > Company Taxes*) in a Multi-EIN company, a pop-up appears with a drop-down list of all available EINs in that company. If an EIN in that company is not a US EIN, it does not appear in this drop-down to allow for taxes to be added.

Company EIN

Display Name* Publishing London

Legal Name* Publishing London

DBA Name

DUNS

Description

Tax ID United Kingdom 1

Question

What type of tax code would you like to add?

Company EIN

Editing

Marketing

Publishing

Sales

All Local State Federal

Earnings Codes

Earnings Code Multiplier Decimal Places (Classic UI & New UI)

140372: The Earnings Code Rate Multiplier now includes four decimal places, and earnings are calculated using a multiplier with up to four decimal places.

Question

Roll up Earning Overtime

SETTINGS

Capture ☒ **Amount** ☒ **Hours** ☐ **Units** ☐

Rate Multiplier 1.5000

Straight vs Premium Straight(1.0) + Premium(Over 1.0) Pay

☐ **Adjust Premium For Minimum Wage**

General Ledger

General Ledger PDFs Redesigned (Classic UI & New UI)

135782: The General Ledger Settings PDF (*Company Settings > Payroll Setup > General Ledger > Settings > Download PDF*) has been redesigned. The Header and Footer of the document have been updated, a cover page has been added, and a menu path displays on the first page of the PDF. Additional updates to the alignment and formatting of the PDF have been made.

Company Configuration: General Ledger Settings

Customer Name:

uite

Source:

https://secur

Generated:

10/25/2019 01:23p

Generated By:

System Administrator

Payroll

General Ledger Settings

Company Settings > Payroll Setup > General Ledger > Settings

Formats

#1 Department Level 1;
#2 Department Level 3;

Overrides

General Ledger conditions will execute in the order they appear below.

Line	Name	Assignments	Filter	Created
12	Net Pay	1: Modify Mapping - GL/GL Offset = 5022	Is Net Pay	10/14/2013 03:59p
12	Cost Center 1		OR(GL: Divisions Is Headquarters Include Subtree, Cost Center Name = , Divisions In Drive Time Include Subtree)	11/10/2017 11:04a
600	Manual PST		AND(Is Check, Is Earning)	12/10/2013 11:40a

132881: The General Ledger Codes PDF (*Company Settings > Payroll Setup > General Ledger > Codes > Download PDF*) has also been redesigned much like the General Ledger Settings PDF.

Company Configuration:
General Ledger Codes

Customer Name:
 Suite

Source:
https://

Generated:
10/25/2019 04:32p

Generated By:
System Administrator

Payroll

General Ledger Codes
Company Settings > Payroll Setup > General Ledger > Codes

Codes

Object Type	Name	Primary Debit	Primary Credit	ER Debit	ER Credit	Cost Center/Job
Bank Account		1020				
Company Tax	ER SUTA Illinois			6765	2365	
Company Tax	ER SUTA Missouri			6760	2360	
Company Tax	Federal Income Tax	2340				
Company Tax	Federal Unemployment Tax			6750	2340	

Reports

Reports: Tax Variance Report Availability (Classic UI & New UI)

103684: As detailed in the October 2019 Payroll release notes, a Tax Variance report is now available to alert employers of out of balance situations, enabling the employer to adjust withholding on future pay statements accordingly. This report is available in the Classic UI, New UI, and Mobile App under the updated menu paths as follows:

- *Team > Payroll > Reports > Taxes > Tax Variance* or *My Info > My Reports > Payroll Reports > Taxes > Tax Variance* (New UI, Mobile App)
- *My Reports > Payroll > Tax Wage Details > Tax Variance* (Classic UI; same menu path)

New UI Enhancements

The following enhancements affect only the New UI. Each enhancement will notate if the update affects the Desktop Experience, Mobile Experience, or both.

New UI Updates – Table of Functionality Added to Pages

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

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
104373	Payroll	Scheduled Deductions	<i>Team > Payroll > Employee Payroll Maintenance > Deductions</i>	Add New [Deduction] (can Add For Multiple Employees) Enable and Configure Goal (upon Save when Add New deduction)	Yes	Yes