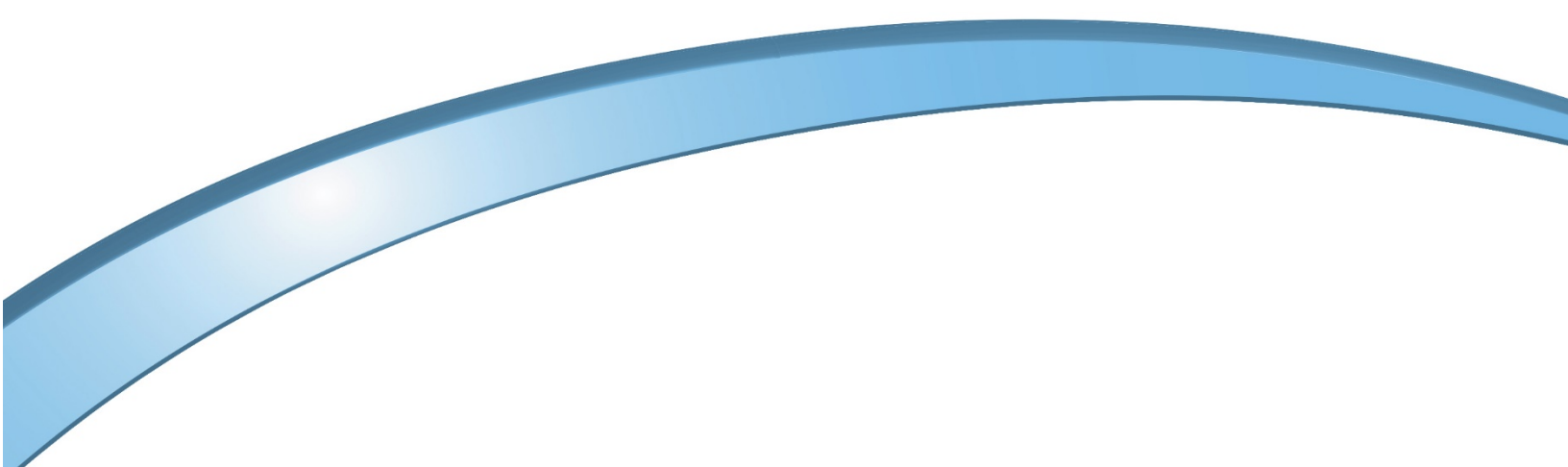


Software Release Notes

# OnePoint Human Capital Management

February 2019



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# Cross Product

## Employee Additional & Total Compensation Functionality & Widgets Added

The following enhancements have been added to the system to provide more information in employee accounts related to additional and total compensation.

### Employee Information: Additional Compensation Widget Added

68080, 85730, 86865, 68138: Within employee accounts, an **Additional Compensation** widget is now available to be added to employee accounts. This widget allows companies to list compensation that is in addition to an employee's base compensation. Examples might be for incentive pay, bonuses, etc.

Additional Compensation

INCENTIVE COMPENSATION

	Target	% of Base
Additional Compensation Field 1	1,000.00	
PBIP	3.50%	
Bonus	2.25%	3,251.25

Additional Compensation Field 1

PBIP

Bonus

	INCENTIVE TYPE	AMOUNT \$	ACTIVE	PER	EFFECTIVE FROM	CHANGE DATE		
×		Additional Compensation Field 1	1,000.00	Yes	Year	11/15/2018		+
		Additional Compensation Field 1	1,000.00	Yes	Year	12/31/1900	11/01/2018	+

As additional compensation is added, an Incentive Compensation section will display showing the totals. Each type of compensation configured in Company Setup will display as tabs in the widget. Click the *Edit* icon to open the fields for editing.

Additional Compensation

INCENTIVE COMPENSATION

	Target	% of Base
Additional Compensation Field 1	1,000.00	
PBIP	3.50%	
Bonus	2.25%	3,251.25

Additional Compensation Field 1

PBIP

Bonus

INCENTIVE TYPE

	Additional Compensation Field 1
--	---------------------------------

Once the fields are open for editing, an *Amount \$* can be added, the *Active* drop-down can be changed from *Yes* to *No*, and the *Per* drop-down will determine how often the additional compensation is granted. Options are yearly, monthly, weekly, hourly, or per pay period.

AMOUNT \$	ACTIVE	PER
1,000.00	Yes ▾	Year ▾
1,000.00	Yes ▾	<div> <div>✓ Year</div> <div>Month</div> <div>Week</div> <div>Hour</div> <div>PP</div> </div>

Multiple lines for the same type of compensation can be added by clicking the Plus (+) sign at the end of the row. Once clicked, a new row will open, and effective dates can be entered in the original entry and in the new row. The *Change Date* column will display the date the *Effective From* date was entered.

EFFECTIVE FROM	CHANGE DATE	
11/15/2018		
12/31/1900	11/01/2018	

In the widget, a *Settings* link is available in the top-right of the space to enable/disable the types of compensation shown within the widget. This will give managers greater control over the types of compensation being reviewed on a per employee basis.

Settings

Additional Compensation Settings

VISIBLE	ADDITIONAL COMPENSATION FIELD
<input checked="" type="checkbox"/>	Additional Compensation Field 1
<input checked="" type="checkbox"/>	PBIP
<input checked="" type="checkbox"/>	Bonus

Within Company Setup, an **Additional Compensation Fields** widget is available to label and define the types of additional compensation to be used. Up to 20 fields can be defined. The *Field Type* column contains a drop-down with the options of *Flat Amount*, *Percent*, or *Percent Of Base*. After making a selection here, the options available to the left in the “*Added to....*” columns will update to display only those options available with the selected field type. A *Used* checkbox is also available to enable/disable the fields.

Additional Compensation Fields					
Field	Used	Added To Annual Total	Added To Hourly & PP Pay Total	Label	Field Type
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 1	Flat Amount
2	<input checked="" type="checkbox"/>			PBIP	Percent
3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bonus	Percent Of Base
4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 4	
5	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 5	
6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 6	
7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 7	
8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 8	
9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 9	
10	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 10	
11	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 11	
12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 12	
13	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 13	
14	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 14	
15	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 15	
16	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 16	
17	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 17	
18	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 18	
19	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 19	
20	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Additional Compensation Field 20	

68080: When adding the *Additional Compensation* widget to employees, if no *Additional Compensation Fields* have been made visible, a message will display within the widget to inform users that none of the configured *Additional Compensation Fields* have been enabled to be visible for the employee. The *Settings* link in the upper corner of the widget can be opened and fields selected.

### Additional Compensation

There are no fields marked as "visible" for this employee. Please use the settings menu on the widget to make fields visible or contact your administrator.

If no *Additional Compensation Fields* have been configured in Company Setup, the pop-up from the *Settings* link will be blank.

### Employee Information: Total Compensation Widget Added

68118 & 68142: Within employee accounts, a **Total Compensation** widget is now available to be added to employee accounts. This widget will track employee incentive-based and other additional compensation along with their regular base compensation and then get a total annual compensation based on the two values.

Total Compensation		
TOTAL COMPENSATION		
	Amount \$	Hours
Annual	148,751.25	2080.00
Pay Period	5,682.74	80.00
Hourly	71.03	



## New Additional Compensation Report Added

68133: To provide reporting capabilities for the new Additional Compensation and Total Compensation employee widgets, a new report named **Additional Compensation History** has been added.

*My Employees > Employee Maintenance > Additional Compensation History*

Employee ID#	Employee Status	Compensation Type	Date From	Pmt Amount	Percent	Percent Of Base	Per	Is Active
Kronos - Lowell	Active	Christmas Bonus	12-31-1900	\$500.00	-	-	Year	
Kronos - Lowell	Active	PBIP	12-31-1900	-	3.95%	-	Year	Y
Kronos - Lowell	Active	Quarterly Bonus	12-31-1900	-	-	-	Year	Y
Kronos - Lowell	Active	Quarterly Bonus	10-01-2018	-	-	1.85%	Year	Y
Kronos - Lowell	Active	PBIP	10-15-2018	-	3.95%	-	Year	Y
Kronos - Lowell	Active	Christmas Bonus	12-16-2018	\$500.00	-	-	Year	Y

## Adding Additional Compensation via HR Action

85281 & 85283: With the ability to add new types of compensation to employee accounts, we will also allow additional compensation to be added via an HR Action. The values will be added to the **Additional Compensation** widget of employee accounts.

An **Additional Compensation** HR Action Item has been added for HR Action Type, *My Employee Action Request*.

**NOTE:** This will be available under the Company Settings Gear icon.

**Add Item**

GROUP TO ADD TO

☐ New Group

☒ Existing Group Group #1

Rows On Page: 10 | 120 Rows

Name	starts with	
Actual Marital Status		
<b>Additional Compensation</b>		
Address		

This item will be available for HR Action Sub Types of:

- Regular
- Hire
- Re-Hire
- Termination

## Importing to Additional Compensation Widget

68131: We have added the ability to import data into the *Additional Compensation* widget of employee accounts. A new **Additional Compensation History** import template has been added and is available under the *Employee Setup* category of the *Import Overview* page. This is located under *Company Settings > Imports > Overview*.

The new template contains the *Template* fields tab, and *Instruction* tab, and a *Sample* tab (showing how to properly set the fields). Once the template is completed, it can be imported into employee accounts under *Company Settings > Imports > Employee Setup > Additional Compensation History*.

### Template Tab

	A	B	C	D	E	F	G	H	I	J	K	L
1	User Name	Employee ID	SSN	Employee External ID	EIN Tax Id	EIN Name	Start Date	Additional Compensation Type	Value	Active	Period	Remove All Future Entries
2												
3												
4												
5												

### Instruction Tab

Field	Required	Length	Format	Note
Username	Yes			At least one of <b>Username</b> , <b>EmployeeID</b> , <b>SSN</b> , and <b>Employee External Id</b> is required. They are used in order of their appearance to validate the data. That is, Username is used first, EmployeeID is used second, SSN is used third, and Employee External Id is used last.
Employee Id	Yes			
SSN	Yes		123-45-6789	
Employee External Id	Yes			
EIN Tax Id				For Multi-EIN companies. If it's impossible to identify an employee by username, employee id, SSN or employee external id then employee's EIN has to be specified using one of these fields.
EIN Name				
Start Date	Yes	10	mm/dd/yyyy	The label configured at the company level for this additional compensation type
Additional Compensation Type	Yes			
Value	Yes		0.00	Amount/percentage in the specified <b>Period</b>
Active	Yes	1	Y/N	Y or N
Period	Yes		PayPeriod	Additional Compensation Period Type: <b>Year</b> , <b>Month</b> , <b>Week</b> , <b>Hour</b> , <b>Pay Period</b> . PERCENT OF BASE type can use only <b>YEAR</b> value
Remove All Future Entries	No	1	Y/N	Setting this flag to Y will delete all entries which have a start date greater than the 'Start Date' of the line. Example: Employee has 2 existing entries for compensation from 12/31/1900 to 12/31/2008 and from 1/1/2009 to 12/31/9999. If the line inside the file has a start date of 12/31/1900 and the "Remove All Future Entries" flag set to "Y", then the system will delete the existing entry for "1/1/2009 to 12/31/9999".

### Sample Tab

	A	B	C	D	E	F	G	H
1	Employee Id	Additional Compensation Type	Start Date	Value	Period	Active	Remove All Future Entries	
2	65550	Bonus	1/1/1995	2500000	Year	Y	Y	
3								

## KnowledgePass: User Roles Updated

90548: For LMS Administrators, we have updated the KnowledgePass Marketplace Roles list that are currently available in the system. Some names were changed to better reflect accuracy and some new roles were added. These changes will help you better segment and target learning content for the selected roles. Shown below are the changes.

Persona Title	Marketplace Change	Sub Systems
Executive/Decision Maker	New role	All
Project Champion	New role	All
Company Administrator	Name change to System Administrator role	All
General Employee	Name change to Employee role	All
People Manager	Name change to Department Manager role	All
HR Administrator	No change	HR, HRSBE, HR_ADMIN, HR_HOLDING
HR Generalist	Name change to HR User role	HR, HRSBE, HR_ADMIN, HR_HOLDING
HR Clerk	New role	HR, HRSBE, HR_ADMIN, HR_HOLDING
Compensation Manager	New role	HR, HRSBE, HR_ADMIN, HR_HOLDING
Recruiter	New role	HR, HRSBE, HR_ADMIN, HR_HOLDING
Benefits Manager	New role	HR, HRSBE, HR_ADMIN, HR_HOLDING
HR Manager	New role	HR, HRSBE, HR_ADMIN, HR_HOLDING
Payroll Administrator	No change	PR, PR_ADMIN, PR_HOLDING
Payroll Clerk	Name change to Payroll User role	PR, PR_ADMIN, PR_HOLDING
Accountant	New role	PR, PR_ADMIN, PR_HOLDING
Timekeeping Administrator	Name change to TLM Administrator role	TA, TALITE2, TALITE, TA_ADMIN, TA_HOLDING
Clock Administrator	New role	TA, TALITE2, TALITE, TA_ADMIN, TA_HOLDING
Scheduling Administrator	Name change to Scheduler Administrator role	SCHEDULER, SCHEDULER_ADMIN
Scheduling Manager	Name change to Scheduler Manager role	SCHEDULER, SCHEDULER_ADMIN
IT Data Analyst (Ninja)	New role	All

## Administrators

Under *Maintenance > System > KnowledgePass > Files*, when adding or editing a new offering, the roles listed are now updated as shown in the example.

The screenshot shows the 'KNOWLEDGEPASS FILE' configuration page. The breadcrumb trail is: BACK > Home > Maintenance > System > KnowledgePass > KnowledgePass File. The form contains the following fields:

- File Name: wfr\_navigation\_overview.pdf
- Display Name: Navigation Overview
- Active: ☒
- Feedback: ☒
- Category: Company Settings (dropdown)
- Subcategory: Accessing and Navigating (dropdown)
- Content Type: Job Aid (dropdown)
- Seq #: 5
- New: ☒ Until: 06/14/2013
- Description: (empty text area)

**ROLES**

<input checked="" type="checkbox"/> General Employee	<input checked="" type="checkbox"/> People Manager	<input checked="" type="checkbox"/> Company Administrator
<input checked="" type="checkbox"/> Timekeeping Administrator	<input checked="" type="checkbox"/> HR Generalist	<input checked="" type="checkbox"/> HR Administrator
<input checked="" type="checkbox"/> Payroll Clerk	<input checked="" type="checkbox"/> Payroll Administrator	<input type="checkbox"/> Clock Administrator
<input type="checkbox"/> Scheduling Manager	<input type="checkbox"/> Scheduling Administrator	<input type="checkbox"/> Executive/Decision Maker
<input type="checkbox"/> Project Champion	<input type="checkbox"/> HR Clerk	<input type="checkbox"/> Compensation Manager
<input type="checkbox"/> Recruiter	<input type="checkbox"/> Benefits Manager	<input type="checkbox"/> HR Manager
<input type="checkbox"/> Accountant	<input type="checkbox"/> IT Data Analyst (Ninja)	

**COMPANIES**

TLM ☒ Payroll ☒ HR ☒ Scheduler ☐

Filter: All Companies

## Security Profiles for Users

In the application, the roles in the KnowledgePass section of security profiles has been updated to reflect the roles at the company level. (*Company Settings > Profiles/Policies > Security*, on the *Marketplace* tab.)

The screenshot shows the 'KNOWLEDGEPASS / ONLINE HELP USER CLASSIFICATION' list. The roles are listed with checkboxes:

- ☐ Accountant
- ☐ Benefits Manager
- ☐ Clock Administrator
- ☒ Company Administrator
- ☐ Compensation Manager
- ☐ Executive/Decision Maker
- ☒ General Employee
- ☒ HR Administrator
- ☐ HR Clerk
- ☒ HR Generalist
- ☐ HR Manager
- ☐ IT Data Analyst (Ninja)
- ☒ Payroll Administrator
- ☒ Payroll Clerk
- ☒ People Manager
- ☐ Project Champion
- ☐ Recruiter
- ☒ Scheduling Administrator
- ☒ Scheduling Manager
- ☒ Timekeeping Administrator

## Locale Maintenance: Distance Settings Added for Geofencing Support

88709: For companies who have enabled geofencing for their mobile users where distance is measured upon a punch or transfer punch, a new setting within *Locales* maintenance has been added. Users can now choose between Miles and Kilometers for each defined locale. This option is located under *Company Settings > Global Setup > Locales*.

The screenshot shows the 'Locale' maintenance form. The 'Distance In' dropdown menu is open, showing 'km' as the selected option and 'miles' as an available option. Other fields include 'Name\*' (English (UK)), 'Language' (English (UK)), 'Date Format' (dd/MM/yy), 'Time Of Day' (AM/PM), 'Decimal Separator' (.), 'Group Separator' (1,000.000), and 'CSV Field Delimiter' (,). A warning message at the bottom states: 'Please note that selecting a language here does not imply that there are options available that are specific to the country that the language is used in. Country specific options (such as address formats, specific pay calculation or accrual rules etc) are only made available for the countries listed in the Company info tab of the Company Setup.'

## Single Sign On/Out: SSO Single Sign Out

74415: Single Sign Out provides Clients and Partners currently utilizing the Single Sign On (SSO) functionality with the ability to add additional functionality so that when they log out of one application, they are automatically logged out of all applications that are connected to the same Identity Provider.

## Two-Factor Authentication: Updated Messages

91701: With this release, Two-Factor Authentication (2FA) is now required for users with an assigned security profile that includes enabled items marked as requiring Two-Factor Authentication. As such, the following changes have been made:

- The warning message enabled with the previous release (October 2018) in the Edit Account/Employee Information page has been removed.
- The informational message enabled with the previous release (October 2018) in the Security Profile page has been removed. An updated *Two-Factor Authentication Required* checkbox now displays both in the main *Two-Factor Authentication* widget on the Employee Information screen and in the main widget of the Security Profile page.

The screenshot shows the 'Two-Factor Authentication' widget. The 'Two-Factor Authentication Required' checkbox is checked. Below it are two unchecked checkboxes: 'USE GOOGLE AUTHENTICATOR' and 'USE RSA TOKEN'.

**Security Profile**

Name\* Employee

Description Limited access to time entry and accrual information

Active ☒

First Screen Employee: Current Timesheet

Access Policy

**Two-Factor Authentication Required** ☒

**TIMEOUT SETTINGS**

Max Inactive Time (sec) 28800

Display Timeout Warning ☒

- The prompt message when adding Two-Factor Authentication Required security items\* to an originally non-2FA required security profile has been updated, and the two new messages are as follows:
  - When users select *Full Access* for a security profile, a message is displayed to warn the users about what they are about to do.

**Confirm Changes**

You are giving full access to all security items. All employees with this security profile will be required to log in using two-factor authentication.

Save changes?

**SAVE** **CANCEL**

- A confirmation dialogue box appears when adding security items that require Two-Factor Authentication (2FA) to an existing security profile that did not originally require 2FA.

**Confirm Changes**

You have enabled 1 security item(s) that will require employees with this security profile to log in using two-factor authentication.

Save changes?

**Cancel** **Save**

\* Some examples of sensitive security items that require Two-Factor Authentication are:

- Customer employee information (employee account – might include social security number, address, pay information, etc.)
- Colleague information
- Protected health information
- Payment card data
- Banking information
- Mergers and acquisitions
- Board meeting minutes

The **View** drop-down in the security profile allows users to filter the view of security items so they can see all security items, or just security items where *Two-Factor Authentication is or is Not Required*.

The screenshot shows the 'Security Items' section of a software interface. At the top right, there are 'Save' and 'Download PDF' buttons. Below them is a search bar. A 'View' dropdown menu is open, showing three options: 'All', 'Two-Factor Authentication Required' (which is selected with a checkmark), and 'Two-Factor Authentication Not Required'. The dropdown is highlighted with a red box. Below the dropdown, there are tabs for 'Global', 'TLM', 'Payroll', 'HR', 'Modules', 'Profiles', 'Reports', 'ESS', and 'Marketplace'. Under the 'COMPANY SETUP' section, there is a table with columns 'View', 'Edit', 'Add', and 'Delete'. The table lists several items: 'Account Custom Fields Configuration', 'Account Date Fields Configuration', 'Account Policies', and 'Accruals Policies'.

The *Two-Factor Authentication Required* column can be added to the Security Profiles screen via *Add/Remove Columns* to assist users with identifying all profiles that require users to have 2FA enabled.

The screenshot shows the 'Company Security Profiles' screen. At the top, there is a 'Rows On Page' dropdown set to '10' and a 'Refresh Data' button. Below this is a table with columns: 'Name', 'Two-Factor Authentication Required', 'Editable', 'Accounts', and 'Description'. The 'Two-Factor Authentication Required' column is highlighted with a red box. A dropdown menu is open for this column, showing three options: 'All' (selected with a checkmark), 'Yes', and 'No'. The table lists several profiles: 'Admin', 'Admin - Full Access', 'Applicant', 'Employee', 'Employee 2', 'Manager', 'Special', and 'Supervisor'.

The *Two-Factor Authentication Required* column can also be added to the Employee Information screen to assist users with identifying employees with assigned Security Profiles that require 2FA.

The screenshot shows the 'Employee Information' screen. At the top, there is a 'Saved: [System]' dropdown. Below this is a pagination bar showing 'Page 1 of 5' and '1 - 10 of 49 Rows'. Below the pagination bar is a table with columns: 'Last Name', 'Two-Factor Authentication Required', and 'In Payroll'. The 'Two-Factor Authentication Required' column is highlighted with a red box. The table lists several employees with their last names and whether they have 2FA required and are in payroll.

	Last Name	Two-Factor Authentication Required	In Payroll
<input type="checkbox"/>	[Redacted]	Yes	Yes
<input type="checkbox"/>	[Redacted]	No	Yes
<input type="checkbox"/>	[Redacted]	No	Yes
<input type="checkbox"/>	[Redacted]	Yes	Yes
<input type="checkbox"/>	[Redacted]	Yes	Yes

**NOTE:** Valid forms of Two-Factor Authentication in the system are Virtual Code Authentication (VCA), RSA Token, and Google Authenticator. Two-Factor Authentication continues to work the same as

always. For companies who have enabled the *Remember This Device* setting, the users can enter their credentials, check the remember checkbox, and then won't need to enter credentials each time.

72472: When two-factor authentication is required for a user based on their employee profile and the company has not enabled an authentication method (VCA, RSA or GA (Google Authenticator)), the user is now directed to the VCA page upon login.

**NOTE:** Users who login through Single Sign On will not be prompted for Two-Factor Authentication.



## REST APIs

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

- [US Rest Documentation](#)
- [European Rest Documentation](#)
- [Australian Rest Documentation](#)

### REST API Deprecation

This topic describes the deprecated REST API resources that are removed in this release of the application (Discontinued Functionality), together with the resources that are still available within the application but have been scheduled for discontinuation. API users should move to the replacement APIs for any discontinued APIs as soon as possible. You can monitor the use of deprecated resources by examining the response headers.

### Discontinued Functionality

The following REST APIs are discontinued in this release.

Version	API	Relative Path	Replacement	Discontinuation Date
1	Employees	V1/employees	V2/companies/{cid}/employees	December 2018
1	Employee	V1/employee/{id}	V2/companies/{cid}/employees/{aid}	December 2018

No additional APIs are scheduled for discontinuation at this time.

### New and Revised APIs

Several new APIs have been added with this release. For full documentation, please refer to the regional REST API guides listed above.

### Counter Distribution Profile API

83048: Counter Distribution can be configured as part of a pay calculations profile, which can cause complexity configuration as well as in the queries used to execute, (nesting of employee effective-dated profiles in relation to a pay calculations effective-dated profile.)

To resolve these issues, the configuration of the counter distribution can be extracted from the pay calculation profile into a separate profile that is directly assigned to an employee. Within the v2 employee profile API, a new field has been added and allows calls to both GET and PUT.

**/v2/companies/{cid}/employees/{aid}/profiles**

## Rate API Update APIs

90625: Rates can now be effective-dated via REST APIs using the POST and PUT requests.

**NOTE:** The Effective End Date is an optional field. If it is not set, the rate will remain in effect until an effective date is set.

**/v1/company/rate-items**

## Additional Compensation APIs

**86870: New APIs are available to fetch, update and delete compensation records for employees.**

- The base compensation for all subordinates can be retrieved and individual base compensation records can be created.

**/v2/companies/{cid}/compensation/history**

- Records showing additional compensation for subordinates can be retrieved in a list.

**/v2/companies/{cid}/compensation/additional**

- The compensation/total endpoint retrieves total compensation information for all subordinates.

**/v2/companies/{cid}/compensation/total**

## Resolved Issues

The following issues have been resolved with this release.

### Headcount Chart Showed Incorrect Count for Turnover Report

86484: When navigating to *My Reports > HR Reports > Turnover* and creating a bar graph chart for the Actual Headcount, any value over 1000 now displays accurately instead of reformatting to a 1 as previously seen.

### Cursor Not Placed in Company Short Name Field When Switching Companies

74129: When logged in to a client company and switching companies, the cursor is now placed into the *Company Short Name* field by default.

## Information Announcements

46860: Announcements created by the user or other users as informational messages are now shown on Dashboard screen:

- When the Dashboard screen is opened.
- When switching Dashboard tabs.
- When the Dashboard screen is opened and saved.
- After the Dashboard screen is refreshed.

## Ability to Rollback Accruals Without Security Permission

90666: When the Rollback Accruals security permission (*Modules page, Accruals section, Edit Balances (Run Accruals) (Rollback)* setting) is unchecked in the assigned security profile, users no longer have the option to *Rollback Accruals* in the Accrual Balances report.

### Start Widget Configuration Missing Employee Information Internal Link

90097: The Start Widget Configuration now includes the Employee Information link as expected in all applicable environments.

### REST API Error 404 Unresolvable URL - Leave of Absence Case Note Endpoints

91871: Users are no longer receiving *HTTP code 404: "Unresolvable URL"* when invoking the Leave Of Absence Notes endpoints for both GET and POST.

### Bypass VCA Settings

92960: Updates were made to several Security Profile items that require Two-Factor Authentication (2FA) to ensure that the Bypass VCA option now works correctly in scenarios where the security profile settings do not require 2FA.

# Time and Labor

## New Functionality! Master Timesheets

In multi-EIN companies, employees often work in multiple EINs and maintain separate time accounts for time entry in each EIN. It can be difficult to track employee time data across EINs. The Master Timesheet and related multi-EIN features address this problem by providing:

- **A global view of the time data across EINs** - A view of time data for individual employees is presented in a master timesheet. Using master timesheets, all time data, including worked hours, punches, time off, extra pay, and piecework accumulated across multiple EINs is combined in one timesheet.
- **Profile synchronization** - Profiles used to define the rules for processing time data can be consistently updated and applied across EINs when Master Timesheets are enabled. When a profile is changed for an employee in one EIN, the profiles will be automatically updated in other EIN accounts.
- **Pay Calculation Options** - Pay calc rules with filters can do calculations based on hours worked in a specific EIN or cumulative hours across all EINs. This enables overtime calculations based on total hours worked across EINs.
- **Pay Prep and Payroll Export** - Time data can be grouped and filtered by EIN prior to input into the payroll subsystem or generation of payroll exports for external payroll systems.
- **Payroll** – When time from the Master Timesheet is Sync'ed into Payroll, the time will be split by EIN.
- **Accruals** – Accruals will be calculated and managed with the master account.
- **Schedules** – Schedules will be assigned and managed with the master account.

## Cost Centers: Move Cost Center Option

63511: In a previous release (December 2017), the *Move* cost center button was removed to allow for rework of the functionality and improvements to the data integrity when cost centers are moved. In this release, the functionality is now available again.

Users can now *Move* any cost center value throughout the Cost Center Tree. When a Cost Center value is moved, the new cost center value is updated in each area of the system that it was used, such as:

- Time Entries
- Pay Prep
- Rate Tables
- Pay Calc. rules
- Workload templates
- Scheduled/managed cost centers
- Scheduler settings
- Integration
- Groups

Cost Center 2 Properties: 1

Admin, Clerical, Other

Save Delete **Move** Add New (Same Level: 1) Add New (Child: 2)

**Main**

Name Admin, Clerical, Other

Abbreviation 20

Description

External Id Payroll Code Location Code

Visible ☒

**SETTINGS**

Allow Time Allocation Towards This 1 ☒

## Counter Distribution Profile

### Counter Distribution Profile Report: View Accounts Button and Clone Button Added

87700, 87699: Within the *Counter Distribution Profiles* report, a *View Accounts Associated w/Profile* option/icon has been added. When clicked, all employees assigned to the selected profile will display. On the accounts list page, selectable icons for Quick Links and Employee Information are available as well as selectable EIN links.




Additionally, a *Clone Counter Distribution Profile* icon has been added to the report to allow you to copy an existing profile.

← Counter Distribution Profiles

New Counter Distribution Profile

Rows On Page 20 1 Row Refresh Data Full Screen [Default] Settings Filter Select Columns Export

















Date Created: Calendar Range All Custom Filter: Add New

	Name	Active	Description
	starts with	All	=
  	Counter Distribution	Y	

View Accounts Associated w/Profile

← Counter Distribution Profile Accounts: Counter Distribution

Rows On Page 10 8 Rows Refresh Data Full Screen [Default] Settings Select Columns Export

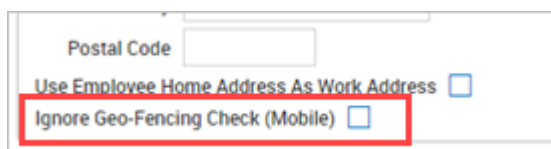
	Employee Id	Badge	Username	First Name	Last Name	Employee EIN	In Payroll	Locked	Uniform Size
	=	=	=	starts with	starts with	starts with	All	All	=
 	9		jsnow	Jon	Snow	Default	Yes	No	
 	8		jannister	Jaimie	Lannister	Default	Yes	No	
 	4		cbing	Chandler	Bing	Default	Yes	No	
 	5		jtribiani	Joey	Tribiani	Default	Yes	No	
 	6		pbuffer	Phoebe	Buffer	Default	Yes	No	
 	7		rgrimes	Rick	Grimes	Default	Yes	No	
 	2		rachel.green	Rachel	Green	Default	Yes	No	
 	3		rgellar	Ross	Gellar	Default	Yes	No	

## Employees Import: Counter Distribution Profile to Apply Cost Center Defaults

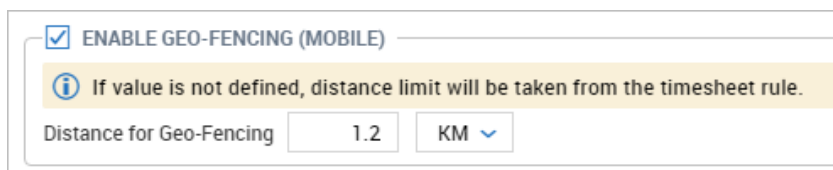
87706: When using the *Employees* import template to import employees containing default cost centers, any associated default counter distribution profile will be imported along with the other data. The *Employees* import template is located under *Company Settings > Imports > Overview* under the *Employee Setup* category. Once the import template is completed, it can be imported back into the system under *Company Settings > Imports > Employee Setup > Employees*.

## Geofencing: Distance Override for Cost Centers

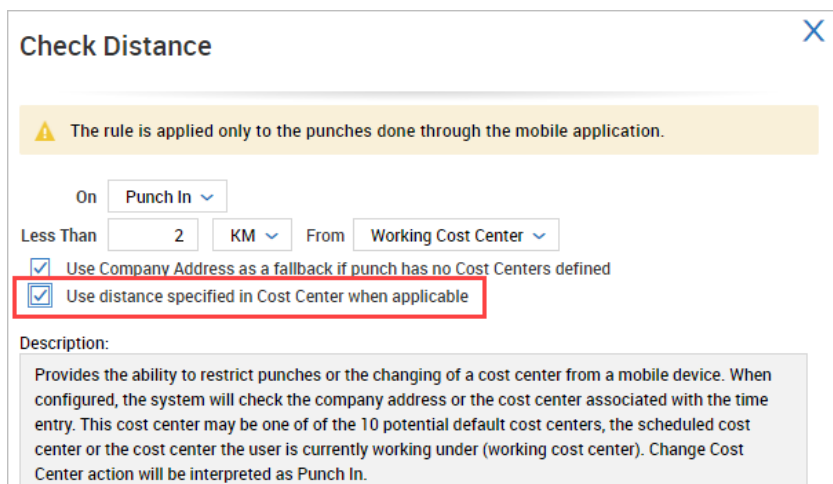
66175: Within Cost Center maintenance, the geo-fencing settings have been redesigned. In previous releases, there was just one setting to ignore the geo-fencing check for mobile devices.

A screenshot of a web form showing a checkbox labeled 'Ignore Geo-Fencing Check (Mobile)' which is currently unchecked. Above it is a text input field for 'Postal Code' and another checkbox labeled 'Use Employee Home Address As Work Address'.

In this release, we have created a geo-fencing section with an **Enable Geo-Fencing (Mobile)** setting that will be checked by default. We have also added a new setting named **Distance for Geo-Fencing** setting. This setting allows distance restrictions to be set for each cost center level, i.e., CC1 can be set to 1.0 mile or kilometer, and CC2 can be set to 1.7 miles or kilometers.

A screenshot of a settings section titled 'ENABLE GEO-FENCING (MOBILE)' with a checked checkbox. Below the title is an information icon and text: 'If value is not defined, distance limit will be taken from the timesheet rule.' At the bottom, there is a label 'Distance for Geo-Fencing' followed by a text input field containing '1.2' and a dropdown menu currently set to 'KM'.

Additionally, within the *Check Distance* timesheet profile rule, a setting is now available to override the distance set within the rule and use the restriction set in the cost center. It will be unchecked by default.

A screenshot of the 'Check Distance' rule configuration window. It features a warning message: 'The rule is applied only to the punches done through the mobile application.' Below this, there are settings for 'On' (set to 'Punch In'), 'Less Than' (set to '2'), 'From' (set to 'Working Cost Center'), and 'KM'. Two checkboxes are present: 'Use Company Address as a fallback if punch has no Cost Centers defined' (checked) and 'Use distance specified in Cost Center when applicable' (checked). A description box at the bottom explains the rule's function: 'Provides the ability to restrict punches or the changing of a cost center from a mobile device. When configured, the system will check the company address or the cost center associated with the time entry. This cost center may be one of the 10 potential default cost centers, the scheduled cost center or the cost center the user is currently working under (working cost center). Change Cost Center action will be interpreted as Punch In.'

These settings are used only for mobile punching employees. When the *Check Distance* rule is added to employee timesheet profiles, the system will use the mobile device's geo-fencing technology to apply punch restrictions according to the settings in the rule and the cost center.

## Managed Cost Centers (MCC)

### Employee Filter Added to MCC Reports

84784: Managers will now be able to see employees from MCC groups in the employee filter on reports. For example, Manager 4 is assigned as manager over CC2 and CC3, which includes Employees 2, 4 and 5. Manager 4 logs in and navigates to the *Calculated Time Summary* report and selects the employee filter; the result is that Manager 4, along with Employees 2, 4 and 5 will display in the filter.

Employees Filter	
NOT SELECTED	
SELECTED (0)	
SAVED LISTS	
COMPA	
Rows On Page	10 4 Rows
EMPLOYEE ID	USERNAME
starts with	=
emp2	emp2
emp4	emp4
emp5	emp5
man4	man4

### MCC Groups Added to Manager Employees Access Report

86089: To help managers easily filter and view their MCC group employees, the **Manager Employees Access** report can now be filtered by an MCC group in the *Group Type* column. This report is located under *Company Settings > Global Setup > Groups > Manager Employees Access*.

PERMISSIONS	GROUP TYPE	GROUP NAME
=	starts with managed	starts with
View Account, Approve Time Off Requests, View Timesheet	Managed Cost Center	Ottawa
View Account, Approve Time Off Requests, View Timesheet	Managed Cost Center	Ottawa

### MCC Groups in Employee Group Membership Report

79895: Managed Cost Centers are now included in the *Employee Group Membership* report. After clicking on the *Group Permissions* icon, the group members are displayed in the *Members in Group* widget. The report can be accessed under *Company Settings > Global Setup > Groups > Employee Group Membership*.

Back Home > Company Settings > Global Setup > Groups > Employee Group Membership

Rows On Page 10 15 Rows Refresh Data Full Screen [Default] Settings Filter Select Columns Export

Employee Filter: All Employees

Group Type	Group Name	Employee Id	Username	First Name	Last Name	Employee Status	Locked	Group Description
-	starts with	starts with	-	starts with	starts with	!= Terminated	All	-
Managed Cost Center	A	Man_34419	Man_34419	Man_34419	Man_34419	Active	No	Auto Group Based On Cost Center A

Group Permissions

---

Back Home > Company Settings > Global Setup > Groups > Edit Group Permissions: A

Name A

Description Auto Group Based On Cost Center A

Group Managers

Rows On Page 10 2 Rows

Employee Id	Name	Permissions

Members In Group (A)

Rows On Page 50 1 Row

Employee Id	First Name	Last Name
starts with	starts with	starts with
Man_34419	Man_34419	Man_34419

MCC Managers Permissions in Scheduled vs Actual Summary Report and Roll Call Report 84380, 78843: Within the *Scheduled vs Actual* report in *Summary View* and the *Roll Call* report, managers are now able to view all the time worked by employees within their managed cost centers.

For example, Employee B works in CCA and Manager A can now see Employee B's time allocated to CCA on any time report, giving managers a fuller picture of the cost centers they manage.

### MCC Time Entry Approval Step in Workflow - New Approval Option Added

88272: A new **Require Only One Approval** setting has been added to the **On All Approved** workflow action step of the **Approve/Reject Time Entries** step. This setting is designed to be used when cost center managers approve time entries.

Consider the following scenario.

- A company has a timesheet workflow configured with two *Approve/Reject Time Entries* steps.
- The first step is configured so the *To Be Completed By* field is set to *Cost Center Manager (Level 1)*.
- The second step is configured so the *To Be Completed By* field is set to *Cost Center Manager (Level 2)*.
  - Without the new setting, both managers will need to approve time entries before the workflow will move to the next step in the workflow.
  - With the new setting checked, only one of the two managers will need to approve the time entries for the workflow to move to the next step in the workflow.



Action Properties: On All Approved

Name

Description

Next Step

Require Only One Approval ☒ ?

☒ EMPLOYEE FILTER  
No Filter Is Selected

Requires only one manager per step to approve or reject. Once the first manager takes action, the workflow will continue to the next step.

## Pay Calculations 2.0: Accrual Rules Set Accrued To Date

50905: The existing *Accrual Deduction*, *Accrual Grant (v2)*, and *Worked Hours To Time Off Pay* Calculations 2.0 rules have been updated with a new setting for *Update 'Accrued To' Date On Accrual Policy*. This option allows users to define when a rule should or should not update the *Accrued To* date for accruals.

Accrual Deduction

COUNTERS

Apply Limits To: ☒ Counter ☐ Counter List

Counter 4

SETTINGS

Update 'Accrued To' Date On Accrual Policy ☐

Execution Frequency

Deduct Partial Values ☐

TIME OFF UTILIZATION POLICY

Required Settings

Expire After  Days

Expires On Pay Period End ☐

SETTINGS

Update 'Accrued To' Date On Accrual Policy ☐

Execution Frequency

Execution For ☒ All ☐ Pay Period(s)

☐ Only Calculate Up To Today

COUNTER CONDITIONS

Counter 3

ADD

When adding a new rule, this setting is disabled by default. When a rule is enabled with the new setting selected, the updated date does change. When the new setting is not enabled, the updated date does not change.

## Pay Calculations 2.0: Time Off On Scheduled Days Only in Non Rolling Period Overtime Rule

92930: Time off can be restricted to count against scheduled days only when the Pay Calculations 2.0 *Non-Rolling Period (N-Days) Overtime* rule is used. The *On Scheduled Days Only* option is available under *List Time Off Entries* in the filter for the rule.

**What Counts Toward ?**

☒ All Cost Center 9, Exclude

☐ List Cost Center 9

☒ All Jobs (HR), Exclude

☐ List Jobs (HR)

☐ All Time Off Entries

☒ List Time Off Entries  **Always**

Paid Time Off  **On Scheduled Days Only**

Allocate ☐ Paid Break ☐ Paid Lunch ☐ All Time Off

☒ **DESCRIPTION:**

Applies hours worked within a specific number of days as of a certain date that is not rolling to a specific Counter. After the Counter is selected, additional configuration may be set up to control what counts toward the Counter, how to distribute hours in the Counter, and any overrides that should be applied to the Counter.

**Required Settings**

Over ? Hours Worked In A ?-Day Period, Assign To Missing Counter

**Filters & Additional Settings**

**What Counts Toward ?**

- Any Work Time Entry
- On Scheduled Days, Time Off Category: 5 Time Off Categories (Paid Time Off)
  - Paid Lunch
  - Flex Time
  - Paid Break
  - ...

**? Distribution Rule**

- Last Time Entry (Chronologically)

## Rates: Effective End Date Added to Rate Tables

84935: Companies will now be able to edit the effective end dates of additional rate entries within the rate tables of employee accounts and rate maintenance tables. Previously, this functionality was not available, and the end dates were automatically generated by the system when adding or splitting a rate.

This functionality is supported in:

The *Base Compensation* widget of employee accounts in *Employee Information*.

**RATE TABLES**

Rate 1: Rate Table 1  Personal  **EDIT**

Rate 2: Rate Table 2	×	\$ 25.75000	10/17/2018	10/17/2019	
	\$	22.50000	12/31/1900	10/16/2018	

Within rate table maintenance, under *My Employees > Employee Maintenance > Rates > Rate Tables*, or under *Company Settings > Global Setup > Rate Tables*.

**Edit Item**

Description

**RATE SCHEDULE**

	RATE / Hour	FROM*	TO*	
	\$* 22.000000	12/02/1918	10/16/2018	SPLIT
X	\$* 21.000000	10/17/2018	12/08/2020	SPLIT

**USAGE**

- ☒ Time Entry
- ☒ Pay Record
- ☒ Payroll
- ☒ Counter
- ☒ TLM Shift

**GLOBAL MATCH CRITERIA**

Department  ☒ Include Subtree ☒

Location  ☐ Include Subtree ☐

Jobs (HR)  ☐ Include Subtree ☐

### Time Off Requests: Check Future Approved Time Off

78970: Within the *Excess Settings* section in the Time Off Request Profile, a new checkbox for *Check Future Approved Time Off* can be enabled so the system will consider future approved Time Off when determining if the employee will have a negative balance because of their time off request.

This setting can be used when the *Subtract Scheduled Hours from Remaining Balance* setting is disabled in the Company Setup. Previously, when scheduled hours were not deducted from the remaining balance, the system could not validate Time Off Requests while considering future approved Time Off. The *Check Future Approved Time Off* setting allows customers to not have scheduled hours deducted from the remaining balance, but still be able to validate Time Off Requests with scheduled Time Off in the future.

Only future approved Time Off in the current accrual year is considered with this setting. When this rule is in place, it validates Time Entries entered on the timesheet to make sure they do not result in a negative balance.

**EXCESS SETTINGS**

When Requesting, Employee Will Receive Error

If Entered Time Off Exceeds Current Balance By 0 Hours

☒ **CHECK ESTIMATED BALANCES**

☒ On Date Of Request  
☐ At End Of Accrual Year

☐ Check Unapproved Requests

☐ **Check Future Approved Time Off** ⓘ

**WAITING PERIOD**

**COLLECT COST CENTERS**

Rate To Apply ☐

This setting only needs to be enabled if "Subtract Scheduled Hours from Remaining Balance" is disabled in global settings. This setting allows the system to check future approved time off to determine if the employee will exceed their balance.

When the *Subtract Scheduled Hours from Remaining Balance* is enabled in the Company Setup, enabling the *Check Future Approved Time Off* does not change existing behavior. *Check Future Approved Time Off* is only in effect if the *Subtract Scheduled Hours from Remaining Balance* is disabled. The tooltip next to the *Check Future Approved Time Off* setting explains how these options impact each other.

**ACCRUALS POLICIES**

Display Values In ☒ Hours ☒ Days

Display Hours with 2 Decimal Places and Days with 5 Decimal Places

Subtract All Scheduled Hours From Remaining Balance ☒

Taken Is Calculated From Beginning Of Accrual Year And Up To Current Day

This new setting is also available in the Time Off Exceeded timesheet rule.

**Time Off Exceeded**

Display Warning If Entered Time Off Exceeds Current Accrued Amount By 0 Hours

☒ Apply To All Accrued Time Off Categories  
☐ Apply Only To Following Time Off Categories Eq

**BALANCES**

☒ Check Current Balance (Total Balance)  
☐ Check Available Balance

**MESSAGE TO DISPLAY**

Remaining accrued balance for {TimeOffName} would be negative: {AmountExceededBy}.

☐ Generate Notification When This Rule Is Triggered  
(Use Notification Configuration Screen To Set Up Notification)

☐ **CHECK ESTIMATED BALANCES**

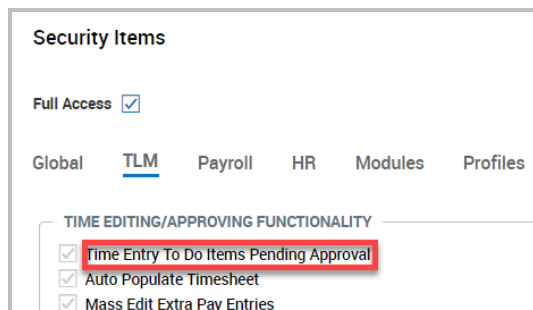
☐ Check Unapproved Requests

☐ **Check Future Approved Time Off** ⓘ

☐ Debug

## Timesheets: Time Entry To Do Items Pending Approval

92702: A new *Time Entry To Do Items Pending Approval* security option is available on the TLM tab in the *Time Editing/Approving Functionality* section of the security profile. When enabled, this security item provides users access to the new Time Entry To Do Items Pending Approval report under *Manage Time > Manage Timesheets*.



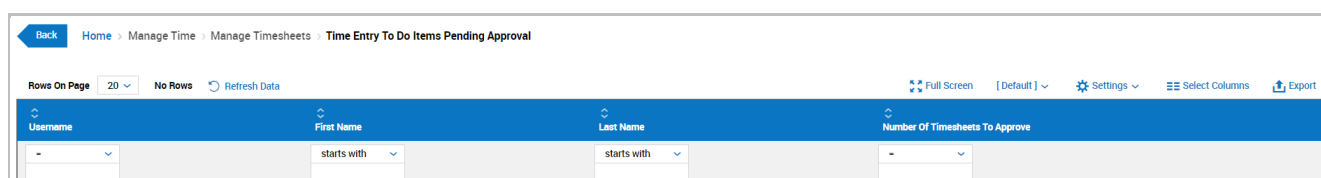
Security Items

Full Access ☒

Global TLM Payroll HR Modules Profiles

TIME EDITING/APPROVING FUNCTIONALITY

- ☒ Time Entry To Do Items Pending Approval
- ☒ Auto Populate Timesheet
- ☒ Mass Edit Extra Pay Entries



Back Home > Manage Time > Manage Timesheets > Time Entry To Do Items Pending Approval

Rows On Page 20 No Rows Refresh Data

Full Screen [Default] Settings Select Columns Export

Username	First Name	Last Name	Number Of Timesheets To Approve
-	starts with	starts with	-

The *Number Of Timesheets To Approve* with unsubmitted Time Entry To Do Items displays per each manager on the report.

**NOTE:** Only Timesheets with Time Entries to approve are counted in the report. The *Approve/Reject Time Entries* step should be configured in the Timesheet Workflow.

## Workflows: Bypass if Missing Approver to Work with Split/Join Steps

93090: In previous releases, Timesheet workflows configured with a Split step for approvals would bypass the entire step for all managers if any of the managers were not specified in the workflow. The problem occurred when the *If recipient is missing set time entries status to* option was set. Managers who were identified to approve the step did not receive To Do Items in these cases.

With this enhancement, any managers identified in the split approval step will receive To Do Items to complete.

## Benefits and ACA

Codes Removed for 2018 Calculation

91334: Per IRS guidelines, ACA codes 1I and 2I have been removed from the 2018 timeline calculation.

2018 Form 1094-C & 1095-C

91038, 90983: The 2018 versions of Form 1094-C and 1095-C are now available within the product under *My Reports > ACA (Affordable Care Act) > 1094-C, or 1095-C*.

2018 Form 1095-C and Form 1095-C Dependent

90990, 86533: The 2018 Form 1095-C is now supported within the application. The updates are mainly cosmetic, with the biggest change that Box 1 and Column (a) in Part III of the form are now broken out into three separate fields for first name, middle initial, and last name.

Form 1095-C

600118

**1095-C**  
Form  
Department of the Treasury  
Internal Revenue Service

**Employer-Provided Health Insurance Offer and Coverage**  
Do not attach to your tax return. Keep for your records.  
Go to [www.irs.gov/Form1095C](http://www.irs.gov/Form1095C) for instructions and the latest information.

☐ VOID  
☐ CORRECTED

OMB No. 1545-2251  
**2018**

Part I Employee				Applicable Large Employer Member (Employer)																	
1 Name of employee (first name, middle initial, last name) Phoebe Buffay		2 Social security number (SSN)		7 Name of employer				8 Employer identification number (EIN)													
3 Street address (including apartment no.)				9 Street address (including room or suite no.)				10 Contact telephone number													
4 City or town		5 State or province		6 Country and ZIP or foreign postal code				11 City or town		12 State or province		13 Country and ZIP or foreign postal code									
Part II Employee Offer of Coverage				Plan Start Month (enter 2-digit number):																	
				All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec					
14 Offer of Coverage (enter required code)																					
15 Employee Required Contribution (see instructions)				\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$					
16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)																					
Part III Covered Individuals																					
If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee. <input type="checkbox"/>																					
(a) Name of covered individual(s) First name, middle initial, last name				(b) SSN or other TIN		(c) DOB (if SSN or other TIN is not available)		(d) Covered all 12 months		(e) Months of Coverage											
										Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec

Form 1095-C (2018) Page 3

Name of employee (first name, middle initial, last name) Social security number (SSN)

Part III Covered Individuals — Continuation Sheet																					
(a) Name of covered individual(s) First name, middle initial, last name				(b) SSN or other TIN		(c) DOB (if SSN or other TIN is not available)		(d) Covered all 12 months		(e) Months of Coverage											
										Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec

In addition to the updated 2018 Form 1095-C, the updated 2018 Form 1095-C Dependent is also now supported in the system.

Form 1095-C Dependent

600118

**1095-C**  
Form  
Department of the Treasury  
Internal Revenue Service

**Employer-Provided Health Insurance Offer and Coverage**  
 ▶ Do not attach to your tax return. Keep for your records.  
 ▶ Go to [www.irs.gov/Form1095C](http://www.irs.gov/Form1095C) for instructions and the latest information.

VOID  
CORRECTED

OMB No. 1545-2251  
**2018**

Part I Employee				Applicable Large Employer Member (Employer)																
1 Name of employee (first name, middle initial, last name)				2 Social security number (SSN)				7 Name of employer				8 Employer identification number (EIN)								
3 Street address (including apartment no.)				9 Street address (including room or suite no.)				10 Contact telephone number												
4 City or town		5 State or province		6 Country and ZIP or foreign postal code		11 City or town		12 State or province		13 Country and ZIP or foreign postal code										
Part II Employee Offer of Coverage				Plan Start Month (enter 2-digit number):																
	All 12 Months	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec							
14 Offer of Coverage (enter required code)																				
15 Employee Required Contribution (see instructions)	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$	\$							
16 Section 4980H Safe Harbor and Other Relief (enter code, if applicable)																				
Part III Covered Individuals																				
If Employer provided self-insured coverage, check the box and enter the information for each individual enrolled in coverage, including the employee. <input type="checkbox"/>																				
(a) Name of covered individual(s) First name, middle initial, last name			(b) SSN or other TIN		(c) DOB (if SSN or other TIN is not available)		(d) Covered all 12 months		(e) Months of Coverage											
									Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec

# Human Resources

## Cost Centers: Pay Grade Overrides by Location at Employee Level

61829: A new pay grade override option has been added at the cost center level, which when set, allows for a new ratio to be applied to the pay grades of individual employees within their employee accounts. Formerly, it was not possible to edit or override the pay grades. This new option will allow for pay grade overrides without the need to create new cost centers.

To enable a cost center, navigate to the *Cost Center Trees* widget, located under *Company Settings > Global Setup > Company Setup*, typically under the *Company Config* tab. Of the cost center trees enabled, only one can be selected for the pay grade override.

Field	Used	Label	Tree	Use for Pay Grade
1	<input checked="" type="checkbox"/>	Department	Tree: Department	<input checked="" type="radio"/>
2	<input checked="" type="checkbox"/>	Location	Tree: Location	<input type="radio"/>
3	<input type="checkbox"/>	Cost Center 3		<input type="radio"/>
4	<input type="checkbox"/>	Cost Center 4		<input type="radio"/>
5	<input type="checkbox"/>	Cost Center 5		<input type="radio"/>
6	<input type="checkbox"/>	Cost Center 6		<input type="radio"/>
7	<input type="checkbox"/>	Cost Center 7		<input type="radio"/>
8	<input type="checkbox"/>	Cost Center 8		<input type="radio"/>
9	<input type="checkbox"/>	Cost Center 9		<input type="radio"/>
10	<input checked="" type="checkbox"/>	Jobs (HR)	Tree: Jobs	<input type="radio"/>

Once a cost center tree has been enabled for pay grade override, you can navigate to the cost center and set the **Location Factor** ratio (defaulted to 1.00) and then check the **Allow Override At Employee Level** checkbox.

All cost centers located under the enabled cost center tree will have this option.

This is located under *Company Settings > Global Setup > Cost Centers*, and then selecting the enabled cost center for editing.

Back Home > Company Settings > Global Setup > Cost Centers > Cost Centers: Department

Cost Center Selector View As List

☐ Show Hidden

☒ Department

- Corporate ( Corp )
- Engineering ( Eng )
- Fort Worth Store ( FWTX )
- Tech Support ( TechSppt )
- Training
- Warehouse ( Wrhse )

Department Properties: 1

Corporate

Main

Name: Corporate

Abbreviation: Corp

Description:

External Id: Payroll Code: Location Code:

Location Factor: 1.00 Allow Override At Employee Level ☒

Visible ☒

SETTINGS

Allow Time Allocation Towards This 1 ☒

Manning: 0.0

GL

Code:



## Pay Information Widget – Employee Information

Once the cost centers housed under the cost center tree have been set to allow overrides at the employee level, employee account under Employee Information can be edited. Within the *Pay Grade* section of the *Pay Information* widget, an **Override** button will display.

After clicking the *Override* button, the *Location Factor* can be edited.

The screenshot shows the 'PAY GRADE' section of a form. At the top, there is a dropdown menu set to 'Level 12 Salary' and a 'Rate By' button set to 'Yearly'. Below this, there are two rows of salary fields: 'Min', 'Mid', and 'Max' for the grade, and 'Min By Location', 'Mid By Location', and 'Max By Location' for the employee's location. The values for the grade are 60,500.000€, 61,000.000€, and 61,500.000€ respectively. The values for the location are the same. To the right of these fields is a 'Compa Ratio' field with the value 0.710383. Below the location fields is a 'Location Factor' field with the value 1.00 and an 'OVERRIDE' button. At the bottom, there is a 'GL' section with a 'Code (DR)' field.

After entering a new ratio, click outside the field and the Min/Mid/Max by Location fields will update to reflect the new values. After entering a ratio, the *Override* button will change to a **Clear Override** button, which will allow the values to be restored to their original values.

This screenshot is identical to the previous one, but the 'Location Factor' field now contains the value 1.50, and the 'OVERRIDE' button has been replaced by a 'CLEAR OVERRIDE' button. The 'Min By Location', 'Mid By Location', and 'Max By Location' fields have been updated to 90,750.000€, 91,500.000€, and 92,250.000€ respectively.

This screenshot is identical to the first one, showing the 'PAY GRADE' section with the 'Location Factor' field set back to 1.00 and the 'OVERRIDE' button.

## Custom Forms: Text Editing Added to Labels

68146 & 85382: Within custom forms, when selecting a field setting of *Label*, a new text editing box will display allowing customization of font, color, size and other attributes.

Back Home > Company Settings > HR Setup > Custom Forms > Page 1: Field 5

Save Add New Field Add Multiple Items ...

Success (1) Hide All

Saved.

Form Page

Page Number: 1

Page Format: Legal 8.5" x 14"

Change Background Image: Choose File

Full Name\*: Employee Name

Marital Status\*: Marital Status

Address: New Field 3

New Field 4

Field Settings

Enabled: ☒ Note: This is a read only field.

Read Only: ☒

Is Required: ☐

Name\*: Employee Update Form

Description:

Type: Label

Label: 2018 Employee Data Update

Position: x: 340 y: 4

Width: 250 Height: 100

Preview

Full Name\*:

Marital Status\*:

Address:

2018 Employee Data Update

## HR Actions

The following enhancements have been completed for HR Actions and are listed below.

HR Actions: EIN Transfer - Switch of Primary EIN in Multi EIN Companies

77374: Managers transferring employees from one EIN to another through an HR Action, will now have the option to switch an employee's primary EIN during the process.

When creating an HR Action for an *EIN Transfer* sub-type, a **Primary EIN** item will be available to be added to the action. By adding this item, when the EIN Transfer action is created for employees, a *Primary EIN* field will then be available, which will be a required field

[Back](#) [Home](#) > [Company Settings](#) > [HR Setup](#) > [HR Actions](#) > [HR Action](#)

### HR Action

Name\*

Type\*

Approver Security For Apply Changes [?](#) ☒

Workflow\*  X

Screen Message

Align To

- Hired
- Name
- Pay Period Profile
- Personal Settings
- Started
- Primary EIN**

No Groups Defined

[Back](#) [Home](#) > [My Employees](#) > [Employee Actions](#) > [HR Action Request: Gabrielle A. Victory. Primary EIN Transfer \(08/13/2018\)](#)

Success (1) [Hide All](#)

Saved.

### HR Action Info

Employee

HR Action

Effective From\*  [?](#)

Hired\*  [?](#)

Salutation

Nickname

First Name\*  Middle

Last Name\*  Suffix

Pay Period\*  [?](#)

EIN\*

Social Security\*

Birthday\*

Person Account

Employee Sync\*  [?](#) X

Employee Id\*

Started\*  [?](#)

Primary EIN\*  [?](#) X

- Default
- Default**
- Gabby's Nest

## HR Actions: Job Info Type Added

64709: Companies using Jobs functionality will now have the ability to create a **Job Info** HR Action to update certain fields for existing Jobs assigned to employees.

When an existing Job is updated, perhaps to change a field such as Pay Grade, the *Job Info* HR Action can then be used to update all affected employees without the need to create and assign a new Job to those employees. The *Job Info* action also contains other action items that can be added, if applicable.

Certain changes made to existing Jobs will be available under the job's *Job Info History* report as follows:

- Changes made to the *Job* widget.
- Changes made to the *Notes* widget.
- Changes made to the *Defaults* widget.
- Changes made to the *Workers Comp Code Types* widget.
- Changes made to the *Job Attributes* widget.

Question

Please, select HR Action Type.

HR Action Type: My Employee Action Request

HR Action Sub Type: Regular

- Regular
- Hire
- Re-Hire
- Termination
- Global Rate Table
- EIN Transfer
- Job Info

Cancel OK

Back Home > Company Settings > HR Setup > HR Actions > HR Action Save Add Group Add Action Item

Success (1) Hide All

Saved.

HR Action

Name\* Job Info

Type\* My Employee Action Request

Approvers Security For Apply Changes ☒

Workflow\* HR Action Change of Status

Screen Message

Align To: Left

Job Info

No Groups Defined

## HR Actions: Manager 1-6 Added to EIN Transfer Sub Type

77982: Within the *EIN Transfer* Sub Type for HR Actions, we have added the action items of Manager 1 through Manager 6. When added to the HR Action, this allows employees to have their managers updated through the action.

The screenshot shows the 'HR Action' configuration page in the background. The 'Add Item' dialog box is open, showing a list of items to be added to the 'EIN Transfer' sub-type. The items listed are 'Key Employee', 'Manager 1', 'Manager 2', 'Manager 3', 'Manager 4', 'Manager 5', and 'Manager 6'. The 'Manager 1' through 'Manager 6' items are highlighted with a red box. The dialog box also includes a 'GROUP TO ADD TO' section with options for 'New Group' and 'Existing Group', and a 'Rows On Page' dropdown set to 10.

## Imports: Option Added to Enable/Disable SSO

68526: When Single Sign On (SSO) was turned on for a company by default, employees hired afterward were all set to log in only through the SSO protocol. To allow companies flexibility when importing employees who should or should not log in with SSO, a new setting has been added to the Employees Import Template to enable/disable the option. This option will also be available in the API import and is only available for HR Enterprise companies.

**NOTE:** Imports are available.

### Employees Import Template – Basic Employee Information Section

Secondary Email	Email 2			75		Y	
Security Question				128		Y	
Security Question Answer				25		Y	
Disable Only login SSO Option			1	1	Y/N	Y	Setting value for this column to "Y" instructs our system to disable Only login SSO Option for an employee.
Locale						Y	Employee locale string.

## Imports: Workers Comp Code Added to Jobs Import Template

7983: The workers compensation code has been added to the Jobs import template to assist companies in automatically populating this field within HR Jobs during the import process. Multiple codes can be added for companies with employees in multiple states, such as states who have their own codes (i.e.,

Indiana, Massachusetts), or other states that fall under the National Council on Compensation Insurance (NCCI).

The *Jobs* import template is available under *Company Settings > Imports > Overview* in the *HR* category.


When the template is complete, it can be imported back into the system under *Company Settings > Imports > HR > Company Setup > Jobs*.

**NOTE:** Imports are available.

Work Schedule Profile				Work Schedule Profile name (must match Work Schedule Profile for company)
Work Schedule Profile Override			Y/N	Work Schedule Profile: Allow override at employee level
Working Time Regulations Profile				Working Time Regulations Profile name (must match Working Time Regulations Profile for company)
Working Time Regulations Profile Effective From			mm/dd/yyyy	Working Time Regulations Profile effective from date
Working Time Regulations Profile Override			Y/N	Working Time Regulations Profile: Allow override at employee level
NCCI			CODE: Description	The worker's comp code and description should be added in the column (ex. 8810: Accountant) and must exactly match the code configured in the company worker's comp settings.
Two letter state abbreviation ex. MA				

	100	101	102	103	104	105
1	Working Time Regulations Profile	Regulations Profile Effective From	Working Time Regulations Profile Override	NCCI	MA	
2						
3						
4						
5						

## OSHA Electronic Filing Support

 44591: We are now providing support within the application to create OSHA Form 300A, validate the required fields, save and finalize, and download to your system where it can then be electronically filed with OSHA after establishing an account with them.

In our application, after the form is populated or manually filled out and saved, the system will validate all required fields and if there are errors, provide information to help fix those issues. The form can then be finalized by clicking the **Finalize Form** button. Once finalized, editing will not be allowed. If editing is needed, an **Unfinalize Form** button will be available, and when clicked, will open the form for editing and saving, where it can then be finalized again.

Forms can be created and viewed under *My Employees > Forms > OSHA 300A*.

Back Home > My Employees > Forms > OSHA 300A

Save Populate Form **Finalize Form** ...


Success (1) Hide All

Saved.

---

OSHA's Form 300A (Rev. 01/2004)

**Summary of Work-Related Injuries and Illnesses**

Year 20  

U.S. Department of Labor  
Occupational Safety and Health Administration  
Form approved OMB no. 1218-006

All establishments covered by Part 1904 must complete this Summary page, even if no work-related injuries or illnesses occurred during the year. Remember to review the Log to verify that the entries are complete and accurate before completing this summary.  
Using the Log, count the individual entries you made for each category. Then write the totals below, making sure you've added the entries from every page of the Log. If you had no cases, write "0".  
Employees, former employees, and their representatives have the right to review the OSHA Form 300 in its entirety. They also have limited access to the OSHA Form 301 or its equivalent. See 29 CFR Part 1904.35, in OSHA's recordkeeping rule, for further details on the access provisions for these forms.

Number of Cases			
Total number of deaths	Total number of cases with days away from work	Total number of cases with job transfer or restriction	Total number of other recordable cases
<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="1"/>
(a)	(b)	(c)	(d)

Number of Days	
Total number of days away from work	Total number of days of job transfer or restriction
<input type="text" value="1"/>	<input type="text" value="0"/>
(e)	(f)

Injury and Illness Types			
Total number of ... (h)			
(1) Injuries	<input type="text" value="1"/>	(4) Poisonings	<input type="text" value="0"/>
(2) Skin disorders	<input type="text" value="0"/>	(5) Hearing loss	<input type="text" value="0"/>
(3) Respiratory conditions	<input type="text" value="0"/>	(6) All other illnesses	<input type="text" value="0"/>

**Post this Summary page from February 1 to April 30 of the year following the year covered by the form.**

Public reporting burden for this collection of information is estimated to average 18 minutes per response, including time for reviewing the instructions, searching existing data sources, gathering the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this data collection, including suggestions for reducing the burden, to Washington, DC 20503. Do not send the completed form to this office.

**Establishment information**

Your establishment name

Street

City  State  ZIP

Industry description (e.g., *Manufacture of motor truck bodies*)

Standard Industrial Classification (SIC), if known (e.g., 3715)

OR

North American Industrial Classification (NAICS), if known (e.g., 336212)

**Employment information** (If you don't have these figures, see the Worksheet on the back of this page to estimate.)

Annual average number of employees

Total hours worked by all employees last year

**Sign here**

Knowingly falsifying this document may result in a fine.

I certify that I have examined this document and that to the best of my knowledge the entries are true, accurate, and complete.

Company name  Title

Phone  Date

Once the form is finalized and ready, the form can be downloaded by clicking the triple dot icon. Options include **Download PDF** and **Download CSV**.

- The **Download PDF** option will simply create a copy of the form in PDF.
- The **Download CSV** option will prompt the user with a file generation questionnaire. After answering the questions and clicking OK, the CSV file will be created.

**OSHA 300A CSV File Generation Questionnaire**

The file contains an EIN whose 300A has already been submitted to OSHA and was accepted. Yes

Establishment Type

Reason for Correction

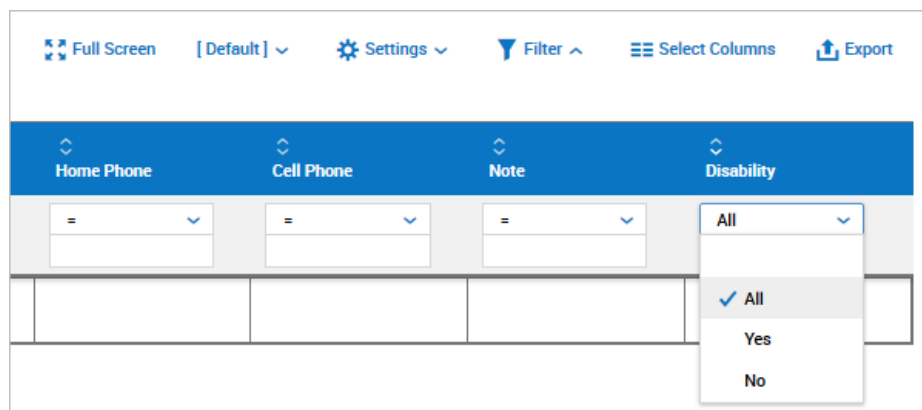
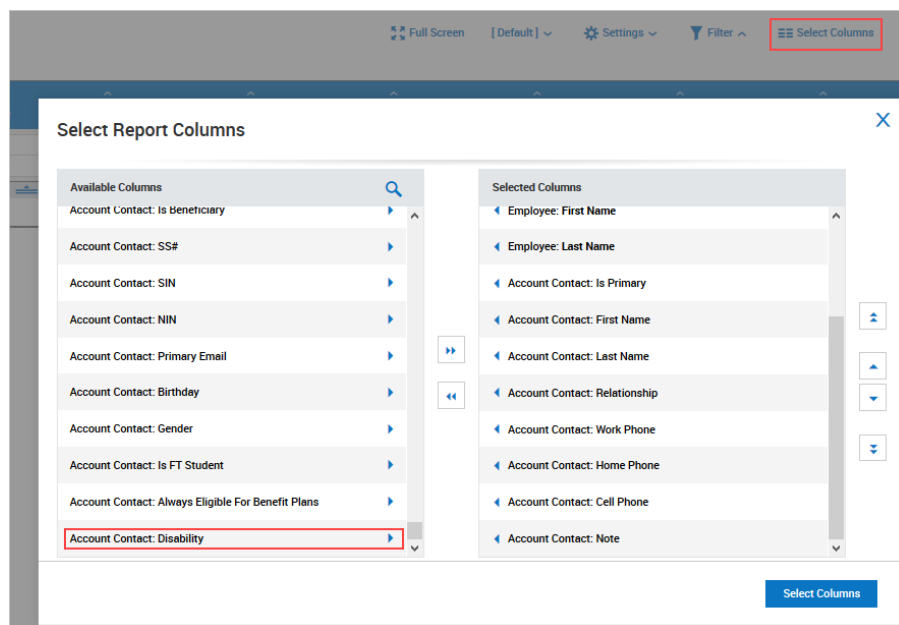
Cancel OK





## Reports: Employee Contact Report – Account Contact Disability Added

62959: An *Account Contact: Disability* field can now be added to the *Employee Contacts* report from *Select Columns*. If the employee contact has a disability, the column is populated with Yes. It can be used as a report filter to include or exclude employee contacts with disabilities in the report. The report is available under *My Reports > HR > Employee Contacts*.



## Reports: Pay Grades (Assigned To Employee) Report - New Columns Added

63167: New pay columns are available to be added to the *Pay Grades (Assigned To Employee)* report, located under *My Reports > HR > Pay Grades (Assigned To Employee)*. These columns will show employee rates by location and show the ranges as minimum, mid, and maximum. If an employee receives different rates according to the location worked, as defined in the system, those rates will display in these columns.

The columns are:

- Min By Location
- Mid By Location
- Max By Location

**Select Report Columns**

Emp. Root: Location: Abbrev. Path

Emp. Root: Location: Abbrev.

Emp. Root: Location: External Id

Emp. Root: Location: Effective Date From

Emp. Limit Location List: Name

Emp. Limit Location List: Effective Date From

Employee: Location Factor

**Employee: Min By Location**

**Employee: Mid By Location**

**Employee: Max By Location**

**Selected Columns**

Button: View Pay Grade

Button: View/Edit Employee

Button: Employee Quick Links

Employee: Employee Id

Employee: First Name

Employee: Last Name

Employee: EIN

Employee: Status

Pay Grade: Name

Pay Grade: Rate Rv

Select Columns

[Back](#) [Home](#) > [My Reports](#) > [HR](#) > [Pay Grades \(Assigned To Employee\)](#)

Rows On Page: 20 1 Row Refresh Data

Employee Filter: All Employees

Employee Id	First Name	Last Name	Employee EIN	Min By Location	Mid By Location	Max By Location	Employee Status
7900	Lisa	Brown	Default	\$60,500.00	\$61,000.00	\$61,500.00	Active

Visa Type\* Australian Visa Visa Category Other Visas Visa Bridging visa E - BVE (subclass 051) Visa # 434 Expiration 10/06/2018

**Account Demographics**  
 Gender U  
 Height 190  
 Weight 89  
 Eye Color green  
 Actual Marital Status M  
 Primary Language rus  
 Secondary Language Eng  
 Recruiter e2 e2  
 Visa Type **AUS\_051**  
 Visa # 434  
 Visa Expiration 10/06/2018  
 Worker Type Employee

## Employees Import

The *Employees Import Template* has been updated to allow the import of *Visa Type*.

Visa Type
Types: E3, H1B, H2A, H3, H4, J1, L1A, L1B - for USA Visas. Types: AUS_050, AUS_189, AUS_100 - for AUS Visas. AUS_Spec - for Special Purpose Visa.

## REST API

For GET and PUT requests for *Visa Type*.

```
{{url}}/ta/rest/v2/companies/621078/employees/5327585/demographics
```

## Workflows: Position Management

For companies with Position Management enabled, we are adding options to workflows and workflow steps to allow for the selection of positions in many of the fields. These are listed below.

### Updated Position Management Workflow Steps

The following steps within workflows have been updated to support Position Management.

- HR Action Step
- Approve/Reject Step
- Checklist Step
- Generate Email Step
- Collect Note Step
- Terminate Employee Step

### Common Options Among Updated Steps

The information listed below is common among all six updated steps.

#### Recipients

Companies with Position Management enabled will now be able to specify ***Specific Position*** or ***Direct Managerial Position*** in the workflow. Depending on the step, this can be selected in the *To Be Initiated By* field, the *Create For* field, the *Send Email To* field, or the *To Be Completed By* field.

By specifying a position over a user, companies can ensure that the workflow will route to other users assigned to the set position, rather than to a specific individual should the individual no longer work at the company, or is unavailable, thus preventing the stalling of the workflow.

### *Step Backup*

Common to all steps containing a *Step Backup* option is the ability to select *User* from a drop-down list. Prior to this release, the drop-down was not available.

### *Viewing Workflows*

Launched workflows can be viewed from the following areas in the application:

- *My Employees > Employee Actions > All Requests* (for HR Action Requests with Type = My Employee Action Request)
- *My Account > My Actions > All Requests* (for HR Action Requests with Type = My Information Action Request)
- *My Account > My To Do Items* (this page also opens by click on the Bell icon displayed in the upper-right corner)
- *My Dashboard > My To Do Items* widget
- *My Reports > System > System Utilities > All To Do Items*

### *To Do Items*

If more than one person is assigned to the same specified position, the To Do Items will be adjusted as soon as one of the assigned employees completes the task. For example, if Peter, Paul, and Mary are all assigned to the Specific Position and Mary completes the step in the workflow, the To Do will not only disappear for Mary but for Peter and Paul as well.

The update of To Do Items will affect the following areas:

- *My Account > My To Do Items* (this page also opens by clicking the Bell icon displayed in the upper-right corner.)
- *My Dashboard > My To Do Items* widget
- *My Reports > System > System Utilities > All To Do Items*

### *Changes to Employee Assignments After To Do Item Received*

When assigning a *Specific Position* or *Direct Managerial Position* in the *To Be Initiated By* field and the workflow reaches the stage where the user(s) assigned to the position receive their To Do Item, if any change occurs to the Employee Assignments to this position, the To Do Items will automatically be adjusted. The result is that any users/employees added to the position will also receive a To Do Item.

**NOTE:** This functionality applies to steps that require interaction from the recipient prior to the workflow moving to the next step.

- If multiple users/employees receive the To Do Item, the first user to take action will result in the To Do Item for the other recipients being removed from their To Do Item list.

- In addition, the To Do Item counter, the Bell icon will be updated (*i.e. decreased*) to reflect that the To Do item was removed.

#### HR Action Step

72396, 68662, 72399, 71281, 72397

The screenshot shows the 'To Be Initiated For' configuration section. The 'To Be Initiated By' dropdown is open, displaying a list of roles. The 'Specific Position' role is selected and highlighted with a blue checkmark. The 'Direct Managerial Position' role is also highlighted with a red box. The 'Account Manager Finance [00000001]' dropdown is visible to the right of the open menu.

#### Approve/Reject Step

71930, 68252, 71079, 71938, 68253, 71934, 68255, 66257

The screenshot shows the 'To Be Completed By' configuration section. The 'To Be Completed By' dropdown is open, displaying a list of roles. The 'Specific Position' role is selected and highlighted with a blue checkmark. The 'Direct Managerial Position' role is also highlighted with a red box. The 'Account Manager Finance [00000001]' dropdown is visible to the right of the open menu.

### Checklist Step

72722, 68840, 68841, 72726, 72724

The screenshot shows a software interface with a 'Create For' dropdown menu open. The menu lists several options: Employee, Supervisor, Manager, Time Off Requests Handler, Specific Account, Specific Group, Request Creator, Direct Managerial Position, Specific Position (which is selected with a checkmark), and Based on Job Attribute. A red box highlights the 'Create For' dropdown and the 'Specific Position' option. The background shows a search bar with 'Account Manager Finance [00000001]' and a 'No Actions Configured' message.

### Generate Email Step

72234, 68790, 68791, 72236

The screenshot shows a software interface with a 'Send Email To' dropdown menu open. The menu lists several options: Employee, Supervisor, Manager, Time Off Requests Handler, Specific Account, Specific Group, Request Creator, Direct Managerial Position, Specific Position (which is selected with a checkmark), Cost Center Manager, and Based on Job Attribute. A red box highlights the 'Send Email To' dropdown and the 'Specific Position' option. The background shows a search bar with 'Account Manager Finance [00000001]' and a 'Step Backup' checkbox.

### Collect Note Step

72096, 68327, 68331, 66701, 68328

Step can be skipped ☒

To Be Completed By **Specific Position** \* Account Manager Finance [00000001]

Employee

Supervisor

Manager

Time Off Requests Handler

Specific Account

Specific Group

Request Creator

Direct Managerial Position

✓ Specific Position

Cost Center Manager

Based on Job Attribute

No Actions Configured

### Terminate Employee Step

68607, 72130, 68610, 66783

Terminate Original Employee

To Be Completed By **Specific Position** \* Account Manager Finance [00000001]

Employee

Supervisor

Manager

Time Off Requests Handler

Specific Account

Specific Group

Request Creator

Direct Managerial Position

✓ Specific Position

No Actions Configured

### HR Action Request Workflows: Auto-Generate Parallel Workflow

74828: In the August 2018 release, the ability to automatically generate sequential approvals up through the management chain was added to HR Action workflows. In this release, a new option enables the managers in the hierarchy to approve the workflow steps in parallel.

The *Workflow Subtype* determines whether workflow approvals can be completed in parallel or must be completed in order (sequential).

After adding a default workflow, the *Generate Default Workflow* pop-up appears.

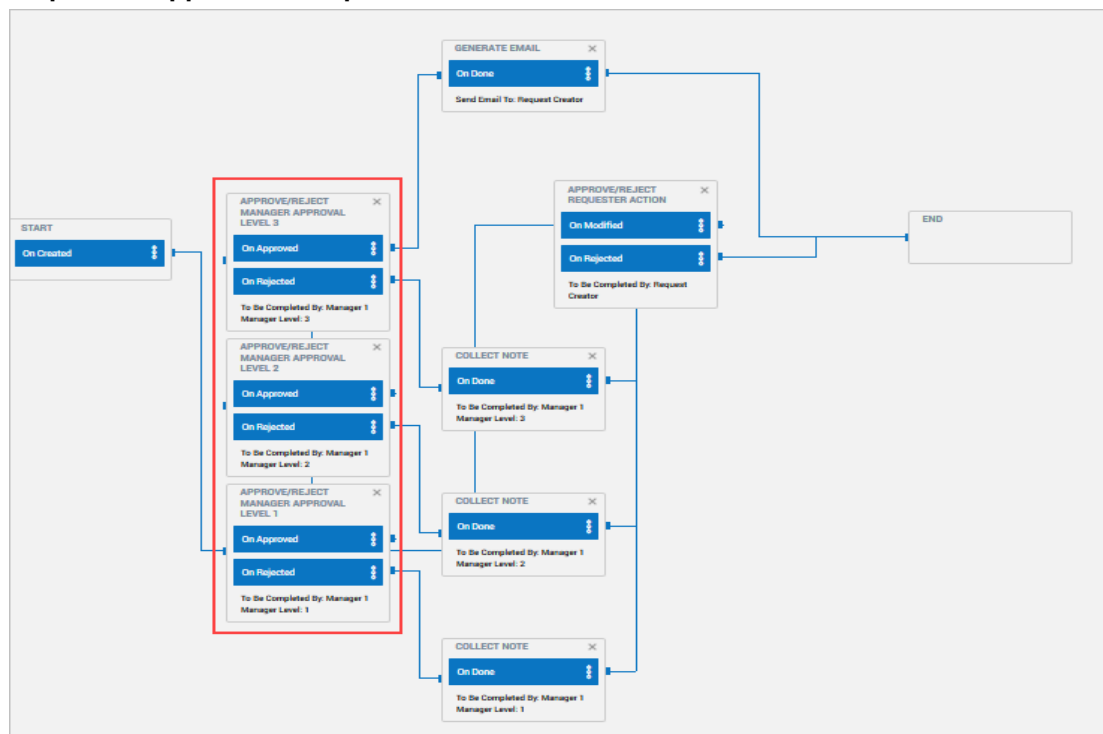
- Selecting *Sequential* will automatically generate a workflow containing successive approval steps. Those steps must be completed in order beginning with lower level managers and progressing through the hierarchy.
- The *Parallel* option allows approvals to be completed in any order. Higher level managers can approve their steps without waiting for their subordinates to approve their steps.

**NOTE:** The *Approval Chain Number* option was re-named in this release to *Number of Approvals*. This option determines how many levels of approval will be automatically generated in the workflow.

The screenshot shows the 'Generate Default Workflow' dialog box. It contains the following fields and options:

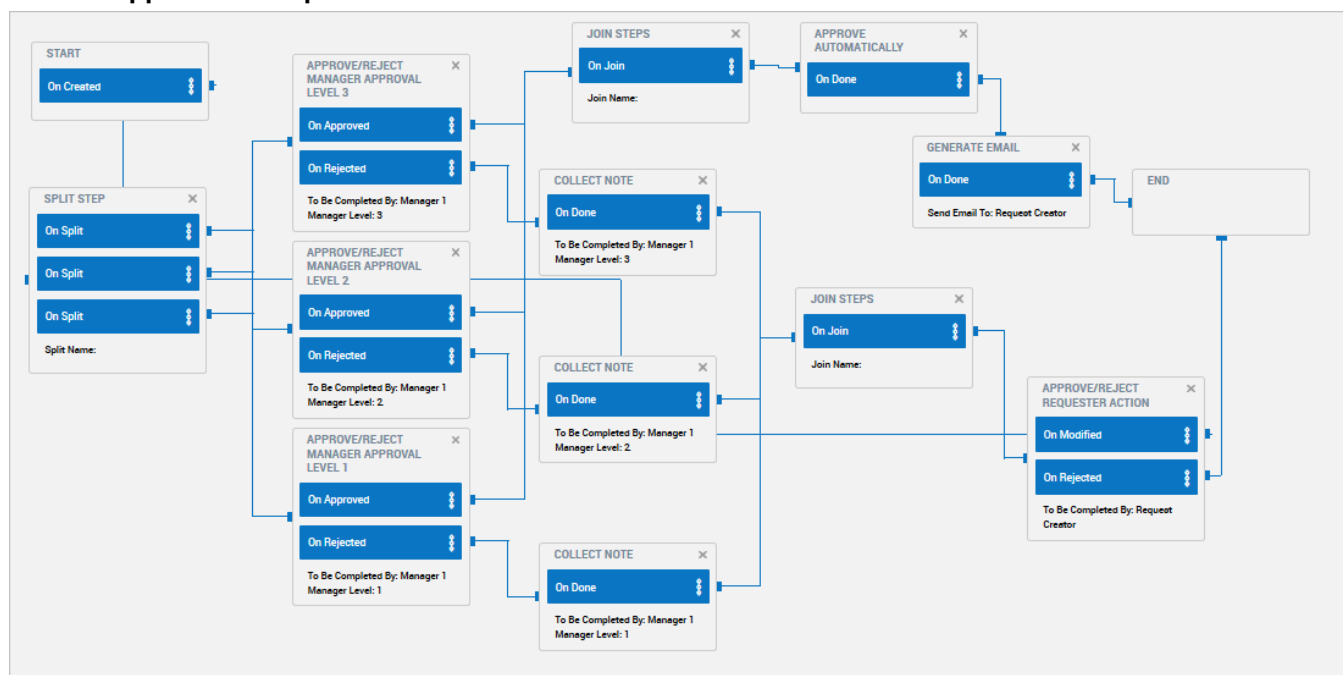
- HR Action Request**
- HR Action Type:** Promotion (dropdown)
- Number of Approvals:** 3 (dropdown)
- Workflow Subtype:** Sequential (dropdown, highlighted with a red box)
- To Be Completed Chain:** Sequential (dropdown, with a checkmark next to it, also highlighted with a red box)
- Parallel** (option, not selected)
- Buttons:** Cancel and OK

### Sequential Approval Example





## Parallel Approval Example



In the parallel approval workflow, each approver receives a To Do Item. The request is only approved if all managers approve their To Do items. The *Join* step associated with approvals will not progress to the automatic approval until all managers have approved the request. If a manager at any level rejects the request, the To Do Items for all managers will be removed and the request will go to the *On Modified* step in the *Approve/Reject Requester Action* step.

The following default options are selected for steps that follow the approvals:

- In the *On Approved* actions of each approval step, the *Apply Changes* and *Update Checklist Item* options are not checked.
- In the *Join* steps following an *Approve/Reject* step, The *Leave Remaining Split Steps Open* option is selected.
  - In the *Approve Automatically* step that follows the *Join* step the *Update Checklist Item* is checked.
- In the *Join* step following *Collect Note* steps, The *Leave Remaining Split Steps Open* option is not checked and the *Automatically complete all pending split steps and move to next step in the workflow* is selected.

## HR Action Request Workflows: Flow of Hierarchy in Chain of Approval

82484 & 73837: A new **Enable Dynamic Workflow** checkbox has been added to the *Approve/Reject* step of HR Action Request workflows. When checked, the setting will ensure the workflow is routed to an approving manager within the employee's hierarchy in the event the original approver has a status of terminated or not in payroll.

However, if a level in the hierarchy is skipped due to a manager being terminated or on leave, and later that skipped position becomes active again, the pending To Do Item will get moved back to the original manager for approval.

Additionally, if the employee's manager changes before the HR Action can be approved, the workflow will move the approval to the new manager within 24 hours and then proceed with the new hierarchy for approvals.

**Step Properties: Approve/Reject**

Name: Manager Approval Level 1

Description:

Auto Approve: ☐ ⓘ

To Be Completed By: Manager 3 ▾

Enable Dynamic Workflow: ☒ ⓘ

Step Backup: ☐

WORKFLOW STEP ACTIONS

ACTION		
		On Approved
		On Rejected

Checking this box allows an approving manager to be skipped if the account status is set to "Is Terminated" or is NOT set to "In Payroll". The To Do item for this step will move to the next available manager in the employee's hierarchy. If changes are made to an employee's hierarchy that affect To Do assignments, the To Dos will be reassigned within 24 hours of the change.

### Checklist Items: Forms I9 and W4 Added

85615 Checklist items for I9s and W4s have been added as screen links for My Form I9s and My Form Withholding.

Formerly, these two items were listed with (*coming soon*) messages. Those messages have been removed and the items are now available to be completed. After a checklist has been assigned to an employee, they can retrieve and complete the checklist from their My To Do items under the *Bell* icon.

Incomplete (0 out of 2) 0%

Started On 10-30-2017

1 ... **CONTINUE**

Group #1 (2) 0% complete

My Form I9s Mark as Complete

My Form I9s

View Your I9 Forms >

My Form Withholding

Due Date 04-26-2017 (Overdue) Waiting On

## FMLA Forms Updated

84704: FLMA forms have been updated with the new expiration dates of August 2021. New forms will have this expiration date. Existing forms retain the expiration date that was used when they were created.

## Resolved Issues

The following issues have been resolved with this release.

### Recruitment: Error with Job Board URL

69869

#### **UPDATE on October 18, 2018**

Our engineering team has applied a temporary fix for this issue. At this time, we think most clients will not experience security issues when embedding Career/Job URLs within outside websites. In the meantime, our teams are actively working on a permanent solution.

#### **UPDATE on October 15, 2018**

On October 12, 2018, we communicated about an issue regarding users experiencing errors when they attempted to embed a Recruiting Job URL into an outside website. An incomplete solution was provided in that communication and our development team has determined the initial fix would only suffice for up to 3 URLs. The solution which we had provided (shown below) requires us to roll the initial fix back to its original state and you may experience errors while our team works on a more updated solution. We will update you as soon as we have a permanent option available.

#### **Published on October 12, 2018**

Companies using the Recruitment module experienced security violation and frame errors within browsers when using embedded URLs for their internal career job boards. The following will need to be done to correct the issue.

Step 1: Contact Support in order to Whitelist the parent application URL that will be hosting the OnePoint URL.

Step 2: Embed the Recruitment page using a URL like this:

[https://<domain>/ta/<company\\_Short\\_Name>.jobs?InFrameset=1](https://<domain>/ta/<company_Short_Name>.jobs?InFrameset=1)

OR-

[https://<domain>/ta/<company\\_Short\\_Name>.careers?InFrameset=1](https://<domain>/ta/<company_Short_Name>.careers?InFrameset=1)

### Default message in Notification Used Invalid Tag FULL\_NAME

83973: When creating an Applicant Password Reset notification, the name field auto-populated with the tag, {Full\_Name}, which was an invalid tag resulting in errors. The name field has now been changed to auto-populate with the tag, {Account\_Full\_Name} which will result in a successful notification.

### System Error When Completing HR Action

83513: When a user with proper security access attempted to complete an HR Action to update account information, a system error was generated. This has been corrected and users will be able to initiate and complete HR Actions.

### Required Worker Type Demographic Item Not Required in Employee Accounts

79795: When the Worker Type demographic item was set as required within a demographic profile, the corresponding field within the Account Demographics widget of employee accounts was not showing the field as required and users were able to save the page without an entry in this field. The system will now set required demographic items as required within employee accounts; and if a required field is saved without an entry, the system will generate an error, as expected.

### Error When Adding New Performance Review

79746: Users have reported that when personal goals are set in a finalized performance review and the next review is set to auto-generate, the new review was carrying over the personal goals from the previously finalized review. The auto initiate did not occur, and when trying to manually initiate the review, an error of *This review cannot be initiated. Weights must total 100%. Current total is 0.0% for Personal Goals*. This has been corrected and auto-generated reviews will be successfully created without carrying over the personal goals from the previous review.

### Custom Form Field Cutting Off After 50 Characters

79405: The name field in a custom form allowed more than 50 characters to be entered and when saved, cut the name off at 50 characters. The character width of the name field is now hard-coded to cut off at 50 characters, so users will not be allowed to type past the limit.

### Performance Review Group Averages Not Appearing on PDF

79378: When downloading performance review settings to PDF, the group averages for Core Values and Competencies (Job and Company) did not properly display in the resulting output. Moving forward, these values will correctly display in PDF output.

### Performance Reviews Personal Goals Out of Order

78349: After adding personal goals to a performance review, then saving and returning to add another goal, the new goal should have been added to the bottom of the list, but instead was adding it to the secondary position. Moving forward, new goals will be added in the correct order.

### Filtered Document Types Not Copying from Company to Company

78215: Document Types created with applied filters in one company and then copied over to a new company will now result in the items being correctly copied with the filters intact in the new company.

### Form WH-381 Populating Incorrectly in PDF

75276: When populating the *Because you needed to care for your* section of Form WH-381 with either spouse or child, the resulting PDF flipped the selections (child selected = spouse selected on the PDF and vice versa.) The PDF will now display the selections correctly.

### Error When Using Single Quote Character in Custom Filters

70856: When adding a custom filter to a checklist and using special character of a single quote, errors were generated. The system will now support the use of the single quote special character (i.e., Ass't) when creating custom filters in Checklists, Benefit Plans, Notifications, and Forms.

### Security Violation Submitting Custom Applicant Questionnaire

63774: When creating a customized applicant questionnaire and using multi-radio buttons with a specified list of items, users received security violation messages when submitting the form. Moving forward, this type of configuration is allowed and can be successfully submitted.

### Using Date Filter in Training/Certification Report Resulted in Incorrect Data

5803: When running the Training/Certifications report from *My Employees > Employee HR Maintenance > Training/Certifications*, the report correctly showed courses according to a filtered *Completion Date*, but the dollar value of the Company Cost (\$) column denoted ALL instances of an employee completing this course, regardless of the filtered timeframe.

Since the purpose of this report is to display the training/certifications on a cumulative basis; and is not designed to be a history of each time a training is taken, some column names were changed to more accurately reflect their purpose.

- The column named *Completion Date* - Changed to *Current Completed Date*
- The column named *Instructor* - Changed to *Current Instructor*
- The column named *Renewal Term* - Changed to *Current Renewal Term*
- The column named *Source* - Changed to *Current Source*

- The column named *Company Cost (\$)* - Changed to *Combined Company Cost (\$)*
- The column named *Employee Cost (\$)* - Changed to *Combined Employee Cost (\$)*
- The column named *CEU's* - Changed to *Combined CEU's*

The column name changes do not affect the *View History* version of the report.

Additionally, on the main report and the *View History* version of the report, a *Completed On* filter has been added and is based on the completion date of the course.

- This filter is located next to the *Expires On* filter above the columns and contains options of *Calendar Range*, *Date Range*, and *Expression*.

### Expense Reporting with Certify: Error Message Generated Upon Sync Users

72270: When attempting to sync users for the Expense Reporting with Certify marketplace product, a detailed message for each employee is now displayed in the case where any or all employees cannot be synchronized.

### E-Verify - No Close Statements to Select

75917: When attempting to close an E-Verify case, a prompt to select a close statement appeared, but there were no statements to choose from if the case was closed on the E-Verify side. Now, when trying to close the case, no closure reasons are available (as case already closed), and the following message displays: *Case is already closed on E-Verify side. We are about to update the case with latest info. Do you want to continue?*

When the user selects Yes, a E-Verify Case closed message displays along with a Closure Reason.

### Punctuation Lost on Exported Performance Reviews

86443: When exporting a performance review containing words with apostrophes, the resulting PDF was missing the punctuation. This has been corrected and exports will now contain the correct punctuation.

### Pay Calculations Not Visible in HR Action

84977: When initiating a My Employee Action Request for an HR Action and including the Pay Calculations action item, the assigned recipient group were unable to see Pay Calculations. Moving forward, the Pay Calculations will be visible.

### Form I9 Unable to Filter on Columns

82370: Users attempting to filter on certain columns within the Form I9 report page, under My Employees > Forms > I9s, error messages were generated, and the columns could not be filtered using

standard filtering criteria. This has been corrected and the report columns can now be filtered as expected.

### System Unresponsive When Downloading Employee Documents in Edit Screen

87414: When editing a document under *My Employees > Employee HR Maintenance*, documents can now be successfully downloaded using the *Download File* button.

### Columns Unavailable in Employee Contacts Report

78493: Certain Account Contact columns were unable to be added in the Employee Contacts reports for employee dependents. The following columns can now be added to the report:

- Account Contact: Address (all types)
- Account Contact: Actual Marital Status
- Account Contact: Is Smoker
- Account Contact: Height
- Account Contact: Weight
- Account Contact: Account Id

### Imported Null HR Custom Field Populates When Filtered as Not Null

71197: When null values for HR Custom Fields were imported, they populated as Null on the Employee Information report when filtered as Not Null. Moving forward, if an HR Custom Field has no value, Null will be set in the database. When filtered, IS NULL and IS NOT NULL will work correctly.

### New Hire Checklists Not Assigned to Employees

86633: When importing new employees via REST API, the appropriate New Hire Checklists are now assigned to all applicable new hires.

### Applicant Portal Show Job Map Not Displaying

87217: Within the applicant portal for the Recruitment marketplace product, when viewing a job on a map, the map did not render and displayed a blank space. This issue has been corrected and the map will now display correctly.

### Employee Information Employee Picture Column Not Running in IE11

86477: When pulling the *Employee: Picture* column into the Employee Information report page, the system would either take a long time to load or not load at all when using the IE11 browser. The Chrome and Firefox browsers did not have this issue. To correct the issue for IE11 browsers, access the *Compatibility View Settings* from the browser settings menu and ensure the *Display intranet sites in Compatibility View* setting is unchecked.

### Applicant Column Numbers Not Updating When Applicant Deleted

85210: Within the Job Requisitions page of the Recruitment marketplace product, when an applicant was deleted, and the applicant was also deleted, the *# of Applicants* column was not updating to reflect the deletion. If done in reverse order with the application being deleted first, and the applicant remaining, the column updated correctly. This has been corrected so the *# of Applicants* column will properly update regardless of the order of the deletions.

### PDF of Custom Form Changing Employee Values

82334: When creating a PDF of a custom form, employee values of Pay Grade and Employee Type showed incorrectly on the PDF version of the form; when form added to employee, the values showed correctly. This has been corrected and now all fields will correctly display in the PDF of a custom form.

### Birthday Deleted When HR Action Modified By User With Limited Security

79141: When Birthday was included as an HR Action Item, and a user with no security access to Birthday modified the HR Action, the employee's Birthday for which the HR Action was submitted was deleted. The issue has been identified and corrected and HR Action Items where a user has limited or no access to the item will not be deleted when the action is submitted.

### Latency in Performance Development Page

77662: Latency issues experienced by larger companies when accessing the Performance Development page under *My Employees > Performance Management > Performance Development* have been resolved and the page will now load considerably faster.

### FMLA Form – WH-381: Entry Fields Become Unaligned

83759: Entry fields are now properly aligned after the Are eligible for FMLA Leave box is checked. Formatting issues have been resolved.

### FMLA Form – WH-381: Blank Second Page

86349: Problems with the display of forms that occurred when adding a FMLA-WH381 form to a new employee have been corrected. Previously, blank second pages or pages that contained check boxes and text entry boxes were displayed without supporting information or instructions.



# Payroll

## Deduction Wizard

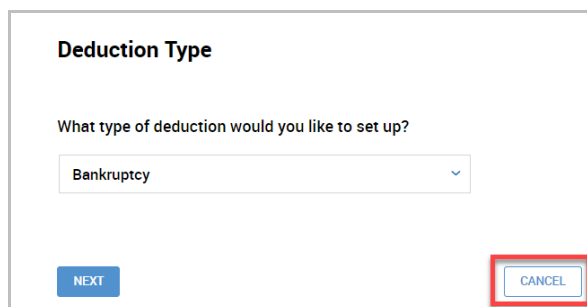
The following enhancements have been complete for the Deduction Wizard.

### Vendors in Alphabetical Order

All garnishment types within the Deduction Wizard now list all appropriate vendors in alphabetical order.

### Cancel Button

A Cancel button is now available for selection throughout the screens within the Deduction Wizard.



**Deduction Type**

What type of deduction would you like to set up?

Bankruptcy

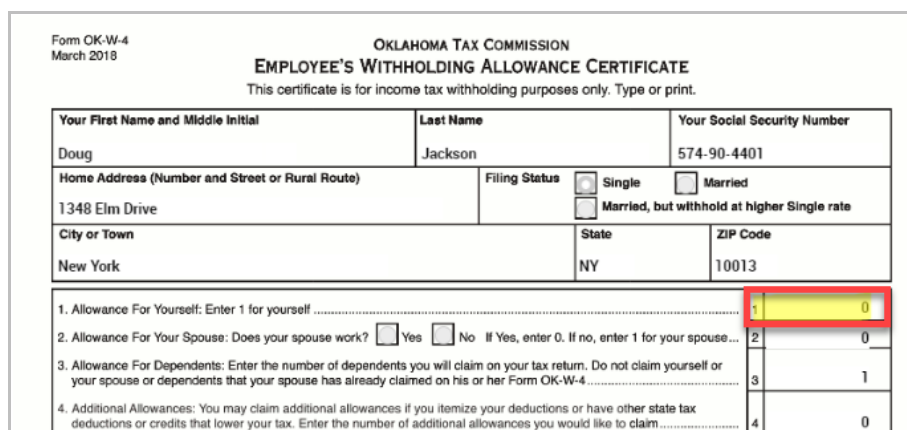
NEXT CANCEL

## Forms

The following enhancements have been made to Forms in the system.

### Personal Withholding Exemption on Oklahoma W-4

Line 1 on the 2018 Oklahoma W-4 is auto-populated with a 1 and can now be edited and set to 0 when applicable.



Form OK-W-4  
March 2018

OKLAHOMA TAX COMMISSION  
EMPLOYEE'S WITHHOLDING ALLOWANCE CERTIFICATE  
This certificate is for income tax withholding purposes only. Type or print.

Your First Name and Middle Initial Doug	Last Name Jackson	Your Social Security Number 574-90-4401
Home Address (Number and Street or Rural Route) 1348 Elm Drive	Filing Status <input checked="" type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate	
City or Town New York	State NY	ZIP Code 10013

1. Allowance For Yourself: Enter 1 for yourself	1	0
2. Allowance For Your Spouse: Does your spouse work? <input type="checkbox"/> Yes <input type="checkbox"/> No If Yes, enter 0. If no, enter 1 for your spouse...	2	0
3. Allowance For Dependents: Enter the number of dependents you will claim on your tax return. Do not claim yourself or your spouse or dependents that your spouse has already claimed on his or her Form OK-W-4	3	1
4. Additional Allowances: You may claim additional allowances if you itemize your deductions or have other state tax deductions or credits that lower your tax. Enter the number of additional allowances you would like to claim	4	0

### 2018 IRS Form 8027

The IRS Form 8027 has been updated for 2018 and is now available in the system under *My Employees > Forms*.

**New Form 8027**

Year
2018

Employees

If no employee selection is made, results will be for all employees.

OK
CANCEL

## 2018 State withholding Forms Available for 2019 Withholding

2018 W4 forms have been made available for 2019 for the following states: Alabama, Arizona, Arkansas, California, Connecticut, District of Columbia, Georgia, Hawaii, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, New Jersey, New York, North Carolina, Ohio, Oklahoma, Rhode Island, Virginia, Vermont, West Virginia, Wisconsin.

## 2019 Federal W-4 Form for States

The 2018 Federal W-4 form is now available for 2019 for the following states: Colorado, Delaware, Idaho, Montana, Nebraska, New Mexico, North Dakota, Oregon, Utah, Oregon, and South Carolina.

## 2019 W4 Withholding Form Updates

Updates have been made to the 2019 W-4 withholding forms, state and federal, including a change to the Middle Initial field to ensure the field always shows only one character.

## Reports: Applied For Column in Company Taxes

A new column, *Applied For*, is now available for inclusion via *Select Columns* in the Company Taxes report for both Admin (*Maintenance > Companies > Client Resources > Payroll (Taxes) > Company Taxes*) and Client (*Company Settings > Payroll Setup > Company Taxes*) companies. This data will assist users with easily identifying taxes with the *Applied For* setting selected.

Company Taxes									
Mass Edit Selected Company Taxes									
<div> <div>Rows On Page: 50</div> <div>Rows 1-50</div> <div>Page 1</div> <div>Refresh Data</div> </div> <div> <div>Full Screen</div> <div>[Default]</div> <div>Settings</div> <div>Filter</div> <div>Select Columns</div> <div>Export</div> </div>									
<div> <div>Company: All Companies</div> <div>As Of Date: 10/25/2018</div> </div>									
		Company: Short Name	Company: Name	Tax Jurisdiction	Tax State	Tax Type	Company Tax Name	Applied For	Company Tax Description
		starts with	starts with	starts with	starts with	starts with	starts with	All	starts with
<input type="checkbox"/>			00000000001		Federal	MEDIZ	Additional Medicare	No	Additional Medicare
<input type="checkbox"/>			00000000001		Federal	FICA_CR	Agricultural OASDI New Hire Incentive	No	Agricultural OASDI New Hire Incentive
<input type="checkbox"/>			00000000001		Federal	FICA_CR	Agricultural OASDI New Hire Incentive - March 2010	No	Agricultural OASDI New Hire Incentive - March 2010

A value of *Yes* will display in the *Applied For* column for taxes with the option enabled, and *No* will display for taxes with the checkbox unchecked.

## Reports: Last Day Paid in Pay Statement History & Employees Not Paid Reports

A new checkbox, *Last Day Paid*, can now be enabled within the Pay Statement History (*My Reports > Payroll > Pay Statement History*) report. When enabled, only the last Pay Statement is shown per each employee.

The new option considers the date/account filters, so if *Last Year* is chosen as the date range filter, the last Pay Statement is shown for the last year. If only specific employees are selected, the last records are displayed for those accounts only.

The option also considers the *Show Only Finalized Payrolls* checkbox. When *Last Day Paid* is selected, only the last finalized Pay Statement is shown for each employee. If *Show Only Finalized Payrolls* is not selected, and *Last Day Paid* is enabled, only the last Pay Statement is shown, regardless of its status.

The *Last Day Paid* considers 5 types of Pay Statements: Regular, Manual, Historical, Set Up, and Gross Up. All other Pay Statement types are ignored. If an employee has a Regular Pay Statement 11/03/2018 and a Successorship Pay Statement for 12/03/2018, when *Last Day Paid* is enabled, only the Regular 11/03/2018 Pay Statement is displayed. It is possible that no records will be displayed if there are no Pay Statements that meet the criteria defined by the filters, the *Show Only Finalized Payrolls* option, and the supported Pay Statement types.

The *Last Day Paid* can also be included in the Employees Not Paid report (*Manage Payroll > Manage Payrolls > View All Payrolls, View Payroll* in the Payroll Prep Process) as an additional column via *Select Columns*.

Back Home Manage Payroll Manage Payrolls View All Payrolls Employees Not Paid Payroll Quick Links

Payroll: Semi-Monthly - 5

Rows On Page: 20 Showing: 1-20 of 35 Page: 1 of 2 Refresh Data Full Screen [Default] Settings Filter Select Columns Export

Employee Filter: All Employees Settings: Only Display Employees In Pay Periods Assigned To Payroll

	Employee ID	Badge	Username	First Name	Last Name	In Payroll	Locked	Last Day Paid	File ID	Wellness	Account Field 2	Emp
	=	=	=	starts with	starts with	All	All		=	=	=	Te
	1019			Monica		Yes	No	02/10/2017				
	1001			Rachel		Yes	Yes					

The column displays the Pay Date for the last finalized Pay Statement per each employee. Four Pay Statement types are supported: Regular, Manual, Historical, Set Up, and Gross Up. All other Pay Statement types are ignored. The value of the *Last Day Paid* column is updated each time a payroll is finalized/rolled back.

### Taxes: Ohio Local Taxes and Courtesy Wages

Ohio local resident (courtesy) wages and withholding are only calculated when the *Courtesy Withholding* option is enabled on the employee's resident Tax Code record and the employee works in a municipality different than their resident municipality.

The Ohio local resident (courtesy) wages will compute on Pay Statements calculated for Pay Date 1/1/2019 and beyond. Any adjustments to wages on prior Pay Statements will need to be manually calculated and updated via a Payroll Adjustment.

Effective with the 2018 Forms W-2 and beyond, a *R* indicator will display before the Locality name listed in Box 20 of the W-2 for the Ohio resident (courtesy) wage/withholding records. This only impacts Ohio local taxes and does not apply to other state local wage/tax records as resident/non-resident. In addition, this only affects the paper and PDF Forms W-2 available to the Admins, company users and ESS users. No changes will be made to any electronic Forms W-2 files, MasterTax, ADP or BSI files.

### Resolved Issues

The following issues have been resolved with this release.

#### Custom Forms Add/Delete Button Greyed Out

When users access the Company Administrator Security Profile and attempt to enable access to a Custom Form, the Add/Delete buttons are no longer greyed out and are now available for selection. When selected, users have access to choose the Delete button for Custom Forms.

#### Download to PDF and Send To Options in Vendor Payment Preview

The Vendor Check Preview screen options for Download PDF, Send To, View Delivery History and Close have been restored and can now be used successfully.

#### Oklahoma W-4 Total Allowances

The Total Allowances now populate correctly on the Oklahoma W-4.