Software Release Notes

OnePoint Human Capital Management

February 2019

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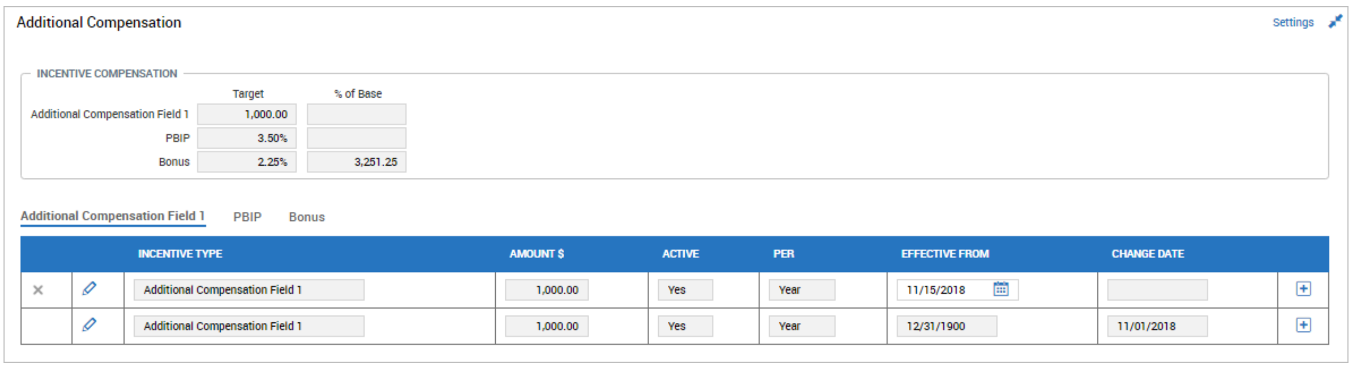
Cross Product

Employee Additional & Total Compensation Functionality & Widgets Added

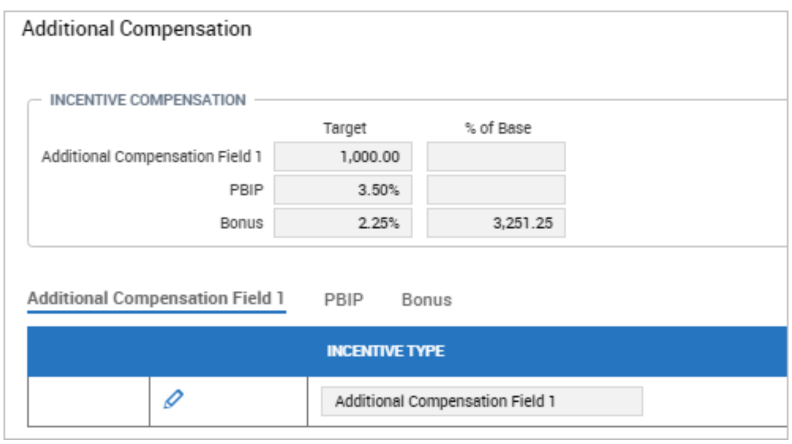
The following enhancements have been added to the system to provide more information in employee accounts related to additional and total compensation.

Employee Information: Additional Compensation Widget Added

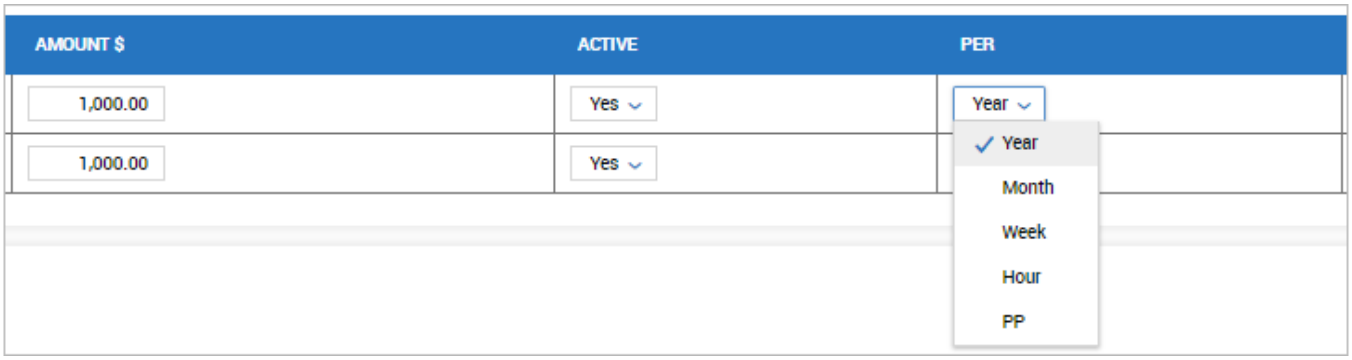
68080, 85730, 86865, 68138: Within employee accounts, an ***Additional Compensation*** widget is now available to be added to employee accounts. This widget allows companies to list compensation that is in addition to an employee's base compensation. Examples might be for incentive pay, bonuses, etc.



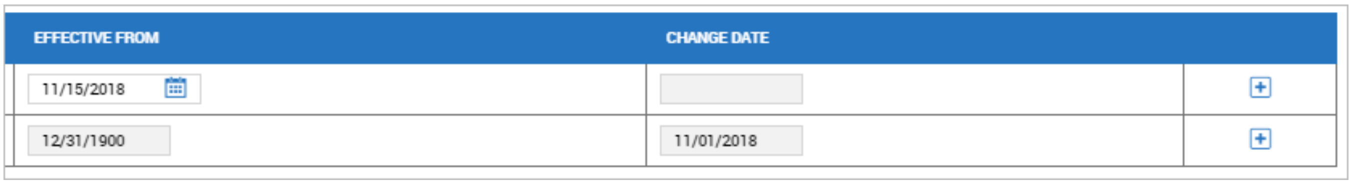
As additional compensation is added, an Incentive Compensation section will display showing the totals. Each type of compensation configured in Company Setup will display as tabs in the widget. Click the *Edit* icon to open the fields for editing.



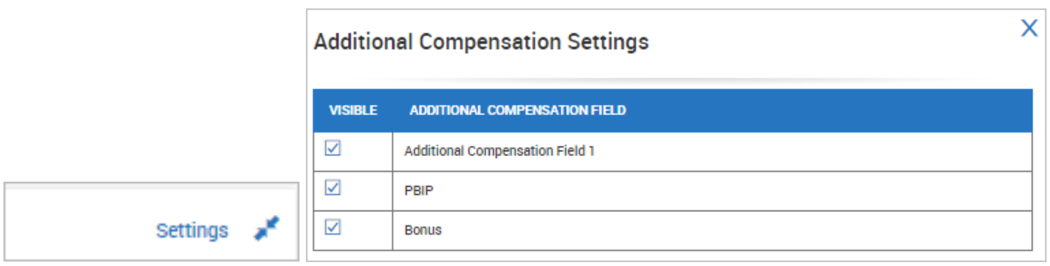
Once the fields are open for editing, an *Amount $* can be added, the *Active* drop-down can be changed from *Yes* to *No*, and the *Per* drop-down will determine how often the additional compensation is granted. Options are yearly, monthly, weekly, hourly, or per pay period.



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.



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.



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	☑	☑	☐	Additional Compensation Field 1	Flat Amount
2	☑			PBIP	Percent
3	☑	☑	☑	Bonus	Percent Of Base
4	☐	☐	☐	Additional Compensation Field 4	
5	☐	☐	☐	Additional Compensation Field 5	
6	☐	☐	☐	Additional Compensation Field 6	
7	☐	☐	☐	Additional Compensation Field 7	
8	☐	☐	☐	Additional Compensation Field 8	
9	☐	☐	☐	Additional Compensation Field 9	
10	☐	☐	☐	Additional Compensation Field 10	
11	☐	☐	☐	Additional Compensation Field 11	
12	☐	☐	☐	Additional Compensation Field 12	
13	☐	☐	☐	Additional Compensation Field 13	
14	☐	☐	☐	Additional Compensation Field 14	
15	☐	☐	☐	Additional Compensation Field 15	
16	☐	☐	☐	Additional Compensation Field 16	
17	☐	☐	☐	Additional Compensation Field 17	
18	☐	☐	☐	Additional Compensation Field 18	
19	☐	☐	☐	Additional Compensation Field 19	
20	☐	☐	☐	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

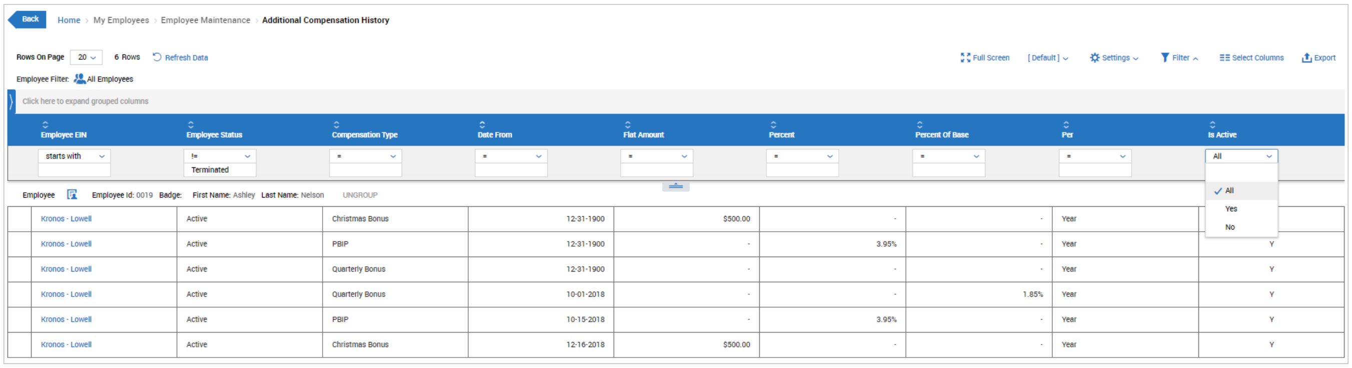
TOTAL COMPENSATION

	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

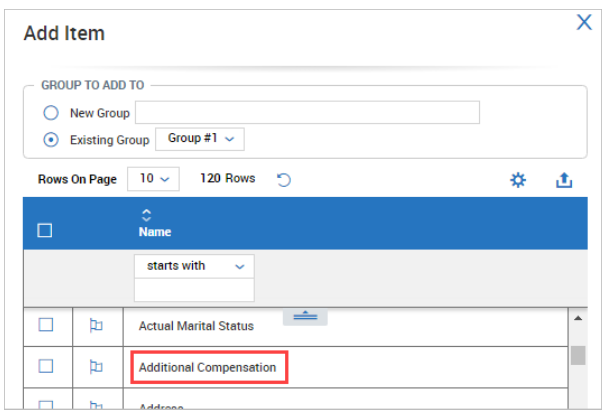


Adding Additional Compensation via HR Action

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.



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

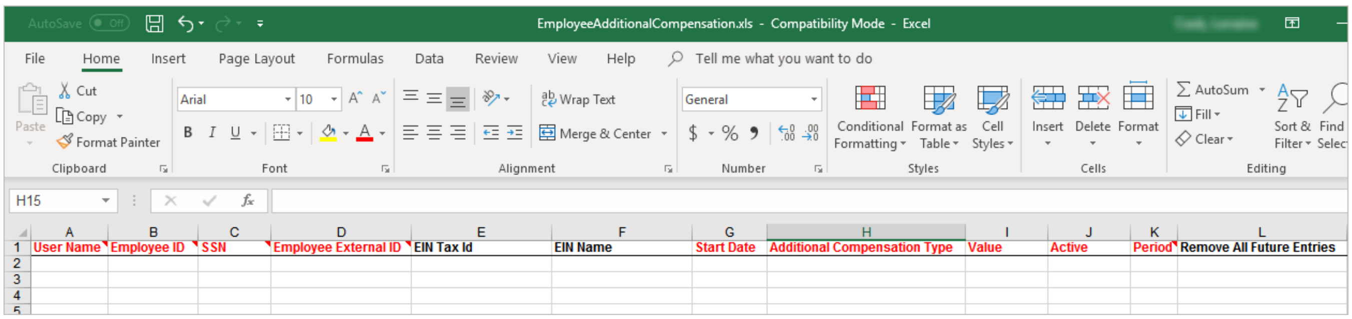
- Regular
- Hire
- Re-Hire
- Termination

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*.

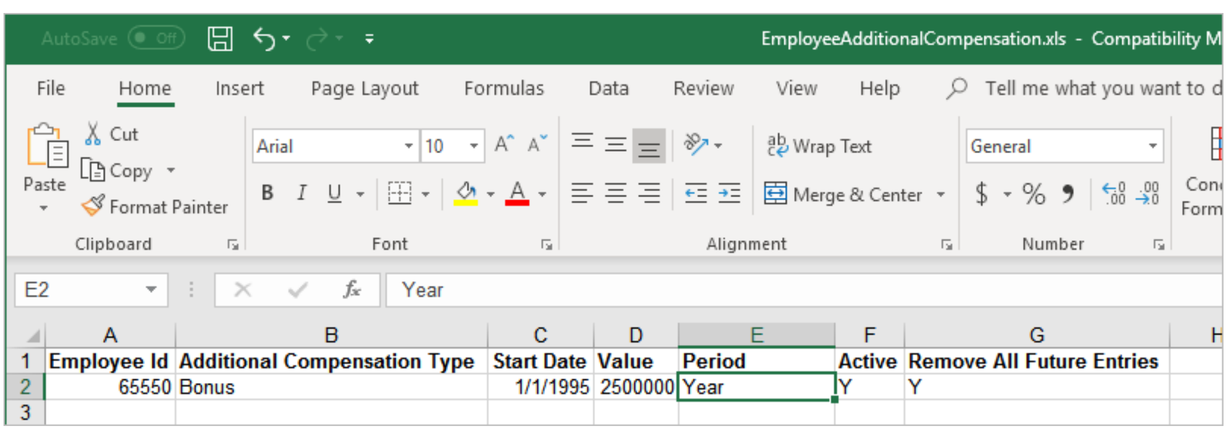
Template Tab



Instruction Tab

Field	Required	Length	Format	Note
Username	Yes			At least one of UserName, EmployeeID, SSN, and Employee External Id 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	
Additional Compensation Type	Yes			The label configured at the company level for this additional compensation type
Value	Yes		0.00	Amount/percentage in the specified Period
Active	Yes	1	Y/N	Y or N
Period	Yes		PayPeriod	Additional Compensation Period Type: Year , Month, Week, Hour, Pay Period. PERCENT OF BASE type can use only YEAR 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



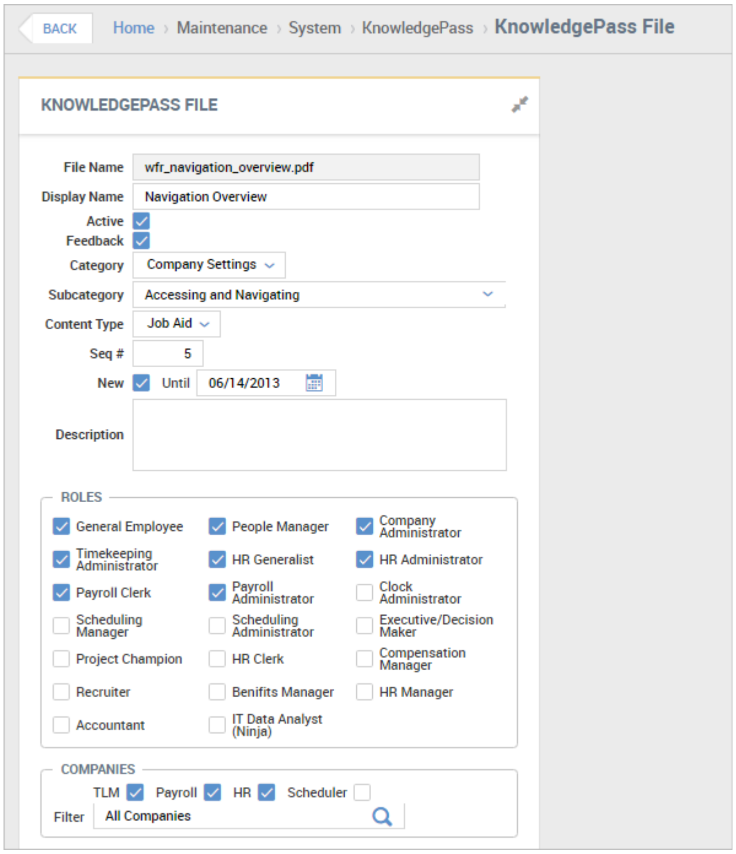
KnowledgePass: User Roles Updated

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

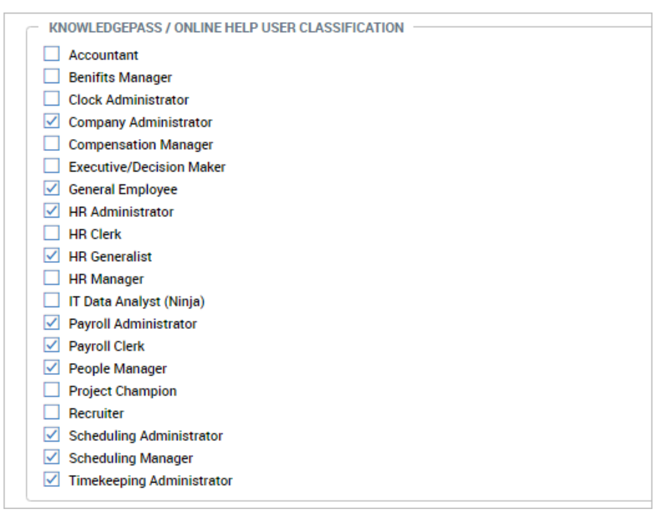
Administrators

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



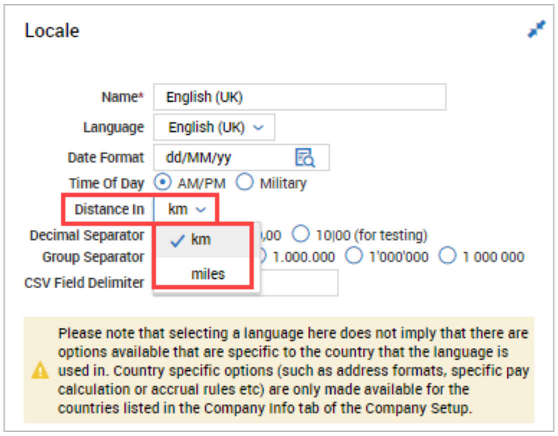
Security Profiles for Users

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.)



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*.



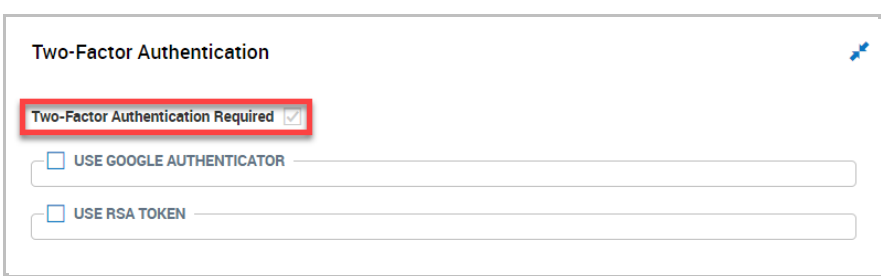
Single Sign On/Out: SSO Single Sign Out

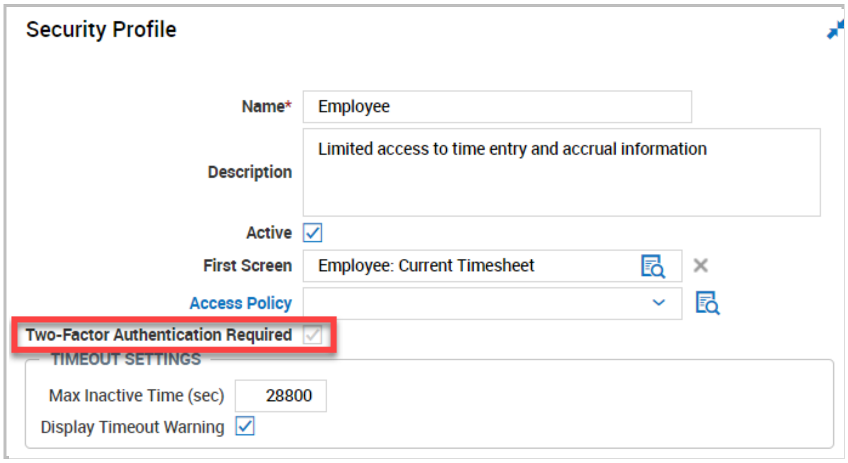
74415: Single Sign Out provides Clients and Partners currently utilizing the Single Sign On (SSO) functionality with the ability to add additional functionality so that when they log out of one application, they are automatically logged out of all applications that are connected to the same Identity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

Two-Factor Authentication: Updated Messages

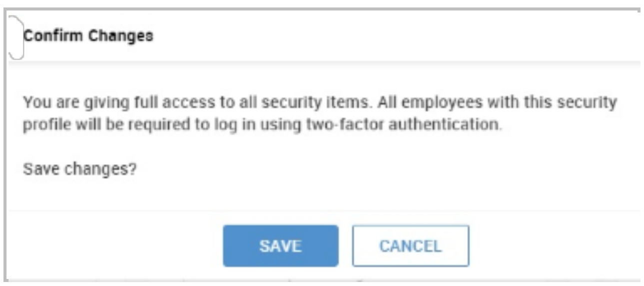
91701: With this release, Two-Factor Authentication (2FA) is now required for users with an assigned security profile that includes enabled items marked as requiring Two-Factor Authentication. As such, the following changes have been made:

- 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.

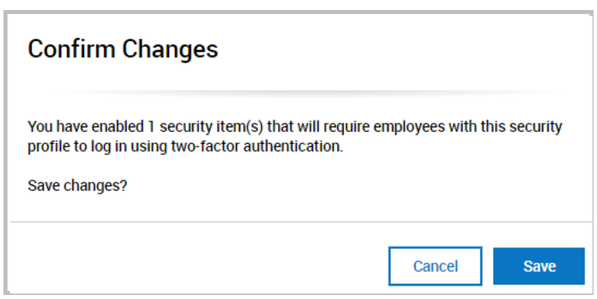




- The prompt message when adding Two-Factor Authentication Required security items* to an originally non-2FA required security profile has been updated, and the two new messages are as follows:
  - When users select *Full Access* for a security profile, a message is displayed to warn the users about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



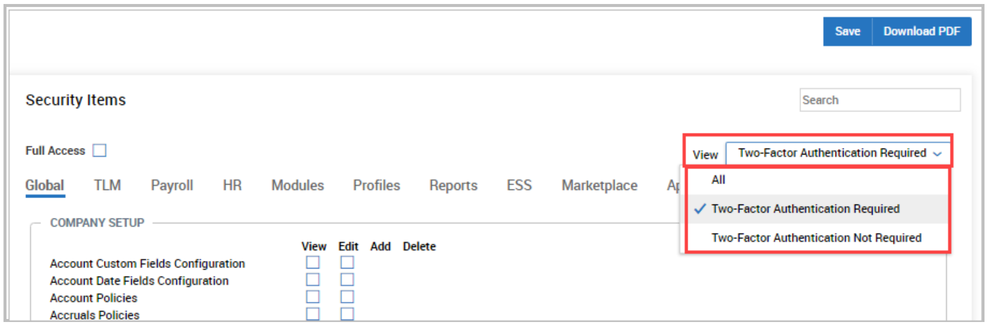
  - A confirmation dialogue box appears when adding security items that require Two-Factor Authentication (2FA) to an existing security profile that did not originally require 2FA.



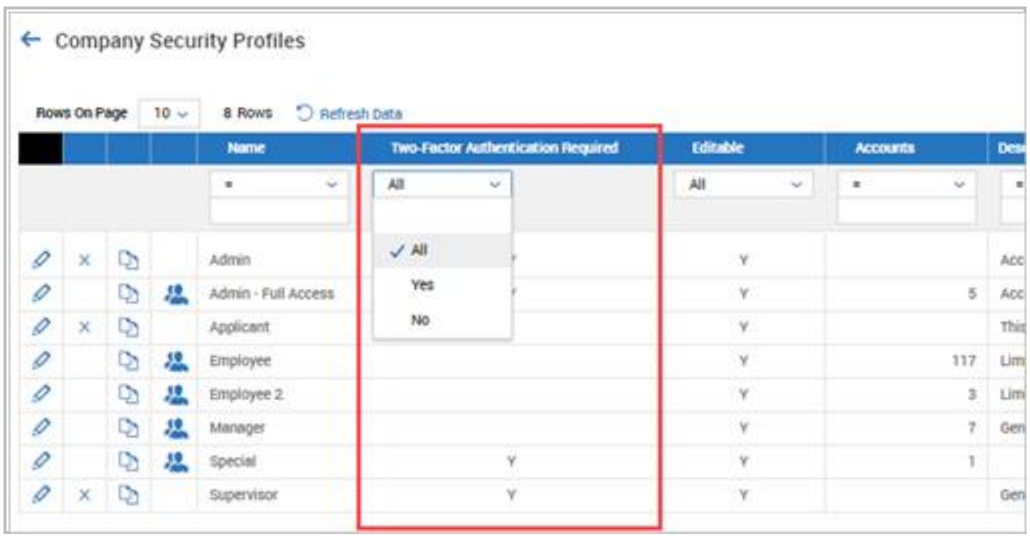
* Some examples of sensitive security items that require Two-Factor Authentication are:

- 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

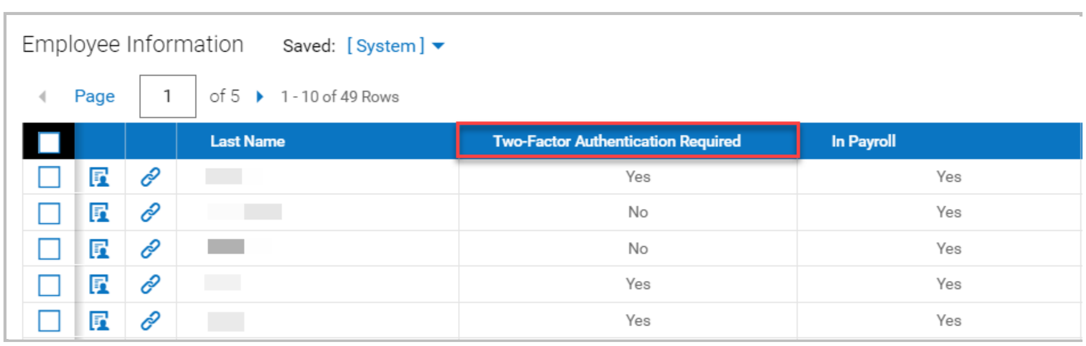
The ***View*** drop-down in the security profile allows users to filter the view of security items so they can see all security items, or just security items where *Two-Factor Authentication is* ***or*** *is Not Required.*



The *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 *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.



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

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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 webservices. 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:

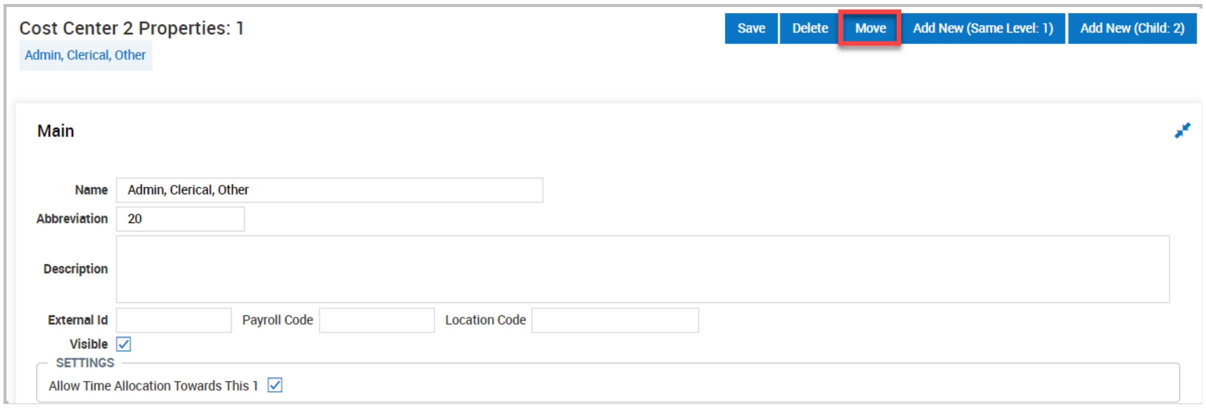
- **A global view of the time data across EINs** - A view of time data for individual employees is presented in a master timesheet. Using master timesheets, all time data, including worked hours, punches, time off, extra pay, and piecework accumulated across multiple EINs is combined in one timesheet.
- **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

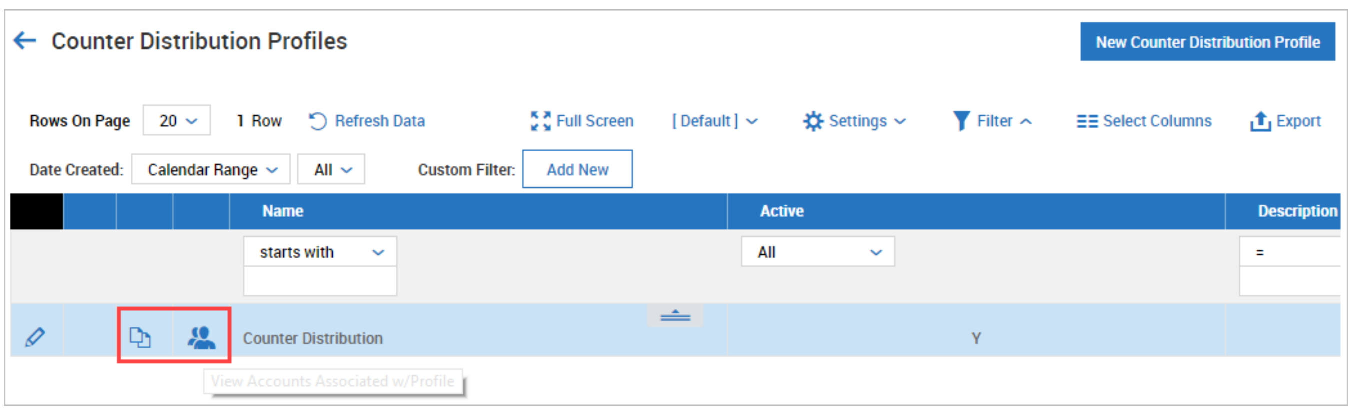


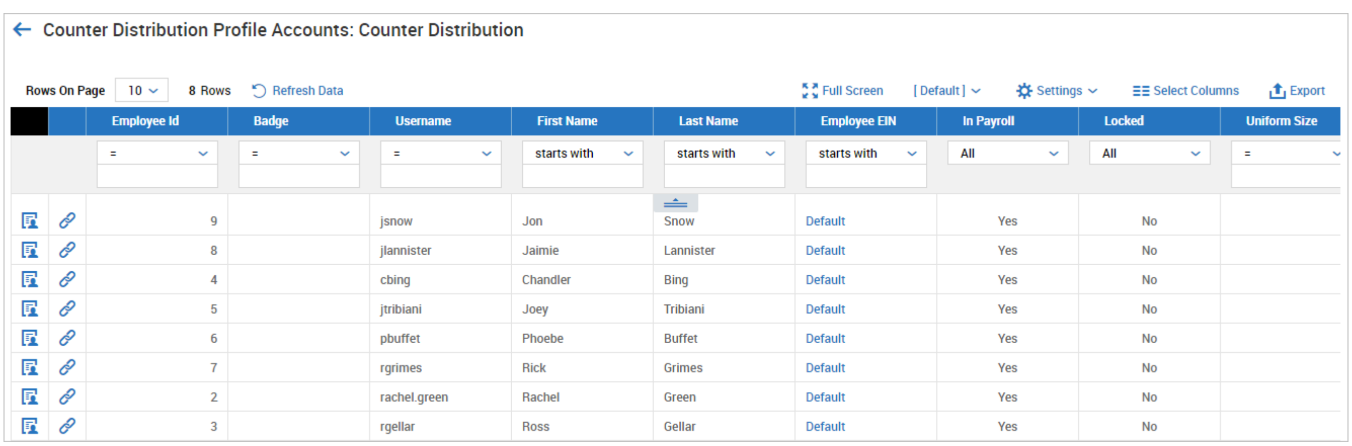
Counter Distribution Profile

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.



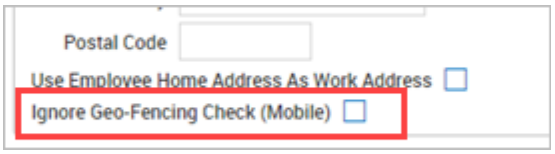


Employees Import: Counter Distribution Profile to Apply Cost Center Defaults

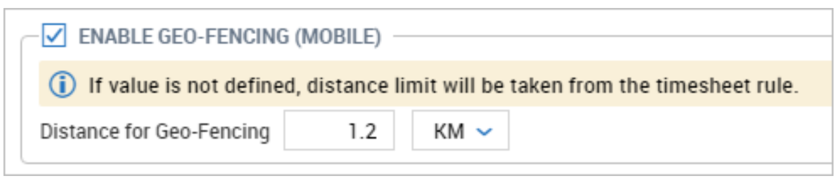
87706: When using the *Employees* import template to import employees containing default cost centers, any associated default counter distribution profile will be imported along with the other data. The Employees import template is located under *Company Settings > Imports > Overview* under the *Employee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

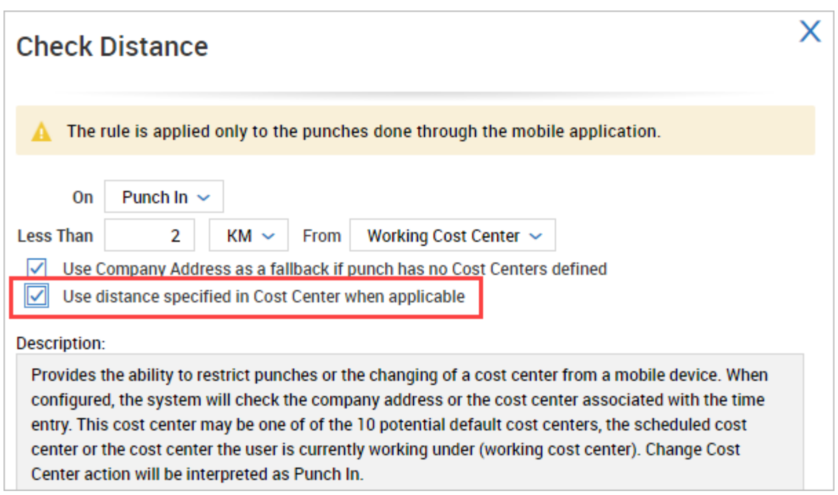
66175: Within Cost Center maintenance, the geo-fencing settings have been redesigned. In previous releases, there was just one setting to ignore the geo-fencing check for mobile devices.



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.



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.

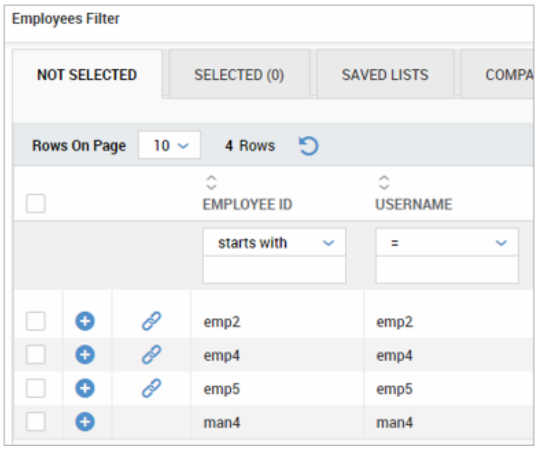


These settings are used only for mobile punching employees. When the *Check Distance* rule is added to employee timesheet profiles, the system will use the mobile device's geo-fencing technology to apply punch restrictions according to the settings in the rule and the cost center.

Managed Cost Centers (MCC)

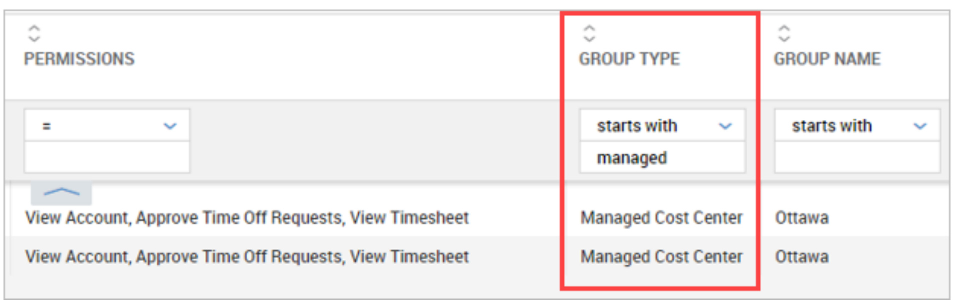
Employee Filter Added to MCC Reports

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.



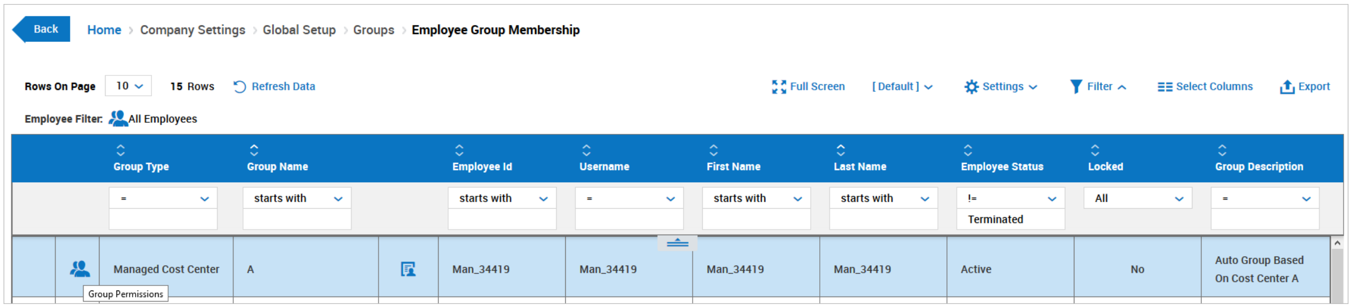
MCC Groups Added to Manager Employees Access Report

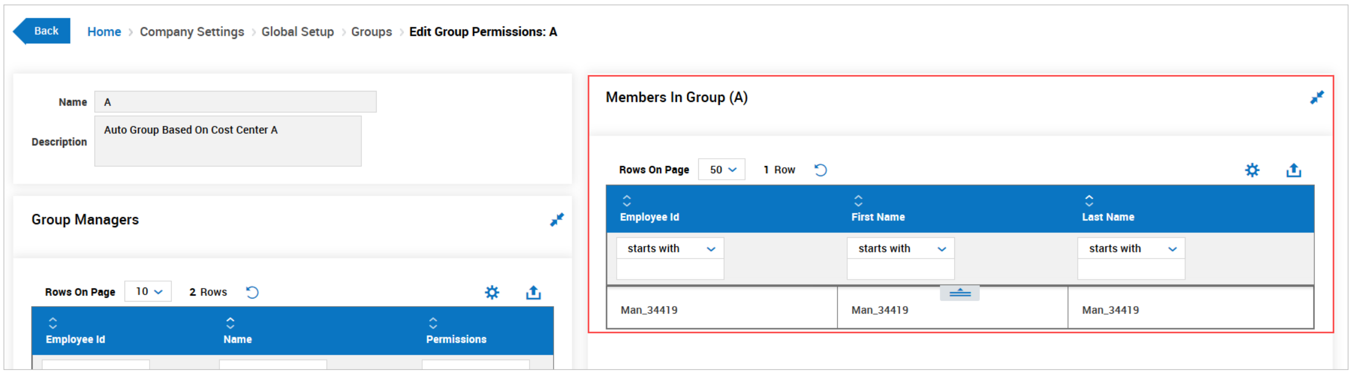
86089: To help managers easily filter and view their MCC group employees, the ***Manager Employees Access*** report can now be filtered by an MCC group in the *Group Type* column. This report is located under *Company Settings > Global Setup > Groups > Manager Employees Access*.



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*.





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.

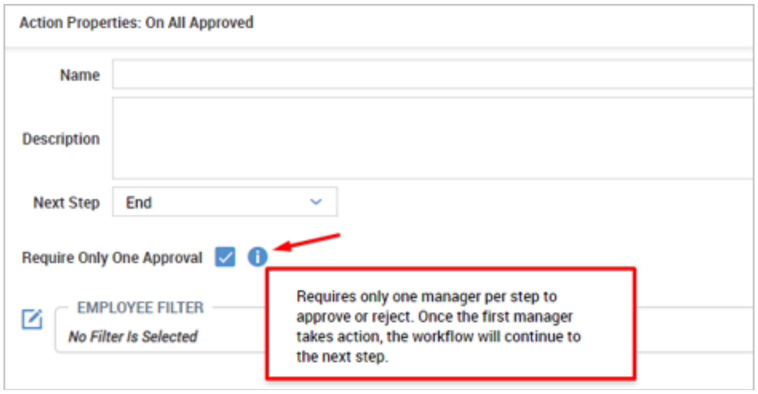
For example, Employee B works in CCA and Manager A can now see Employee B's time allocated to CCA on any time report, giving managers a fuller picture of the cost centers they manage.

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.

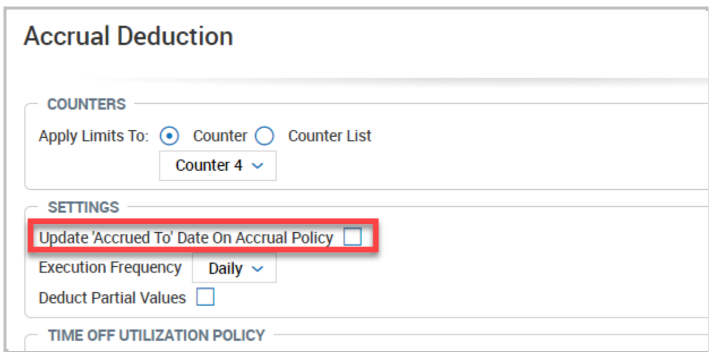
Consider the following scenario.

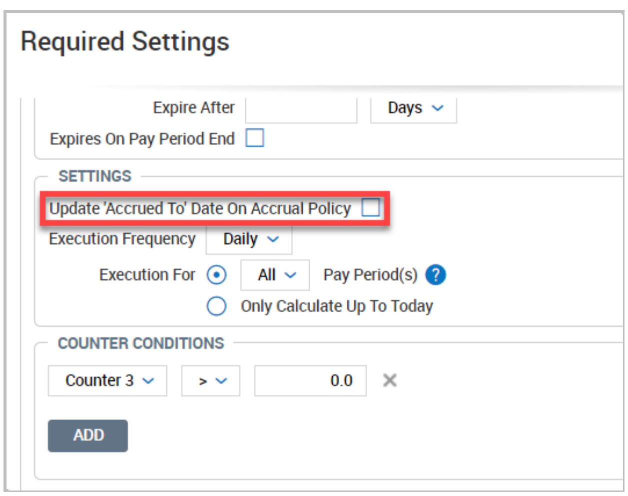
- A company has a timesheet workflow configured with two *Approve/Reject Time Entries* steps.
- The first step is configured so the *To Be Completed By* field is set to *Cost Center Manager (Level 1).*
- The second step is configured so the *To Be Completed By* field is set to *Cost Center Manager (Level 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.



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.

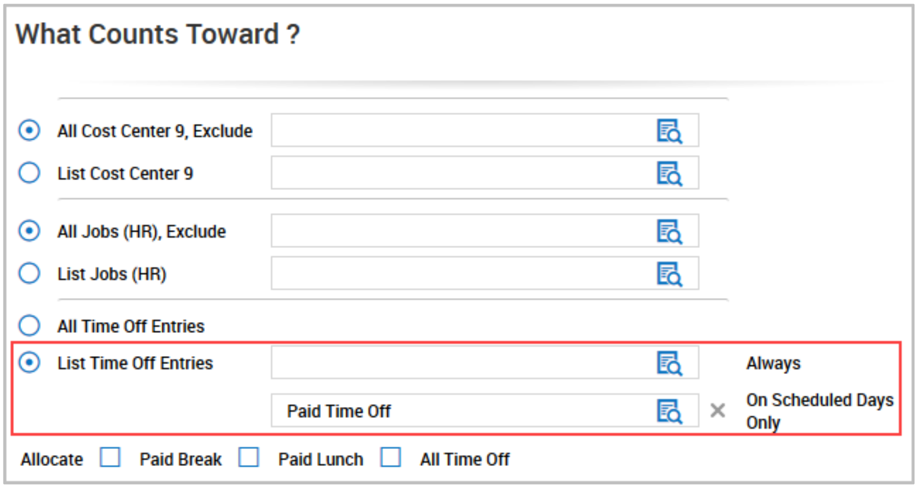


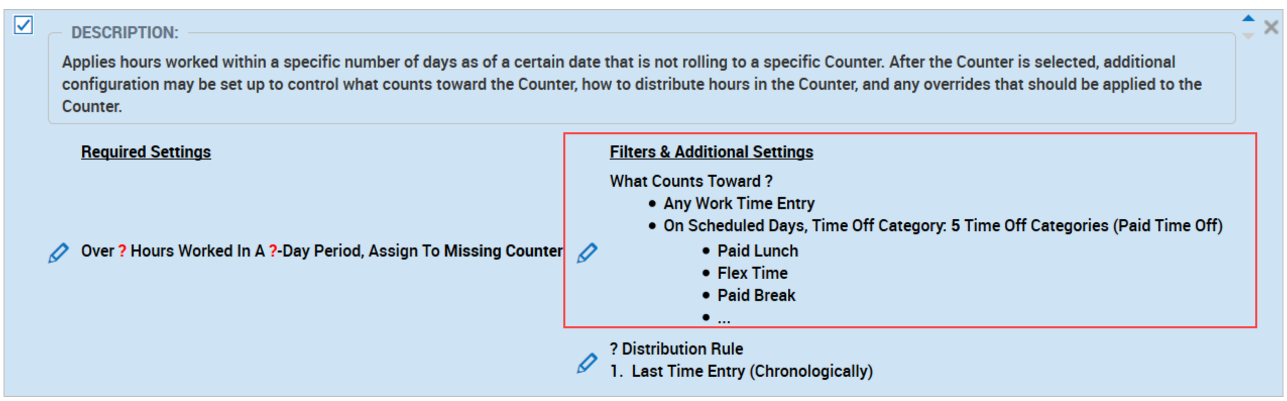


When adding a new rule, this setting is disabled by default. When a rule is enabled with the new setting selected, the updated date does change. When the new setting is not enabled, the updated date does not change.

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.



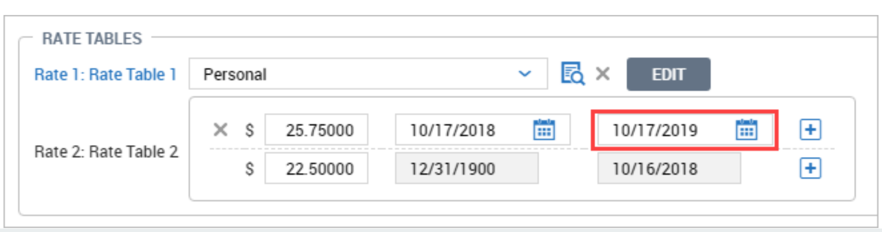


Rates: Effective End Date Added to Rate Tables

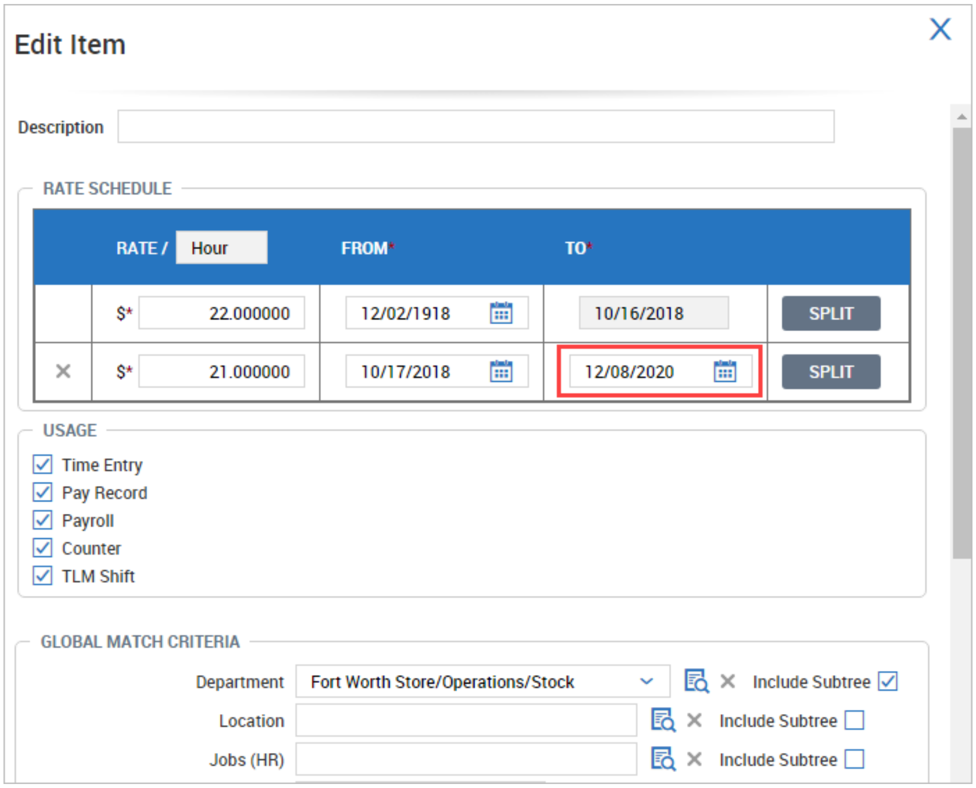
84935: Companies will now be able to edit the effective end dates of additional rate entries within the rate tables of employee accounts and rate maintenance tables. Previously, this functionality was not available, and the end dates were automatically generated by the system when adding or splitting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

This functionality is supported in:

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



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

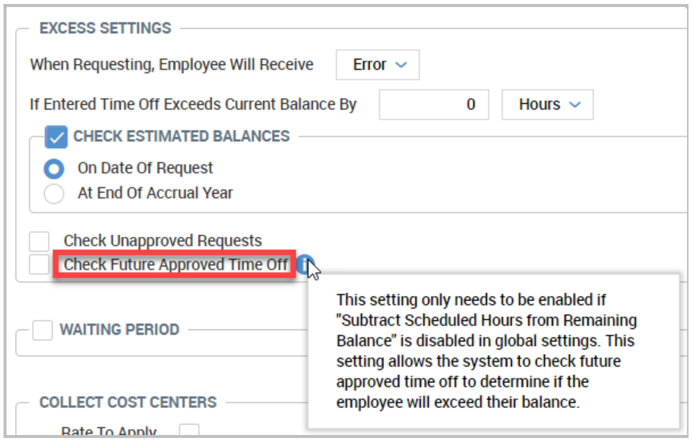


Time Off Requests: Check Future Approved Time Off

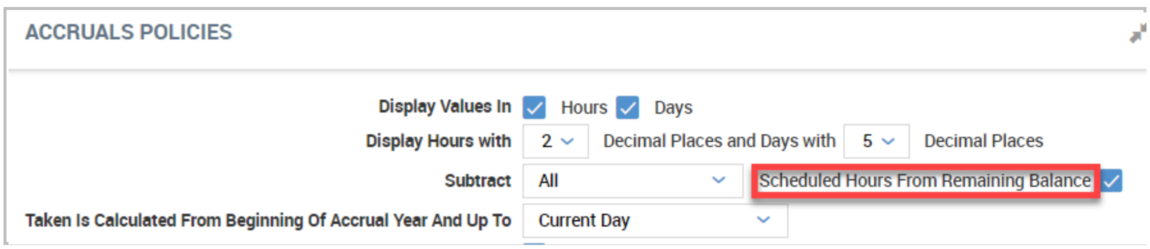
78970: Within the *Excess Settings* section in the Time Off Request Profile, a new checkbox for *Check Future Approved Time Off* can be enabled so the system will consider future approved Time Off when determining if the employee will have a negative balance because of their time off request.

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.

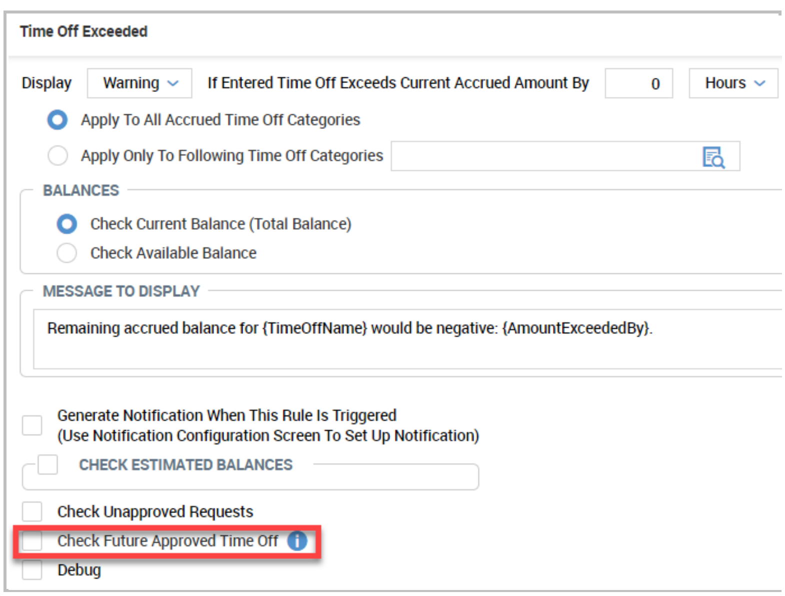
Only future approved Time Off in the current accrual year is considered with this setting. When this rule is in place, it validates Time Entries entered on the timesheet to make sure they do not result in a negative balance.



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.

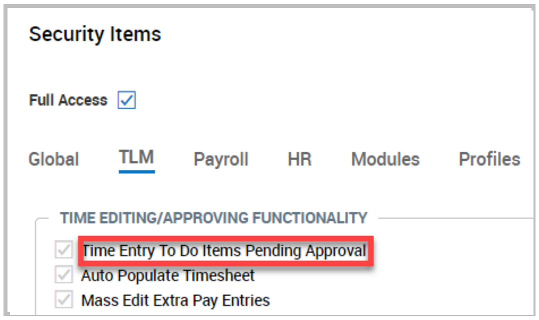


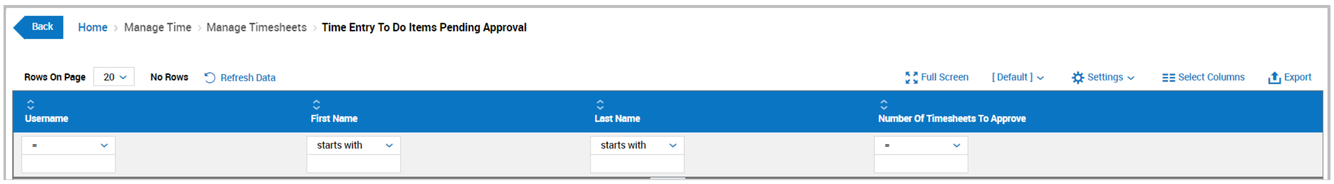
This new setting is also available in the Time Off Exceeded timesheet rule.



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*.





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

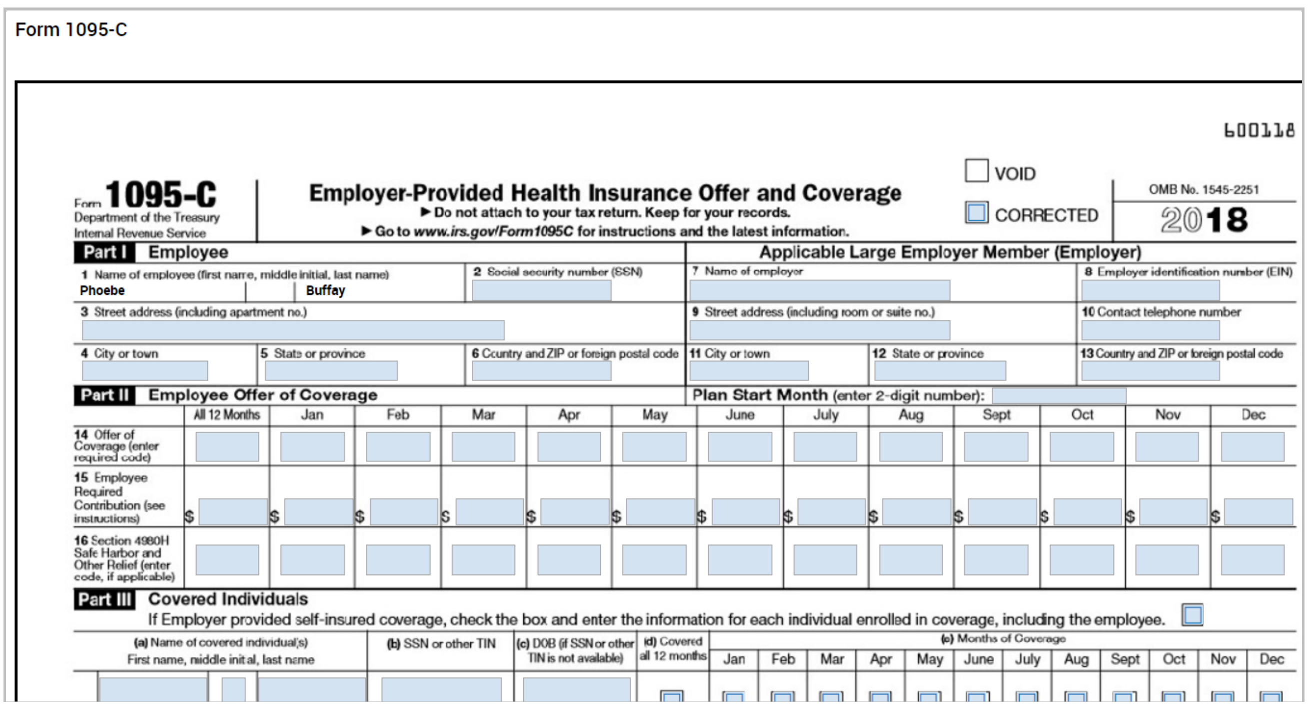
91334: Per IRS guidelines, ACA codes 1l and 2l have been removed from the 2018 timeline calculation.

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

Form **1095-C** 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* for instructions and the latest information.

VOID
CORRECTED
OMB No. 1545-2251
2018

Part I Employee — Applicable Large Employer Member (Employer)

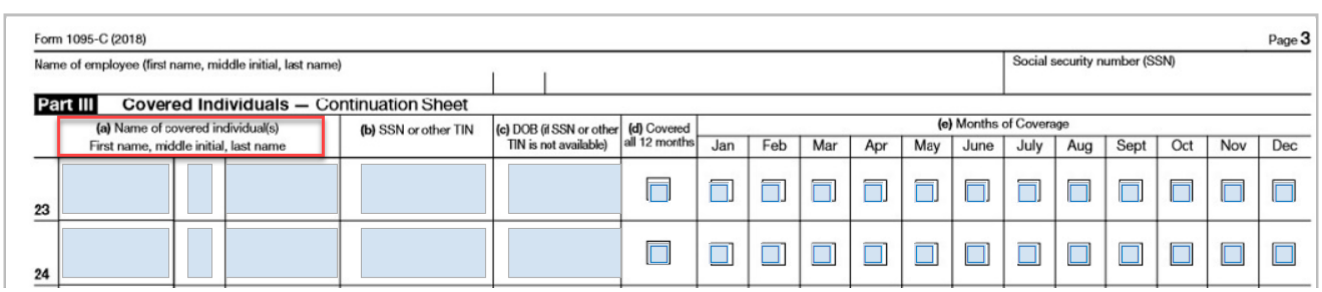
1 Name of employee (first name, middle initial, last name): Phoebe | Buffay
2 Social security number (SSN)
3 Street address (including apartment no.)
4 City or town
5 State or province
6 Country and ZIP or foreign postal code
7 Name of employer
8 Employer identification number (EIN)
9 Street address (including room or suite no.)
10 Contact telephone number
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.

(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	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec



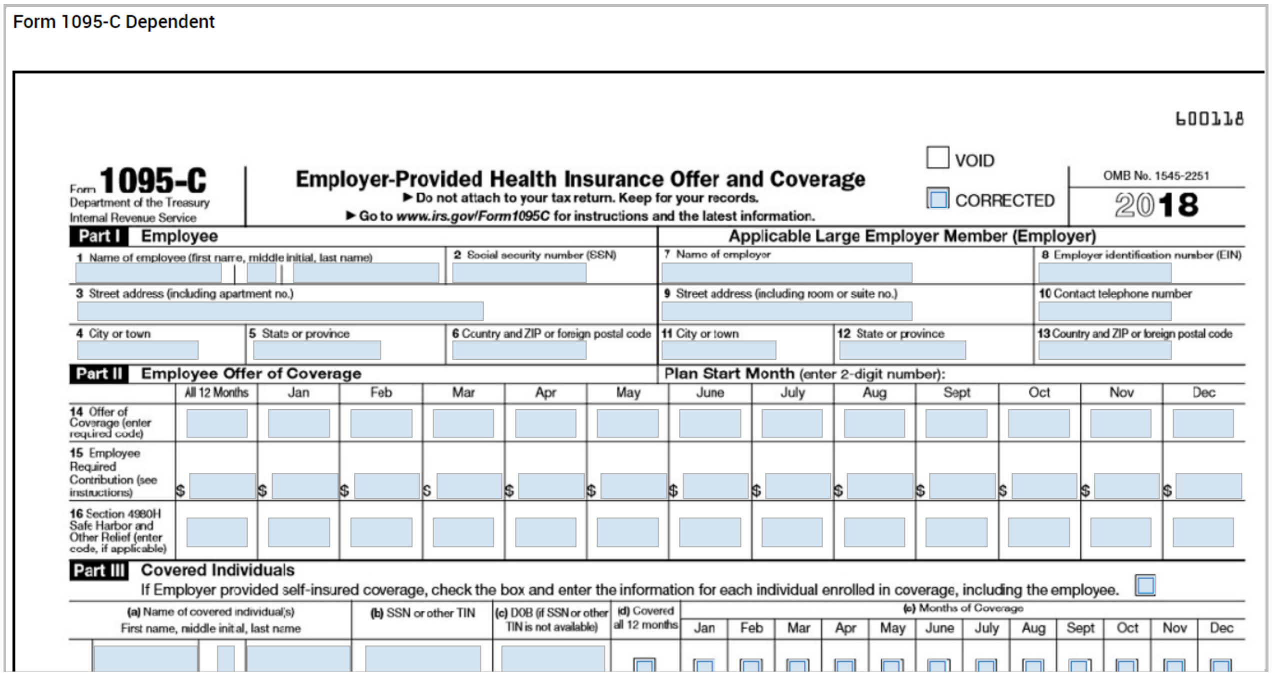
Form 1095-C (2018) Page **3**

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	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
23																
24																

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

Form **1095-C**
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* for instructions and the latest information.

VOID
CORRECTED

OMB No. 1545-2251
2018

Part I Employee

1 Name of employee (first name, middle initial, last name)
2 Social security number (SSN)
3 Street address (including apartment no.)
4 City or town
5 State or province
6 Country and ZIP or foreign postal code

Applicable Large Employer Member (Employer)

7 Name of employer
8 Employer identification number (EIN)
9 Street address (including room or suite no.)
10 Contact telephone number
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.

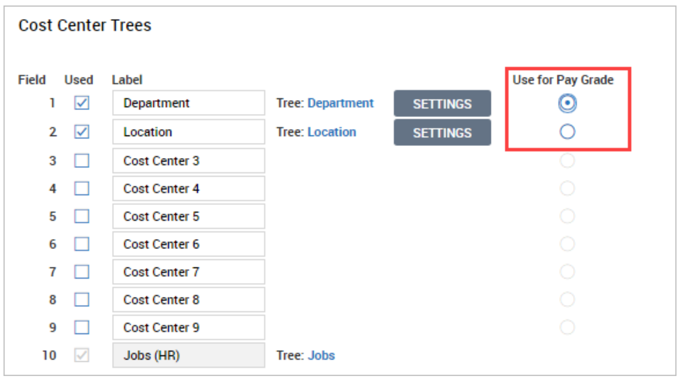
(a) Name of covered individual(s) First name, middle initial, last name	(b) SSN or other TIN	(c) DOB (if SSN or other TIN is not available)	(d) Covered all 12 months	(e) Months of Coverage Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec

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.

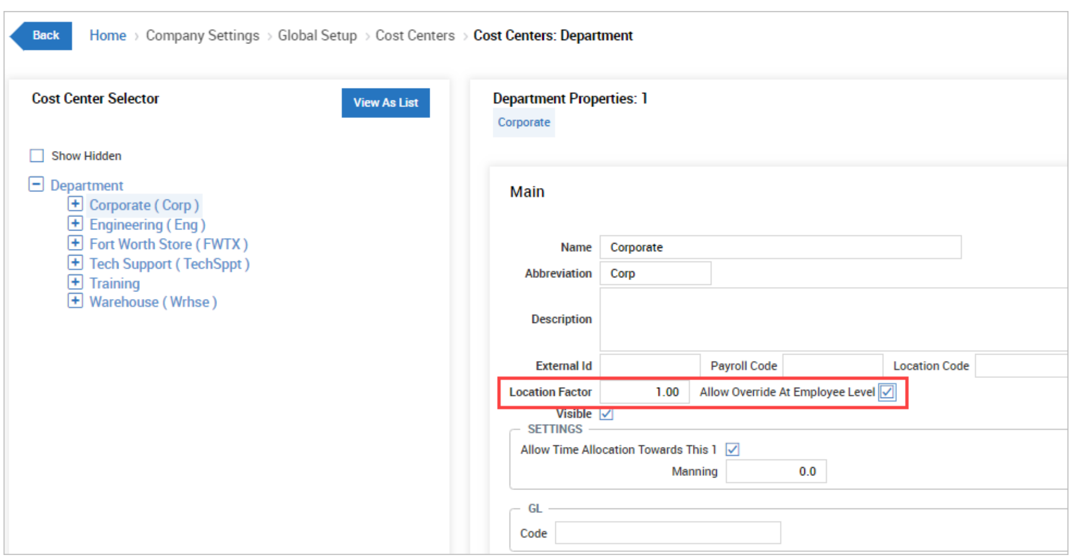
To enable a cost center, navigate to the *Cost Center Trees* widget, located under *Company Settings > Global Setup > Company Setup*, typically under the *Company Config* tab. Of the cost center trees enabled, only one can be selected for the pay grade override.



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.

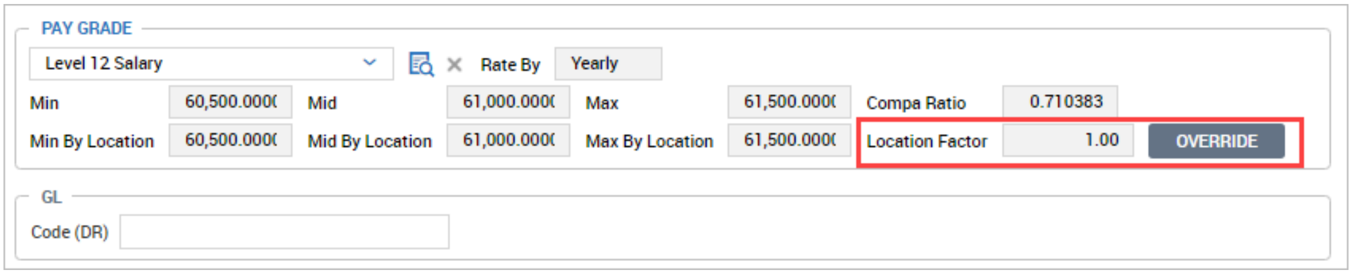
This is located under *Company Settings > Global Setup > Cost Centers*, and then selecting the enabled cost center for editing.



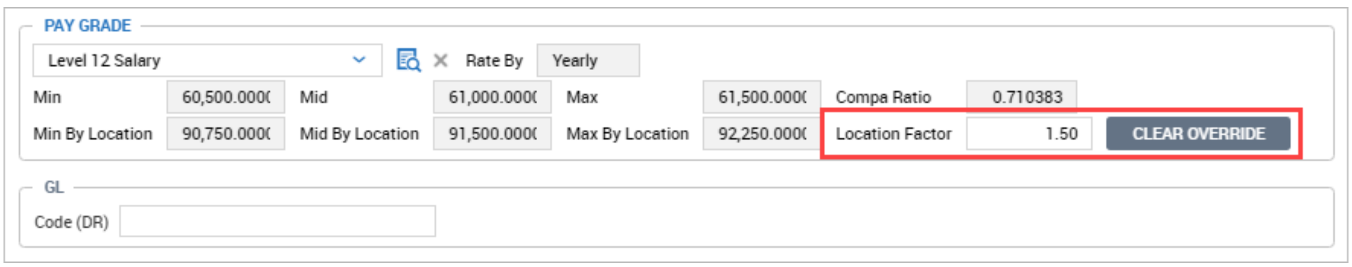
Pay Information Widget – Employee Information

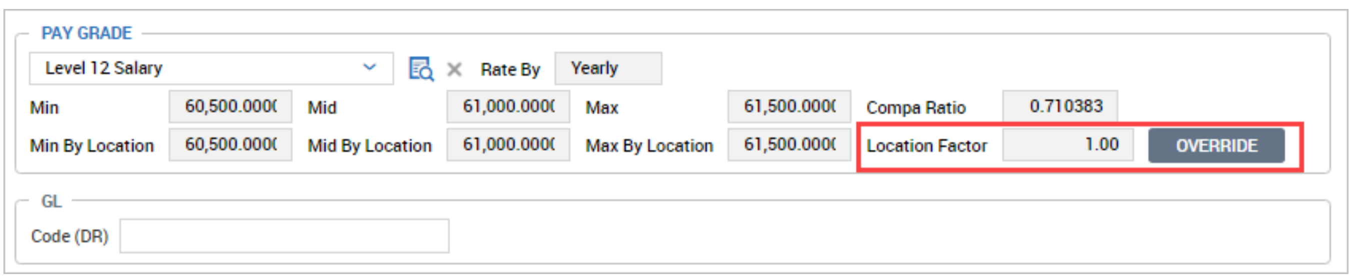
Once the cost centers housed under the cost center tree have been set to allow overrides at the employee level, employee account under Employee Information can be edited. Within the *Pay Grade* section of the *Pay Information* widget, an ***Override*** button will display.

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



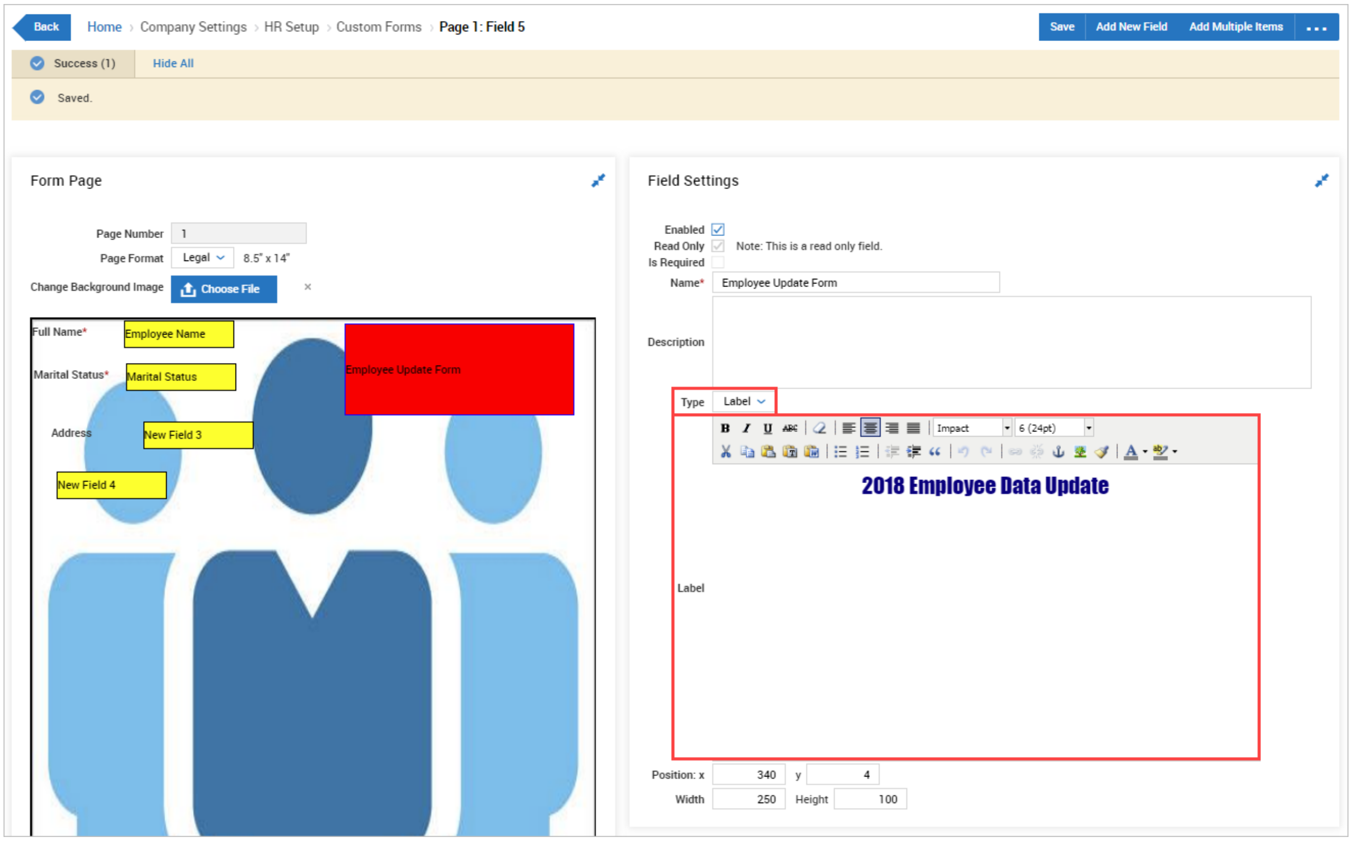
After entering a new ratio, click outside the field and the Min/Mid/Max by Location fields will update to reflect the new values. After entering a ratio, the *Override* button will change to a ***Clear Override*** button, which will allow the values to be restored to their original values.

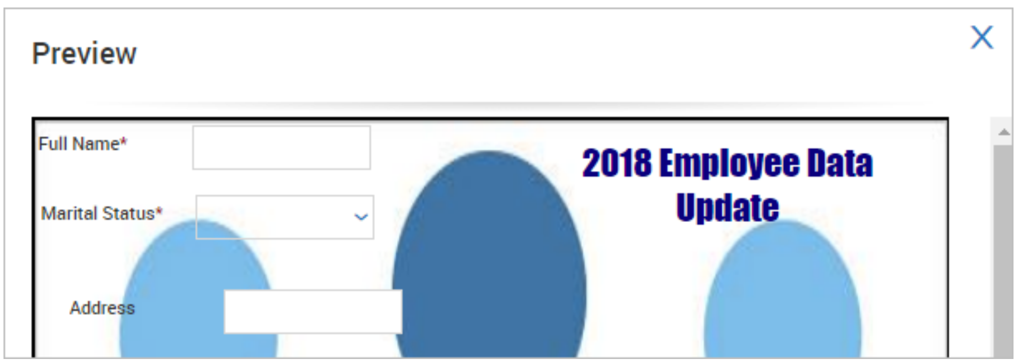




Custom Forms: Text Editing Added to Labels

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.





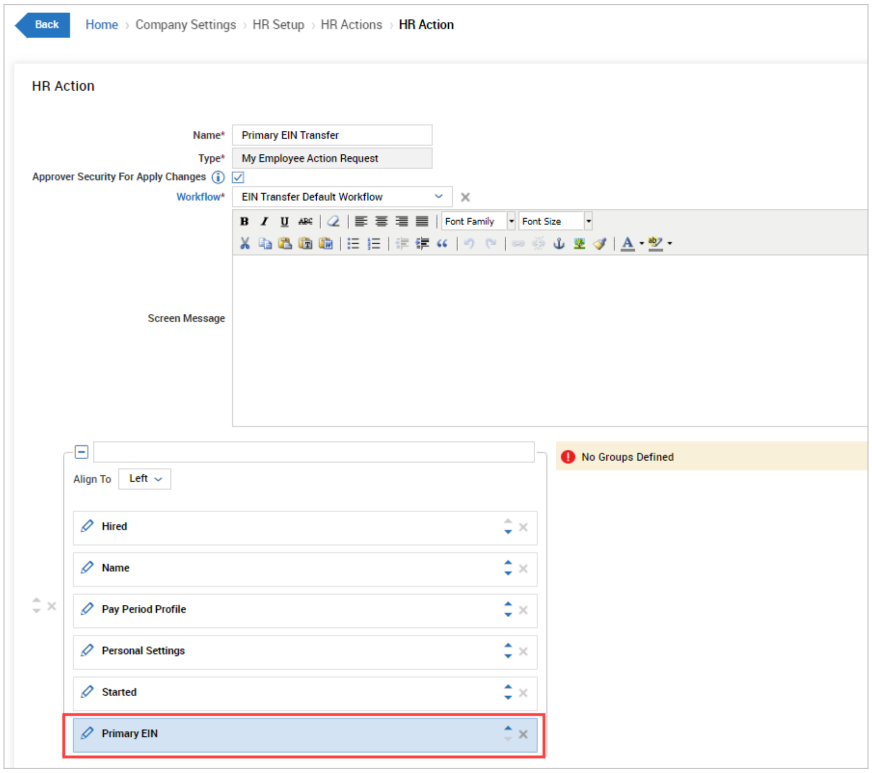
HR Actions

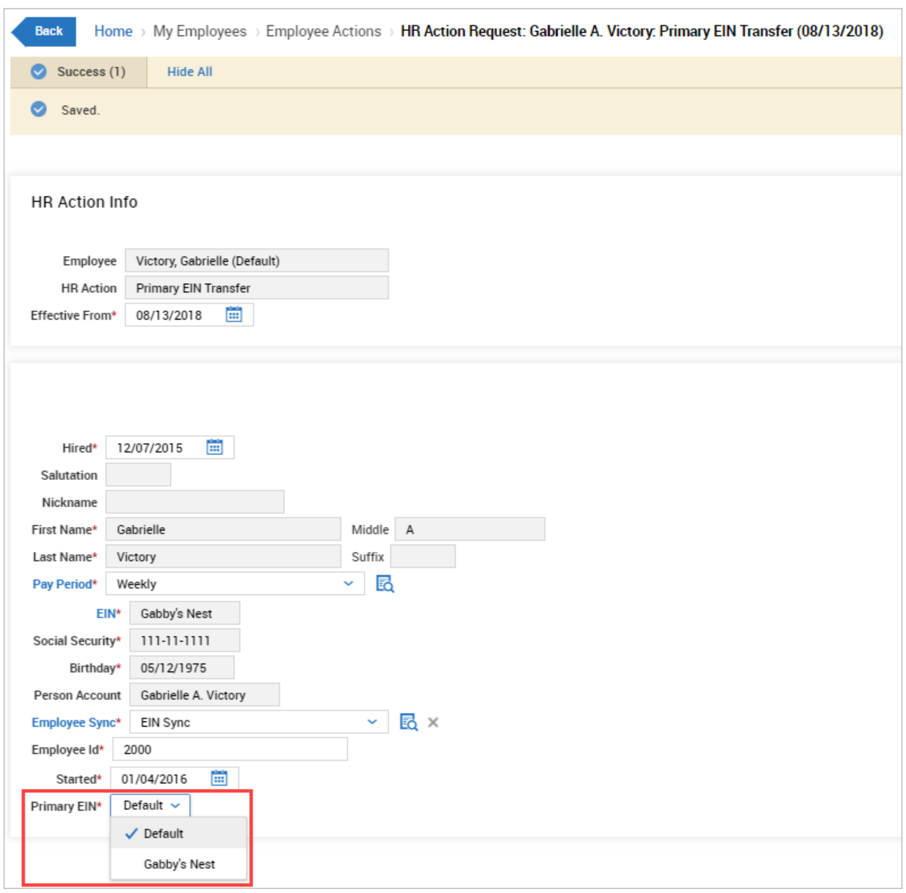
The following enhancements have been completed for HR Actions and are listed below.

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* Primary EIN Transfer
Type* My Employee Action Request
Approver Security For Apply Changes
Workflow* EIN Transfer Default Workflow
Screen Message
No Groups Defined
Align To Left
Hired
Name
Pay Period Profile
Personal Settings
Started
Primary EIN


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 Victory, Gabrielle (Default)
HR Action Primary EIN Transfer
Effective From* 08/13/2018
Hired* 12/07/2015
Salutation
Nickname
First Name* Gabrielle Middle A
Last Name* Victory Suffix
Pay Period* Weekly
EIN* Gabby's Nest
Social Security* 111-11-1111
Birthday* 05/12/1975
Person Account Gabrielle A. Victory
Employee Sync* EIN Sync
Employee Id* 2000
Started* 01/04/2016
Primary EIN* Default
Default
Gabby's Nest

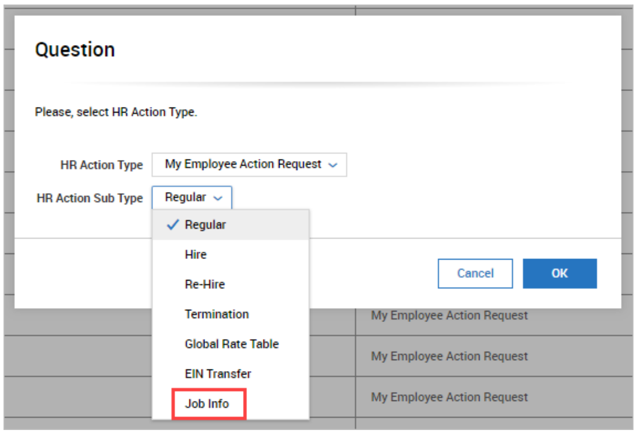
HR Actions: Job Info Type Added

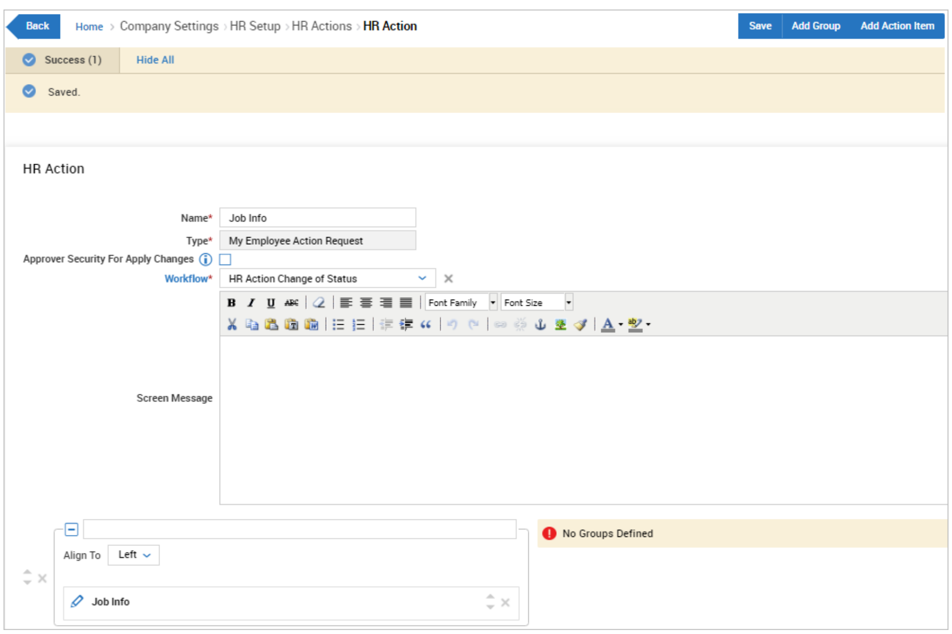
64709: Companies using Jobs functionality will now have the ability to create a ***Job Info*** HR Action to update certain fields for existing Jobs assigned to employees.

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:

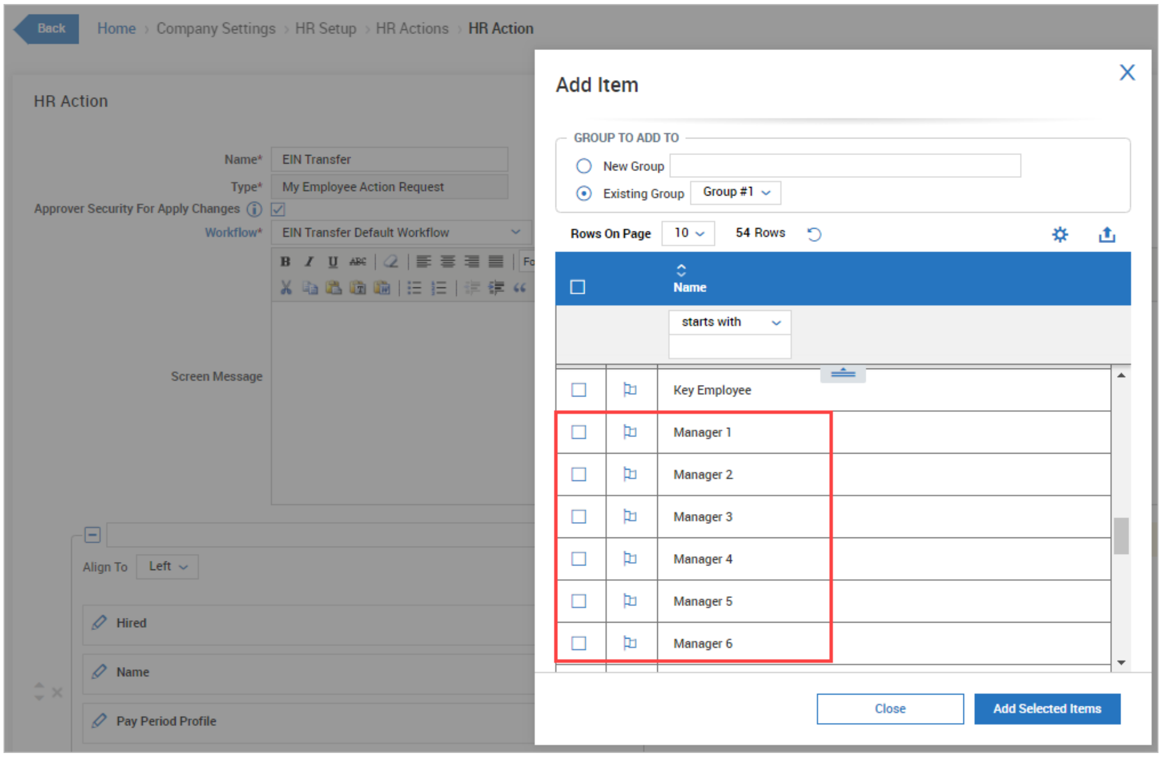
- Changes made to the *Job* widget.
- Changes made to the *Notes* widget.
- Changes made to the *Defaults* widget.
- Changes made to the *Workers Comp Code Types* widget.
- Changes made to the *Job Attributes* widget.





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.

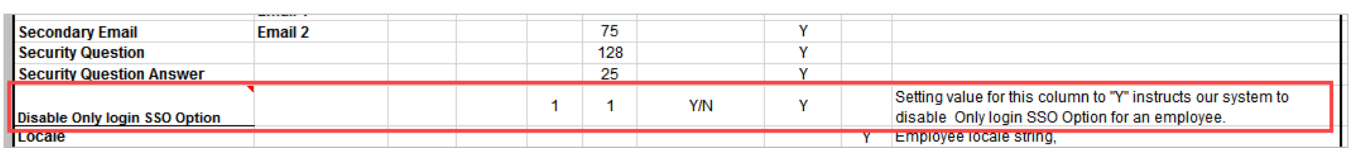


Imports: Option Added to Enable/Disable SSO

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 Two letter state abbreviation ex. MA			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.

	100	101	102	103	104	105
1	Working Time Regulations Profile	Working Time 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*.

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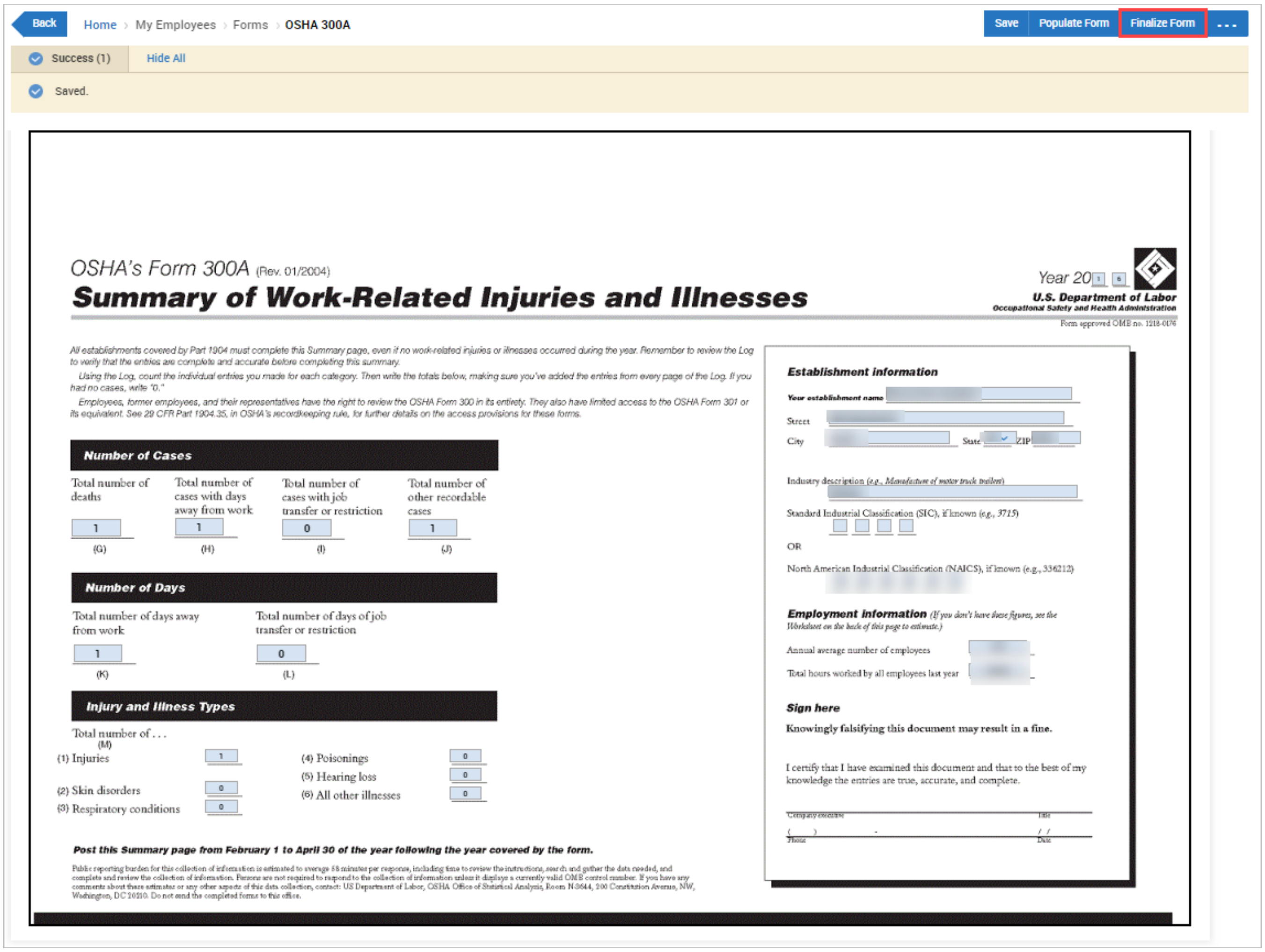
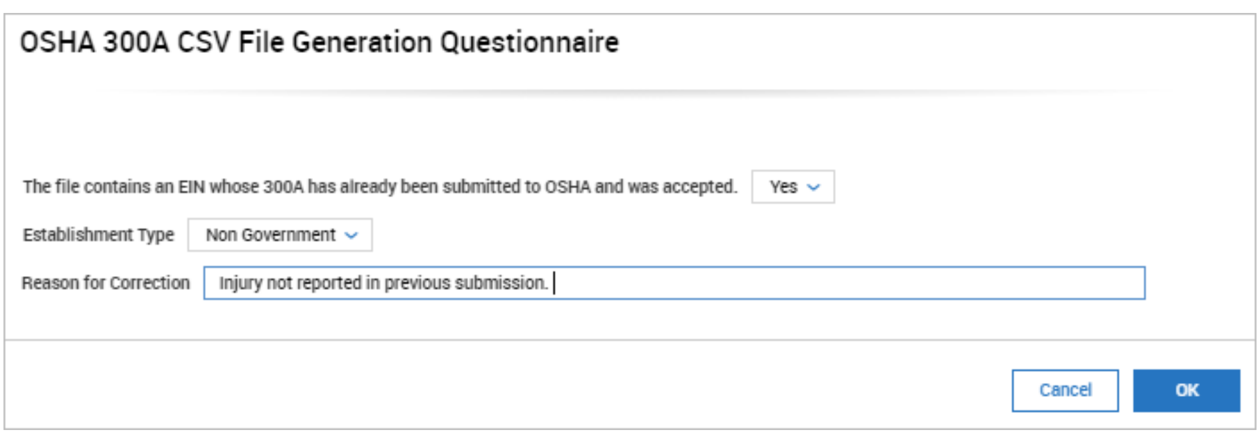
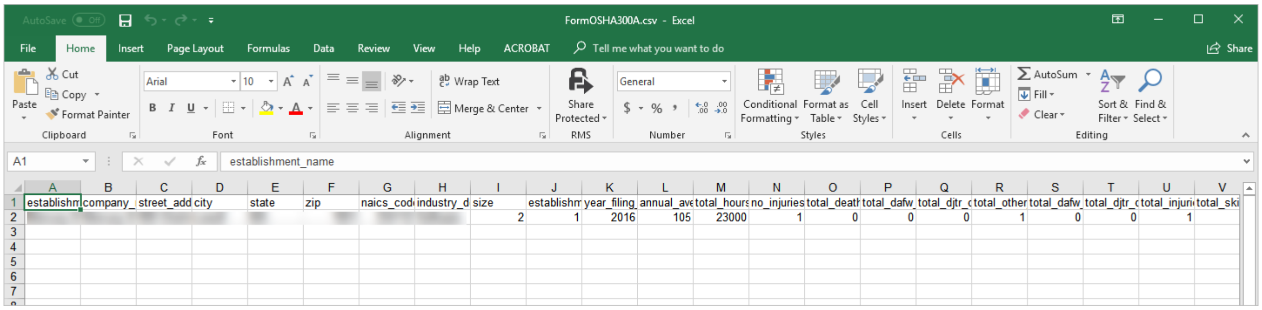


Once the form is finalized and ready, the form can be downloaded by clicking the triple dot icon. Options include ***Download PDF*** and ***Download CSV***.

- 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.





Important Note: We are building our functionality around the ability to upload the CSV files. Direct electronic submittal to OSHA is not supported within the application.

OSHA's data submission process involves four steps:

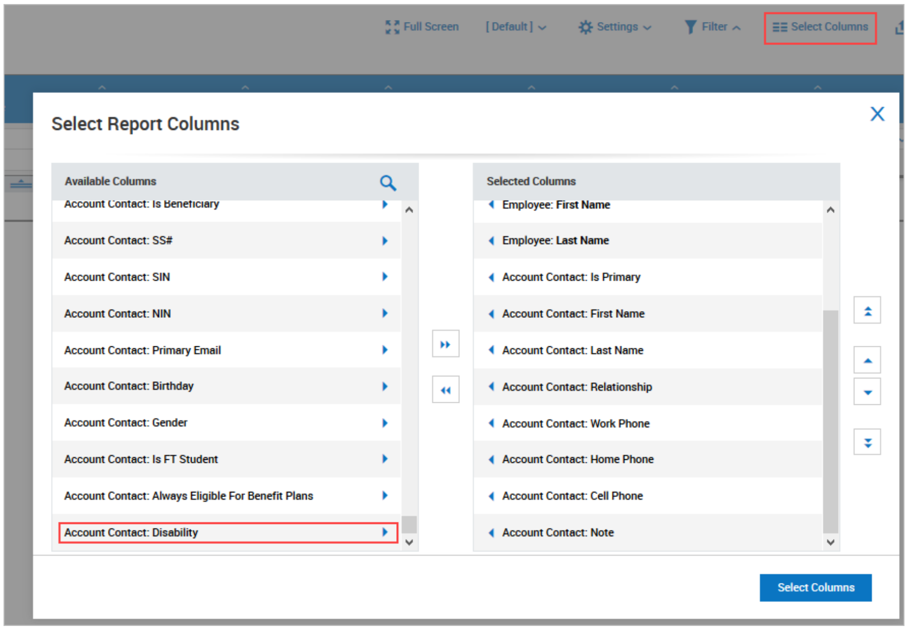
- Creating an establishment within the ITA. (Done by the client with OSHA, provides a login/password)
- Adding 300A summary data.
- Submitting data to OSHA.
- Reviewing the confirmation e-mail.

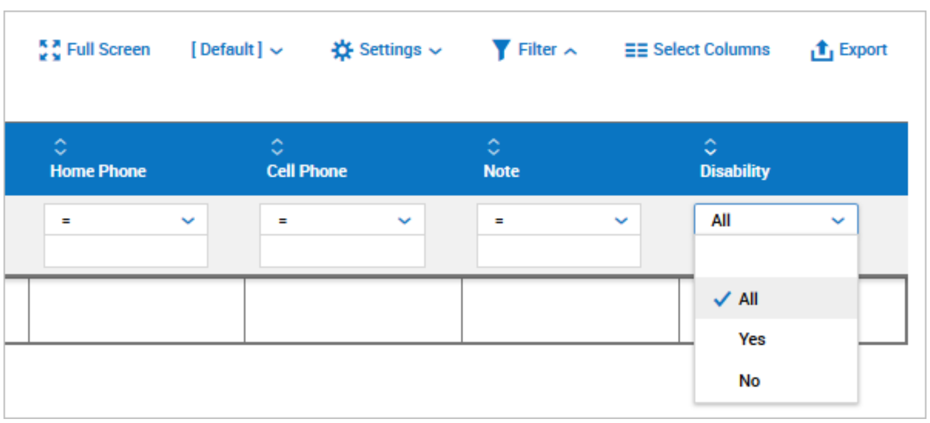
The OSHA website will offer three options for data submission. Employers can:

- Manually enter data into a web form.
- Upload a file for a single establishment or for multiple establishments at once.
- Transmit data electronically through an application programming interface—if the employer uses an automated record-keeping system.

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*.



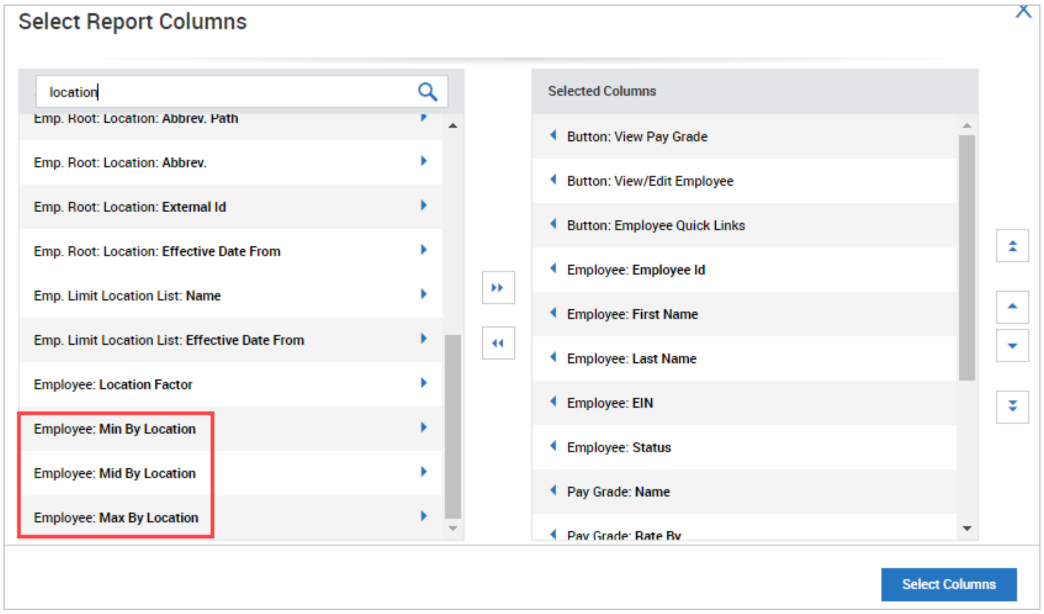


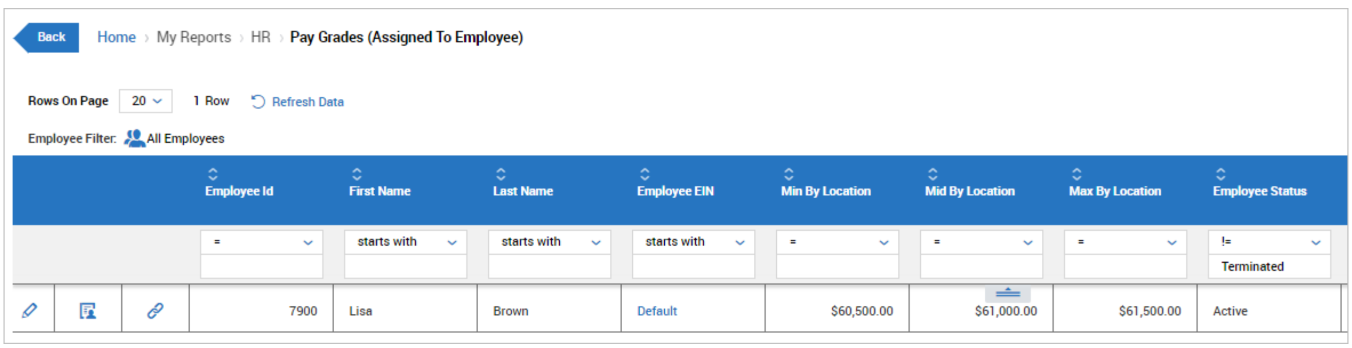
Reports: Pay Grades (Assigned To Employee) Report - New Columns Added

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





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.

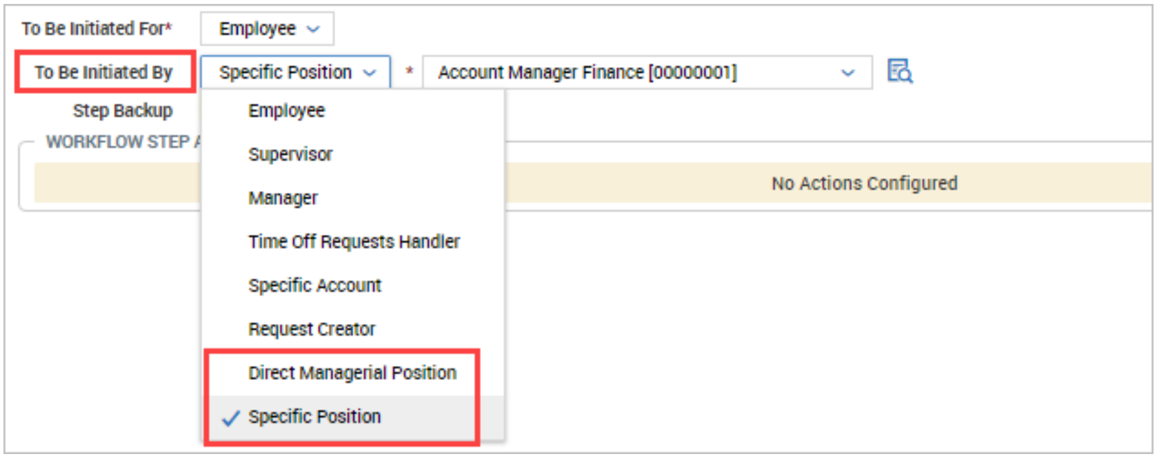
NOTE: This functionality applies to steps that require interaction from the recipient prior to the workflow moving to the next step.

- 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.

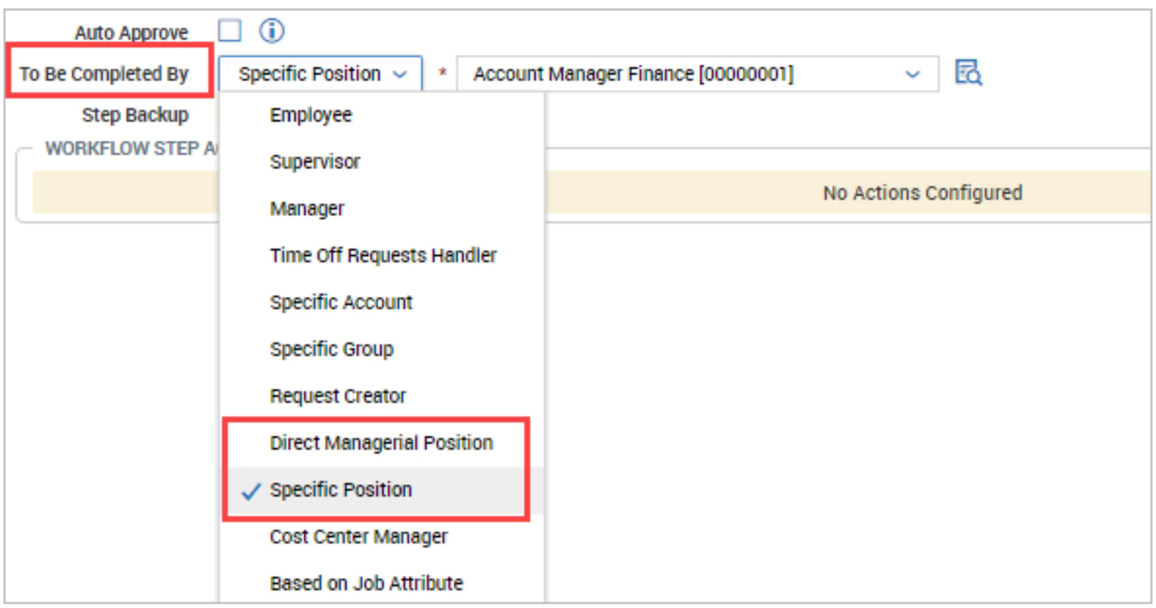
HR Action Step

72396, 68662, 72399, 71281, 72397



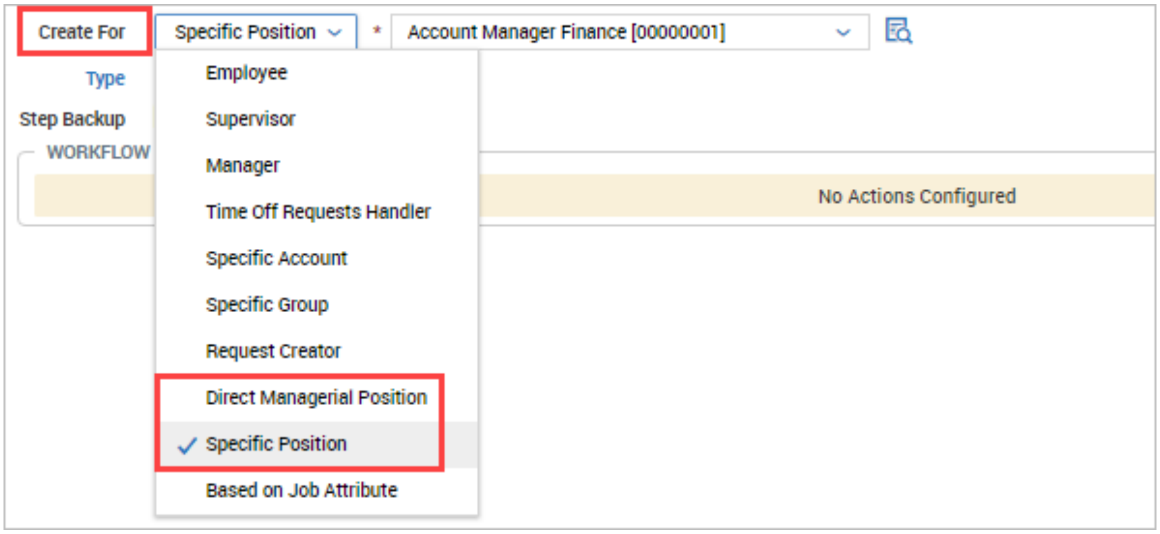
Approve/Reject Step

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



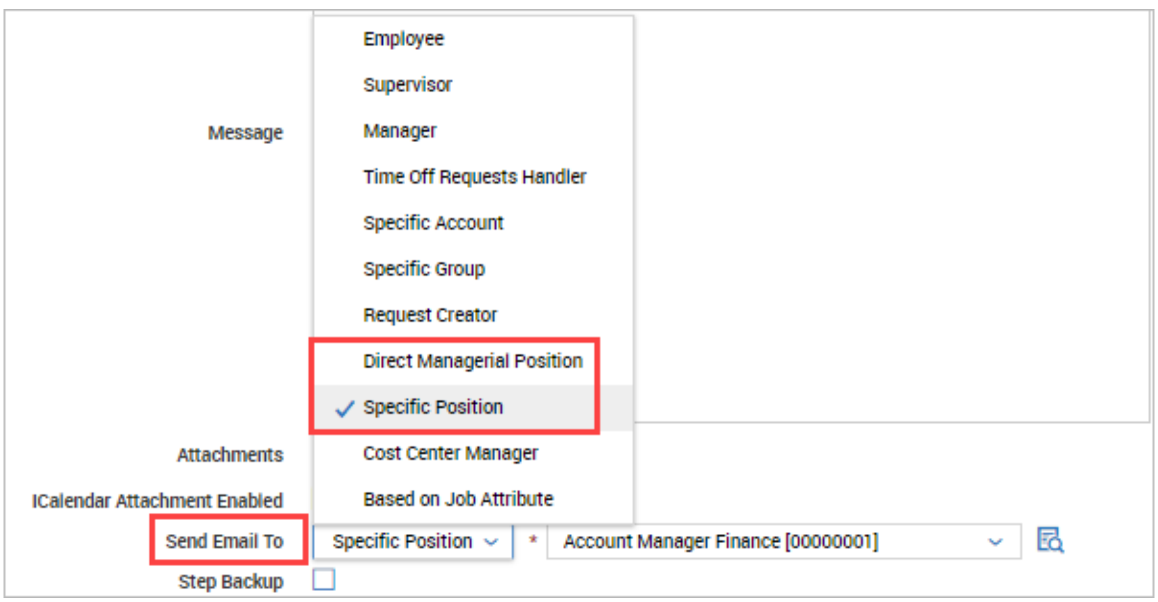
Checklist Step

72722, 68840, 68841, 72726, 72724



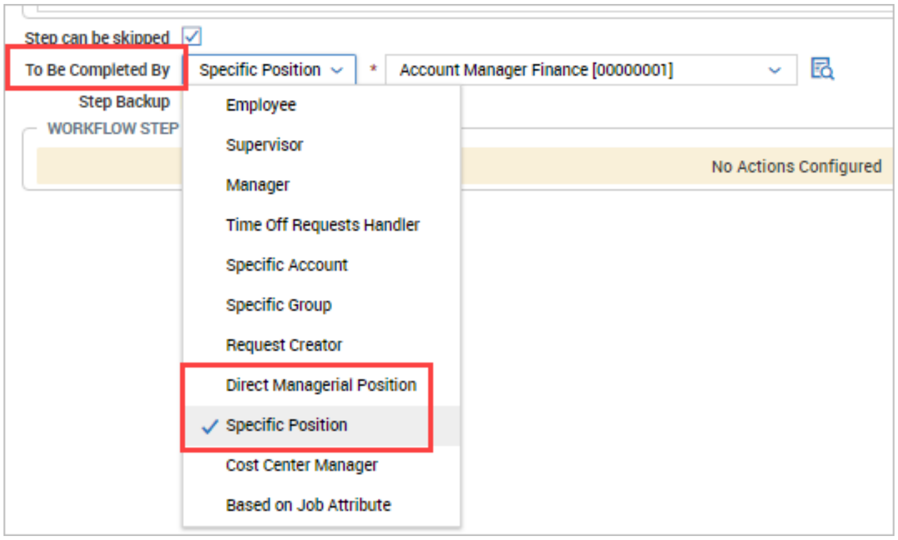
Generate Email Step

72234, 68790, 68791, 72236



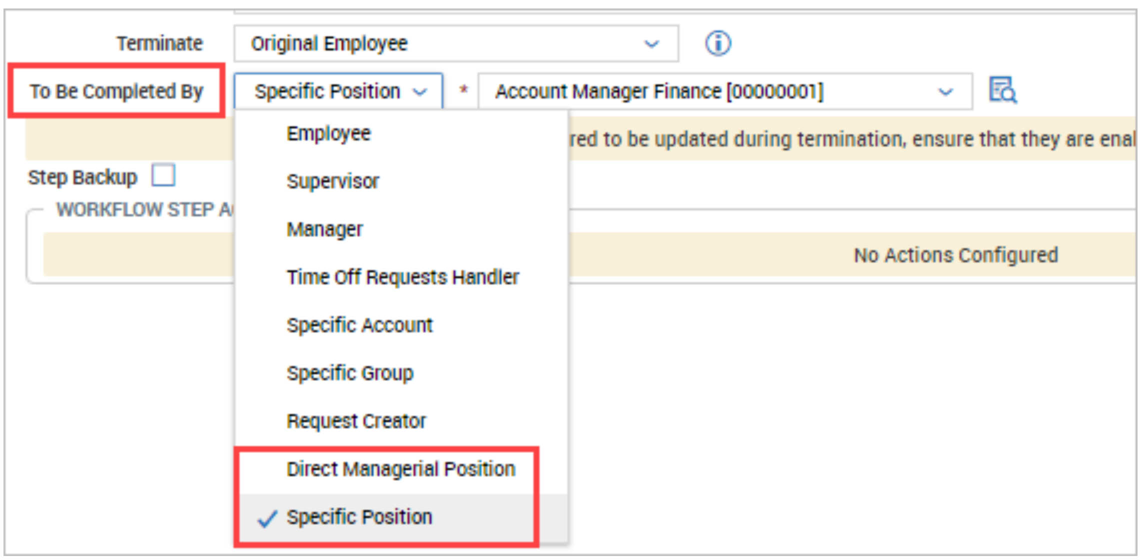
Collect Note Step

72096, 68327, 68331, 66701, 68328



Terminate Employee Step

68607, 72130, 68610, 66783



HR Action Request Workflows: Auto-Generate Parallel Workflow

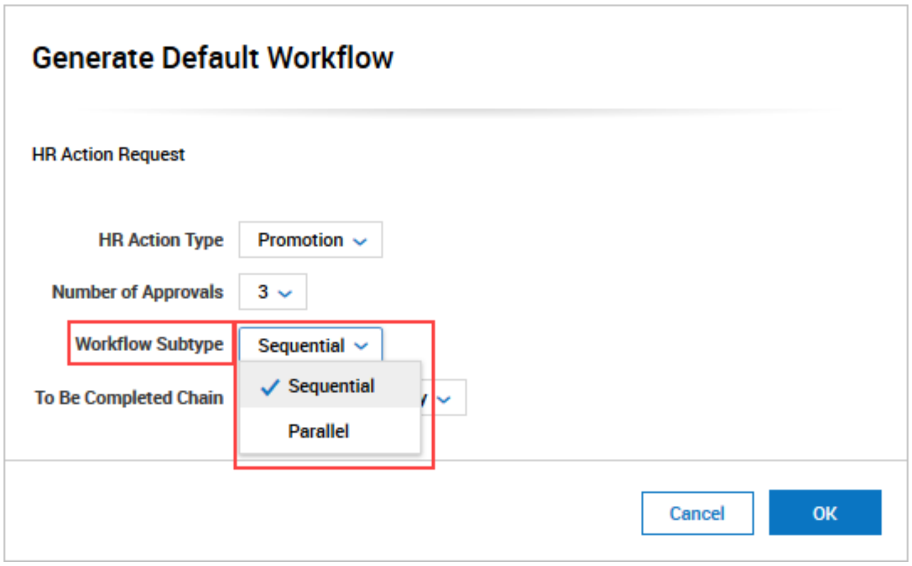
74828: In the August 2018 release, the ability to automatically generate sequential approvals up through the management chain was added to HR Action workflows. In this release, a new option enables the managers in the hierarchy to approve the workflow steps in parallel.

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

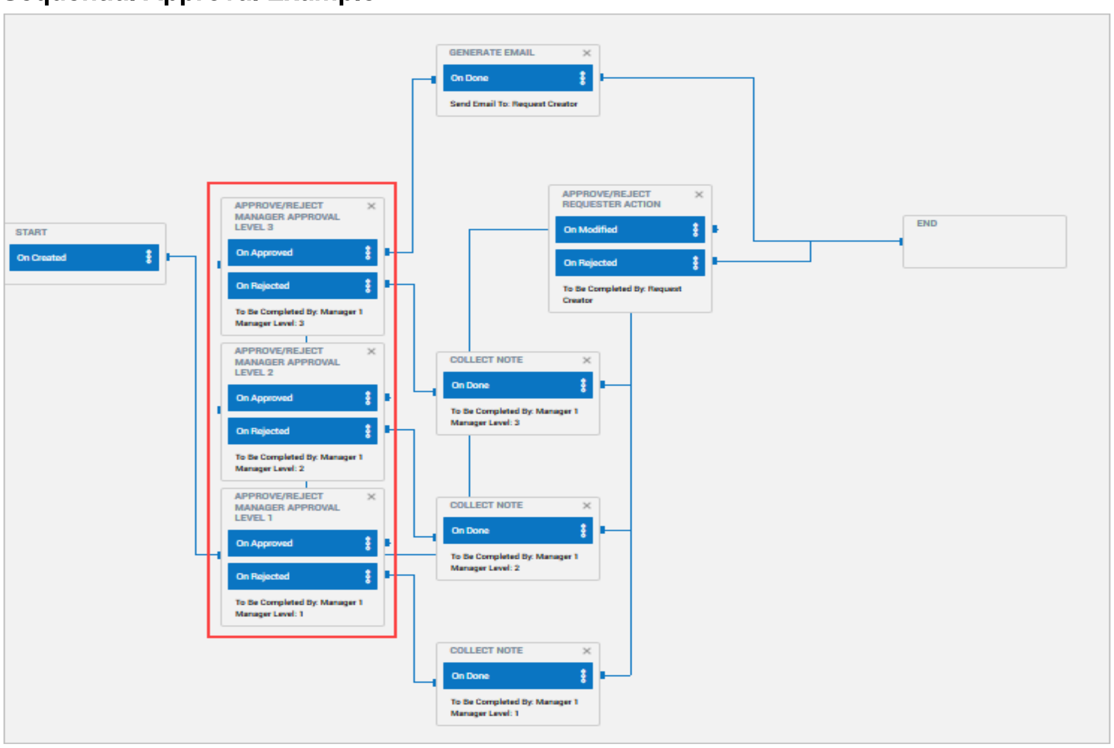
After adding a default workflow, the *Generate Default Workflow* pop-up appears.

- 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.

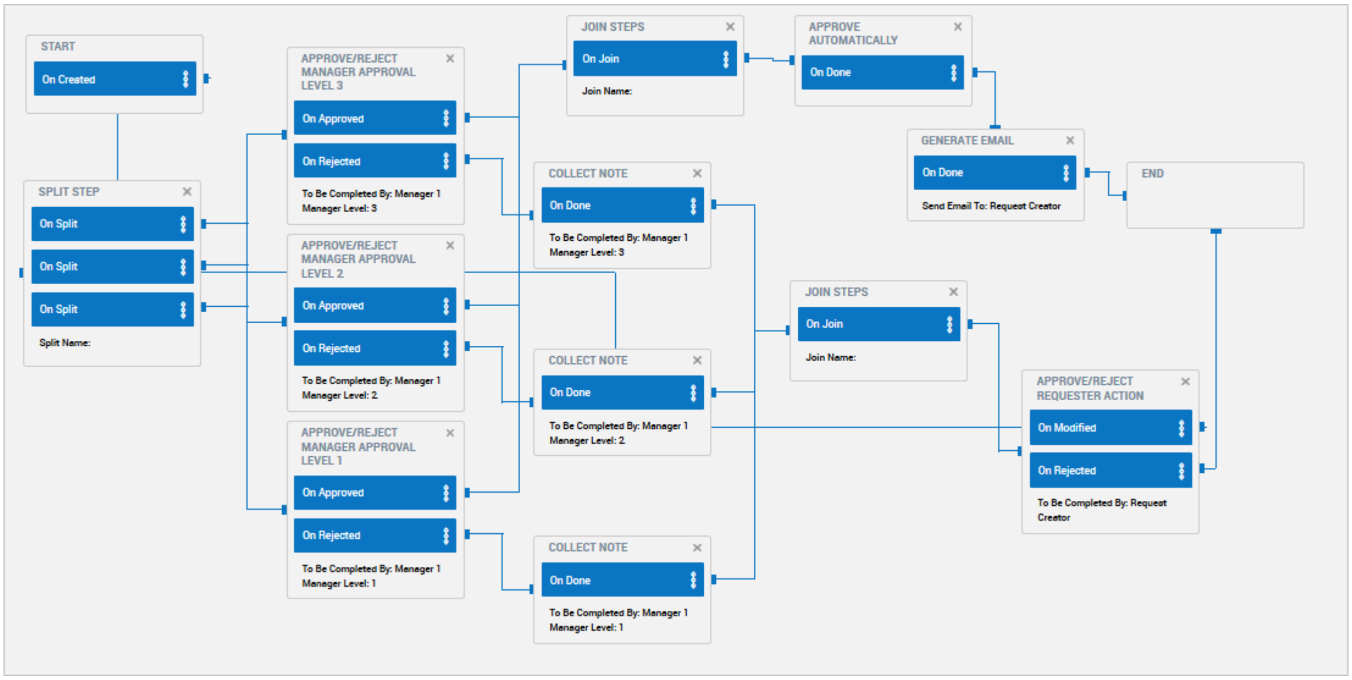
NOTE: The *Approval Chain Number* option was re-named in this release to *Number of Approvals*. This option determines how many levels of approval will be automatically generated in the workflow.



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:

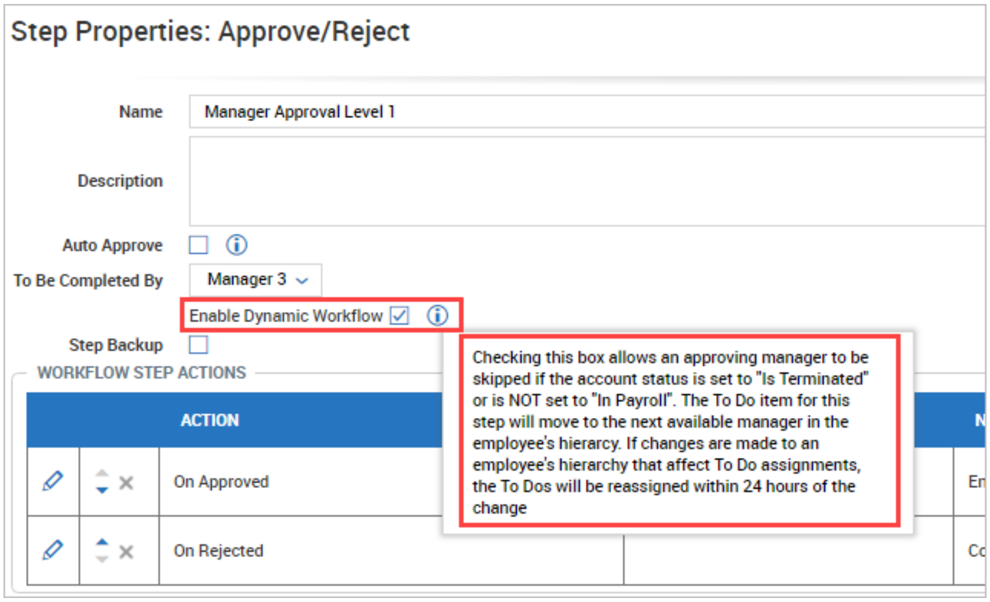
- In the *On Approved* actions of each approval step, the *Apply Changes* and *Update Checklist Item* options are not checked.
- In the *Join* steps following an *Approve/Reject* step, The *Leave Remaining Split Steps Open* option is selected.
  - In the *Approve Automatically* step that follows the *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.

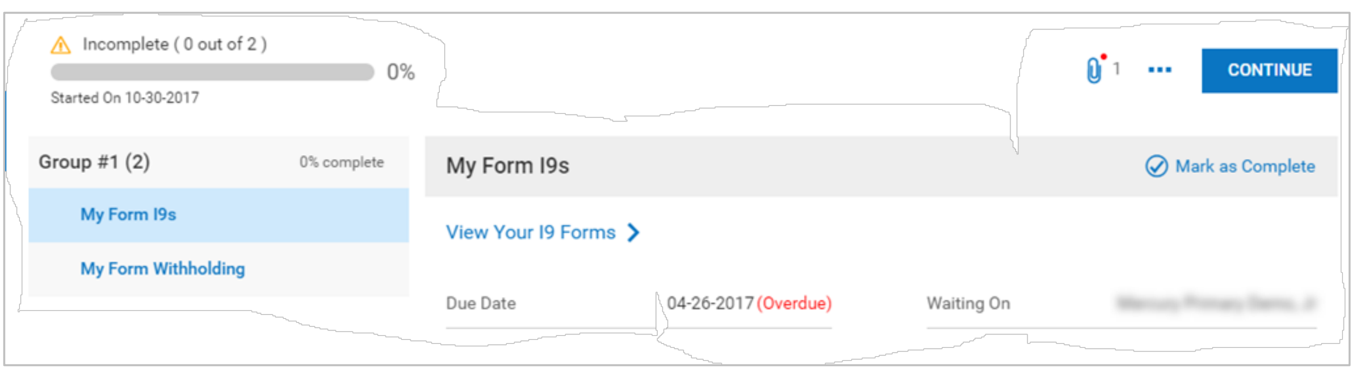
Additionally, if the employee's manager changes before the HR Action can be approved, the workflow will move the approval to the new manager within 24 hours and then proceed with the new hierarchy for approvals.



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.



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

OR-
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

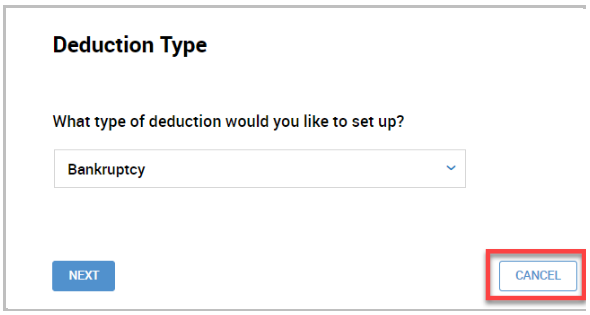
The following enhancements have been complete for the Deduction Wizard.

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.

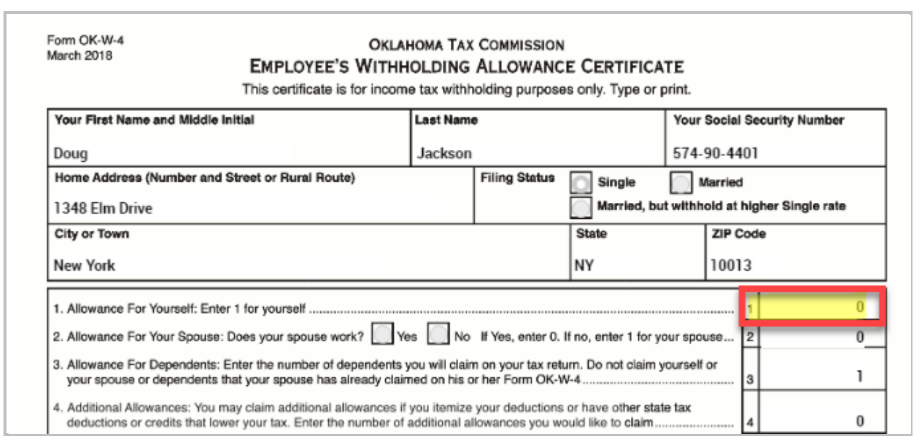


Forms

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

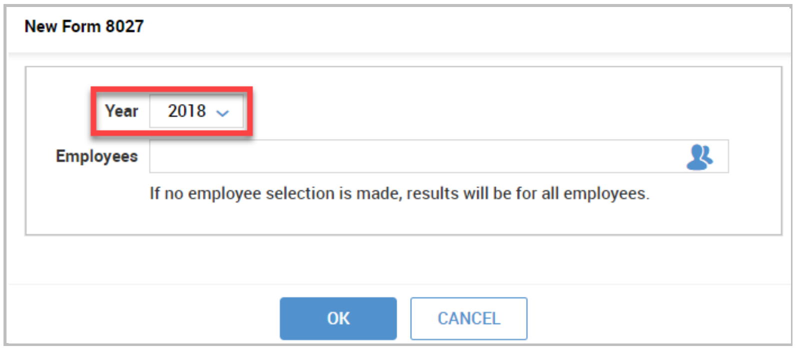
OKLAHOMA TAX COMMISSION
EMPLOYEE'S WITHHOLDING ALLOWANCE CERTIFICATE
This certificate is for income tax withholding purposes only. Type or print.

Your First Name and Middle Initial	Last Name	Your Social Security Number
Doug	Jackson	574-90-4401
Home Address (Number and Street or Rural Route): 1348 Elm Drive	Filing Status: Single / Married / 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? Yes 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*.



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

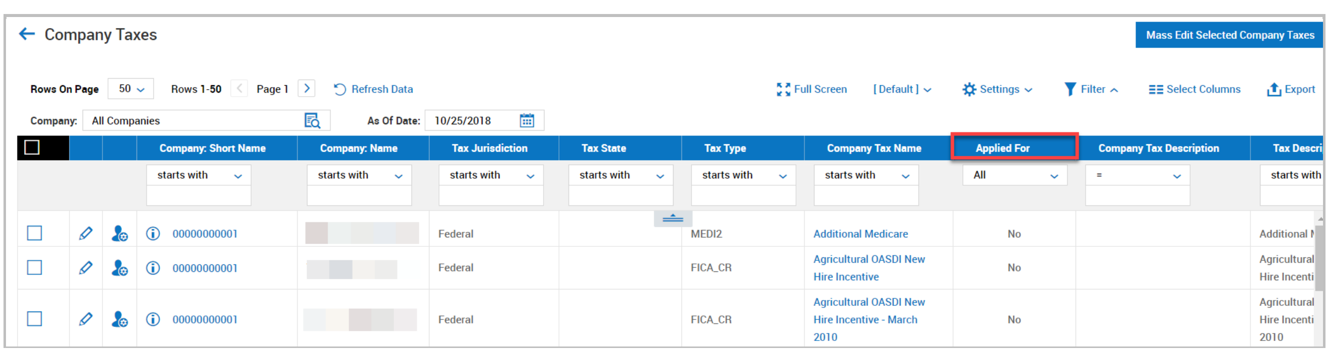
The 2018 Federal W-4 form is now available for 2019 for the following states: Colorado, Delaware, Idaho, Montana, Nebraska, New Mexico, North Dakota, Oregon, Utah, Oregon, and South Carolina.

2019 W4 Withholding Form Updates

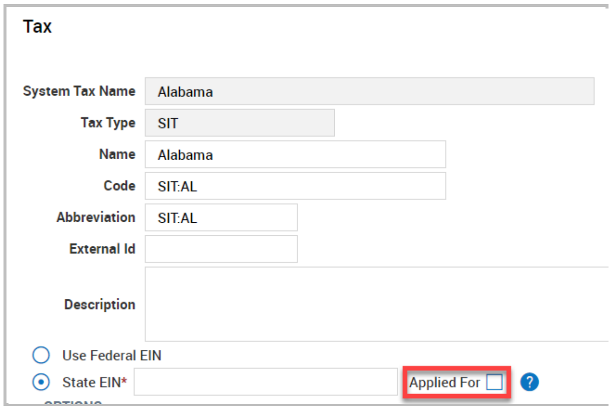
Updates have been made to the 2019 W-4 withholding forms, state and federal, including a change to the Middle Initial field to ensure the field always shows only one character.

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.

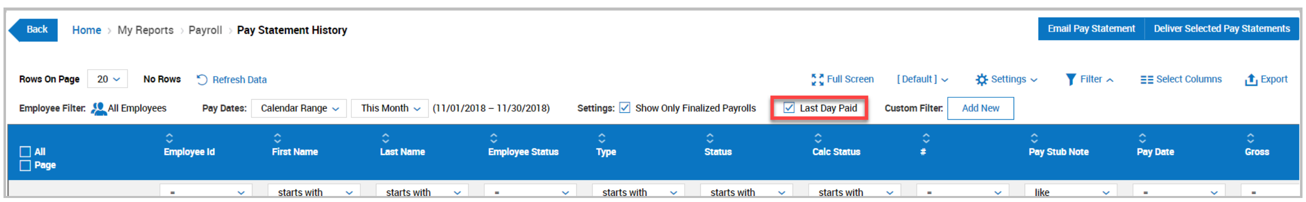


A value of *Yes* will display in the *Applied For* column for taxes with the option enabled, and *No* will display for taxes with the checkbox unchecked.



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.

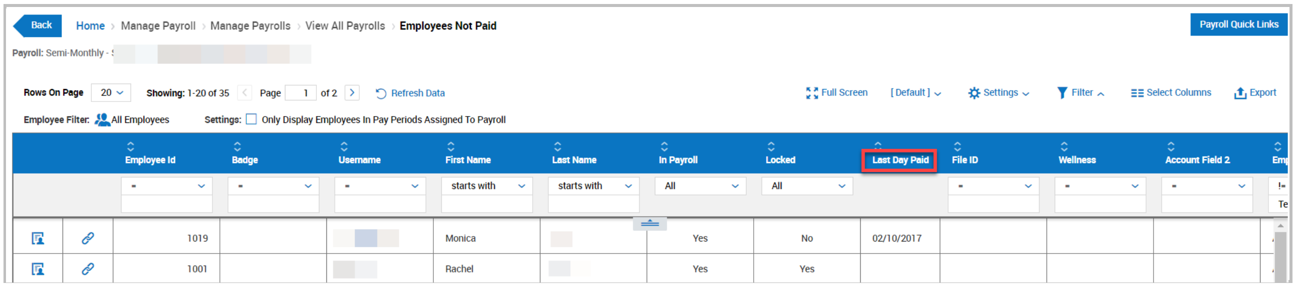


The new option considers the date/account filters, so if *Last Year* is chosen as the date range filter, the last Pay Statement is shown for the last year. If only specific employees are selected, the last records are displayed for those accounts only.

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*.



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.