Software Release Notes

OnePoint Human Capital Management

October 2019

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Supported Operating Systems and Browsers

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

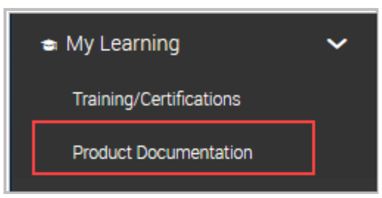
NOTE: The list shown in the table below are operating systems we support, though they may not be actively tested.

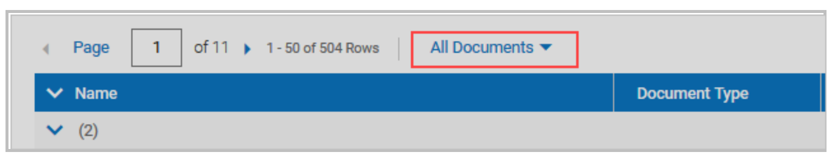
Platform	OS Version		Browser	Version
Desktop			Internet Explorer	11
Windows	7, 10		Microsoft	Edge
Mac	10.13.4 (High Sierra)		Google Chrome	latest
Mobile			Mozilla Firefox	latest
iOS	11.4.1 -> latest		Safari	latest
Android	6.0.1-> latest			

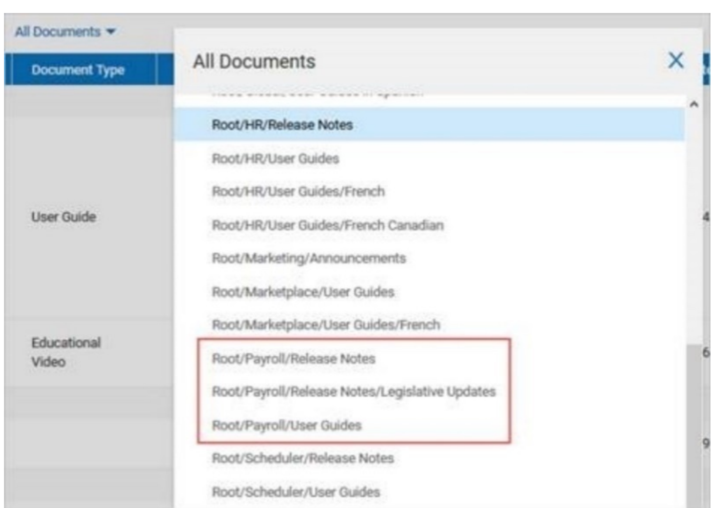
Downloading Documents in the New UI

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

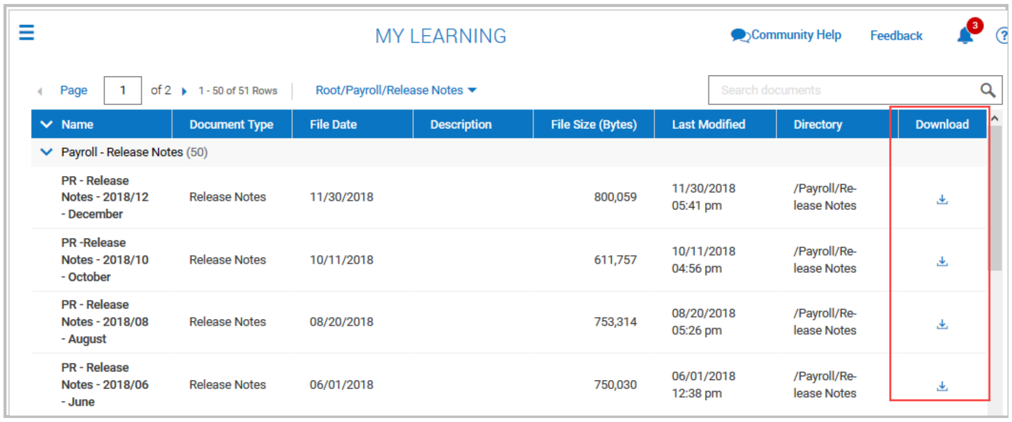
On the *My Learning* page, the *All Documents* drop-down allows you to select a document from the appropriate group for download. For example, payroll users may want to narrow the list to Release Notes, Legislative Updates or User Guides.







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



Human Resources

*****Certify Marketplace Product Changes*****

REMINDER: In the August 2019 system release cycle, information was included in the August HR release notes informing you about upcoming changes to the Certify Expense Reporting Marketplace product. When this release is applied to your server in October, these changes will be applied.

HIGHLIGHTS

The ESS (Employee Self Service) piece of the Certify expense reporting product is retired as of this release. The menu paths were located as follows:

In the New UI, this option was located under *My Info* > *My Information* > *My Expenses* and under *My Info* > *My Reports* > *HR Reports* > *Marketplace* > *Certify*

In the Classic UI, this option was located under *My Account* > *My Apps* > *My Expenses*
The MSS (Manager Self Service) piece of the Certify expense reporting product has been moved to *Company*

Settings > *Our Company* > *Certify Expense Reporting*.

In the New UI, this option was located under: *Team* > *HR* > *Employee Maintenance* > *Expense Reporting*

In the Classic UI, this option was located under: *My Employees* > *Employee Maintenance* > *Expense Reporting*

The MSS (Manager Self Service) Certify Reporting option remains under:

New UI: *Team* > *HR* > *Reports* > *Marketplace* > *Certify*
Classic UI: *My Reports* > *Marketplace* > *Certify* > *Certify Result Info*

*****Retirement of Recruitment Module Classic Applicant Portal*****

REMINDER: In September and October, we sent out communications regarding the retirement of the old, or classic applicant portal (.jobs or .careers) for the Recruitment module. When this release is applied to your server in October, the retirement of the old portal will be complete, and you must transition to the new applicant portal.

NOTE: In the October release, the *Enable New UI for All Links* setting that was available in the Applicant Configuration page will be removed. You will no longer need to enable anything. You will automatically be directed to the new portal.

Below is the announcement we sent out in Community in September and October.

News On The Applicant Experience (HR Recruitment)

Last year, we launched a new applicant experience to optimize your recruitment efforts to help you deliver a great candidate experience that engages and delights from the start.

If you don't make the jump today, you'll want make plans to make the change as the classic applicant experience will be going into retirement during the October 2019 release. To help you take the plunge and start reaping the benefits of the new applicant experience, we put together this quick reference guide.

Keep in mind this announcement is just for the applicant experience and since the new experience is driven from security profiles, only your applicants will see this change. This is also a great way to see the benefits of the whole new experience before you transition to it.

New EasyBackgrounds Marketplace Product Active – Old Version Retired

As of the October system release, users of the easyBackgrounds Marketplace product will now experience and use the new version. The old version will officially be retired in the October release.

In addition to a new look and feel, the new easyBackgrounds integration gives access to a wealth of new features and improved user support. Among the primary benefits of the new integration:

- **A more streamlined experience:** You can now initiate a single background check order, rather than the current two-step process, beginning with the Instant SSN Trace. Your pricing will not change, and you'll have access to the same screening packages you've been using.
- **More features:** The easyBackgrounds website provides numerous tools to help you easier sort through results, update orders, and manage your account online.
- **Better compliance:** The new website offers multiple ways to manage and update background check authorization forms. Also, if you elect not to hire somebody because of the results, easyBackgrounds offer a one-click Adverse Action process for effortless compliance.
- **Better support:** The new integration is thoroughly tested and extremely reliable. If you do have questions or encounter issues, they are much easier for easyBackgrounds to troubleshoot and provide more immediate resolution.
- **Clear invoicing:** Your invoices will come directly from easyBackgrounds, and background screening fees will be very easy to review and manage directly on the background check report.

Benefits

Benefits Enrollment – Clean Up (Classic UI & New UI)

During the course of a benefits enrollment period (new hire enrollment / open enrollment), employees may start an enrollment but not complete it. Previously, the enrollments with a status of *New* on employee records could still be submitted by employees after the enrollment period ended. This caused issues for HR Administrators in having to decide if it was appropriate to allow those enrollments to be approved.

To prevent these issues, we have changed the system to prevent the submission of enrollments after the enrollment period has ended (open enrollment period / new hire period - last day new hire can enroll.)

This will allow HR Administrators to delete any left-over enrollments as part of a clean-up process for enrollments still in *New* status on the *Change Requests Summary* report, located under *Team > Benefits > Enrollment Requests > Change Requests Summary*.

Benefit Plans: Download PDF of Benefit Plans (Classic UI & New UI)

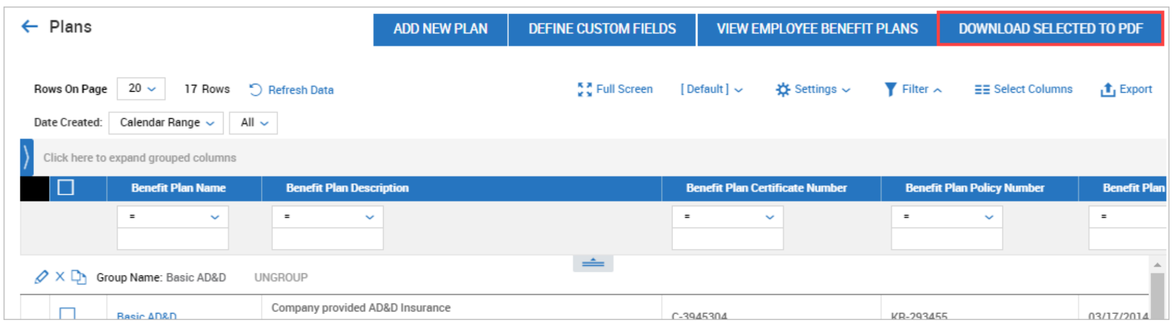
In this system release, we are adding the ability to download existing Benefit Plans in PDF. There are two methods available to utilize the PDF functionality:

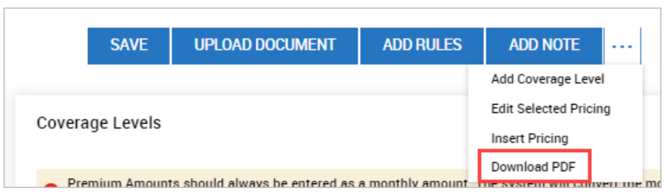
- From the *Benefits > Plans* report page, a new ***Download Selected To PDF*** button is available where one or more plans can be selected at a time to be included in the PDF.
- When editing or viewing a Benefit Plan, a ***Download PDF*** option is available under the Actions ellipses. This option will download information for that benefit plan only.

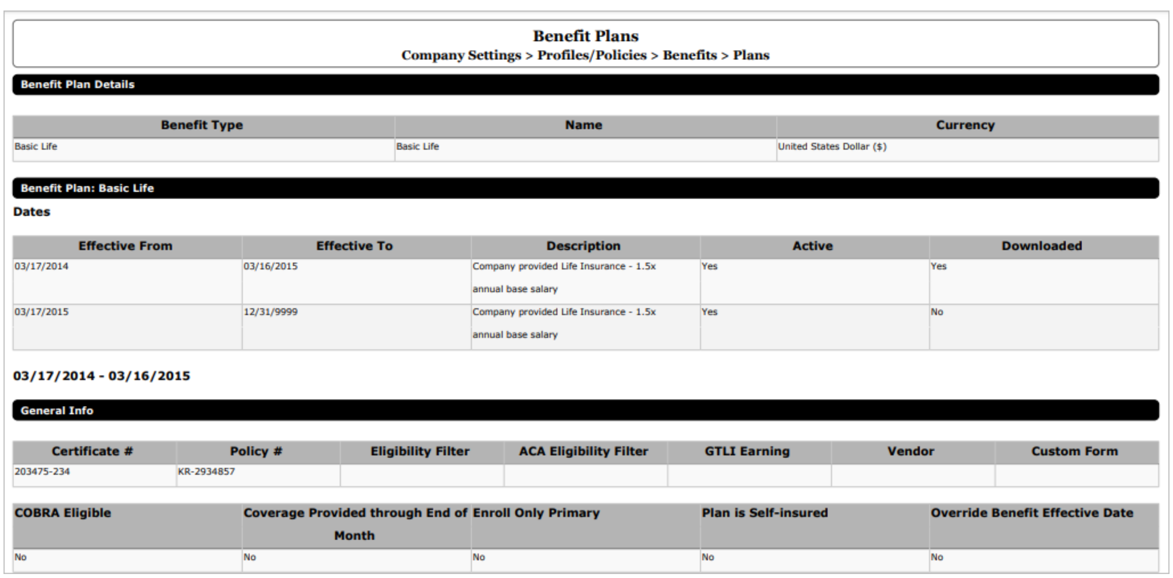
This is available in companies with the HR module enabled and is also available in the Payroll module. Benefit Plans are located under *Company Settings > Profiles/Policies > Benefits > Plans*.

Users with security permissions to view the Benefit Profiles (Benefit Profiles item enabled in their assigned Security Profile) can utilize the **Download Selected to PDF** option.

Shown below are examples of the two new Download PDF options and the resulting PDF. Below the examples is a bulleted list showing the options we are including in the PDF downloads in this release.






Benefit Plans
Company Settings > Profiles/Policies > Benefits > Plans

Benefit Plan Details

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

Benefit Plan: Basic Life

Dates

Effective From	Effective To	Description	Active	Downloaded
03/17/2014	03/16/2015	Company provided Life Insurance - 1.5x annual base salary	Yes	Yes
03/17/2015	12/31/9999	Company provided Life Insurance - 1.5x annual base salary	Yes	No

03/17/2014 - 03/16/2015

General Info

Certificate #	Policy #	Eligibility Filter	ACA Eligibility Filter	GTLI Earning	Vendor	Custom Form
203475-234	KR-2934857					

COBRA Eligible	Coverage Provided through End of Month	Enroll Only Primary	Plan is Self-insured	Override Benefit Effective Date
No	No	No	No	No

#1 Basic Life

Eligibility Filter	ACA Eligibility Filter

Pricing

Coverage Amount

11/02/2020

Coverage Amount	Premium	Employer Pays
175000	80.00	65.00

03/16/2020

Coverage Amount	Premium	Employer Pays
150000	75.00	55.00

- 121748: The *Download Selected to PDF* button in the Benefit Plans report page
- 127311: The *Download PDF* option added to the Actions ellipses when editing/viewing Benefit Plans
- 121700: Dates Info
- 121700: General Info widget
- 130636: Coverage Levels Pricing - Coverage Amount/Age of Dependents
- 130635: Coverage Levels Pricing – Coverage Amount/Age of Spouse
- 130634: Coverage Levels Pricing – Coverage Amount/Age
- 130629: Coverage Levels Pricing – Coverage Amount
- 128885: Coverage Levels Pricing – Premium

EOI: Option Added to Increase Units Amount in EOI Tiers (Classic UI & New UI)

In Benefit Plan EOI Tiers Configuration (editing EOI tiers), a column for **Increase %** has historically been available, but there has been no method available to add a specific unit amount increase. In this release, we will allow for a unit amount increase.

There are instances where a benefit plan that requires EOI will only allow an employee to increase their current number of units by a certain amount each time they re-enroll rather than basing that increase on the guaranteed number of units.

Example: Employees are allowed to increase enrollment by 2 units over their current amount of units each time they re-enroll. Initial guaranteed amount for new enrollees is 15 units. The employee chose 10 units last year. This year, they are able to go up to 12 units without providing EOI. If they elect 12 this year, next year they will be able to go to 14 units without EOI. If they elect more than the maximum unit increase listed in this new column over the prior year, the system will flag that they need to provide EOI.

The following is now available:

A drop-down has been added to the % Increase column in EOI tiers. In the drop-down, you can now choose *Increase %* or *Increase Unit*.

A note has been added (4th bullet) in the Note section: *Unit increase is based on employee's current enrollment*

If an employee elects more than the allowed unit value increase from the prior year, or the benefits administrator attempts to assign more value than the allowed unit increase, the system will show that Evidence of Insurability is required and either impose a limit until evidence is supplied, or not allow that selection to be saved based on the settings in the benefit plan whether "*Allow requests over the limit. Defaults to the limit until evidence is uploaded.*" is selected or not in the benefit plan configuration.

If you do not want your employees to be able to increase unit values over the current enrollment, you can enter 0 in the unit increase column and require EOI for any units above current. (If *Allow requests over the limit….* is checked, increased amount requested will be in a pending state until EOI is uploaded.)

HR Actions

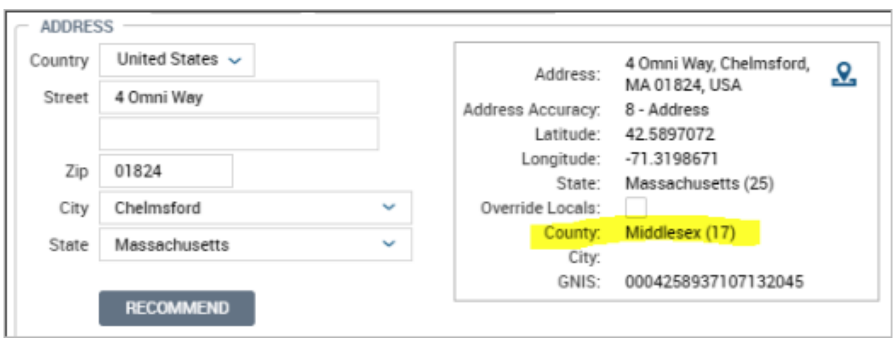
Started HR Action Item Added for HR Action Regular Sub-Type (Classic UI & New UI)

We have added the ***Started*** HR Action Item to the *Regular* HR Action sub-type. This item will allow managers/users to update a *Start Date* when processing an HR Action To Do Item. The *Started* item was previously available in the *Hire* and *Re-Hire* sub-types. By having it available in the *Regular* sub-type allows users to update a potential *Start Date* in a pre-hire scenario.

HR Reports

Employee Reports: County Added as Selectable Column (Classic UI & New UI)

14994: When the Payroll module is enabled, the *County* field that populates in the geospatial mapping section next to the address in employee records, will now be available as a selectable column in employee report pages.



The column will be available to be added in the following reports:

- All Forms
- Benefit Census Report
- Benefit Enrollment Status
- Benefit New Hire Status
- Employee Contracts
- Employee Roster
- Account Taxes
- Account Tax Jurisdictions
- Scheduled Deductions
- Direct Deposits
- Scheduled Earnings
- Pay Grades (Assigned To Employee)

Worker Type Column Available (Classic UI & New UI)

113423 & 111198: A ***Demographics: Worker Type*** column is now available to be added to the following reports.

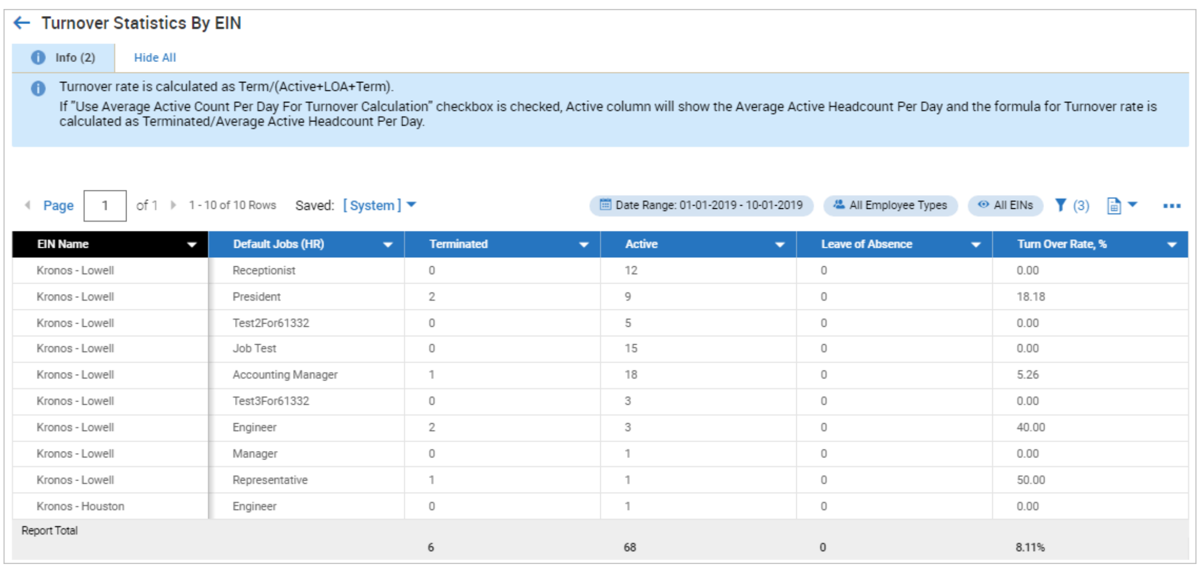
- **Detailed Rates** – *My Info > My Reports > HR Reports > Employee Maintenance > Detailed Rates*
- **Base Compensation History** – *My Info > My Reports > HR Reports > Employee Maintenance > Base Compensation History*
- **Additional Compensation History** - *My Info > My Reports > HR Reports > Employee Maintenance > Additional Compensation History*
- **Seniority** - *My Info > My Reports > HR Reports > HR Maintenance > Seniority*
- **Turnover Statistics** - *My Info > My Reports > HR Reports > Turnover > Turnover Statistics*

Turnover Statistics By EIN Report Added (Classic UI & New UI)

105398: We have added a new ***Turnover Statistics by EIN*** report which shows EIN Name, Default Jobs (HR), actual Terminated, Active, Leave of Absence and Turn Over Rate % for the selected date range. The report displays an Info message to show you how the turnover rate is calculated.

The report is located as follows.

- Classic UI: *My Reports > HR > Turnover > Turnover Statistics By EIN*
- New UI: *Team > HR > Reports > Turnover > Turnover Statistics By EIN*



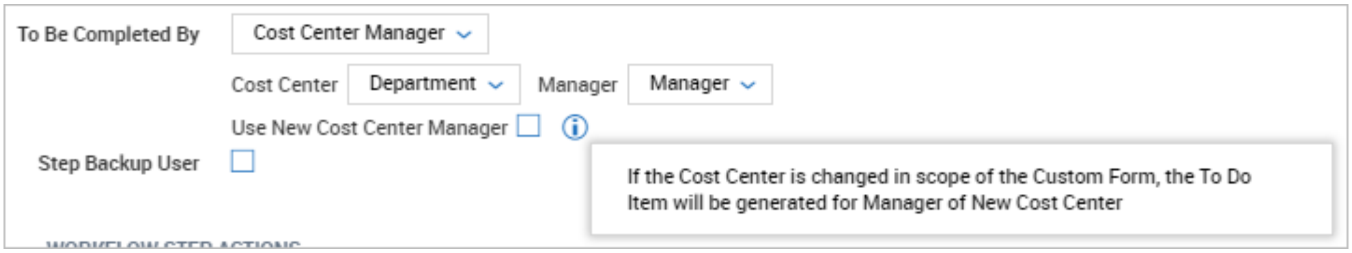
EIN Name	Default Jobs (HR)	Terminated	Active	Leave of Absence	Turn Over Rate, %
Kronos - Lowell	Receptionist	0	12	0	0.00
Kronos - Lowell	President	2	9	0	18.18
Kronos - Lowell	Test2For61332	0	5	0	0.00
Kronos - Lowell	Job Test	0	15	0	0.00
Kronos - Lowell	Accounting Manager	1	18	0	5.26
Kronos - Lowell	Test3For61332	0	3	0	0.00
Kronos - Lowell	Engineer	2	3	0	40.00
Kronos - Lowell	Manager	0	1	0	0.00
Kronos - Lowell	Representative	1	1	0	50.00
Kronos - Houston	Engineer	0	1	0	0.00
Report Total		6	68	0	8.11%

Workflows

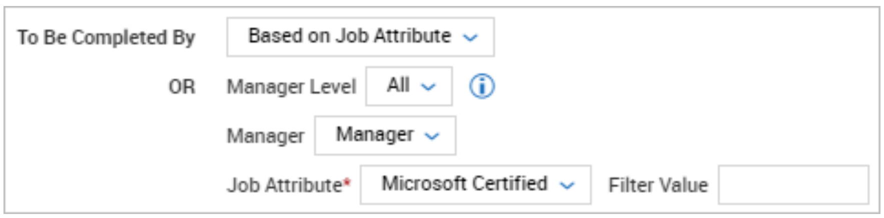
Custom Form Workflow: Options Added to Approve/Reject Step (Classic UI & New UI)

102918: Within the ***To Be Completed By*** field of the ***Approve/Reject*** step of an Employee Custom Form workflow, additional options of ***Cost Center Manager*** and ***Based on Job Attribute*** have been added.

When selecting ***Cost Center Manager***, additional fields will display allowing you to select the Cost Center and Manager (Manager, Manager 2, Manager 3.) Another option to route the workflow to a new cost center manager is also available and contains an info icon explaining the setting.



When selecting ***Based on Job Attribute***, additional fields will display allowing you to select the Manager Level, Manager (Manager, Manager 2, Manager 3) and Job Attribute. You can optionally add a Filter Value to the Job Attribute. When selecting a manager level, the To Do Item will be assigned to the person within the manager hierarchy that matches the specified job attribute or the manager level, whichever is first.



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

New UI: HR Updates

Table of Functionality Added to Pages

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

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
106408	ACA	Form 1095-C	*My Info > My HR > Forms > Government Forms > 1095-C*	Electronic Consent	Yes	Yes
88220	HR	Recruitment	*To Do Items*	*Hiring Stage Change Request* workflow To Do Item – View Job Application, Approve/Reject, Approve Automatically	Yes	Yes

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
113818	HR	Comp. Mgmt. Module	*Manager To Do Items*	*Approve, Reject,* Compensation To Do Items *Modify, Finalize, Save, Delete* Compensation Proposal Request	Yes	Yes
113818	HR	Comp. Mgmt. Module	*Team > Compensation > Reports > Manager Budget*	Report now available in Mobile	Prev .Ava il.	Yes
113818	HR	Comp. Mgmt. Module	*Team > Compensation > Reports > Process Results*	Report added to New UI Mobile	Prev .Ava il.	Yes
113818	HR	Comp. Mgmt. Module	*Team > Compensation > Budget*	View/Edit Overall Budget	Yes	Yes
113818	HR	Comp. Mgmt. Module	*Team > Compensation > Proposals*	View/Edit Proposals Mass Approve	Yes	Yes
113818	HR	Comp. Mgmt. Module	*Team > Compensation > Proposal To Finalize*	View/Edit All Actions Finalize	Yes	Yes
113818	HR	Comp. Mgmt. Module	*Team > Compensation > Worksheet*	View/Edit All Actions Send for Approval	Yes	Yes

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
96821	HR	HR Reports	*My Info > My Reports > HR Reports > Employee Maintenance > Detailed Rates*	Delete one or more rate table entries	Yes	Yes
96821	HR	Employee Maintenance Reports	*My Info > My Reports > HR Reports > Employee Maintenance > All HR Action Requests*	**View Applicant** (row level icon)	Yes	Yes
96821	HR	Employee Maintenance Reports	*My Info > My Reports > HR Reports > HR Maintenance > Employee Headcount*	Employee Headcount report added	Yes	Yes
96821	HR	Employee Maintenance Reports	*My Info > My Reports > HR Reports > HR Maintenance > Cost Centers Accessible To Employee*	View Accounts assigned to a Cost Center Level	Yes	Yes
97904	HR	My Company	*My Info > My Company*	Added: Announcements Events	Yes	Yes
105969	HR	Government Forms	*Team > HR > Forms > Government Forms > Vets 100*	MSS *Download PDF*	Yes	Yes
120932	HR Recruitment	Applicant Checklists	*Team > Recruitment > Pre-Boarding > Applicant Checklists*	*Desktop Only* View Available Button Will redirect users to Checklists maintenance page in *Company Settings > HR Setup > Checklists*	Yes	No

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
120932	HR Recruitment	Applicant Checklists	*Team > Recruitment > Pre-Boarding > Applicant Checklists*	**Row Level Icons**: View/Edit Applicant Checklist View Checklist Items View Applicant Availability & Preferences **Buttons**: **Multiple Selections** Assign New View Available View Selected Delete Selected	Prev. Avail.	Yes
119718	HR Recruitment	Job Applications	*Team > Recruitment > Candidates > Job Applications*	*View Text Resume* icon Added to Job Applications Report Page	Yes	Yes
131012	HR Marketplace	Everything Benefits	*Team > Benefits > EverythingBenefits*	An inline warning message added: "This report will be moved to *Admin > Company Settings > Marketplace > EverythingBenefits in the December release.*"	Yes	Yes

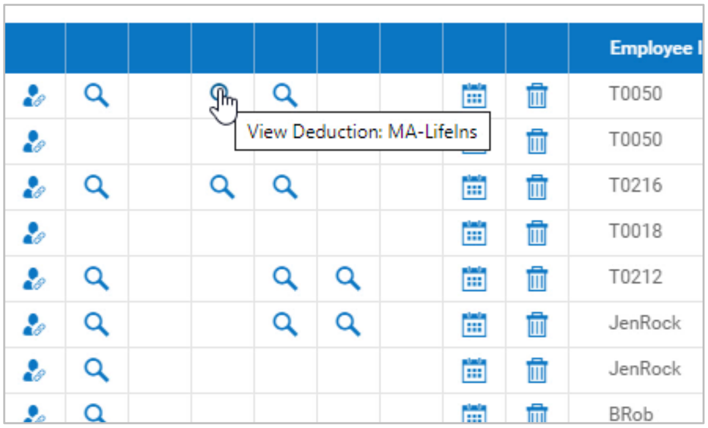
New UI: Benefits

In this release, we are rolling out New UI pages and functionality for benefit plans for both desktop and mobile experiences.

Benefit Plans: Viewing Scheduled Deductions and Earnings in the New UI (Mobile & Desktop)

106674 & 106675: The *View Scheduled Deduction* and *View Scheduled Earnings* icons in the employee Benefit Plans report page (*Team > Benefits > Benefit Plans*) now displays the name of the specific deduction or earning tied to the employee's benefit plan, in the tool tip text that appears when hovering your mouse over the icons.

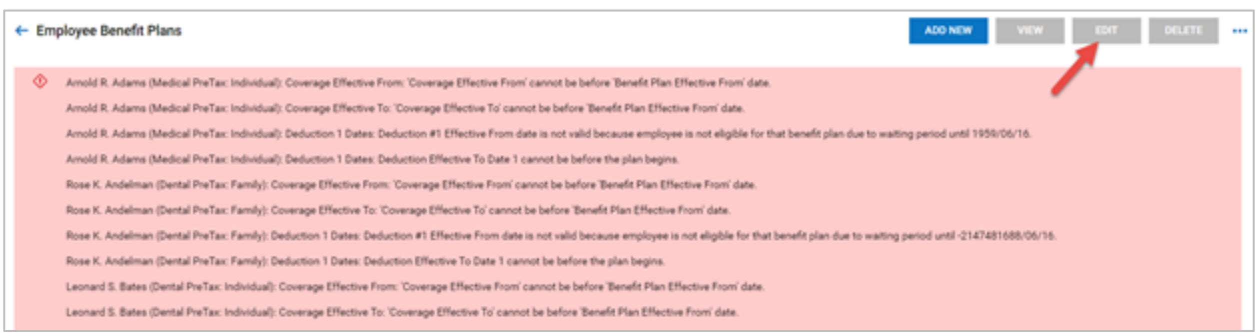
- For example: A deduction named *MA-LifeIns* will appear in the hover text as *View Deduction: MA-LifeIns.*

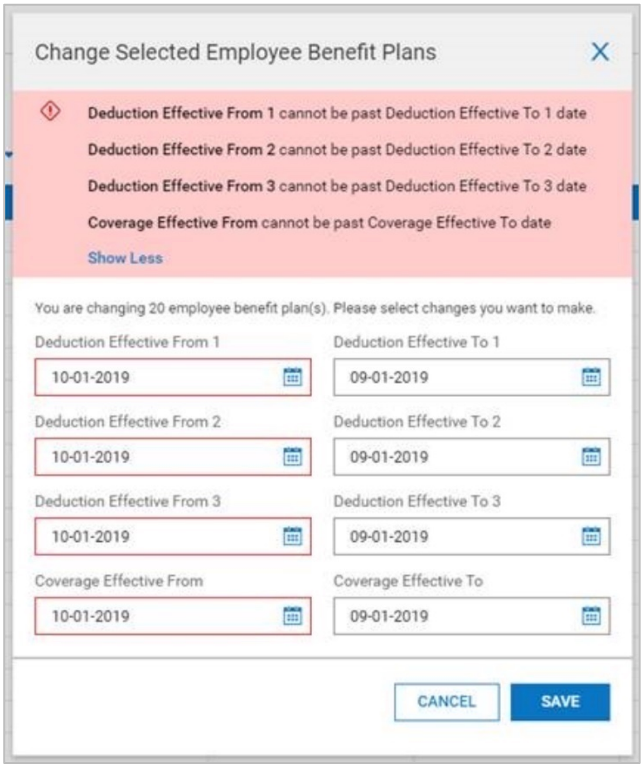


Benefit Plans: Mass Editing Benefit Plans in the New UI (Mobile & Desktop)

106670: If the *Edit* action (formerly *Mass Edit* in the Classic UI) is applied to selected benefit plans from the Benefit Plans report page (*Team > Benefits > Benefit Plans*) and date changes produce an error for one or all of the selected plans upon pressing save, these plans will not update with these changes. Inline error messages will appear on the Benefit Plans report page indicating which specific error blocked the update.

If the *To* date comes before the *From* date for Coverage and Deductions 1|2|3, the error will be captured and displayed inline in the pop-up.



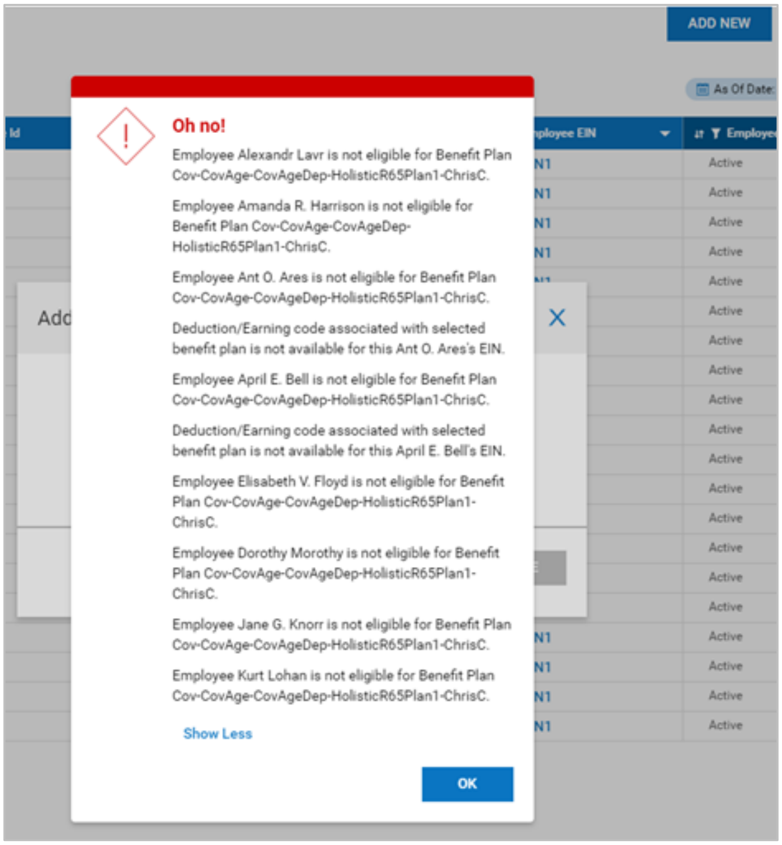


Benefit Plans: Adding New Benefit Plans in the New UI (Mobile & Desktop)

106673: When accessing the employee Benefit Plans report page (*Team* > *Benefits* > *Benefit Plans*) and using the *Add New* action, any errors that block adding a plan will be shown in a pop-up after saving. Any successfully added plans are shown in a carousel. If some plans are blocked from being added and others are successfully created, then upon clicking Ok in the error pop-up, the successfully added plan(s) will be presented.

If all plans are blocked from being added, after pressing Ok in the error pop-up the *Add New* pop-up will appear again allowing the selection of employee(s), effective date, and the plan and coverage to be modified.

NOTE: In the Classic UI, added plans had to be saved after the add new process. In the New UI, just-added plans do not need to be saved as they are automatically created after the Add New action is successfully completed.



Benefit Plans: New User Experience Benefit Plan Custom Field Default Value Behavior (Mobile & Desktop)

110903, 117225, 123228, & 135194: When a benefit plan is created for one or more employees using the *Add New* action from the employee Benefit Plans report page (*Team* > *Benefits* > *Benefit Plans*), any enabled custom fields for the plan will handle default values according to the table displayed below.

When on the Edit Benefit Page, if the inputted value for a Character's custom field is more than the maximum length, an error is shown upon saving the plan.

Field type	Behavior in New User Experience	Comparison with Classic UI
System Account	If a System Account custom field contains a default value that does not exist, then the default value will be cleared and the custom field in the employee's benefit plan will be empty.	New User Experience = Classic UI
Link	Any inputted default value is displayed without issue in the custom field.	New User Experience = Classic UI
Characters	Any inputted default value is displayed without issue in the custom field.	New User Experience = Classic UI
Date	If a Date custom field contains a default value with invalid symbols, such as letters, then the default value will be	New User Experience = Classic UI

	cleared and the custom field in the employee's benefit plan will be empty.	
Email	If an Email custom field contains a default value without "@", then the default value will be cleared and the custom field in the employee's benefit plan will be empty.	Allows for a benefit plan to be saved with an invalid email without @.
Integer	If an Integer custom field contains a default value with invalid symbols, such as letters, then the default value will be cleared and the custom field in the employee's benefit plan will be empty.	New User Experience = Classic UI
Time	If a Time custom field contains a default value with an invalid separator ("." or "," instead of ":"), then the default value is either converted or will be cleared and the custom field in the employee's benefit plan will be empty.	Modifies default value, i.e. "5.10" will be changed to "5:06". Completely invalid symbols (e.g. letters) are cleared.
Currency	If a Currency custom field contains a default value with a comma separator "," instead of a decimal ".". then the value will be converted, for example: "70,67" to "7067" "100,00" to "10000", "1,000,00" to "100000", etc. If a Currency custom field contains a default value with letters, then the default value will be cleared and the custom field in the employee's benefit plan will be empty.	New User Experience = Classic UI
Numeric	If a Numeric custom field contains a default value with comma separator "," instead of a decimal ".", then the value will be converted, for example: "45,66" to "4566" "100,00" to "10000" "1,000,00" to "100000", etc. If a Numeric field contains a default value with letters, then the default value will be cleared and the custom field in the employee's benefit plan will be empty.	New User Experience = Classic UI
List: Select, System Account, Link,	If a List custom field for these field types contains a default value which does not	New User Experience = Classic UI

Characters, Date, Currency, Email, Integer, and Numeric	exist in the list then the default value is saved. However, when a user edits an employee's benefit plan, upon saving the plan a validation error will be displayed.	
List: Time	If a List custom field for these field types contains a default value which does not exist in the list then the default value is saved. However, when a user edits an employee's benefit plan, upon saving the plan a validation error will be displayed. Only valid format is "00:00", eg "02:55", "2:55" is not valid.	New User Experience = Classic UI

Benefit Plans: New User Experience Benefits Child Premium Calculation Behavior

118667: When a benefits administrator adds dependents to an employee's plan and the user possesses *View/Edit* permissions to *Benefit Children Premium Calculation* and *Benefit Management (Plans)*, the application automatically identifies dependents based on the *Number of Children Included In Premium Calculation* setting and the *Age Preference* rule of *Younger to Older* or *Older to Younger*.

If a plan with these settings already existed in the Classic UI and the benefits administrator removes one or more existing dependents from the premium calculation consideration, an inline message will be displayed stating, "*Include in Premium selection rule was overridden. Please identify Children to include in premium*." This means removing an existing dependent provides custom control of child premium selections for child dependents that are not restricted by the *Age Preference* rule.

Example of View/Edit Permissions Behavior*:*

A benefit plan already exists with three children. One is 22 years old, one is 23 years old, and the third is 24 years old. The plan configuration only allows 3 children to be included in the child premium calculation. In the New User Experience, the benefits administrator de-selects the child who is 24 years old from the child premium calculation consideration. At this point, the "*Include in Premium selection rule was overridden. Please identify Children to include in premium.*" message appears because the *Age Of Preference* rule has been overridden from automatically selecting who is included. This provides you with control to include other child dependent(s), which will replace those removed from the child premium calculation.

If the given user only has *View* permissions to *Benefit Children Premium Calculation*, the user can't modify the default selection of child dependents included in the child premium calculations. These dependents will only be verified as included in the child premium calculation upon saving the plan.

Once the plan is saved, only newly added dependents will be automatically identified as included in the premium according to the *Age Preference* rule and checkboxes will be enabled accordingly. Existing dependents will not be removed even if they no longer qualify for inclusion into the child premium calculation based on the *Age Preference* rule.

Example of View Only Permissions Behavior:

According to the plan configuration, up to three children can be included in the child premium calculation. The *Age Preference* rule is set to *Younger to Older*. Initially, the benefits administrator adds 2 children who are 20 years old and 17 years old. Upon saving, both will be included in the premium.

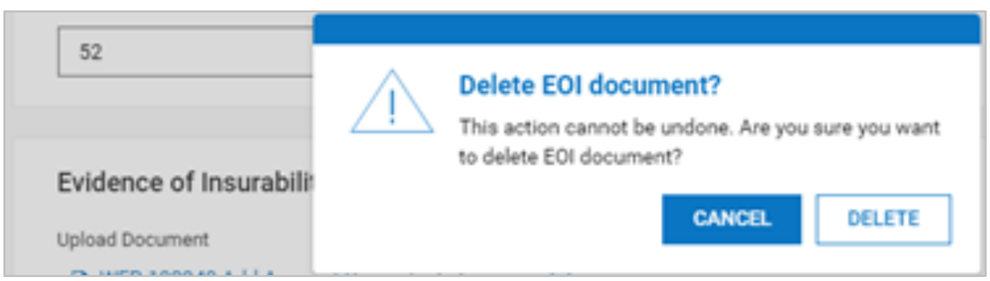
The benefits administrator then adds 2 more children, 5 years old and 1 years old. These two newly added children are processed against the *Age of Preference* rule. As a result of the processing, only the 1 year old child is included in the child premium calculation, since the 1 year old child is younger than the 5 year old child. This child dependent is added to the previously included children (20 years old and 17 years old). As a result, the children who are 20 years old, 17 years old, and 1 years old will be included in the child premium calculation for the plan.

Benefit Plans: Change to EOI Document Behavior (Mobile & Desktop)

110906: In the New User Experience, when the Integrated Document Storage marketplace product is disabled for a company, any previously uploaded Evidence of Insurability documents will still be available to download, but they cannot be deleted, and new documents cannot be uploaded.

Benefit Plans: EOI Document Downloads if Integrated Storage is Turned Off (Mobile & Desktop)

124950: If an employee's benefit plan contains an Evidence of Insurability document, upon pressing delete, a confirmation message will now appear confirming the deletion.



Benefit Plans: Expiration Dating of EOI Documents (Mobile)

120520: In the August 2019 system release, we made available functionality for EOI documents provided by employees to be periodically renewed. We added a new *EOI expires* field within the *Evidence Of Insurability* section of benefit plans. In that system release, this was made available for the Classic UI and the Desktop experience within the New UI. In the release, we are adding this functionality to the Mobile experience within the New UI.

For more details, please reference the HR August 2019 release notes, and search for 15610.

Benefits: Employee Update of Beneficiaries Between Enrollment Periods (Mobile & Desktop)

98656: Employees will now have the ability to update their benefit plan beneficiaries any time between enrollment periods. Employees will not have to register a Life Change Event to change beneficiaries or wait for an enrollment period.

For example, Sue Smith has her niece as her sole beneficiary to her life insurance plan. Her sister has a second child and Sue wants to split the life insurance benefits between both children. Sue can now update her beneficiaries at any point and is not required to wait until the next enrollment period.

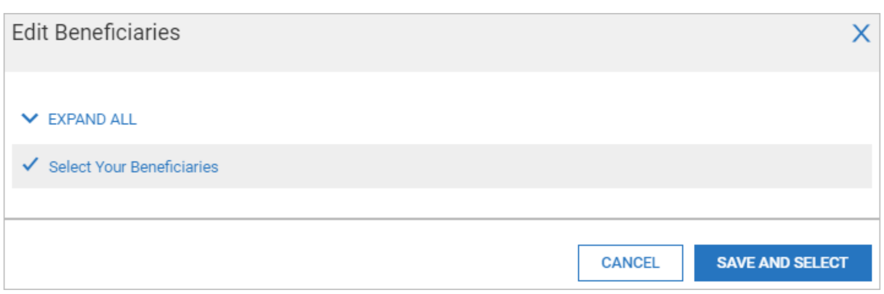
For employees to be able to do this, their security profiles must be set with the ***Edit Beneficiaries Between Enrollment Periods*** setting. This is located in the *Benefits* section of the *ESS* tab.

Employees will then access their benefit plans under *My Info > My Benefits > Benefit Plans*.

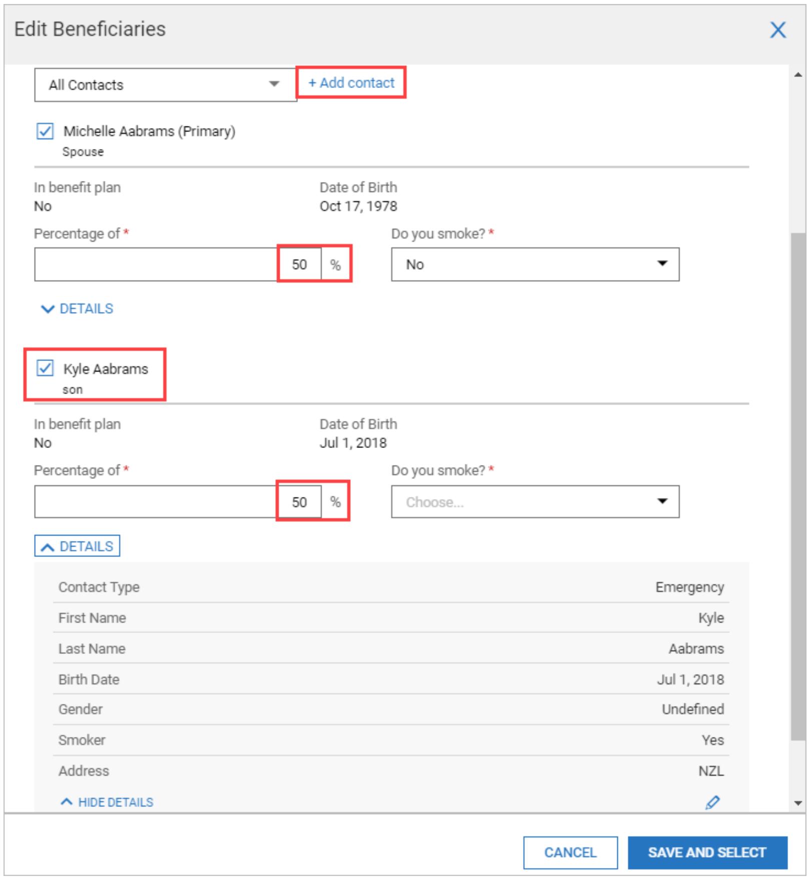
An ***Edit Beneficiaries*** edit icon is available in the Review/Edit Benefits screen next to benefit plans where beneficiaries are enabled in the benefit plan.

Clicking this button will present a pop-up where employees will choose an effective date for the change. The date must be for current or future dates.

After clicking Save on the effective date pop-up, the employee will be presented the ***Edit Beneficiaries*** pop-up where they can click the link for ***Select Your Beneficiaries***, or if contingent beneficiaries have also been selected on the employee's assigned benefit plan, a link for contingents will also be available.



Once employee clicks one of the links, another ***Edit Beneficiaries*** pop-up will open. Current beneficiaries are shown with boxes checked and current percentages populated. Employees can edit beneficiary information here by changing percentages for existing beneficiaries and/or adding new beneficiaries by clicking the Add Contact link and creating a new beneficiary. After clicking *Save And Select*, the new selections will be applied.



New UI: HR Actions

Bradford Factor Profile Added (Mobile)

117252: When hiring an employee via an HR Action, the ***Bradford Factor Profile*** HR Action Item is now available and supported in the New UI Mobile experience. This is valid for *My Employee Action Request* using sub-types Regular, Hire, Re-Hire, and Termination. HR Actions can be configured under *Company Settings > HR Setup > HR Actions*.

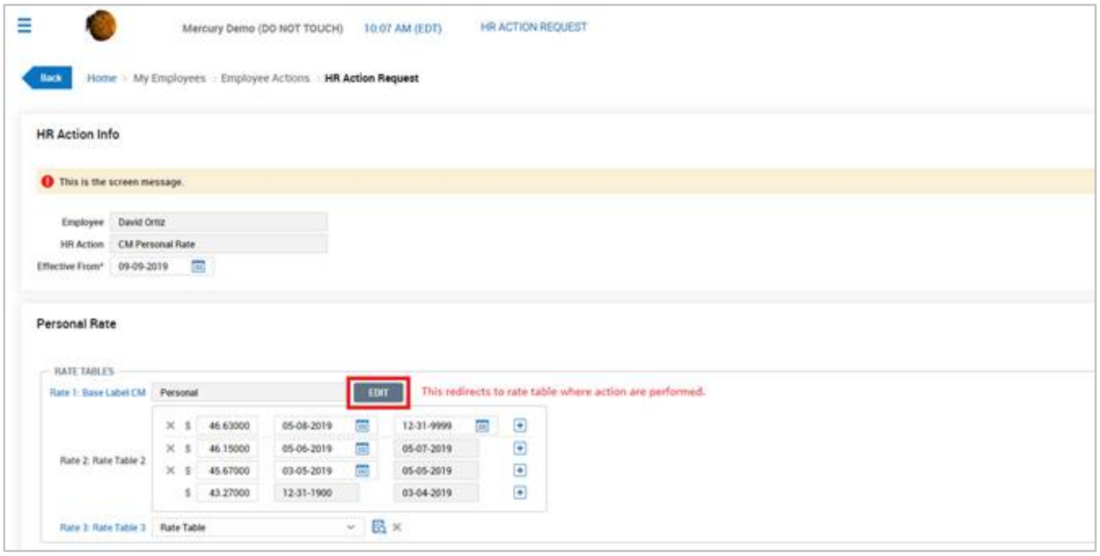
Personal Rate Table (Mobile & Desktop)

125722: The ***Personal Rate Table*** HR Action Item is now available and supported in the New UI. This is valid for *My Employee Action Request* using sub-types Regular, Hire, Re-Hire, and Termination. This action item will update the *Personal Rate Table* widget in employee accounts. HR Actions can be configured under *Company Settings > HR Setup > HR Actions*.

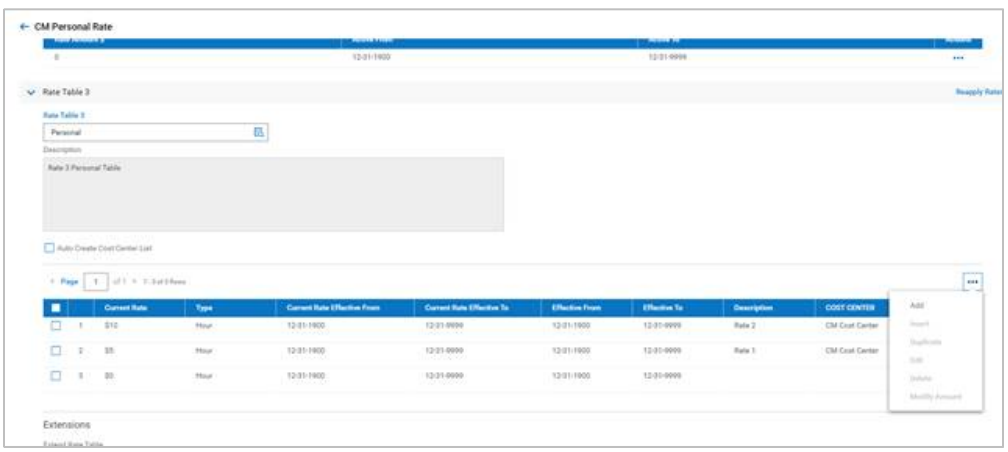
Personal Rate Table (Mobile & Desktop)

66463 (EPIC): In the New UI, in both the mobile and desktop experiences, the Personal Rate Table has been converted into the New UI. In the New UI, HR Actions containing the Personal Rate Table, will allow users to complete the personal rate table without being redirected to a different page to complete the task.

Classic UI HR Action – The Edit button must be clicked and redirects to the rate table where actions are taken.



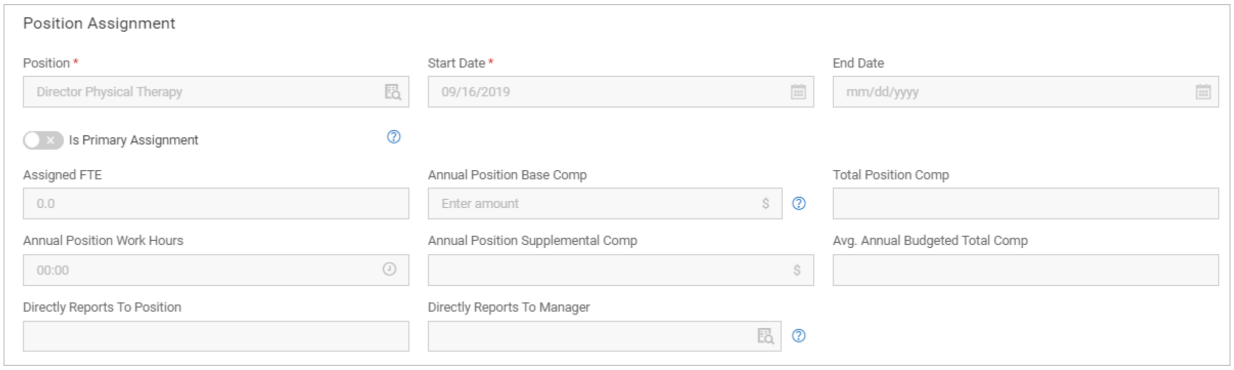
New UI HR Action – No Redirect. The table and all its actions are available in the HR Action.



Position Assignment Added to Hire HR Action (Mobile & Desktop)

65237 & 65240: A new ***Position Assignment*** HR Action Item is now available and supported in the New UI. This is valid for *My Employee Action Request* using sub-type Hire. HR Actions can be configured under *Company Settings > HR Setup > HR Actions*.

In the New UI, users can start a Hire HR Action and when the new *Position Assignment* action item has been added to the action being used, users can input the position assignment details in the new *Position Assignment* widget prior to saving/submitting.

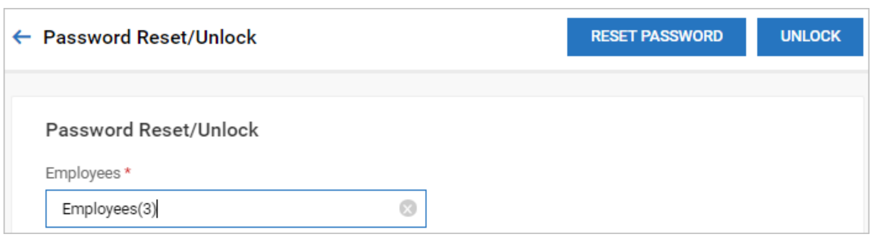


NOTE: In the New UI Mobile environment, an HR Action can be initiated from the *Available* tab of the HR Action page. This can be done in two ways:

- Employees can initiate an HR Action from *My Info > My HR > HR Actions*.
- Managers can initiate an HR Action from *Team > HR > HR Actions*.

New UI: Password Reset/Unlock Added to HR Menu (Mobile & Desktop)

125934 & 127196: In the New UI, managers can now reset passwords and unlock employee accounts from a new combined Password Reset/Unlock option. Users can select one of more employees and select either the Reset Password button or the Unlock button. The option is located under *Team > HR > Employee Maintenance > Password Reset/Unlock*.



New UI: Performance Management Goals

Goals Without Date Available for Performance Reviews (Mobile & Desktop)

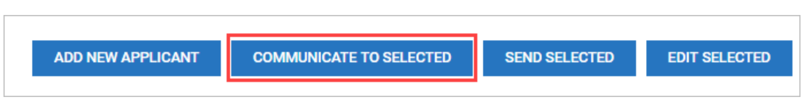
126714: Within Performance Development, if goals are created without dates (date fields blank), they will now be available for selection when adding employee goals. Goals can be added from the *Entry* tab of Performance Reviews and includes Personal, Shared and Company goals.

New UI: Recruitment

Email Label Changes (Mobile & Desktop)

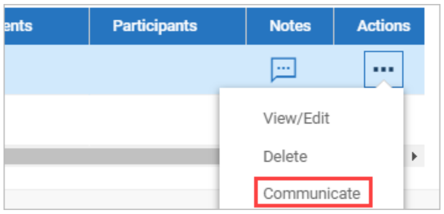
Within the Recruitment module, changes have been made to the terms/labels for *Email* and *Email To Selected*. The *Email* term has been updated to *Communicate*. These labels are found in communication areas related to applicants and job applications.

Applicants report page under *Team > Recruitment > Candidates > Applicants*



Viewing applicants under *Team > Recruitment > Candidates > Applicants*

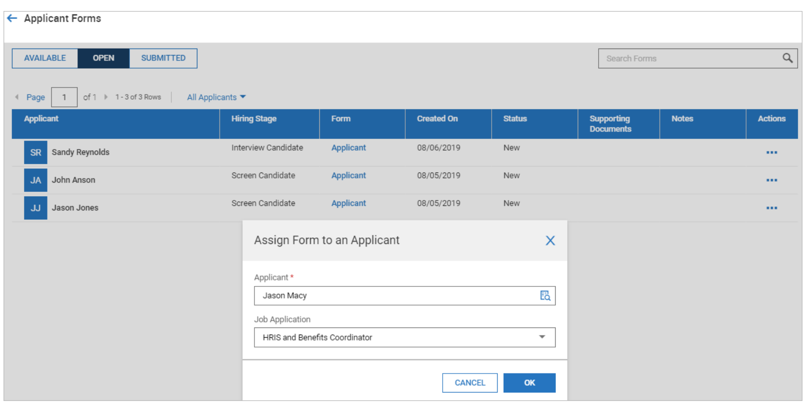
Viewing applicants – *Interviews* widget action ellipses under *Team > Recruitment > Candidates > Applicants*



Job Applicants report page under *Team > Recruitment > Candidates > Job Applications*

Job Applications: Selection Added to Assign Another in Open and Submitted Tabs (Mobile & Desktop)

115149: In the August 2019 system release, we added the option for users to select a Job Application when assigning an applicant a custom form under *Team > Recruitment > Pre-boarding > Applicant Forms*. There is an option, *Assign Another*, that users can access under the *Actions* ellipses to add another custom form to any applicant. In this release, we are adding the ability to select a Job Application when assigning an applicant to a custom form under this option as well, which is available under the Open and Submitted tabs.

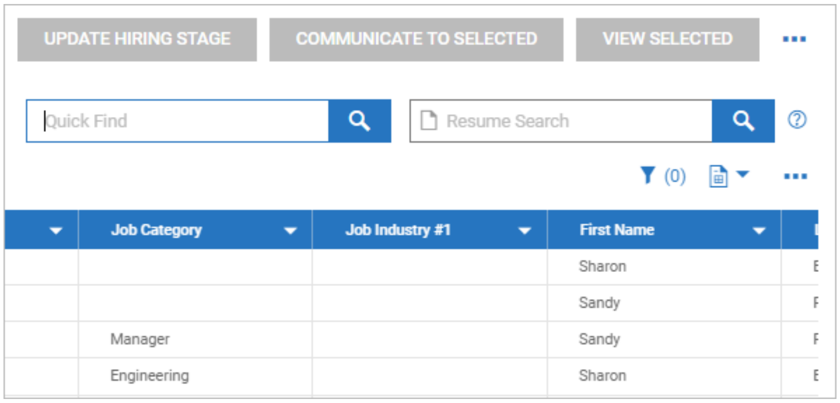


When selecting a Job Application from the drop-down list, the following will occur.

- If applicant applied for the selected job application, the information from the job requisition will pre-populate with the job requisition information.
- If applicant did not apply for the selected job application, nothing will populate.
- If applicant applied for multiple jobs, a lookup list will be available so users can select the correct job requisition.

Job Applications: Quick Find Added to Job Applications Page (Mobile & Desktop)

119717: A new ***Quick Find*** box on the Job Applications page has been added. This is available under *Team* > *Recruitment* > *Candidates* > *Job Applications*. This option will search the candidates based on the same functionality as the Quick Find option on the Applicants page.



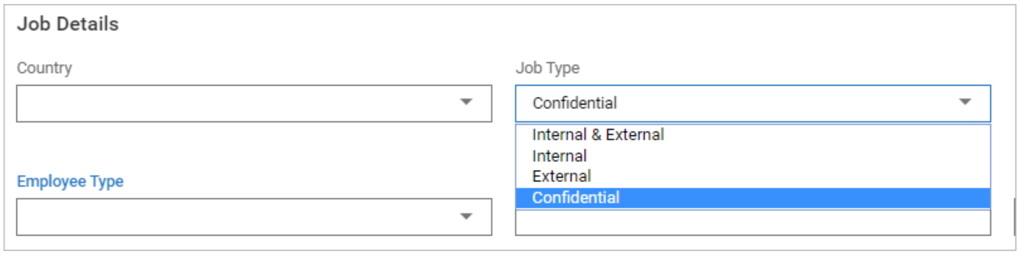
The fields include:

- First Name
- Last Name
- Applicant Hiring Stage
- Character Traits
- Objective/Summary
- Other Skills
- Custom Fields
- Company name(Professional References Section)
- Contact FullName(Professional References Section)
- Job Title, CompanyCity, CompanyName, CompanyType and position's brief Description (Work Experience Section)
- Skill Name

Job Requisitions: Confidential Job Requisition Functionality Added (Mobile & Desktop)

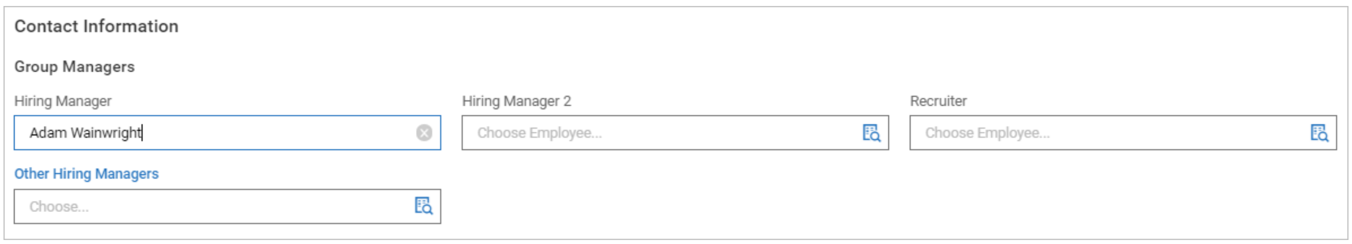
5154: Because some job requisitions may be sensitive, or are defined for high level job openings, we have added new functionality for Managers/Recruiters to create job requisitions as confidential. A Manger/Recruiter can add an applicant to a confidential job requisition and/or notify an applicant of the confidential job requisition providing the applicant with a communication containing a URL specific to the job which can then review and/or apply.

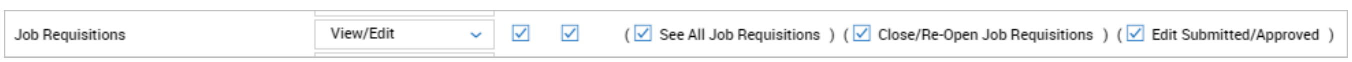
Within the ***Job Details*** widget of job requisitions, we have added a new ***Job Type*** of ***Confidential***. This designation will mark this requisition as being unique and allows you to handle it differently from *Internal* and *External* requisitions.



In the confidential job requisition, you must have at least one hiring manager listed. This manager will see the confidential requisition (with the appropriate security permissions described below.)

Note that hiring managers listed on a job requisition can see only the requisitions for which they are listed as a hiring manager unless they have the *See All Job Requisitions* setting enabled in their security profile under the *Recruitment* section under the *HR* tab of security profiles.



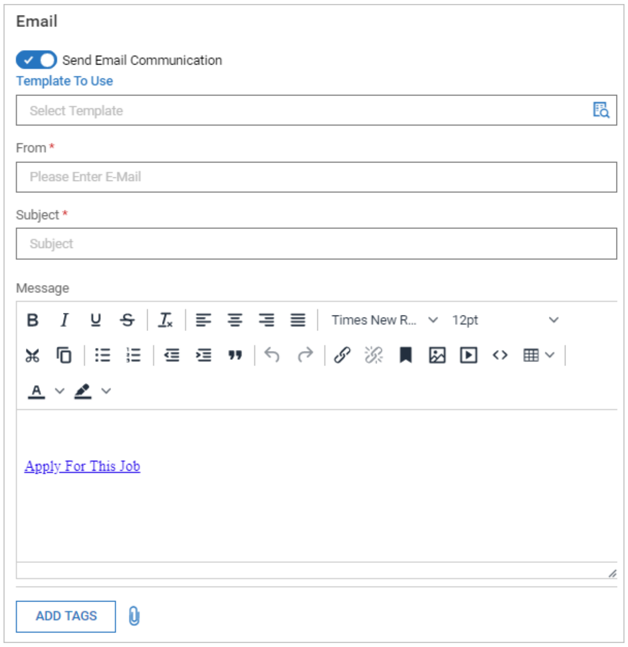


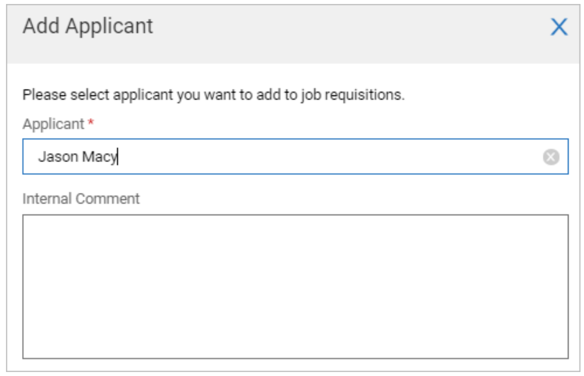
Security Setting for Confidential Job Requisitions

A new security setting has been added to control whether users can view or edit a confidential job requisition. The new setting is named ***Job Requisition Confidential*** and can be set to *View* or *View/Edit*. It is located in the *Recruitment* section under the *HR* tab of security profiles.

Adding & Communicating With Applicants

Within a job requisition (opened for editing), users can select ***Add Applicant*** which will add the selected applicant to the *Job Applications* report page. Users can also notify applicant(s) of a job requisition by selecting the ***Notify Applicant*** button . Users will select an applicant, select a communication method, complete the information, and then send. The applicant will receive an email inviting them to apply for the job.





Apply Link & Communications

In the Communication, an *Apply For This Job* link is automatically generated and added to the *Message* section of the communication. A customized message can be typed, or a notification template can be applied. If using a template, the *Apply For This Job* link can be copied/pasted into that template.

When the applicant receives the communication with the *Apply For This Job* link, and then clicks the link, they will have to log in with their User Name and Password to view the job and/or apply.

Only the direct recipient of the communication containing this URL will be able to see and apply for the confidential job.

New UI: Reports

Applicant Info Audit Report Added (Mobile & Desktop)

129952: For users of the Recruitment module, a new audit report for applicant information has been added to the system. This report allows users to determine how an applicant's notification preferences have changed, which can allow them to troubleshoot issues with notifications not being delivered. Additionally, changes to addresses, email addresses, profiles and more can be tracked.

- The report is located under: *My Info > My Reports > System Reports > Audit Trail > Applicant Info*

Position Management: Position Assignment History Audit Report Added (Mobile & Desktop)

127580: For users of Position Management, a new position assignment history audit report has been added to the New UI and is available in both the mobile and desktop experiences. The report is located under *My Info > My Reports > System Reports > Audit Trail > Position Assignment History*. The report will show the audit history for changes made to position assignments.

When users navigate to this report directly, the default will be set for all assignments and will show any changes made that day (i.e. date file is set to Today). When users navigate to this report via the

Assignments to Positions widget on the Employee Profile, it will be pre-filtered for that particular employee.

Worker Type Added to Turnover Statistics Report (Mobile & Desktop)

111203: To assist HR Administrators in examining their company's turnover statistics, a new option to view terminated employees by worker type has been added to the Turnover Statistics report. The report is located under *Team > HR > Reports > Turnover > Turnover Statistics*.

Under the Gear icon in the report, in the *Termination* section, we have added ***Terminated By Worker Type***. When checked, this data will be included in the *Summary* section of the report and will pull the worker type from the terminated employee's account.

Terminated By Worker Type

Metrics	Count	Percent	Avg. Length
Employee	1	25.00 %	5.37
Seasonal Worker	1	25.00 %	5.34

New UI Workflow

Job Requisition Workflow: Approvals Based on Managerial Hierarchy (Mobile & Desktop)

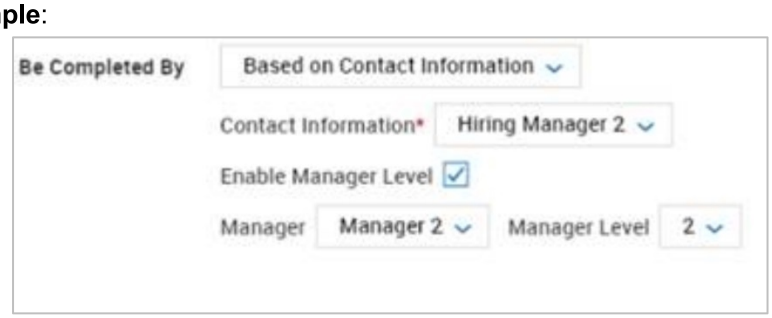
99144: When creating a Job Requisition Workflow, users will now be able to see and select the hiring managers configured and enabled under the *Configuration* page of Recruitment and selected in each Job Requisition. The manager hierarchy (Manager, Manager 2, etc.) can also be set. These selections will help ensure the proper individuals are part of the approval process for the Job Requisition in which the workflow is attached.

In the *To Be Completed By* field of the *Approve/Reject* step, when selecting *Based on Contact Information*, the hiring managers fields from the Configuration page will display.

- In the Job Requisition, managers are assigned to those fields. When making a selection in the workflow, i.e., selecting *Hiring Manager*, the user (Brad White, in our example) will receive the Job Requisition for approval/rejection.

Checking the *Enable Manager Level* in the workflow will route to the level specified for approval.

Example:



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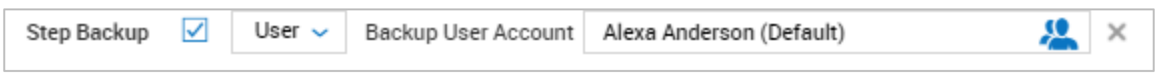
- In the example above, Manager 2 has been selected, Manager Level 2 of Hiring Manager 2 in the workflow approval step.
- In this case Breanna Green is the Hiring Manager 2 in the job requisition.
- Based on the example hierarchy below, Aaron Aabrams is Manager 2, Level 2 of Breanna Green who is the hiring Manager 2 in the Job Requisition, therefore, Aaron Aabrams should be the approver and receive the To Do Item.
  - **Sally Jones (Level 3) -** Manager 2 of Aaron Aabrams
  - **Aaron Aabrams - (Level 2)-**Manager 2 of Bryan Adams
  - **Bryan Adams - (Level 1)** Manager 2 of Breanna Green
  - **Breanna Green**- <u>Hiring Manager 2 in Job Requisition</u>

Enable Dynamic Workflow can also be enabled and allows an approving manager to be skipped if their account status is set to “Is Terminated” or “Not in Payroll” where the To Do Item moves to the next available manager in the hierarchy. IF, in the same example above, Aaron Aabrams is terminated and Dynamic workflow is enabled, approval would then go to Sally Jones for approval since Sally Jones is Manager 2 of terminated Aaron Aabrams.

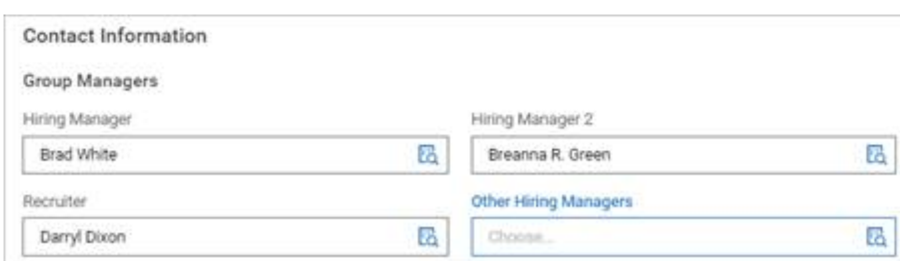
Step Backup can also be enabled. In the same example above, if Bryan Adams does NOT have a Manager 2 on his record (Manager 2 field is null for Bryan Adams), if step backup user is enabled and a Backup User Account selected, the To Do Item/Approval should go to the step backup user (Alexa Anderson in the case below):



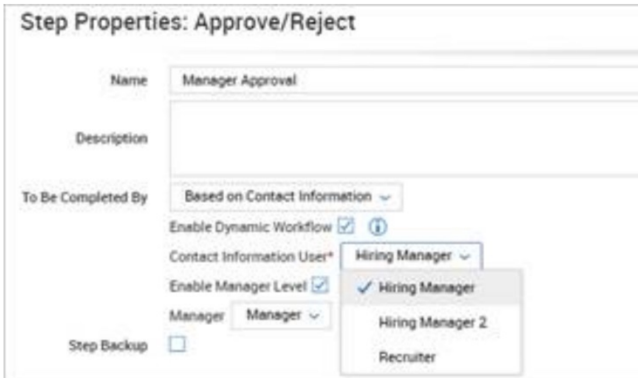
– These settings are optional. You can use just the Hiring Manager options in the *Contact Information User* drop-down if only that manager needs to approve/reject the Job Requisition.

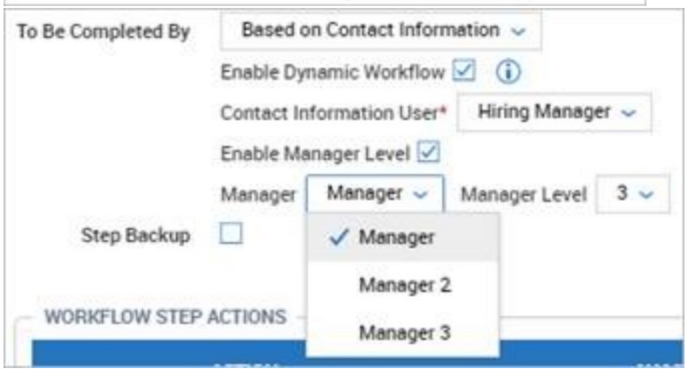
Configuration Page of Recruitment – Hiring Managers enabled

Job Requisition – The enabled Hiring Managers are selected



In the Job Requisition Workflow – The Hiring Managers and Manager Levels are available when selecting *Based on Contact Information* in the *To Be Completed By* field.





Time and Labor

Basic Scheduling Scheduler Overview Screens Consolidated (Classic UI & New UI)

134215: From Basic Scheduling's *Schedule Overview*, the menu options *Overview*, *Overview (Monthly)*, and *Overview (Weekly)* will be consolidated to *Schedule Overview* in December of 2019.

The following deprecation messages have been added to the *Schedule Overview* page:

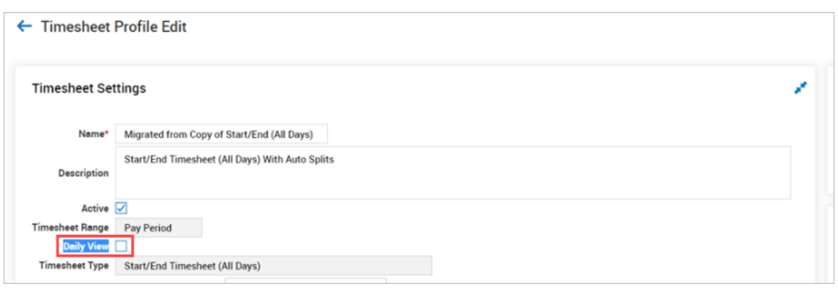
- *Schedule Overview – Is no longer supported. In December this option will be removed from the product and no longer available.*
- *Schedule Overview Weekly – Is no longer supported. In December this option will be removed from the product and no longer available.*
- *Schedule Overview Monthly – Is no longer supported. In December this option will be removed from the product and no longer available.*

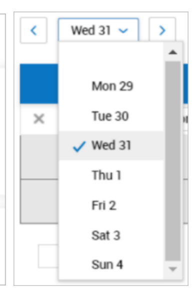
Copy Rates Added as New Option for Guaranteed Minimum Hours Pay Calc 2 Rule (Classic UI & New UI)

135607: A new option, *Copy Rates*, has been added to the *Guaranteed Minimum Hours* rule for Pay Calc 2 companies so that the extra flat rate will pick up the counter amount correctly in the expression. Previously, *Extra Flat Pay Based On Expression (Counters)* was not applying correctly if the setting *Use Applied Rate If Greater Than Min Wage* in the *Apply Minimum Wage to Counter* rule was enabled.

Day View of Classic Timesheet (Classic UI & New UI)

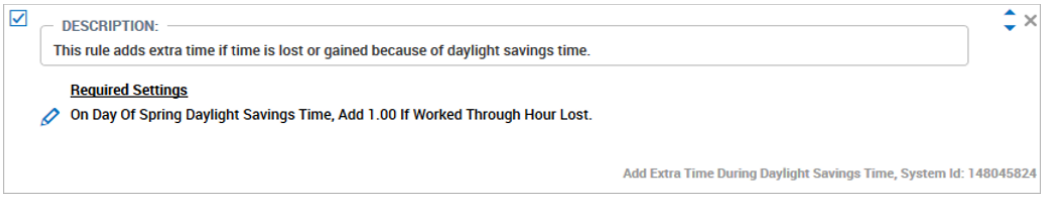
128840: A new *Daily View* setting for the *Start/End (All Days)* Timesheet profile is available on the *Timesheet Profile Edit* page within the *Timesheet Settings* section. When *Daily View* is enabled, the Timesheet tab will display one day at a time, and you can select days in the Timesheet range from the drop-drown, select a day from the calendar, or scroll through each day. When you do select a day, you will be navigated to the daily view of the selected day.



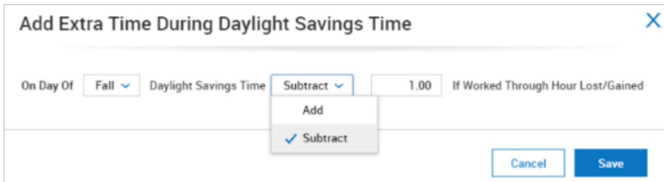


Give Full Scheduled Hours During Daylight Savings Time (DST) (Classic UI & New UI)

118556: For Pay Calc 2 companies, a new rule, *Add Extra Time During Daylight Savings Time*, has been added to automatically extend or reduce the employee's scheduled shift on DST day. If an employee is set up with a schedule that will auto-populate the time and the employee's schedule crosses the DST change, this rule will calculate the employee's full hours.



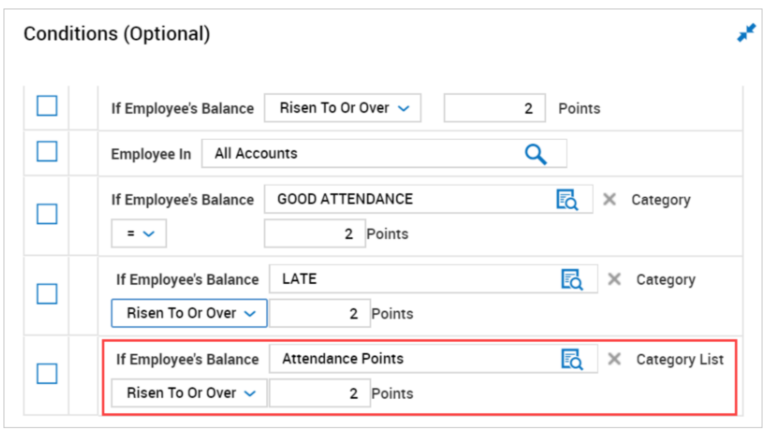
You can select *Spring* or *Fall*, then *Add* or *Subtract* for the time entered in the *If Worked Through Hour Lost/Gained* field.



Global Notifications

Condition Based on Point Category List (Classic UI & New UI)

121248: A new option has been added within the *Conditions (Optional)* widget from *Company Settings > Global Setup > Notifications*. You now can select a point *Category List*. Click the search *View Point Category Lists* icon next to *If Employee's Balance*, and the *Point Category Lists* window will display.

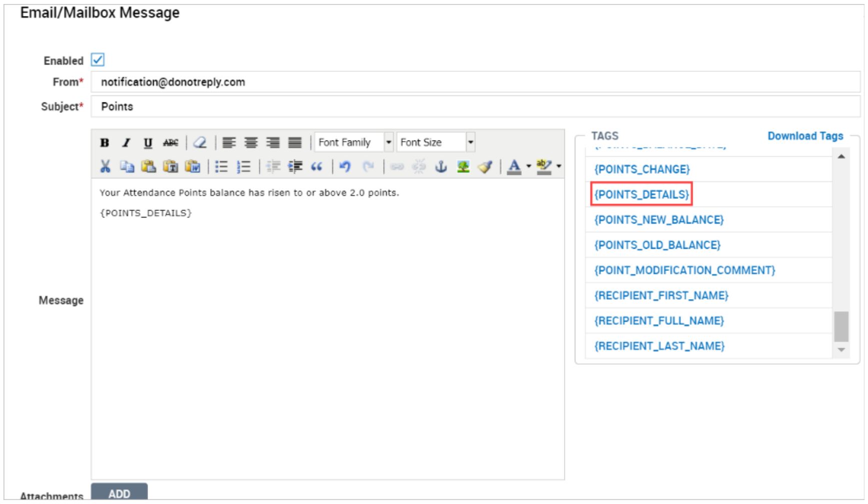


To add a new Point Category, click the *New Point Category List* button. From the *Edit List: Attendance Points* window, you can add or remove any number of categories to the list. This will allow for notifications to be sent when the sum of all point in the *Point Category Lists meets the condition*.

Details Per Point Category in Tags (Classic & New UI)

117505: On the Employee Points *Notification* page within *Email/Mailbox Message*, the *Points Details* tag has been adjusted so that it will only include details related to the categories chosen in the *Category List* from the *Conditions (Optional)* widget.

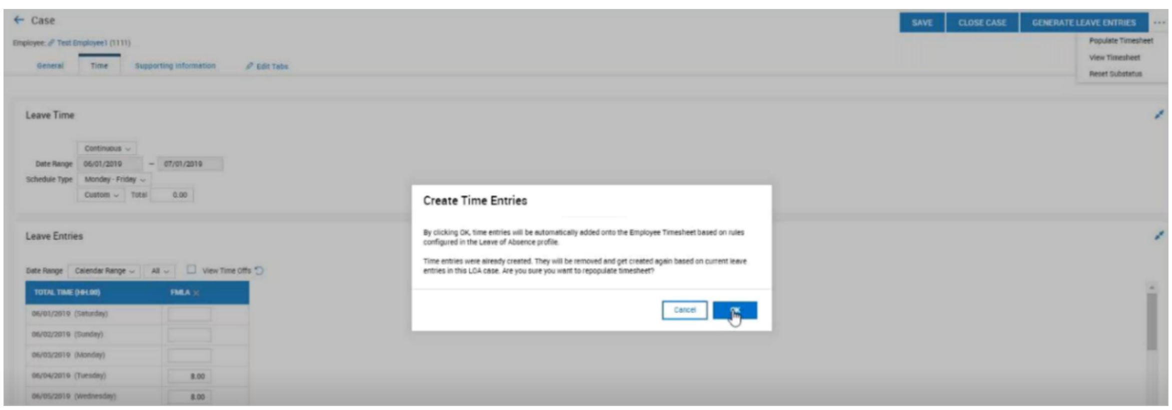
For example, if an employee exceeds the threshold of late punches and absences, and late punches and absences are within the same *Category List*, the employee will only see points details in the notification related to late punches and absences.



Leave of Absence

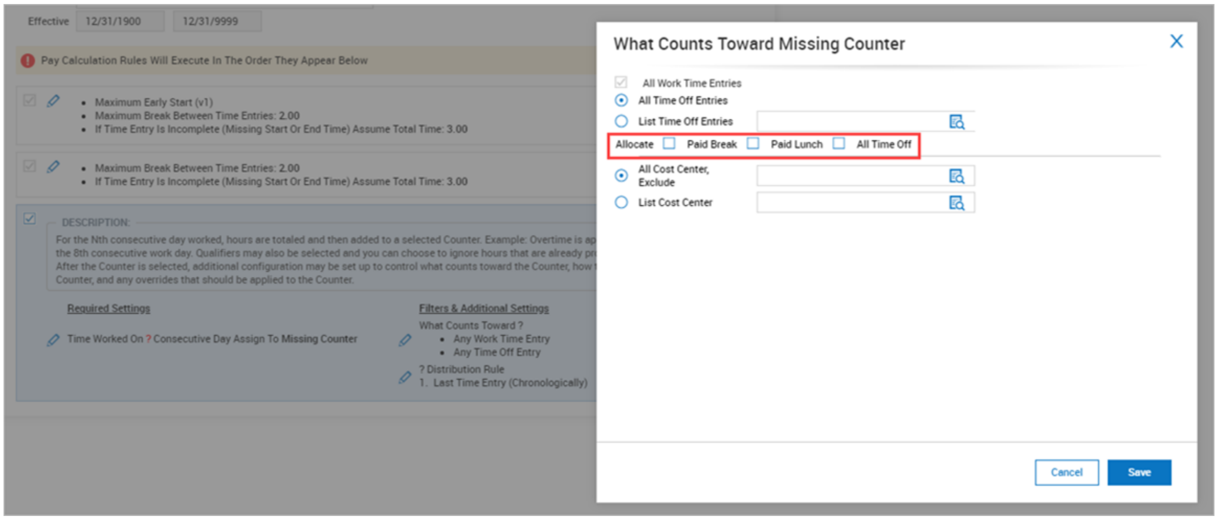
"Re-Populate" Timesheet Functionality in Leave Case (Classic UI & New UI)

102813: You can now re-populate the timesheet from a Leave Case without having to manually remove time entries on the Timesheet first. When re-populating by clicking the *Populate Timesheet* button, all previously created time entries in timesheets that were generated by the leave case will be removed and will be replaced with the new entries. Any manually added/edited time entries on the Timesheet, as well as future scheduled time off, will not be affected.



Nth Day OT Rule Needed Cost Centers and Allocate Time Off in "What Counts Towards" Section (Classic UI & New UI)

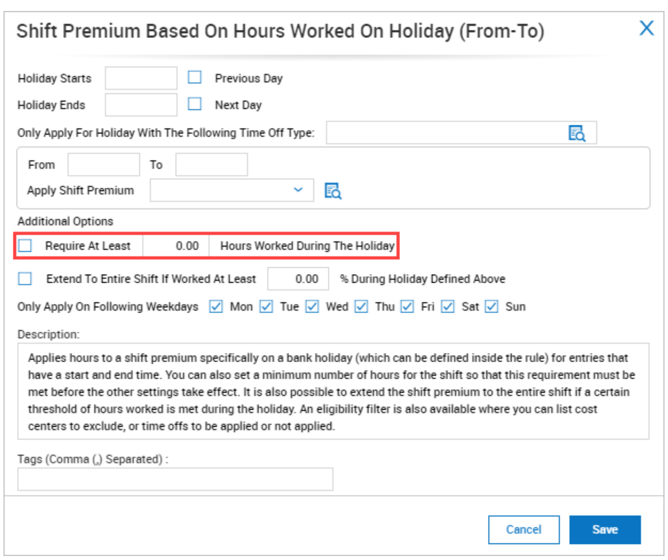
126934, 144068: For Pay Calc 2 companies, you can now define the cost centers that should not count towards the *Nth Day Overtime* rule so that employees do not receive overtime when they aren't eligible, as well as determine if overtime should or should not be allocated to paid breaks, lunches and/or time off. Within the *What Counts Toward filter,* select which cost centers should be included and which should be excluded. You also have the option to allocate overtime for *Paid Break*, *Paid Lunch*, and *All Time Off* by checking the boxes.



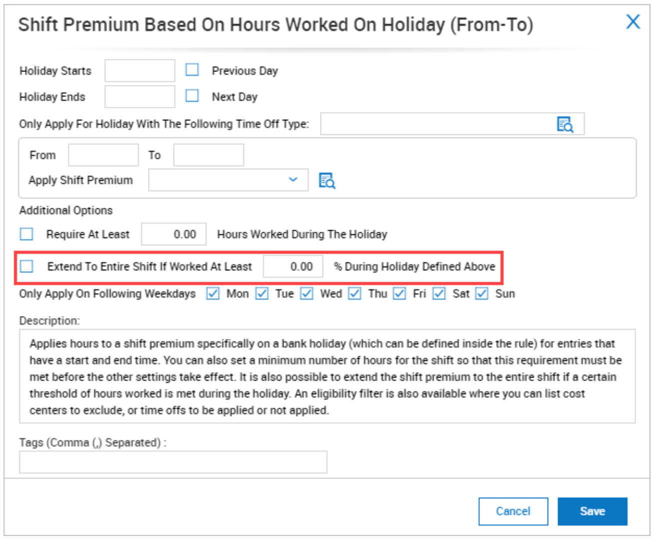
Pay Calc 2 Shift Premium – Hours Worked on a Holiday (From-To) (Classic UI & New UI)

112076: You can now re-populate the timesheet from a Leave Case without having to manually remove time entries on the Timesheet first. When re-populating by clicking the *Populate Timesheet* button, all previously created time entries in timesheets that were generated by the leave case will be removed and will be replaced with the new entries. Any manually added/edited time entries on the Timesheet, as well as future scheduled time off, will not be affected.

You can define when the holiday will start and end, when the shift premium falls, if the employee needs to work a certain number of hours, and you can select the days for which these rules will be valid. For example, if an employee works on a public holiday and requires additional pay for that day, this rule can be enabled just for that day. Enable *Require At Least _ Hours Worked During This Holiday*. Enter the number of hours that apply.



This rule can be extended to the employee's entire shift if t*he employee worked at least X percent in the premium period. The X percent must be present in the shift before the extension occurs. Enable Extend To Entire Shift If Worked At Least _ % During Holiday Defined Above. Enter the percentage that applies.*



Timesheet Profile Migration & Consolidation (Classic UI & New UI)

Only two Timesheet profile types are now supported: *Start/End (All Days)* and *Bulk Hours*. Capabilities, data and configuration settings that were available in other previously supported profiles have been added to the *Start/End (All Days)* and *Bulk Hours* Timesheet profiles.

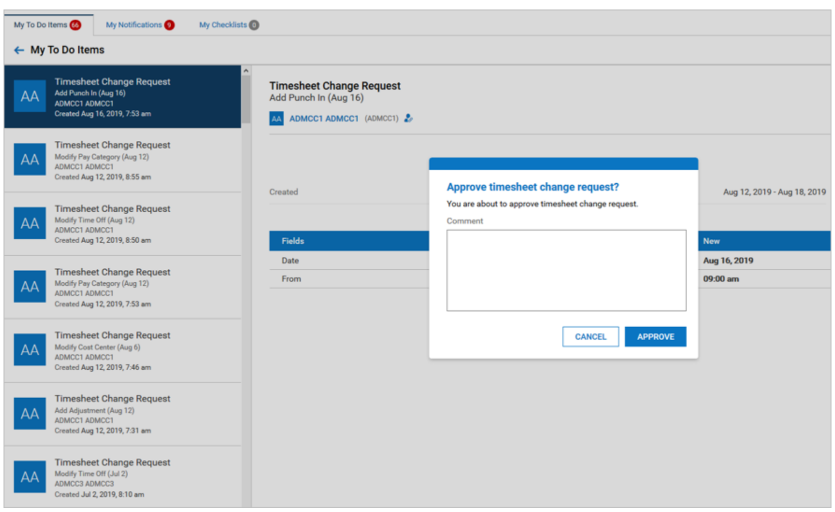
At this time, the non-supported Timesheet profile types will remain unaffected, but you will no longer be able to create new profiles that are of the previously supported Timesheet profile types. Eventually, once all non-supported Timesheet profile types have been migrated to the two supported profile types, the non-supported Timesheet profile types will be completely removed.

NOTE: In the New UI Desktop Experience or the New Mobile App, if employees attempt to access their timesheet that has one of the unsupported Timesheet profiles assigned, they will receive an error message.

New UI: Alerts Updated

Timesheet Change Request Workflow Actions Alert (Desktop & Mobile)

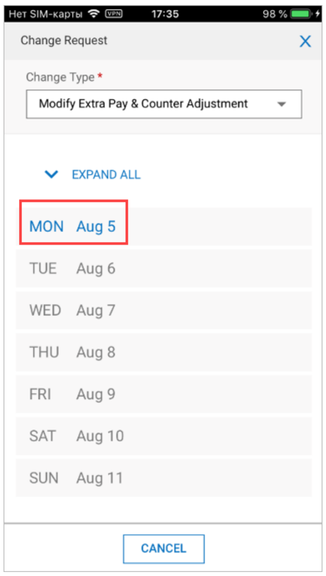
115233: Instead of the Timesheet Change Request Workflow action alert asking if you want to continue, the alert will now reaffirm the action specific to what change is occurring.

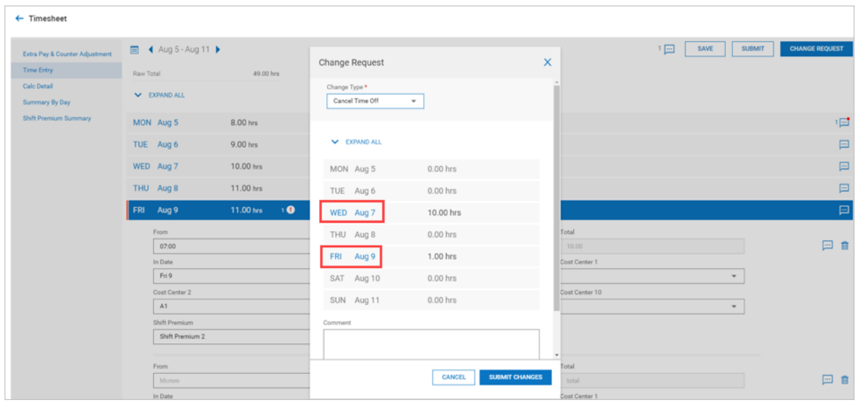


New UI: Timesheet Change Requests – Employee

Indicator for Actionable Days (Desktop & Mobile)

126939: Dates that contain information regarding a timesheet change request modification will now display as blue, and can be clicked on the Desktop Experience, or tapped on the New Mobile App. When you click or tap on the date that is highlighted in blue, it will expand to show details of the modified entry. Dates that do not have modified data are grayed out. All *Change Type* options under *Change Request* have the capabilities to display as blue with expandable details.

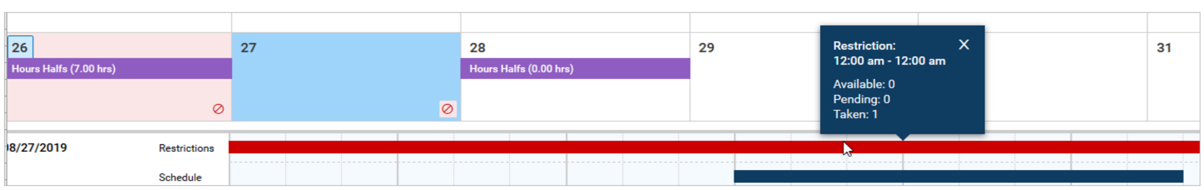




New UI: Time Off Request

MSS/ESS: Timeline Restrictions Tooltip (Desktop & Mobile)

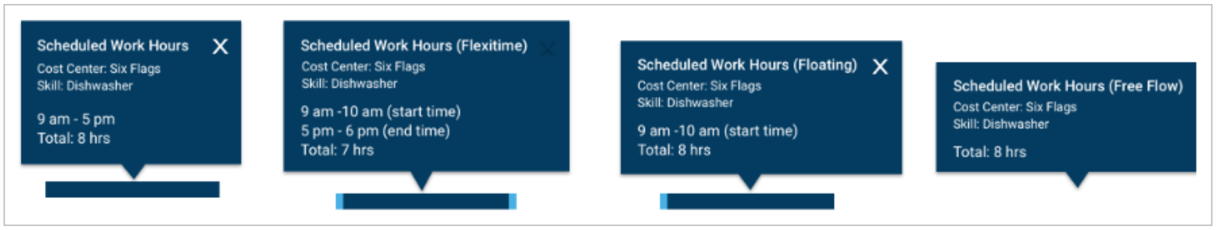
126877: Within the timeline at the bottom of the *Time Off Request* page, a tooltip with details on Time Off Planning restrictions will display on the *Restrictions* line when you hover the cursor over the bar on the desktop, or tap it with your finger on the mobile app. Details will include the time range of the restriction, the available number of slots, pending requests, and the number of taken- authorized- requests (dependent on security profile settings).

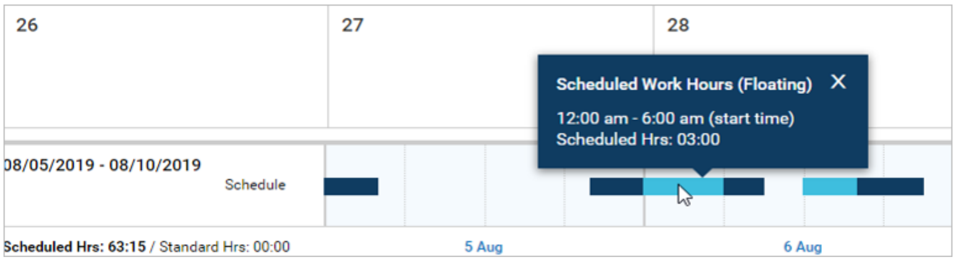


MSS/ESS: Timeline Tooltip (Desktop & Mobile)

126876: Within the timeline at the bottom of the *Time Off Request* page, a tooltip with details for the shift will now display on the *Schedule* line when you hover the cursor over the bar on the desktop, or tap it with your finger on the mobile app. For each individual schedule, the tooltip will indicate if the *Scheduled Work Hours* are fixed, flexitime, or floating; the start and end time of the shift as applicable;

scheduled hours. If Scheduler is enabled in your company, the tooltip can display the skills associated with the shift.





Payroll

Attention Apple Users: iOS Version Recommendation

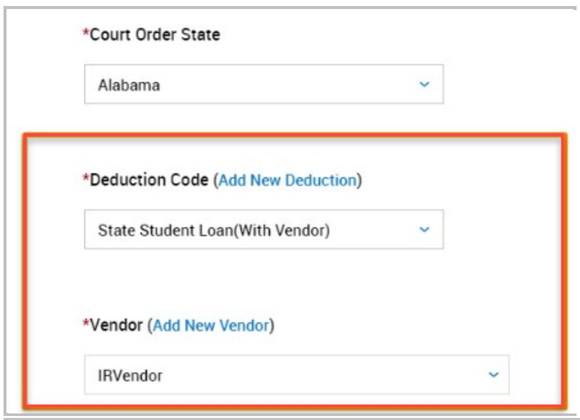
If you use iPads or other Apple mobile devices to process payroll, it is highly recommended that the latest iOS 13 version be installed on your devices. Doing so will optimize system performance and the display of pages and pop-ups.

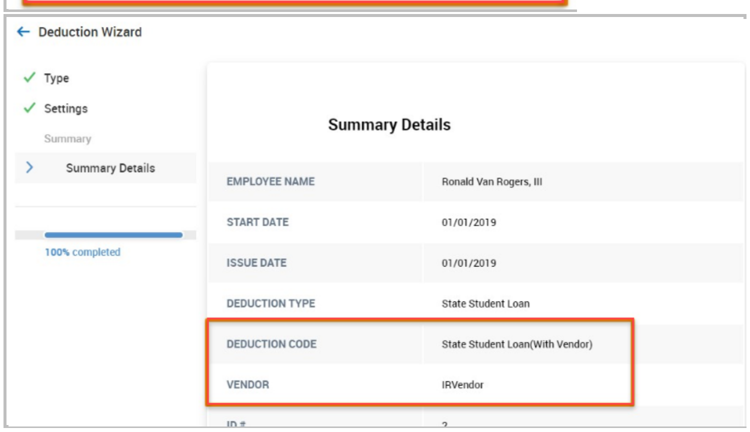
NOTE: This does not affect the New UI Mobile App. It only affects users who access the New UI via a browser on an Apple mobile device.

Deductions

Vendor Based on Deduction in Deduction Wizard (Classic UI & New UI)

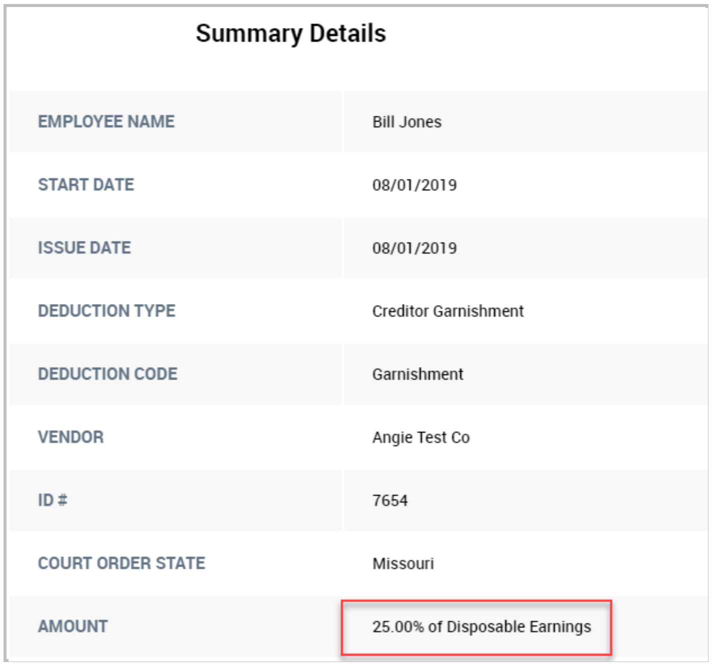
128456: As previously communicated with the service pack for 08/16/2019, the Deduction Wizard vendors are dependent on the deductions selected, and now display after the deduction field in the wizard. When a deduction that requires a vendor is selected, *Vendor* becomes a required field in the Deduction Wizard. Fields also now appear in a more logical order in the *Summary Details* section of the Deduction Wizard, with *Vendor* positioned beneath the *Deduction Code*.





Maximum Percent Allowed Type on Deduction Wizard Summary Page (Classic UI & New UI)

94452: On the Summary Page of the Deduction Wizard, the numeric maximum percent allowed now displays with the appropriate earnings type (Gross, Disposable). For example, if the maximum percent (25%) is based on Disposable Earnings, the Summary Page will show 25% of Disposable Earnings.



FIPS Code for NY Child Support No Longer Required (Classic UI & New UI)

WFR-130637: The FIPS code is no longer required for New York child support deductions, and as such the field is no longer marked as required when adding a new deduction for NY child support via the Deduction Wizard.

Employee Reports

County Added as Selectable Column (Classic UI & New UI)

14994: When the Payroll module is enabled, the ***County*** field that populates in the geospatial mapping section next to the address in employee records, will now be available as a selectable column in employee report pages.

The column will be available to be added in the following reports:

- All Forms
- Benefit Census Report
- Benefit Enrollment Status
- Benefit New Hire Status
- Employee Contracts
- Employee Roster
- Pay Grades (Assigned To Employee)
- Account Taxes
- Account Tax Jurisdictions
- Scheduled Deductions
- Direct Deposits
- Scheduled Earnings

Reports

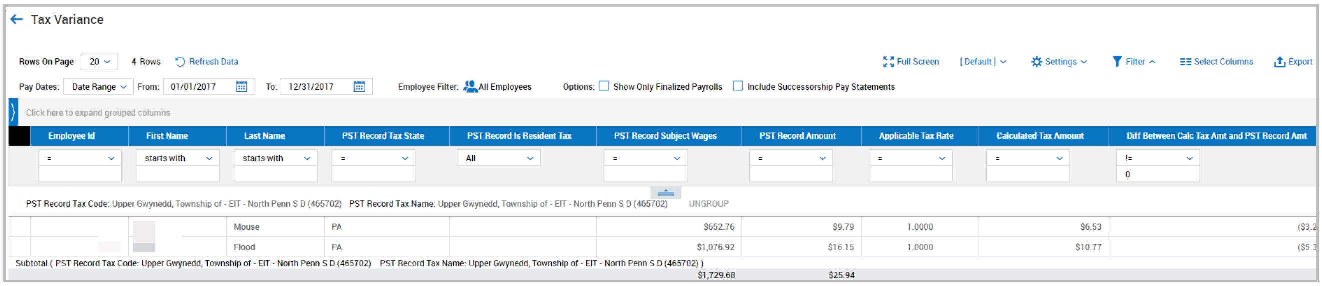
Tax Variance Report (Classic UI & New UI)

106582: Many local jurisdictions assess earned income taxes based on where the employee works and/or lives. Employers are responsible for calculating the applicable local wage and tax amounts and reporting timely to the jurisdiction imposing the tax. In addition, the employer is ultimately responsible for remitting the employee's full non-resident tax amount due, regardless if the amount was withheld from the employee's pay statement or not.

These taxes are not set up to **Auto Correct** when the employee is under or over withheld. Many scenarios exist where the employee might be under withheld such as:

- A tipped employee without enough cash to cover the full tax amount due.
- A manual check calculation where a user overrides the tax amount.
- A tax rate is updated in the system after the actual effective date.

A Tax Variance report is now available under *Team > Payroll > Reports > Taxes > Tax Wage Details > Tax Variance* (or *My Reports > Payroll > Tax Wage Details > Tax Variance* in the Classic UI) to alert employers of out of balance situations, enabling the employer to adjust withholding on future pay statements accordingly.



When employees receive substantial tip amounts, in many cases the wage amount does not cover all the applicable employee tax amounts. Employers must pay the full local tax amount due, regardless of the amount withheld from the employee's Pay Statement. The Tax Variance report compares the local tax amount due to the amount withheld and lists any variance amounts. The default view filters on Tax Types in (EIT, CITY, SCHL, CNTY, OLF, OLTS). User can change this filter to view variances for any types based on a percent.

The Tax Variance report includes the same fields as the Tax Wage Details (By Account) in addition to those listed below:

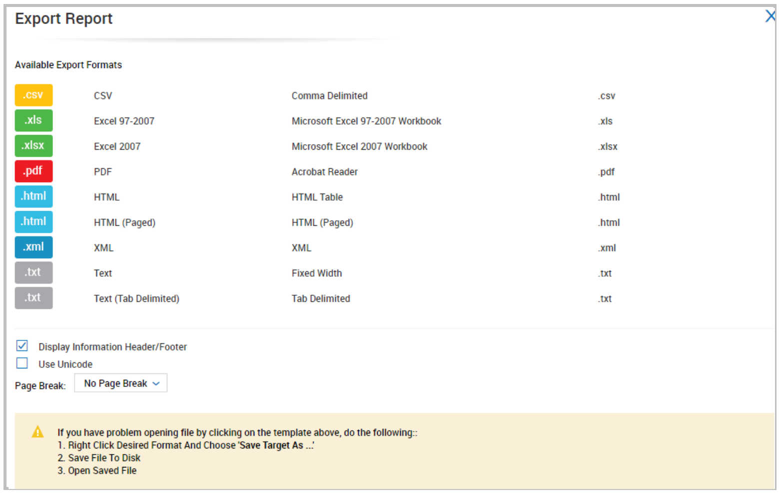
- Applicable Tax Rate
  - Tax rates are stored in a variety of fields in the Company Tax table (Rate, Resident Rate, Non-Resident Rate, Total Resident Rate, Municipal Non-Resident Rate, Municipal Resident Rate, School District Rate, Current Rate % (EE), Current Rate % (ER)). This field should list the applicable tax rate based on Tax State and Tax Code. This field will be blank for any tax not based on a percent.
- Calculated Tax Amount
  - PST Subject Wages * Applicable Tax Rate
- Calculated Tax Amount (ER)
  - PST Subject Wages (ER) * Applicable Tax Rate
- Difference Between Calculated Tax Amount and PST Record Amount
  - Difference will only calculate when Applicable Tax Rate is not NULL
- Difference Between Calculated Tax Amount (ER) and PST Record Amount (ER)
  - Difference will only calculate when Applicable Tax Rate is not NULL
- Current Tax Rate Effective Date

In the event that a tax rate effective date is in the middle of the reporting period, the system will use the rate effective at the end of the reporting period for the calculation.

106585: The Tax Variance report includes standard options (Calendar Range, Date Range and Expression, Sorting, Sorting by Pay Dates, Filtering, Grouping, Show only finalized payrolls, Save Settings, and run from Saved Reports) along with all applicable fields, including all fields in the **Tax Wage Details (By Account)** report. The report summarizes data based on fields listed in the report.

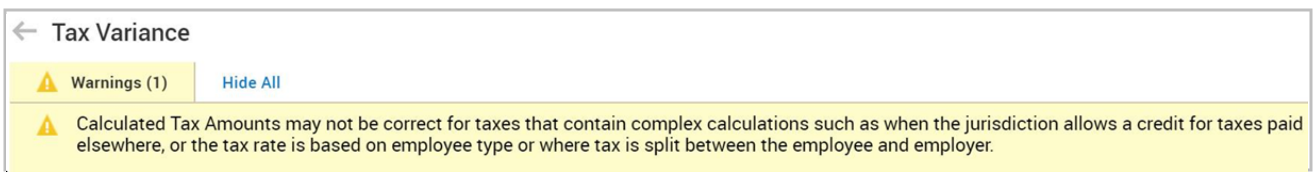
At the Admin level, users can select all companies or a single company.

WFR-106627: All normal export options are available (Excel, PDF, CSV, etc.) for this report.

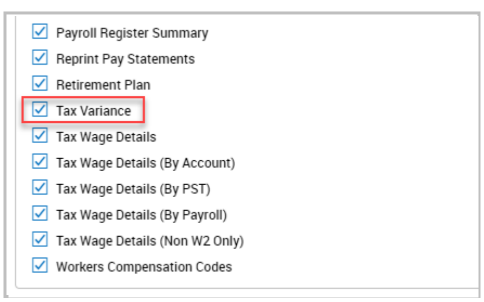


WFR-133036: The following warning message displays on the Tax Variance report under *Team > Payroll > Reports > Taxes > Tax Wage Details > Tax Variance* (or *My Reports > Payroll > Tax Wage Details > Tax Variance* in the Classic UI):

Calculated Tax Amounts may not be correct for taxes that contain complex calculations such as when the jurisdiction allows a credit for taxes paid elsewhere, or the tax rate is based on employee type or where tax is split between the employee and employer.



106590: Users with the security item for **Tax Variance** enabled in their assigned security profile (*Company Settings > Profiles/Policies > Security*, *Reports* tab, *Payroll Reports* section in client companies or *Maintenance > Admin Company > Configurations > Security Profiles*, *Reports* tab, *Payroll Reports* section in Admin companies) have access to the Tax Variance report.

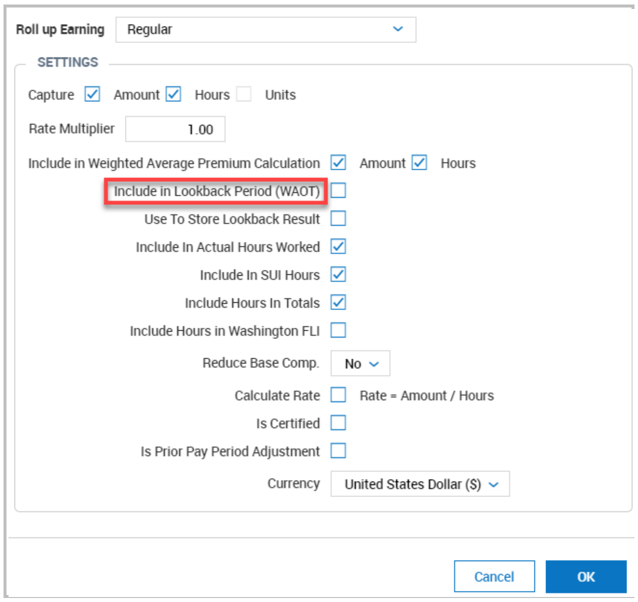


106628 (Classic UI Only): In the Classic UI, Admin and Client companies with the **Email Report Generator** Marketplace product enabled can save and schedule the Tax Variance report to be delivered via email (*Reports > My Saved Reports > Saved Report Email Settings*).

WAOT

Lookback Periods for Additional Earnings Codes (Classic UI & New UI)

125122: Users can now select the **Include in Lookback Period (WAOT)** option for all earnings codes. Any earning codes that can be included in the Weighted Average Premium calculation have the option to **Include in Lookback Period (WAOT) under Settings**. If enabled, the earning code will be included in the WAOT calculation and will include a lookback period if the lookback period is greater than the work week.

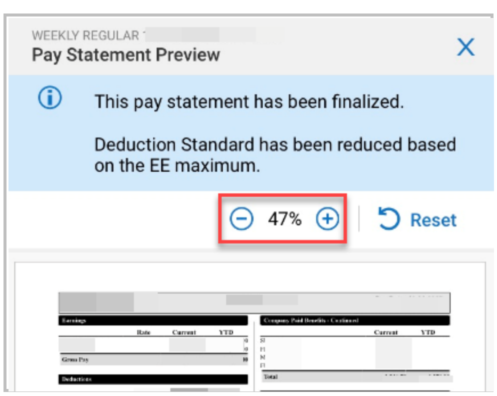


If the earning code should not to be used in the WAOT calculation, the user should not select this option.

NOTE: A detailed document about the WAOT setup and calculation was posted to the Community with the Service Pack information for July 12, 2019, and the same information was included in the detailed Payroll release notes for August 2019.

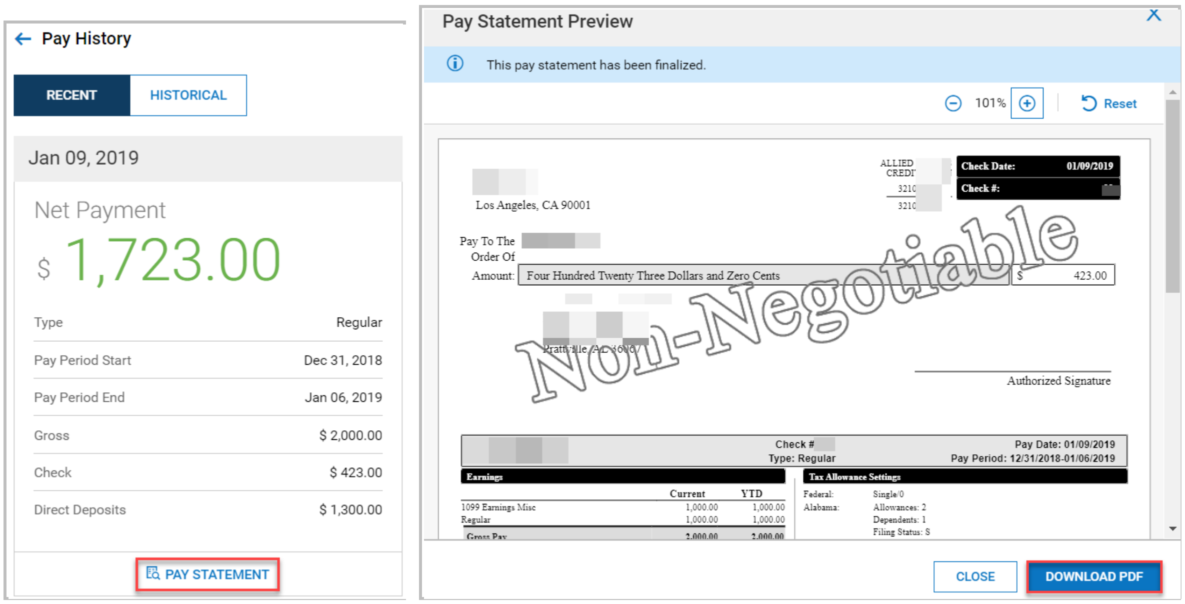
New UI: Pay Statements: Zoom in Preview Pay Statement under My Pay History (Mobile)

129805: Users can now zoom in and out on the Pay Statement Preview in Pay History (*My Info > My Pay > Pay History*), allowing employees to see the selected Pay Statement in closer detail.



New UI: Pay Statements: Employee Pay Statement Preview (Mobile & Desktop)

126940: Employees can preview their pay statement(s) without downloading the document to their computer. From Pay History (*My Info > My Pay > Pay History*), the user can click on the **Pay Statement** link to preview the appropriate pay statement.



From the Pay Statement Preview, the user can download the pay statement via **Download PDF**. From the PDF, the user can print the pay statement using the standard printing process.

New UI: Reports

Reports: Payroll Reports (Mobile & Desktop)

The following Payroll reports are now available in the New UI environment and Mobile App:

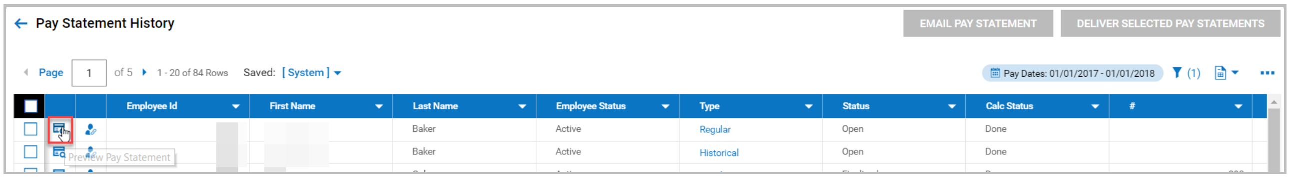
- 129405: Pay Statement (Benefit Coverage) (*Team > Payroll > Reports > Pay History)*
- 129401: Vendor Payments (*Team > Payroll > Reports > Payroll Funding*)
- 131169: All row level actions in the Pay Statement Records History (*Team > Payroll > Reports > Pay History*)
- 131167: All row level actions in the Earning/Deduction/Tax Listing (*Team > Payroll > Reports > Pay History*)
- 131166: All row level actions in the Pay Statement History (Detail) (*Team > Payroll > Reports > Pay History*)
- 131173: All row level actions in the Tax Wage Details (*Team > Payroll > Reports > Taxes > Tax Wage Details*)
- 131168: All row level actions in the Earning/Deduction/Tax Listing (Summary) (*Team > Payroll > Reports > Pay History*)
- 129406: Payroll Alerts (*Team > Payroll > Reports > Pay History > Payroll Alerts*)

Reports: Preview Pay Statement Column and Download PDF Option (Mobile & Desktop)

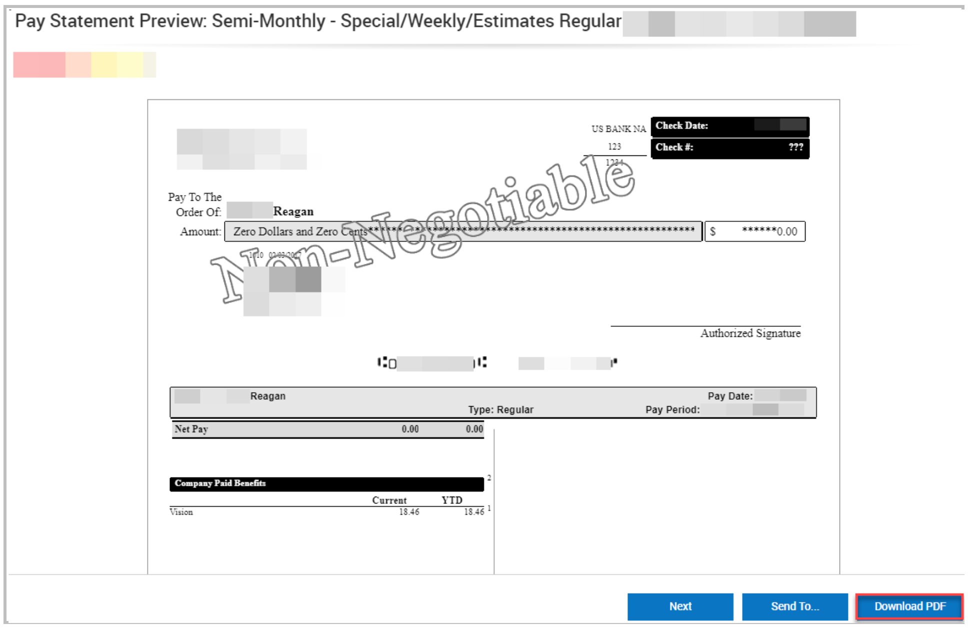
131400: A **Preview Pay Statement** column is now available for inclusion in the following payroll reports under *Team > Payroll > Reports > Pay History*:

- Pay Statement (Benefit Coverage)
- Pay Statement Records History

- Earning/ Deduction/Tax Listing (Summary)
- Earning/ Deduction/Tax Listing
- Pay Statement History (Detail)



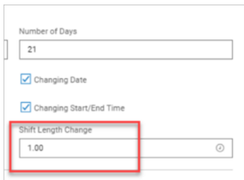
This allows users to preview a pay statement without having to fully open it each time. When a user clicks on the **Preview Pay Statement** icon, s/he is provided with an option to Download PDF, providing s/he with a PDF of the pay statement.



Scheduler

Allow Negative Value Input Schedule Fairness Act (Classic UI & New UI)

133209: On the *Scheduling Fairness Rule*, a negative value input has been added to allow different configurations and pay out conditions for when a *Shift Length Change* adds or removes time when there has been a change to the start or end time of a shift. The trigger will occur if a shift has been added or removed equal to or greater than the defined *Shift Length Change*.



Basic Scheduling Scheduler Overview Screens Consolidated (Classic UI & New UI)

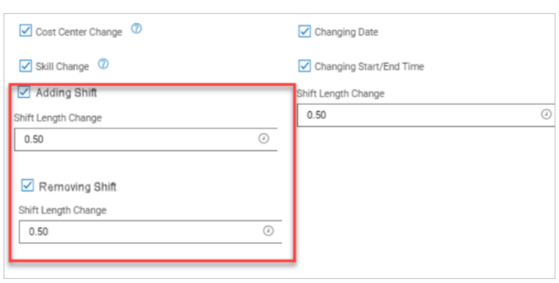
134215: From Basic Scheduling's *Schedule Overview*, the menu options *Overview*, *Overview (Monthly)*, and *Overview (Weekly)* will be consolidated to *Schedule Overview* in December of 2019.

The following deprecation messages have been added to the *Schedule Overview* page:

- *Schedule Overview – Is no longer supported. In December this option will be removed from the product and no longer available.*
- *Schedule Overview Weekly – Is no longer supported. In December this option will be removed from the product and no longer available.*
- *Schedule Overview Monthly – Is no longer supported. In December this option will be removed from the product and no longer available.*

Separate Adding and Removing Shift Triggers in Schedule Fairness Policy (Classic UI & New UI)

131692: *Adding Shift* and *Removing Shift* options have been separated in the *Scheduling Fairness Rule*. This allows you to configure different extra pay amounts depending on whether a shift has been added or removed from the employee's schedule. A trigger will be sent if the added or removed shift length is equal to or greater than the defined *Shift Length Change*.



New UI Updates – Table of Functionality Added to Pages

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

Ticket (EPIC)	Product	Component	New UI Menu Path	Functionality Added	Desk-top	Mobile
113309	Scheduler	Basic Scheduling	*Schedule > Team Schedule View > Weekly/Daily Schedule > Weekly Schedule*	New UI, users can edit TLM shifts. New Mobile App, users can read only.	Yes	Yes
127079	Scheduler	Basic Scheduling	*Schedule > Team Schedule View > Weekly/Daily Schedule > Daily Schedule*	TLM Daily Schedule screen and functionality can be edited for TLM employees only.	Yes	Yes
113312	Scheduler	Basic Scheduling	*Schedule > Team Schedule View > Schedule Entries > Edit Schedule Entries*	TLM Edit Schedule Entries report	Yes	Yes