Software Release Notes

OnePoint Human Capital Management

Release Notes for September 2020

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

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

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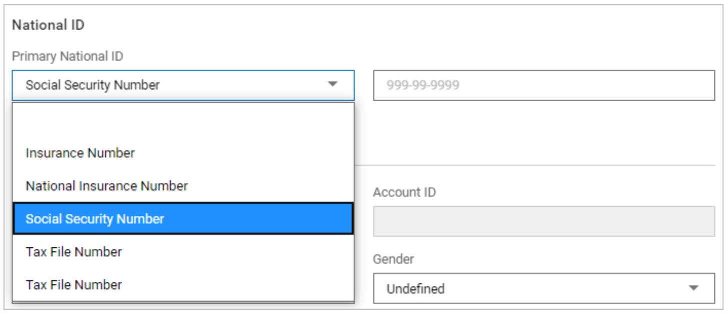
Human Resources

Benefits

Benefit Plans: Primary National ID Added to Benefit Plan Page

125268: When defining Coverage Levels in Benefit Plan configuration, ***Primary National ID Is Required*** has been added to the spouse and dependents section. Formerly, these fields allowed for SSN, BSN, etc. Benefit Plans are set up under *Company Settings > Profiles/Policies > Benefits > Plans*.

When *Primary National ID Is Required* is checked for the spouse and/or dependents, it will become a required field when saving the dependents contact information in benefit plans added to employee accounts.



Benefit Reports: Default Columns Updated

179273: The formerly optional ***Employee: Current Benefit Profile (Effective)*** column has now been added as a default column to the *Benefit Open Enrollment Status* report, located under *Team > Benefits > Reports*. The column is between the *Employee Status* and *Not Started* columns on the report. These changes will allow for Benefit Admins to easily see the relevant data for monitoring open enrollment status but will still allow for a quick way to audit for employees who were or were not assigned a profile in error.

Checklists

Checklist Items: New ‘Hyperlink Within System’ Added

163791: When creating checklists under *Company Settings > HR Setup > Checklists*, a new ***Hyperlink Within System*** item has been added that will allow for the selection of an internal link within the system. When the recipient receives the checklist, the link will be active, and they can click the link to be taken to that page within the system.

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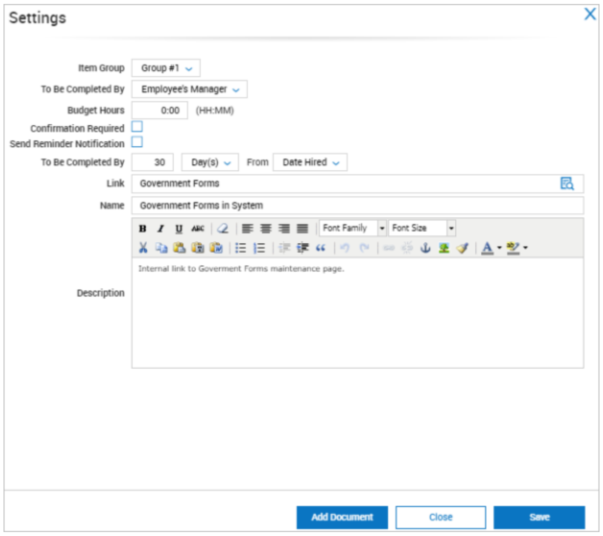


Pagination Added to My Checklists Tab

176541: In the New UI, the *My Checklist* tab now includes a page selection field and arrows so that users can navigate through multiple pages of their checklists. This also improves the page loading time for users who have many checklists.

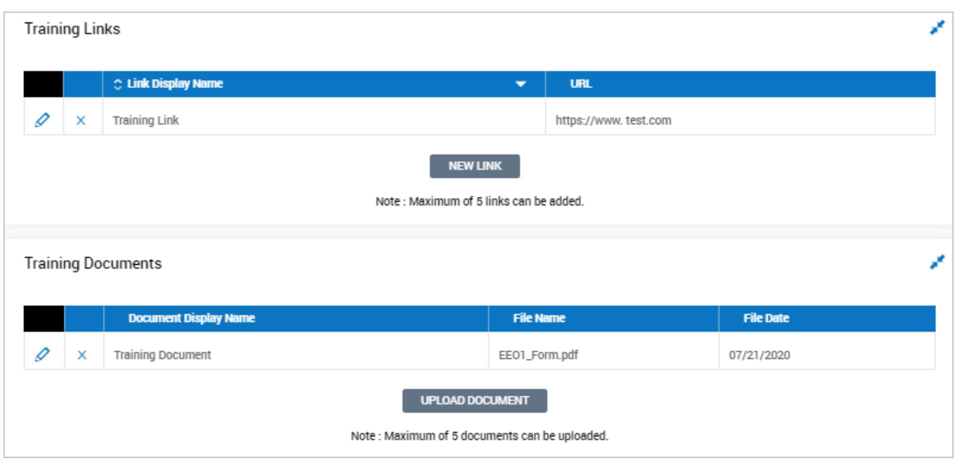
Courses/Certifications

Training Links and Documents Added for Courses and Certifications

177614: Users with access to enter Courses/Certifications data, can now attach training links and documents so employees assigned to the course can view the training links and documents for courses assigned to them.

This can be done under *Company Settings > HR > Courses/Certifications* with the addition of two new widgets; ***Training Links*** and ***Training Documents***. Up to 5 links and 5 documents (10MB each) can be added for each course or certification.

Companies should have *Integrated Document Storage* enabled in their Marketplace products in order to store documents. If it's not enabled, the *Training Documents* widget will not be visible.



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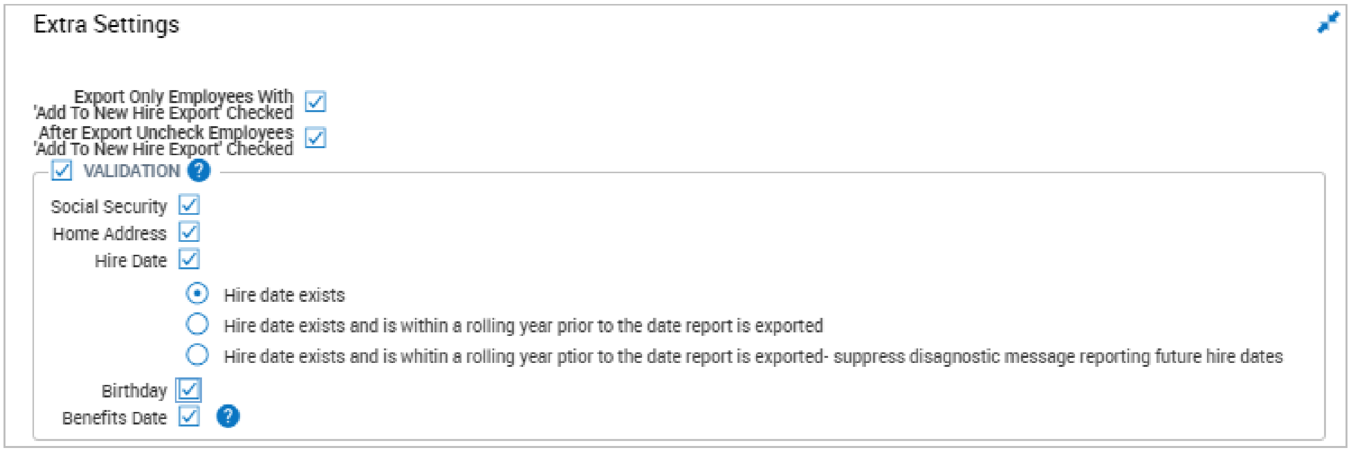
Data Exports

New Hire Data Export – State Specific Rule for New York

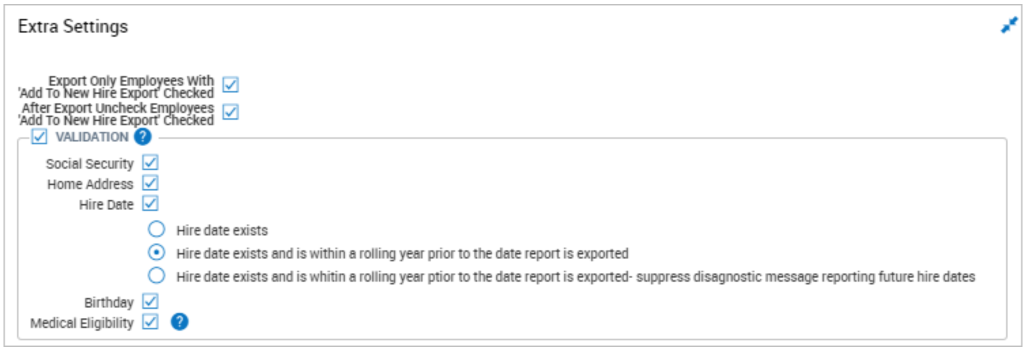
152895: The data export for new hire reporting in the state of New York has been updated with state specific rules.



- A *Validation* section has been added to the *Extra Settings* section, where you can choose the type of data to be validated (Social Security, Home Address, Hire Date, Birthday and Benefits Date.) Info icons are available to help users understand the *Validation* section and *Benefits Date* checkbox.
- For *Benefits Date* validations, the following must be in place for the employees:
  - In the *Pay Information* widget of employee accounts, when *Dependent Benefits Eligibility* is set to *Eligible* the *Benefits* field in the *Dates* widget must contain a date.
  - If *Dependent Benefits Eligibility* is not set to *Eligible*, a *Benefits Date* is not required.

New Hire Data Export – State Specific Rule for North Dakota

149041: The data export for new hire reporting in the state of North Dakota has been updated with state specific rules.



- The *Validation* section has been updated to include Medical Eligibility. An info icon is available to help users understand the Medical Eligibility checkbox.
- For *Medical Eligibility* validations, the following must be in place for the employees:
  - In the *Pay Information* widget of employee accounts, the *Medical Eligibility* field must have a value of *Eligible* or *NOT Eligible* selected.

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New Hire Data Export – Validations Updated

106886: Historically, the New Hire Data Exports allowed up to 4 optional validation rules to be applied to the new hire's information before the employee data was included in the New Hire Data Export. We have updated these validations as listed below.

The text in the Info icon has been updated to reflect these changes.

System will check employee's information, based on option selected.
If employee's record fails the validation, employee will be identified on the New Hire Diagnostic download when the New Hire Reporting export is executed.

1. Complete home address exists (street, city, state and zip).
2. Hire Date
    - Hire date exists - any date in the future or past.
    - Hire date exists and is within a rolling year prior to the date report is exported.
    - Hire date exists and is within a rolling year prior to the date report is exported - suppress diagnostic message reporting future hire dates.
3. Birthday exists and is a date prior to the date report is exported.
4. Social Security number exists and is valid. Invalid SSN are listed below:
    - 9 in first position
    - 666 in first 3 positions
    - 000 in first 3 positions
    - 00 in positions 4 - 5
    - 0000 in positions 6 - 9
    - 123-45-6789
    - 987-65-4321
    - All 9 digits the same number (999-99-9999, 111-11-1111, Etc.)
    - More than 6 repetitive digits in a row (555-55-5512, 321-11-1111, 511-11-1115, Etc.)

Social Security Number Validation – New Rule Added

When the Social Security option is enabled, our system has validated the numbers using a series of validation rules. We have now added an additional rule to check for more than 6 repetitive digits in a row (555-55-5512, 321-11-1111, 511-11-1115, Etc.)

Home Address Validation

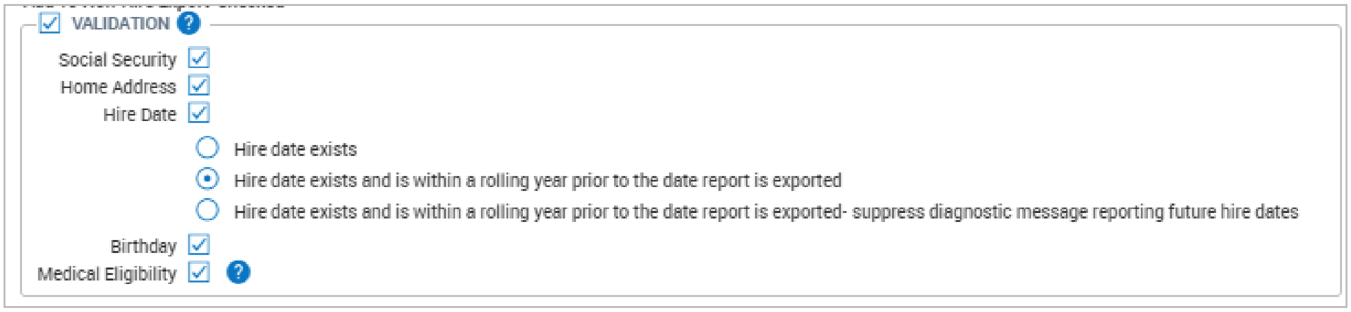
When the Home Address is enabled, the system validates that the street, city, state and zip exist. We will now validate that at least 5 characters exist in Address Line 1 (including spaces)

- Example #1 - ***10 1st*** is a valid address since it contains at least 5 characters (including spaces)
- Example #2 - ***15 1*** is not a valid address since it contains less than 5 characters (including spaces)

The Zip Code will be validated to ensure it is at least 5 characters long (00000 is considered invalid) - this validation is limited to US addresses.

Hire Date Validation

The system validates that the employee's Hire Date exists and is a date in the past. We are now adding additional options to allow the Hire Date to be validated in three different ways. One option can be selected. When the Hire Date validation option is not checked, these three options will be hidden.



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Option 1: Hire date exists

- Ignore validation on hire/rehired date. Include employee in file regardless if hire/rehired date is a past, present or future date.
- If an employee is marked as *Add To New Hire Export* and this option is selected, employee is included in data export.
- If Hire Date is blank, do not include employee in data export. Note: System will not allow the user to add a new employee if Hire Date is blank.

Option 2: Hire date exists and is within a rolling year prior to the date report is exported

- This will enhance and replace the old validation rule, *Hired date exists and is a date prior to the date report is exported*. System will validate that the hire date exists and is in the past with a limit of one year.
- If an employee is marked as *Add To New Hire Export* and this option is selected, employee is included in data export only when hire/rehired date is within one rolling year in the past.
  - If hired/rehired date is in the past more than one rolling year…
    - Employee is not included in New Hire Data Export.
    - Diagnostic message of *Hired date is too old* is generated.
  - If hired/rehired date is in the future…
    - Employee is not included in New Hire Data Export.
    - Diagnostic message of *Hired date is a date in the future* is generated.
  - Example of one rolling year in the past.
    - Data export is generated on 1/21/2020. Only employees with hired/rehired date between 1/21/2019 and 1/20/2020 are included.
  - During deployment, if Hire Date is enabled on a currently existing New Hire Data Export, system will default to this rule.

Option 3: Hire date exists and is within a rolling year prior to the date report is exported – suppress diagnostic message reporting future hire dates

- This will be the same rule as *Hire date exists and is within a rolling year prior to the date report is exported*, with the exception that the diagnostic message of *Hired Date is a date in the future* will be suppressed. The system will validate that the hire date exists and is in the past with a limit of one year.
- If an employee is marked as *Add To New Hire Export* and this option is selected, employee is included in data export only when hire/rehired date is within one rolling year in the past.
  - If hired/rehired date is in the past more than one rolling year…
    - Employee is not included in New Hire Data Export.
    - Diagnostic message of *Hired date is too old* is generated.
  - If hired/rehired date is in the future…
    - Employee is not included in New Hire Data Export.
    - No diagnostic message is generated; instead employee will automatically be included in a future New Hire Data Export.

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    - One exception to this rule - future hire date diagnostic message will be generated if hired date is more than 30 calendar days in the future.
  - Example of one rolling year in the past.
    - Data export is generated on 1/21/2020. Only employees with hired/rehired date between 1/21/2019 and 1/20/2020 are included.

Employee Information

Years of Service Calculation

124473: Within the *Dates* widget of employee accounts, the *Years of Service* calculation was not always accurate. To correct this issue, the *Years of Service* calculation will now be done within the ***Employee Status Change*** *History* (formerly named the *ACA Employee Status Change History* widget.)

In this widget, you will see a listing of hiring/rehiring/termination statuses and status changes can be added here. Adding dates to the widget will not update the *Dates* widget on the employee record.

E-Verify/Form I9

E-Verify: Temporary COVID-19 Policy Compliance for Expired List B Identity Documents

179542: Due to closures of the Department of Motor Vehicles and other state and federal agency locations related to the COVID-19 situation, the federal government has extended the flexibility of the List B I-9 items, honoring List B documents that expired on or after 3/1/2020. This is a temporary measure set to expire July 18, 2020.

However, when users attempted to enter a document with an expiration date in the past in either the Form I-9 or an E-Verify case, users received an error that the document must be unexpired and could not proceed.

We have adjusted the expiration date validation for I-9 List B items to allow for any document that has expired on or after March 1, 2020. If a document expired prior to March 1, 2020, the user will still get an error for an invalid expiration date upon saving the I-9, or processing through E-Verify. The changes will affect any new I-9 form created.

Forms

Update of Voluntary Self-Identification of Disability Form CC-305

177621, 177622, 179423, 177623: The new revised government form CC-305 (Voluntary Self-Identification of Disability), used by federal contractors or subcontractors, has been updated in the system.

The form is available for Managers under *Team > HR > Forms > Government Forms > CC-305*, and available to employees under *My Info > My HR > Forms > Government Forms > CC-305*. The form is also available for applicants when included in the Applicant Profile.

The form has the following properties:

- Employee Name and Employee ID, which will pre-populate from the employee record.

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- A new Employer section is available for employers to modify as needed for record-keeping purposes. The Job Title and Hire Date will be pre-populated and the pre-populated fields can be edited/deleted by the Employer as needed.
- Can be downloaded in PDF.

A new security setting has been added to control edit permissions for managers. The Form CC-305 security setting has View/Edit/Add settings and is located in the Employee section of the HR tab in security profiles.

HR Core

Checklists: Completion Order Enforcement

163745: To prevent employees from completing checklists in any order of their choosing, which may cause issues in certain situations, we have added a new ***Enforce Completion Order*** checkbox to the Checklist configuration page, located under *Company Settings > HR Setup > Checklist*. This will require checklist items to be completed in sequential order.

Checklists with this new setting enabled are only valid on new assignments, meaning if a checklist without this setting is later edited with the new setting checked, users already assigned the previous checklist will not be required to complete theirs in sequential order.

Company EINs Column Added to Reports

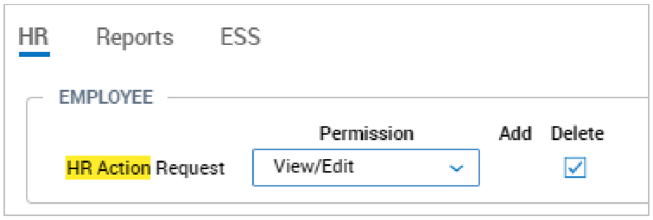
173633, 173695: A ***Company EINs*** field is available to be added to the following report pages:

- Jobs report page, under *Company Settings > HR Setup > Jobs*.
- Positions report page, under *Company Settings > HR Setup > Positions*.

HR Actions: Deleting My Information Type HR Action

166308: In the February 2020 release, we added My Information type HR Action requests in the All HR Actions Report. Users with appropriate permissions can view these types of requests submitted by employees on the report. There may be scenarios such as HR Actions that were started but never submitted by employees and they need to be cleaned up and deleted.

With the proper Delete Security Setting enabled in Security for HR Action Request, user can now also delete. My Information type requests from the All HR Actions report page. The setting is located in the *Employee* section of the *HR* tab of security profiles (*Company Settings > Profiles/Policies > Security*.)



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Imports

Benefit Plan Premiums Import: Pay Period Hours Added

182240: In the February 2020 release, functionality was added so a user can select a coverage type of user-defined based on pay period hours when creating a benefit plan. In this release, we are adding ***Pay Period Hours*** to the *Benefit Plan Premiums* import template.

Age Years		3	[0-9]+	Exactly one of Age, Length Of Service, Salary or Pay Period Hours is REQUIRED based on coverage type. First row will be used as "Initially" row and value will be ignored.	Age, in years, for age-based tiers
Age Months		2	[0-9]+		Age, in months, for age-based tiers
Length Of Service		4	[0-9]+		Used in 'Length Of Service' coverage type. Can mean Days, Weeks, Months or Years based on coverage settings.
Salary		15	0.00		Used in 'Premium By Annual Salary' coverage type.
Pay Period Hours	erage Type	8	0.00		Hours, for 'User Defined' based coverage type based on 'Pay Period Hours'
Premium		15 or 1024	0.00 or Expression		Total monthly premuim amount for benefit plan

Courses/Certifications Import Template: Training Link URL Added to Import Template

181945: When importing course or certification information using the Courses/Certifications import template, you can now include Training Link URLs. Once imported into the system, employees can then click the links to be taken to that page so they can view/process their assigned training. Up to 5 links can be entered for the import.

Training Links Information	**Training Link Display Name 1**				255	
	Training Link URL 1				1024	
	Training Link Display Name 2				255	
	Training Link URL 2				1024	
	Training Link Display Name 3				255	
	Training Link URL 3				1024	
	Training Link Display Name 4				255	
	Training Link URL 4				1024	
	Training Link Display Name 5				255	
	Training Link URL 5				1024	

Managed Cost Centers

In the February 2020 system release, work was done to Managed Cost Center functionality to make it available in more areas of the application. This included adding a new Cost Center Managers widget to cost center maintenance under Global Setup where managers and permissions could be added.

In this release, we are continuing to expand this functionality by adding additional managed cost center functionality for HR Recruitment.

Setting Permissions in Cost Centers

The *Cost Center Tree Permissions* have been updated to reflect the options available for cost center managers. You can set permissions at the cost center level, which will trickle down to the managers. If managers should have different permissions from those set at the cost center level, each manager can be edited accordingly from their employee accounts.

When checking *View Job Application*, the *View Applicant* and *View Job Requisition* settings will automatically check and then gray out. This allows users to view applicant, job application, and job requisition links from the pages in Recruitment.

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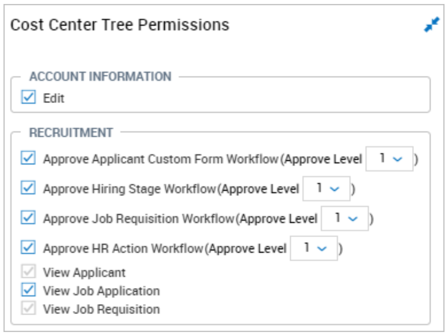

Permissions to Same Manager for More Than One Cost Center from Same Tree

151191: Permissions from more than one cost center tree can be granted to the same manager from within the Managed Cost Center widget.

Scenario 1

- CC2 is a child of the CC1 cost center tree.
- EMP1 is the manager of CC1 and CC2 via the Managed Cost Center (MCC) widget. The cost center permissions for CC1 and CC2 are set differently in the widget.
- CC2 is added to Job Requisition A.
- When EMP1 logs in, he will have access to the MCC relevant data pertaining to Job Req A; the permissions coming from CC2 in the MCC widget. Cost center permissions of CC1 are not relevant for this scenario.

Scenario 2

- CC3 is a child of CC2 and CC2 is a child of the CC1 cost center tree.
- EMP1 is manager of CC1 and CC2 via the Managed Cost Center (MCC) widget. The cost center permissions for CC1 and CC2 are set differently in the widget.
- CC3 is added to Job Requisition A.
- When EMP1 logs in, he will have access to MCC relevant data pertaining to Job Req A in accordance with the cost center permissions of CC2 (i.e. immediate parent cost center permissions are considered.) Cost center permissions of CC1 are not relevant for this scenario.

Import Templates: Employee Managed Cost Centers Template Updated/Moved

150395: The ***Employee Managed Cost Center*** import template has been updated to include the HR Recruitment permissions. Due to this addition, the category in which this template was located (*Time & Attendance Data*) will now be accessed from the *Employee Setup* category.

MCC & Workflows: Cost Center Manager Added to Applicant Custom Form Workflow Steps

145619: For companies with the HR sub-system enabled, System Administrators can now assign Cost Center Managers to certain steps in the *Applicant Custom Form* workflow (Workflow: *Custom Form / Subtype: Applicant*). This will allow the correct manager to act on a job application routed through the workflow.

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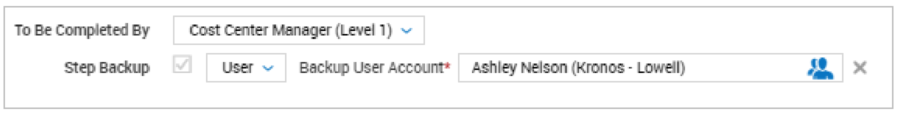
Applicant Custom Form Workflow

The Cost Center Manager option is now available to be selected in the following steps:

- Approve/Reject (available in the *To Be Completed By* field)
- Collect Note (available in the *To Be Completed By* field)
- Generate Email (available in the *Send Notification To* field)

MCC & Workflows: Cost Center Manager Added to Job Requisition & HR Action Request Workflows

145694 & 145702: In *Job Requisition* and *HR Action Request* workflows, the *Cost Center Manager* can now be selected for the *To Be Completed By* (or *Send Notification To* or *Create For* or *To Be Initiated By*) steps. When selecting a cost center manager, a *Step Backup User* will be required; so in the event the cost center manager is terminated, the workflow will not stall, and the To Do Item will route to the backup user.



- For the *Job Requisition* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, and *Checklist* steps.
- For the *HR Action Request* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, *Collect Note, Initiate HR Action Request* and *Checklist* steps.
  - In the *Managed Cost Centers* widget of employee accounts, when editing the permissions for a cost center, a new ***Approve HR Action Workflow (Approve Level 1-5)*** has been added to support the cost center manager assigned to an *HR Action Request* workflow.

MCC & Workflows: Cost Center Manager Added to Hiring Stage Workflow

145693: In the *Hiring Stage Change Request* Workflow, the Cost Center Manager is now available for selection in the workflow steps. They can be selected for the *To Be Completed By* (or *Send Notification To* or *To Be Initiated By* or *Create For*) steps. When selecting a cost center manager, a *Step Backup User* will be required; so in the event the cost center manager is terminated, the workflow will not stall, and the To Do Item will route to the backup user.

The MCC manager is recognized in the workflow because the cost center is attached to the Job Requisition which the application is linked to - the application is linked to the applicant.

- For the *Hiring Stage Change Request* workflow, this can be set in the *Approve/Reject*, *Generate Notification*, *Initiate Form, Initiate HR Action Request*, and *Checklist* steps.

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MCC & Recruitment Reports: Filter Added to Reports for Cost Center Managers

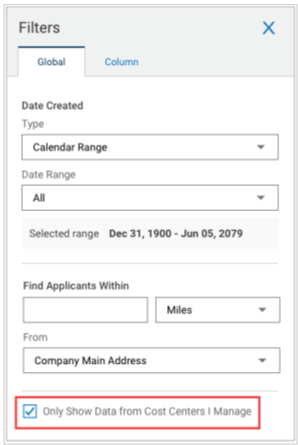
145995, 146126, 146101, 146100, 146105, 146106, 150939, 146113, 146102, 146115, 146122, 146103, 146127, 176785, 146129:

A new *Show My Managed Data Only* filter has been added to multiple Recruitment reports. When enabled, the filter will adjust the report data and display only information related to the manager's managed cost center, along with the Group members of managed cost centers.

- When the filter is disabled, the cost center manager will see all data to which they have access.
- The filter will be enabled by default when managed cost centers is enabled for the manager.
- For System Administrator (SA) login, and for other logged in users who have the MCC (Managed Cost Centers) widget disabled, the MCC filter will not be applied by default on the landing page of Recruitment reports. However, the option to apply the MCC filter will still be provided in Filters.
- If the MCC widget is enabled for the logged in user (whether or not the cost center is configured in the widget) the MCC filter will be applied by default in the reports.

When clicking the filter icon, the *Filters* panel will show the setting checked for that report

New UI



The filter is available in the following reports.

Report	Classic UI Menu Path	New UI Menu Path
All Forms Report	*My Employees > Forms > All Forms*	*Team > Recruitment > Forms > All Forms*
Applicants Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicants*	*Team > Recruitment > Candidates > Applicants*
Applicant WOTC Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant WOTC*	*Team > Recruitment > Candidates > Applicant WOTC*

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Applications Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Job Applications*	*Team > Recruitment > Candidates > Job Applications*
Applicant Interviews Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Interviews*	*Recruitment > Candidates > Applications*
Applicant Checklists Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Checklists*	*Team > Recruitment > Pre-Boarding > Applicant Checklists*
Applicant Checklist Items Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Checklists. Items are accessed from an icon within the report.*	*Team > Recruitment > Pre-Boarding > Applicant Checklist Items*
Applicant Questionnaire Answers Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Questionnaires. Answers are shown in the Question Answer column of the report.*	*Team > Recruitment > Candidates > Applicant Questionnaire Answers*
Applicant Forms Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Forms > Applicant*	*Team > Recruitment > Pre-Boarding > Applicant Forms*
Background Checks Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Background Check > Background Checks*	*Team > Recruitment > Pre-Boarding > Background Checks > Background Checks*
Background Check History Report	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Background Check > Background Checks History*	*Team > Recruitment > Pre-Boarding > Background Checks > Background Check History*
Job Requisitions Report Page	*Company Settings > HR Setup > Applicant Tracking/Recruitment > Job Requisitions*	*Team > Recruitment > Job Requisitions*
Time To Hire Report	*My Reports > HR > Recruitment > Time to Hire*	*Team > Recruitment > Reports > Time To Hire* *Or* *My Info > My Reports > Recruitment Reports > Time To Hire*

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Notifications

Additional Tags Added to Credential Expiration Notification

172958: The following tags have been added to the *Credential Expiration* notification to aid companies in creating email descriptions that better meet their needs.

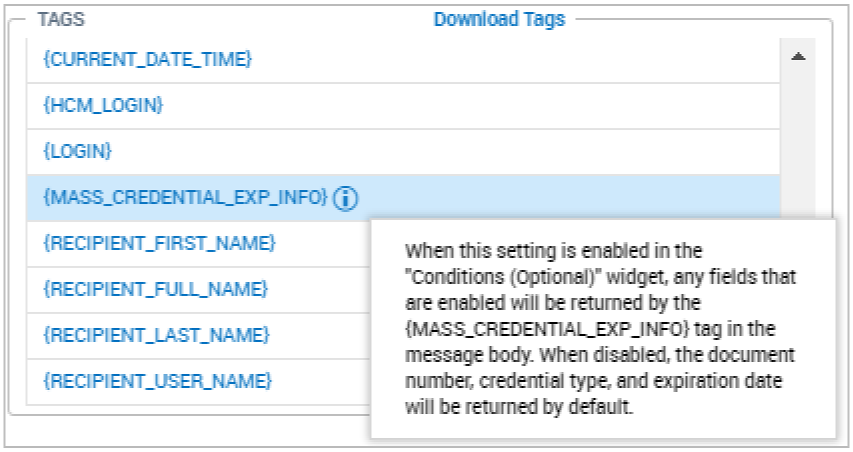
- {CREDENTIAL_ISSUED_DATE}
- {CREDENTIAL_CLASS}
- {CREDENTIAL_RESTRICTIONS}
- {CREDENTIAL_STATE}
- {CREDENTIAL_COUNTRY}
- {CREDENTIAL_PLACE_OF_BIRTH}
- {CREDENTIAL_NATIONALITY}
- {CREDENTIAL_TYPE_FIELD}
- {CREDENTIAL_CUSTOM_1}
- {CREDENTIAL_CUSTOM_2}
- {CREDENTIAL_CUSTOM_3}
- {CREDENTIAL_CUSTOM_4}
- {CREDENTIAL_CUSTOM_5}

Customized {MASS_CREDENTIAL_EXP_INFO} Tag in Credential Expiration (Mass) Notification

179877: Currently the {MASS_CREDENTIAL_EXP_INFO} tag only returns the credential document number, credential type, and credential expiration date. This tag can now be customized in the “Conditions (Optional) widget of the notification to return any relevant information about the expired credential via email without the need for the recipient to log in and verify the information. The tag contains an Info icon that explains how the tag behaves when added in the message body of the notification.

It states:

When this setting is enabled in the “Conditions (Optional)” widget, any fields that are enabled will be returned by the {MASS_CREDENTIAL_EXP_INFO} tag in the message body. When disabled, the document number, credential type, and expiration date will be returned by default.



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Pay Grades

In this release, we are adding the ability to define automatic Steps within Pay Grades. Employees will be moved automatically through the steps according the configuration and date schedule set in each step. Each step will update the employee's Base Compensation. A nightly system job will run to check for employees on Pay Grades configured with automatic steps and then check the dates in the schedule of the steps.

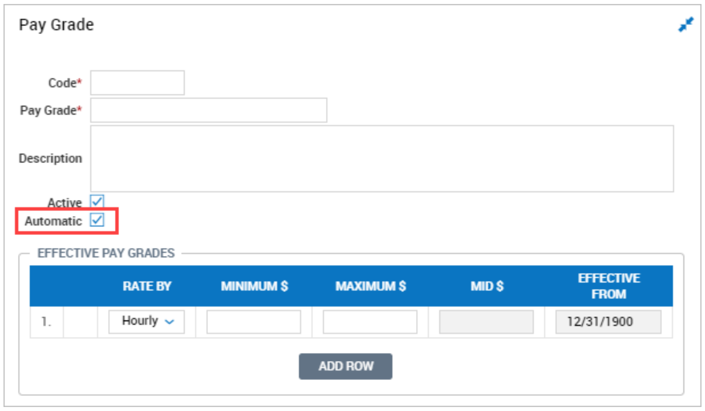
Configuration: Automatic Steps Table for Pay Grades to Move Employees to Different Pay Grade

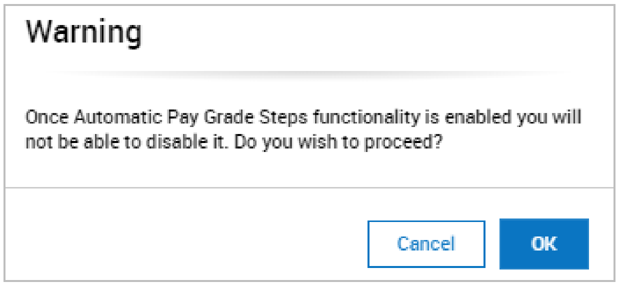
152379, 152362, 152936, 171404

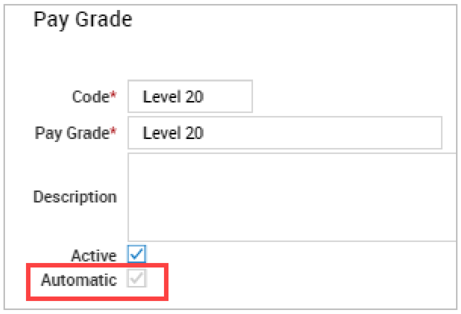
A new ***Automatic*** checkbox has been added to Pay Grades. Using this option will prevent manual intervention when moving employees from one pay grade to another.

When checked, the system will issue a warning. If you proceed, the system will gray out/disable the option which cannot be undone. If you proceed, the system opens an *Automatic Pay Grade Steps* section in the *Steps* widget where configuration schedules can be set and applied to the pay grade.

Once defined, employees assigned to the pay grade will automatically be advanced through the steps set in the *Steps* widget. Pay Grades are configured under *Company Settings > HR Setup > Pay Grades*.







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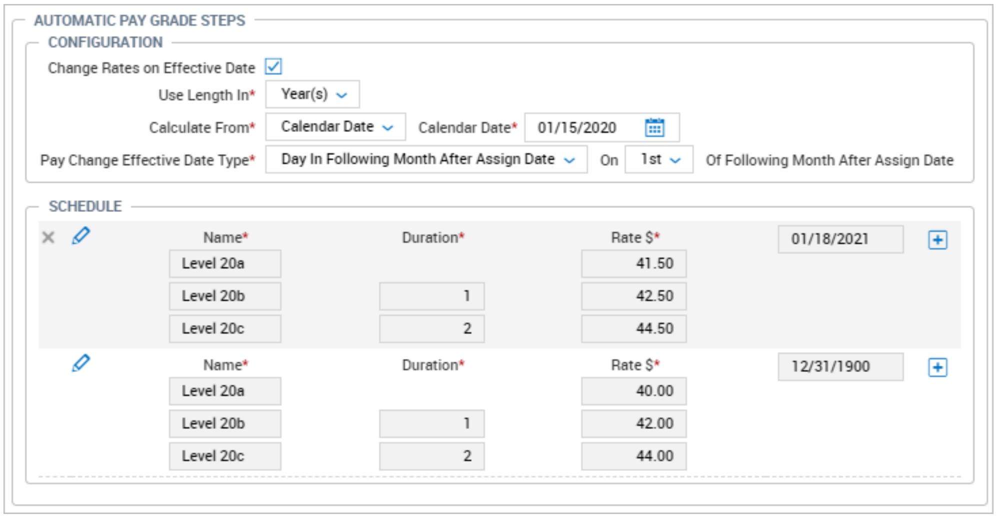
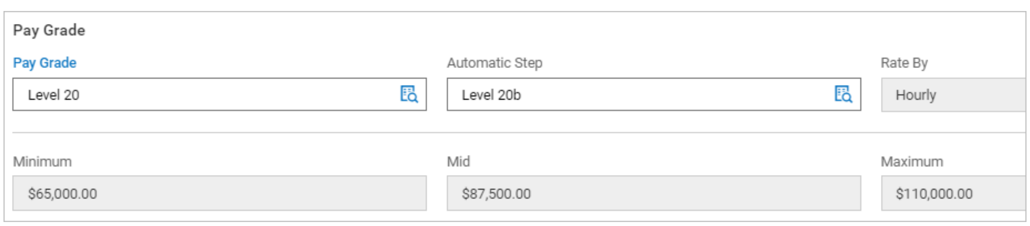


- **Change Rates on Effective Date – When checked, the system will apply the rate for the assigned schedule effective date(s). The changes are applied after the nightly system job runs to evaluate potential upgrades.**
- **Use Length In** – Choose from days, weeks, months or years
- **Calculate From** – Choose from employee dates (hire dates, etc.), calendar dates, or job last changed date
- **Pay Change Effective Date Type** – Allows you to set when the pay change goes into effect. Options include: *Day In Following Month After Assign Date*, *End Of Month After Assign Date*, or *Assign Date*. If choosing one of the first two options, you can also specify the day of the month.
- **Schedule** – Set a cascading schedule to include rate along with currency symbol set in the company and optional effective date. These entries must be in chronological order. The *Duration* field links to the period set in the *Use Length In* field, i.e., if you set this for *Year(s)*, and the schedule *Duration* for 2, 3, 4 etc., the *Rate* will be applied in those number of monthly increments.

Employee Accounts: Automatic Step Field Added to Pay Information Widget

152929 & 171378: The *Automatic Step* field has been added to the *Pay Grade* section of the *Pay Information* widget of employee accounts. The field is only available when a Pay Grade with automatic steps is assigned. In such cases, the *Automatic Step* field will be editable.



Imports: Pay Grade Step Added to Employees Import Template

152931: If Automatic Pay Grade Steps have been added to Pay Grades under *Company Settings > HR Setup > Pay Grades*, the ***Step*** field will now automatically populate the *Instructions* and *Template* tabs of the ***Employees*** (.xls or .xlsx) import template.

If Pay Grade Steps are manually added to Pay Grades, the *Step* will only display on the *Instructions* tab. You must then manually add the *Step* column to the *Template* tab.

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Pay Grade				75		Y	Y	Valid Pay Grade defined in Company Settings > HR Setup > Pay Grades.
Step				10		Y		Valid Automatic Pay Grade Step Name defined in Company Settings > HR Setup > Pay Grades in Automatic Pay Grade Steps section.

AY	AZ	BA	BB	BC	BD	BE	BF
cal Eligibility	Dependent Benefits Eligibility	Union	Pay Grade	Step	Hired	Started	Birthday

Imports: New Automatic Pay Grade Steps Import Template Added to System

152938: To support the maintenance of Pay Grades and Steps, a new **Automatic Pay Grade Steps** import template has been added to the system and is located under *Company Settings > Imports > Overview* in the *HR* section. Once complete, the template can be imported back into the system under *Company Settings > Imports > HR*.

	A	B	C	D	E	F	G	H
1	Pay Grade Automatic Steps							
2	Pay Grade	Effective I	Step Name	Duration Days	Duration Weeks	Duration Months	Duration Years	Rate Change
3								
4								
5								
6								

	Field Name	Required	Unique	Max Length	Valid Formats	Description
Pay Grade Automatic Steps	Pay Grade	Yes	No			Pay Grade Id
	Effective Date	Yes	No		mm/dd/yyyy	Pay Grade Schedule Effecvtive from
	Step Name	Yes	Yes	10	text	Step Name
	Duration Days	Yes, if	No	9		Duration in days (Only one duration column should be filled)
	Duration Weeks	Yes, if	No			Duration in weeks (Only one duration column should be filled)
	Duration Months	Yes, if	No			Duration in months (Only one duration column should be filled)
	Duration Years	Yes, if	No			Duration in years (Only one duration column should be filled)
	Rate Change	Yes	No			Rate Change

Mass Edit: Automatic Pay Grade Step Included in Mass Edit

152930: With the addition of the ***Automatic Pay Grade Step*** field in the *Pay Information* widget of employee accounts, this field will also be available when mass editing employee records in *Company Settings > Mass Edit > Mass Edit Profiles*.

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Mass Edit of Profiles

- The field is disabled by default and only becomes editable when selecting a *Pay Grade* configured with automatic steps.
- The field does have the *Clear* option available to remove the step from the selected employees.

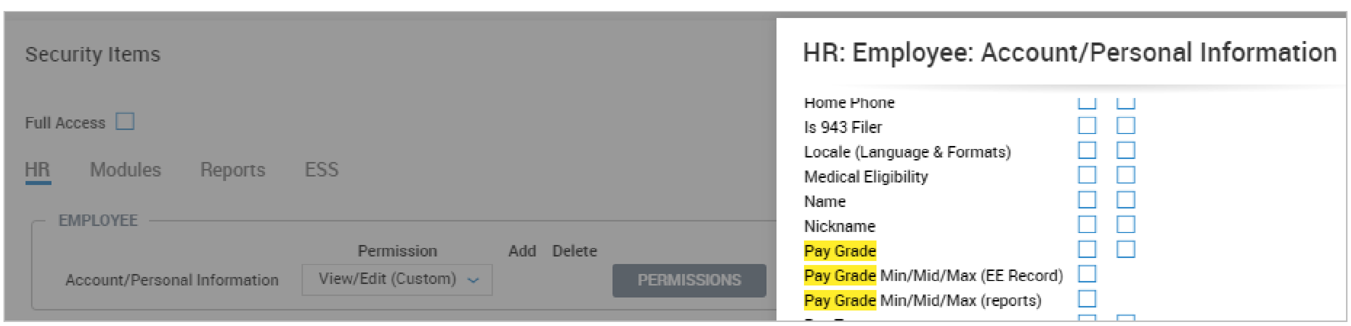
Employee Account After Mass Edit

Security: New Setting Added for Min/Mid/Max Visibility in Pay Grades

139922: Previously, the **Pay Grade Min/Mid/Max** security permission controlled the visibility to the Min/Mid/Max fields only on reports, but not on the employee record. There was an expectation that the permission controlled the visibility to both employee accounts and reports. To provide a clear indication of what the security permission controls, the *Pay Grade Min/Mid/Max* permission has been split into two *View* settings:

- **Pay Grade Min/Mid/Max (EE Record)** – controls visibility to the Min/Mid/Max settings in the Pay Information widget of employee accounts.
- **Pay Grade Min/Mid/Max (reports)** – controls visibility to the Min/Mid/Max values in reports where these values can be added (such as the Employee Information report page.)

The security setting is located under the *HR* tab, when setting custom permissions in the *Account/Personal Information* setting in the *Employee* section.



NOTE: For existing customers who already have the *Pay Grade - View* checkbox checked, the *Pay Grade Min/Mid/Max (EE Record)* will automatically be checked. Uncheck if you want the pay grade visible but don't want the Min/Mid/Max fields visible.

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Rate Changes: Ability to Change Rates When Schedule is Updated

163458 & 152936: When an employee is assigned a Pay Grade with automatic steps and the rate is changed for the current schedule, the new rate will be applied. If a new rate and new effective date is applied, the nightly job will run and update the rate.

Reports: Automatic Pay Grade Step Added to Employee Information Report Page

152932: On the Employee Information report page, the following columns can be pulled into the report:

- Automatic Pay Grade Step

To get a complete picture of the pay grade an employee is on, it is recommended that you also include the *Employee Pay Grade* column and position it next to the automatic step.

Data Retention: Step and Grade Info Included in GDPR Requirements

173876: Automatic Steps containing Base Compensation that are linked to Pay Grades will be included in the data scrubbing via Data Retention rules. Regular Base Compensation was previously included in Data Retention processing. In this release, we are adding the data contained in Automatic Steps.

HR Actions: Pay Grade Warning/Error Validation

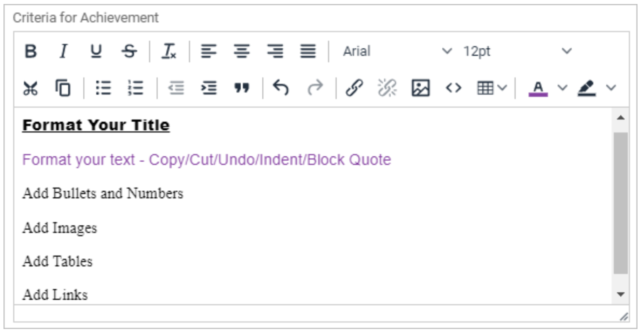
168401: When editing employee information through an HR Action and entering a rate that exceeds the rates entered in the pay grade/steps, users will receive a warning/error message stating that employee pay is not within the selected pay grade.

Performance Management

Goals: HTML Editor Added to Goals Maintenance

173398: When defining goals for performance reviews, we have added an HTML editor to the *Criteria for Achievement* section of the *Goal Assignment* widget in Performance Goal maintenance. This allows you to format your text. The character count in the was increased to allow unlimited characters.

This is accessed under *Team > Talent > Performance > Performance Development*, then open a goal.



Goals: New 'All Development Goals' Option Added to Performance Reviews

53013: Managers can now view all goals associated with an employee so they can review them while working on the review. This works independently of any security settings. This is accessed in performance reviews from the drop-down next to the *Prior Reviews* button.

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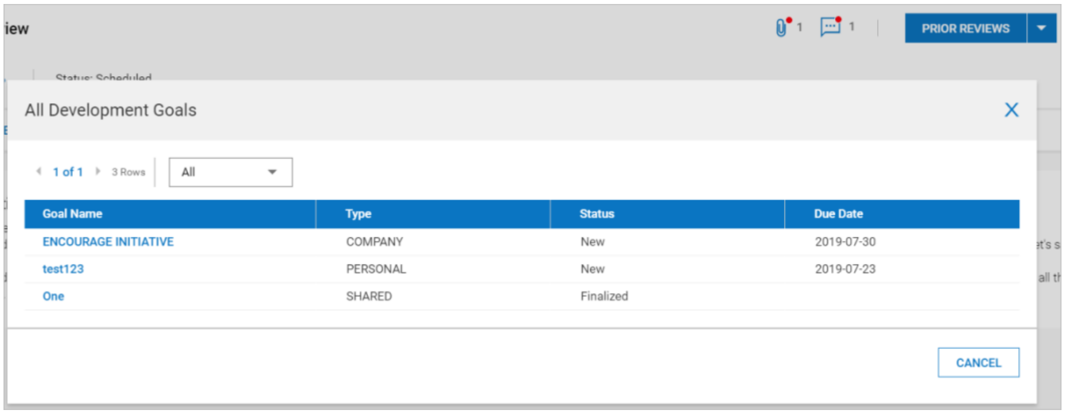


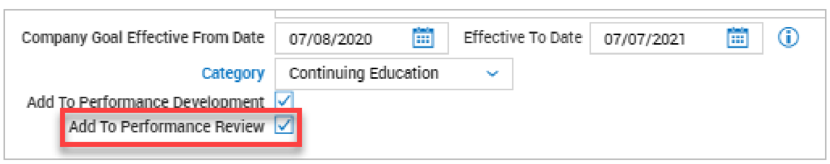
Goals: Auto Add Development Goals to Performance Reviews

91291: When goals are created they can now be flagged to be added to performance reviews. When adding a new review, all goals fitting the date criteria will automatically be moved over to the *Entry* tab and auto populate the *Goals* widget. Managers/users will see the flagged goals and will still maintain the flexibility to manually add goals as needed.

NOTE: The expectation is that all goals will auto-feed to the scheduled review and may result in users needing to remove a few goals instead of always having to add all of them. The goal is to make the experience better through automation but reviewing the scheduled review prior to initiating is still very important.

Goals Maintenance

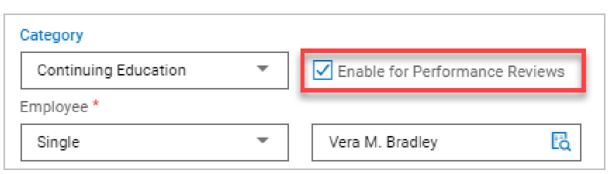
When creating a new goal (*Company Settings > HR Setup > Performance Review > Goals*), check the ***Add To Performance Review*** checkbox to ensure the goal flows to the *Performance Development* and *Performance Reviews* under the *Team* menu.



Assigning Personal Goals

When assigning a personal goal under Performance Development (*Team > Talent > Performance > Performance Development)*, you will maintain control of the goal and whether it will be added to the employee's performance review. This is done by checking/unchecking the ***Enable for Performance Reviews*** checkbox.

NOTE: Company goals and Shared goals that were configured with the *Add To Performance Review* checkbox checked will automatically flow to the performance reviews. Personal goals are the only goals that will have the *Enable for Performance Reviews* checkbox available.



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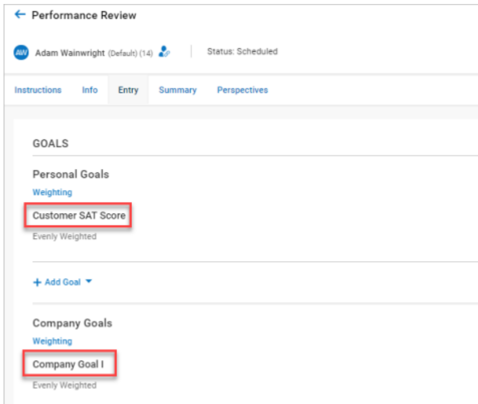
Employee Performance Review

When adding a new performance review for an employee (*Team > Talent > Performance > Performance Reviews*), the flagged goals will flow into the *Entry* tab. Managers/users can add additional goals as needed.

- If the goal has no dates, they will need to be added to the performance review.
- If the goal has dates, the dates still need to be covered by the dates set in the review.
- If the goal is in a Finalized status it will not be auto-added to the review.

The number of goals allowed is still determined by the Performance Review Profile. If that number is exceeded, the system will prompt the user with an error upon save/initiate.

- **Personal Goals**: The weight of the personal goals is based on the weight given to them in the Performance Review Profile. These may or may not add up to 100% and may have to be manually adjusted.
- **Shared Goals**: These will be added with evenly weighted amounts.
- **Company Goals**: If company goals are evenly weighted at profile level then the automatically added goals will also be evenly weighted; however, if company goals are not evenly weighted at the profile level, the goals will be added with their respective individual goal weight.

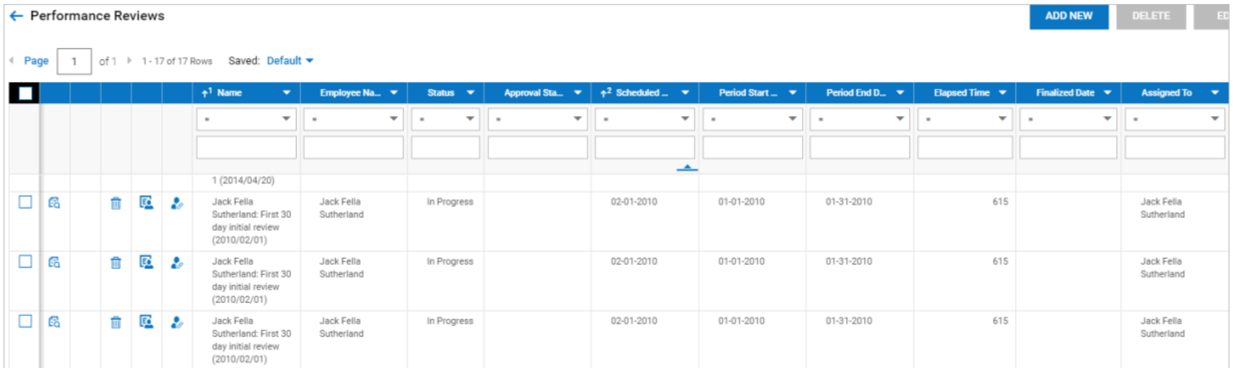


Performance Review Workflow - Steps Available as Report Column

4062: On the Performance Reviews report page, located under *Team > Talent > Performance > Performance Reviews*, a new column is available to be added.

- **Elapsed Time** – Shows how long the review has been on the current workflow step

NOTE: For parallel workflows, the system will add multiple columns so each reviewer will have an elapsed time. If the review is assigned to a group, the group name will be shown.



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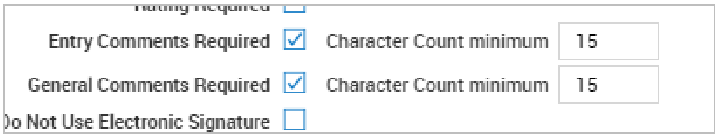
Performance Review Workflow – Comments Minimum Field Added

155358: When *Entry Comments* and/or *General Comments* are required in the *Review* step of a performance review workflow, and to enforce reviewers to enter a valid comment, a ***Character Count minimum*** field has been added to the *Review* step.

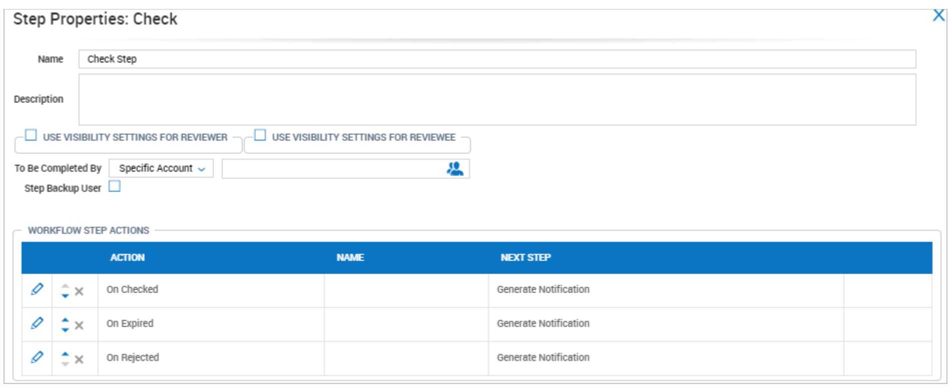
You can now require these comments to contain a minimum number of characters when the *Entry Comments Required* and *General Comments Required* checkboxes are checked in the step. This is valid for both sequential and parallel performance workflows. The maximum character count for these comments is unlimited.



Performance Review Workflow – New 'Check' Step Added

170763 & 45106: A new ***Check*** step has been added to both Parallel & Sequential Performance Review workflows. Its purpose is to allow a user to check the values from a previous review step. When users receive their To Do items from the workflow, the Check step will be read-only and is not a review function and does not have ratings, comments or signatures.

The Check step does have actions of On Checked (what happens next after the user does their check), On Expired (what happens next if the workflow is expired), and On Rejected (what happens next if the user rejects the Check).



Performance Reviews: Auto Add Employee Performance Reviews

7723: Performance reviews will now be automatically added for employees when the manager adds the Performance Review Profile to an employee account. Previously, the review had to be added by clicking a button. When the profile is added, the review and any sub-reviews will be added as a scheduled review and can be edited and worked on as before, including being deleted or modified.

NOTE: If a profile is added to an employee, it will result in a review being added in a scheduled status; but if the profile is incorrect, the added review will not be deleted, and the manager will need to manually delete it.

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Performance Reviews: Multiple Scheduled/Skipped/Finalized Reviews Allowed

111838: When users click to add performance reviews for an employee, the system adds all the primary and sub-reviews. If there are scheduled, skipped, or finalized reviews for the employee, the system would not allow those to be added in addition to the primary/sub review.

In this release you can now add as many scheduled reviews as needed. This also applies to skipped and finalized reviews; but only one of each type can be in progress at a time.

Performance Reviews: Viewing Previous Reviews from To Do Items

155359: To enable managers to easily view historic performance reviews, a link will be provided in their To Do items that will open previous reviews in read-only format.

Performance Reviews: Changing Managers - Updates To Do Items

6203: When changing or updating managers on in-progress performance reviews, the system will now update the To Do Items. This means if Manager 1 has the To Do Item for a review and hasn't yet taken action, and you change the manager in the employee profile to Manager 2, the To Do Item for Manager 1 will no longer display and will route to Manager 2, who will receive a To Do Item.

Additionally, when changing a manager in Employee Information, and there are reviews in progress, an Info message will display stating *Changing managers may automatically update the existing Performance Reviews overnight*.

Position Management

Employee Profiles/Base Comp: Jobs Added via Position Assignment Displays in Rate Tables

182819: When assigning employees to a Position, a Job is added in the process. In the Personal Rate Table of employee accounts, the Jobs (HR) column was not populating with the added Job, but not will moving forward.

FTE Hours Aligned with Base Compensation Default Annual Hours Field

170304, 170306: In Position maintenance, the *Total Hours Per Year* calculations will now be based on the annual hours defined in the *Base Compensation Default Annual Hours* setting, located in the *Account Policies* widget under *Company Setup* (*Company Settings > Global Setup > Company Setup*.) This applies to all areas of the application in which position assignments can be added or edited.

Historically, when entering a value in the FTE field of the *Position Budget* widget in Positions maintenance, the calculation was based on FTE * 2080. Because the *Base Compensation Default Annual Hours* setting can contain a value other than 2080, the calculation for FTE in Position Budget will be based on whatever value is entered there.

Example: Base Compensation Default Annual Hours = 2080

- FTE = 2. Total Hours per year = 4160. User changes 4160 to 5000 in *Account Policies* widget.
- User then changes FTE to 3. The value in the Total Hours Per Year = 6240

In a multi-EIN environment, the hours will be taken from the employee's default EIN as Positions can be assigned to any EIN.

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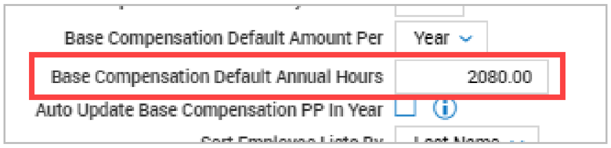
Hiring: FTE Hours with Base Compensation Default Hours in Positions

182595: For Manual Hire or a Hire/Re-Hire HR Action, the value for the Position's FTE hours will come from the value defined in the *Base Compensation Default Annual Hours* field for the EIN assigned to the employee. This setting comes from the *Account Policies* widget in *Company Setup*. Each EIN can have different annual hours set.

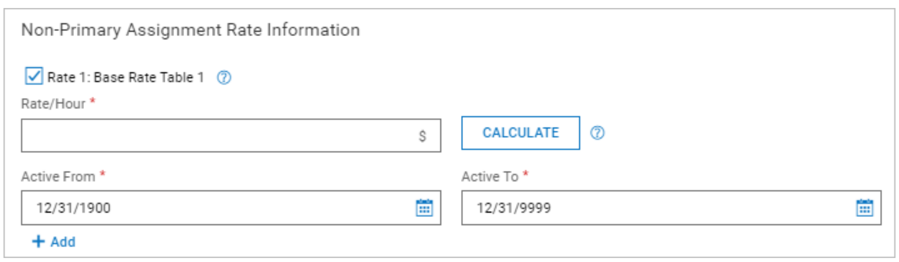


The default value for the EIN in a Hire HR Action comes from the Default EIN of the company. Until a user changes the EIN, the value defined in *Base Compensation Default Annual Hours* for the Default EIN will be used.

HR Actions/Positions: Adding Non-Primary Rates via Regular Type HR Action

151654: When assigning a Position via a Regular Type HR Action, you can now add rates that are outside those associated with the Position. A new ***Non-Primary Assignment Rate Information*** section is now included when assigning a non-primary Position via an HR Action.

NOTE: This now matches the options in the employee assignment pop-up when non-primary position assignments and rates can be entered.



- If your company does not have one of the Rate Tables (*Company Settings > Global Setup > Company Setup* on the *Company Config* tab within the *Account Rate Tables* widget) marked as *Tie To Non-Primary Position Rates equal to Y*, this entire section will not be presented.
- If *Is Primary Assignment* checkbox if checked, these fields will be disabled.
- Once the HR Action has been approved and the assignment has been committed to the database, any information entered in these rate fields will automatically create an entry in the employee's Personal Rate Table.

Jobs(HR) Name Changed to Default Job

169168: To better align the function of the *Jobs(HR)* field with other related areas of HR, such as with Job Requisitions in Recruitment, we have changed the name of *Jobs(HR)* to ***Default Job*** within Position Management.

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Affected Areas:

Column in Position listing page in Classic UI	*Company Settings > HR Setup > Positions*
All Position lookups in Classic UI	*Anywhere a lookup icon is present in selecting a Position*
Exceptions for Reports-To Position Report Under My Reports in Classic UI & New UI	*Classic UI: My Reports > HR > Position Management > Exceptions for Reports-To Position* *New UI: Team > My Team > Reports > Exceptions for Reports-To-Position*
Position Headcount Detail Report Under My Reports in Classic UI & New UI	*Classic UI: My Reports > HR > Position Management > Position Headcount Detail* *New UI: Team > My Team > Reports > Position Headcount Detail*
Employee Assignments Report Under My Reports in Classic UI & New UI	*Classic UI: My Reports > HR > Position Management > Employee Assignments* *New UI: Team > My Team > Employee Assignments*
Column name change in *Employee Assignments* report page.	*Team > My Team > Employee Assignments*
Assignments To Position widget in Employee Information. In Position lookup at the time of position assignment. *Default Job* will be available in selection list.	*Team > My Team > Employee Information* > Add/Edit in the *Assignments To Position* widget
Positions maintenance: In *Position* lookup field when editing positions at the time of selecting a job from the lookup list for *Directly Reports to Position* or *Indirectly Reports to Position.*	*Company Settings > HR Setup > Positions* > Edit position
Default Job column using the *Export* option from the Positions maintenance page.	*Company Settings >HR Setup > Positions* > Export option
Default Job field name listed in *Positions* Import template.	*Company Settings > Import > Overview >* Positions template

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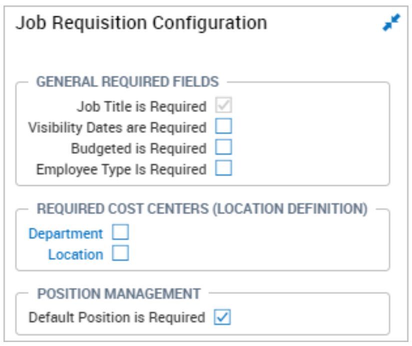
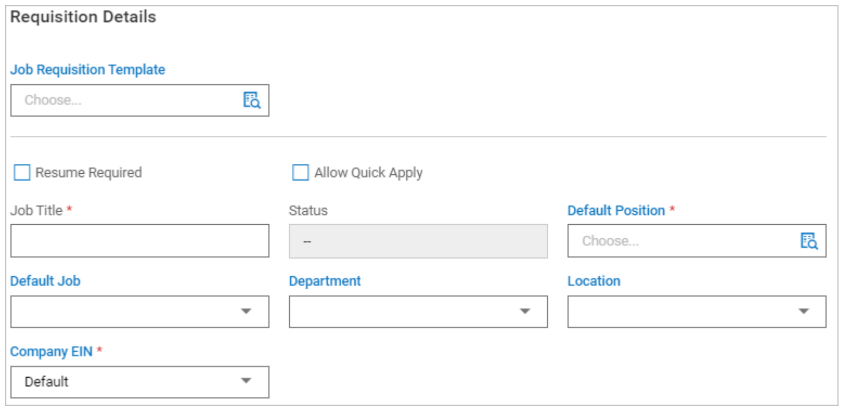
Position Reports: Base Compensation Date Reflects Local Date

179517: In all Position reports, the Base Compensation in the Effective Date column will reflect the local date according to the time zone. For example, the current server date is 6/18/20 and the manager's time zone date is 6/19/20, the *Effective From* date in the reports will show the manager's time zone.

Position Requirement Added to Job Requisition Configuration

161035: For companies who have both Recruitment and Position Management enabled, a *Position Management* widget will display in the *Job Requisition Configuration* widget of the *Configuration* page of Recruitment (*Company Settings > HR Setup > Applicant Tracking/Recruitment > Configuration*.) The widget contains a ***Default Position is Required*** checkbox, and when checked, will require job requisitions to have a default position assigned.





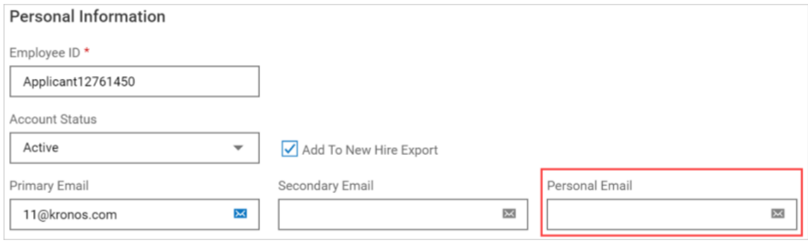
Recruitment

Applicant Hiring & Personal Email Addresses

175410, 176882, 176869: Historically, when applicants were hired, an employee username was created, and the system automatically updated the username on the applicant record; and the applicant's email that was used when the account was created would be removed.

To solve this, we have created a new ***Personal Email*** field that is automatically filled in with the same email address used to create the employee account when hiring an applicant. This field will be maintained and not changed when the applicant is hired, therefore retaining the email information from the applicant's record. This is available for manual hire/rehire as well as HR Action subtypes My Employee (Regular, Hire, Re-Hire, Termination) and My Information.

Recruiters and hiring managers will be able to view the Personal Email address when downloading PDFs from the applicant or employee profiles, on applicant reports, on employee reports, and any other area of the system where email addresses can be viewed, downloaded or exported.



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Personal Email Address & Cell Phone Added to Terminations

175411: In the *Termination Details* section of the *HR Settings* widget (*Company Settings > Global Setup > Company Setup*), we have added ***Personal Email*** (*Displayed/Required*) and ***Cell Phone*** (*Displayed/Required*) to the list of options. When checked, these options will display in the *Termination Detail* widget while terminating employees. These fields can be edited as needed.

Personal Email Address Added to Applicant Import Template

176868: Personal email addresses can now be imported into Applicant Profiles for new or existing applicants via the Applicant Import template. A validation will be performed to ensure the Personal Email Address is unique and is not the same as the Primary Email Address.

If the Personal Email Address field is left blank in the import template, the Primary Email Address will be used as the Personal Email Address.

Applicant Portal: Questionnaire Updated for New UI

173193: Questionnaires added to the applicant portal have now been updated within the New UI. The *Save* button saves and validates the fields and stays on the page. The *Save & Continue* option saves, validates and moves the applicant to the next tab.

Demographics Profile Added to Applicants

168294: In the New UI, when assigning a *Demographic Profile* to an applicant, the *Account Demographics* widget in their profile will now be updated with the fields from the profile without having to click Save first. This will work the same as it does in the Classic UI.

Hiring Manager Issues in Viewing Multiple Job Applications from Applicants

164941, 182052: We have addressed a situation where a hiring manager with proper viewing rights was only able to see one of many job applications submitted by an applicant for job requisitions created/assigned for that manager. A hiring manager/MCC manager who has group rights to the applicant should be able to see all the job requisitions the applicant applied to, not just the one in which the manager is the hiring manager. Moving forward, the following can be expected:

- For hiring managers or MCC managers, they will be able to see all job applications in the Job Applications report for applicants having a job application originated by the hiring manager.
- When the hiring manager clicks *View Application* for all the job applications for which the manager is not either the hiring manager or an MCC manager, the job application will be opened in read-only mode.

For users who are not the hiring manager/MCC manager, when opening the Job Applications report, the following can be expected:

- The *View Job Requisition* button will not display.
- The *Delete Job Application* button will not display.
- These users cannot update the *Update Hiring Stage* option.
- These users cannot update the *Add Questionnaire* option.

NOTE: All the changes are accommodated for the dashboard Job Applications widget as well as the Job Applications report.

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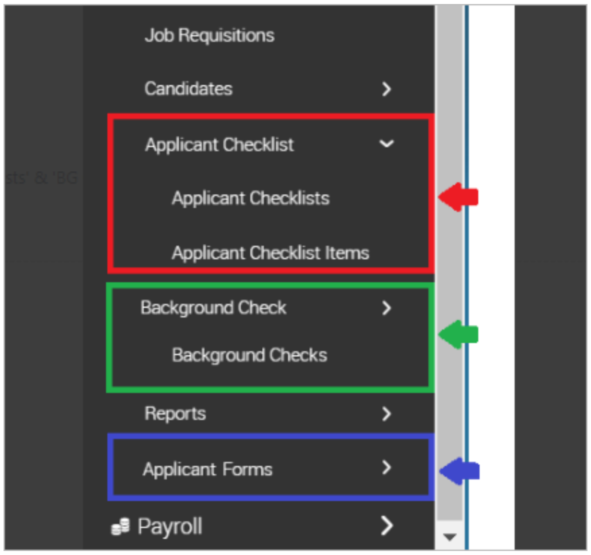
Menu Changes in Recruitment Menu

182277: The following menu changes have been made in the Recruitment menu under Team.

The Pre-boarding menu has been split as follows:

- ***Applicant Checklist*** with sub menu options *Applicant Checklists* & *Applicants Checklist Items* (refer to red box in screenshot)
  - Path: *Team > Recruitment > Applicant Checklist*
- ***Background Check*** with sub menu option *Background Checks* & *Background Checks History* (refer to green box in screenshot)
  - Path: *Team > Recruitment > Background Check*
- The menu option ***Forms*** has been renamed to ***Applicant Forms*** (refer to blue box in screenshot)
  - Path: *Team > Recruitment > Applicant Forms*



Job Requisition Workflows: Generate Notification Couldn't be Sent to "Based on Contact Information"

157701: In *Job Requisition* workflows, in the *To Be Completed By* field of *Generate Notification* and *Checklist* steps, when selecting *Based on Contact Information*, the hiring managers fields from the page will now display. Checking the *Enable Manager Level* in the workflow will route to the level specified for approval.

Position Mgmt/Job Req: Default Position Field Added to Job Requisitions

169158, 169160, 180506: For companies using both Recruitment and Position Management, a ***Default Position*** field is now available in the Requisition Details widget of Job Requisitions. By adding the Position during the Job Requisition process, managers will not have to add it later.

When adding a Default Position, you will be prompted with a warning pop-up stating:

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Job Title, Description, Default Job and Employee Type fields will be overridden with the information attached to this position and Category field will be overridden with the information attached to the default job associated to this Position. Are you sure you want to override these values?

If the Default Position being added to the Job Requisition is marked as Inactive, an error message will be generated. The messages are different depending if the Position is mandatory or not within the requisition.

- If the Position is non-mandatory: *The selected position is inactive. Please select a valid position*.
- If the Position is mandatory: First, the non-mandatory message will display, followed by this message: *Default position is required*.

Position Mgmt/Job Req: Columns Added to Reports

169167: For companies using both Recruitment and Position Management, the following changes have been applied:

- New columns have been added in the Job Requisition report page and the Time To Hire Reports:
  - *Job Requisition: Default Position*
  - *Job Requisition: Position Id*
- The *Jobs(HR)* columns have been renamed to *Default Job* in the *Time To Hire* report as it is in the Job Requisition report page.

Position Mgmt/Job Req: Evergreen Label Name Change in Job Requisitions

169165: The *Disable Evergreen* checkbox in job requisitions can be checked/unchecked. When Position Management and Recruitment are used together, and Positions are added to the job requisition, the label *Disable Evergreen* is not entirely accurate. To address this, we have changed the name from *Disable Evergreen* to just ***Evergreen***. By default, it will be unchecked.

- If you select *Evergreen* and add data, then save, the section will collapse and will be hidden. The data will still be available (*Number Of Openings/Total FTE/Auto Change Status To Close And Filled When Filled*) and displays again when unchecking the checkbox.

Quick Apply: Delete Option Added to Resume Upload

173141: To allow applicants to remove uploaded resumes when using Quick Apply, a delete option represented with a Trash Can icon had been added to the pop-up page. Applicants will be allowed to use this only prior to clicking *Apply* or *Continue*.

Recruitment Configuration: 'Returning Employee Applicant' Security Profile Added

174133: To ensure returning employees can apply for jobs, a new default security profile has been added for them in the Applicant Tracking/Recruitment Configuration widget of the Configuration page of Recruitment. This field will default to the Applicant profile, which gives the former

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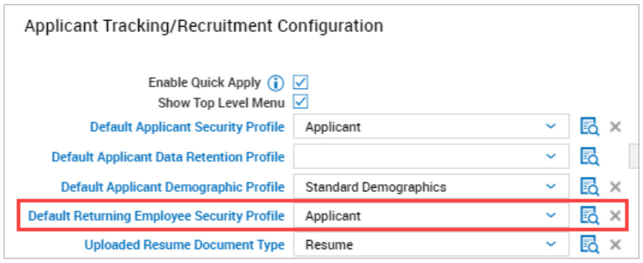
employee/applicant the proper security permission to navigate through the application process. If this profile is not desired, you can create and assign a different one.



Reports

Base Compensation Dates in Reports to Show Local Time Zone

180353: The Base Compensation dates shown in HR reports and maintenance pages across the system will reflect the user's local system date.

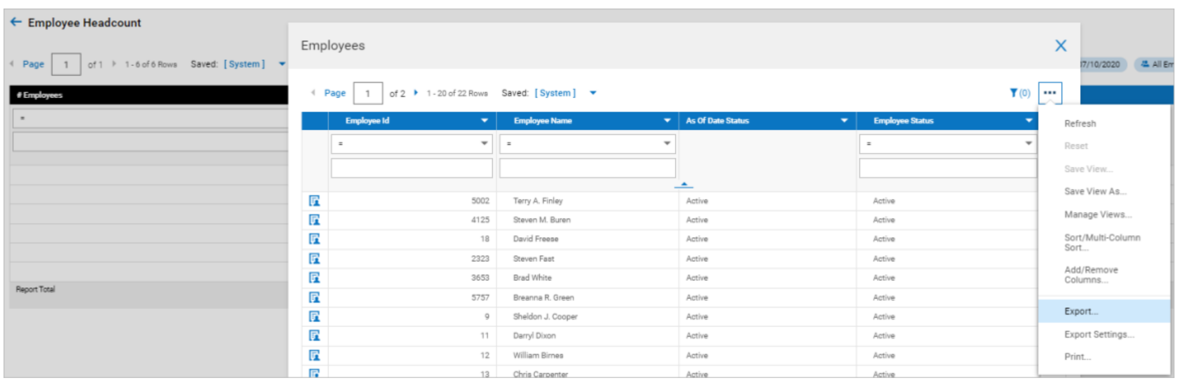
e-Signature Audit Report Updated for I9 Form Signatures

161656: The *Display Name* column in the e-Signature Audit report has been renamed to *Signature Details*. When an I9 form is signed, the audit report will show if the form was signed by the employee or manager. The details will display as follows:

- Form I9 (Employee)
- Form I9 (Manager)

Employee Headcount Report Export Now Available

173179: The ***Employee Headcount Report***, located under *My Info > My Reports > HR Reports > HR Maintenance > Employee Headcount*, will now support the exporting of the employees listed when clicking the numbered hyperlink in the *#Employees* column.



Standard Work Day Setting

Standard Work Day Value in Application

134708: Historically, the *Default Job* field in the *Pay Information* widget of employee accounts accepted 0.00 as a valid value for the *Standard Work Day* field. But when the *Standard Work Day Is Required* field was checked as required under the *Account Policies* widget of Company Setup, and a Default Job was assigned to an employee, the record could not be saved because the system would not accept the 0.00 *Standard Work Day* value coming from the Job. This has been corrected and the value will now be

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accepted. This will occur with a manual hire, an edit, an import, through HR Action updates, mass edit of employee accounts, or when assigning a default job to a cost center or position.

Terminations

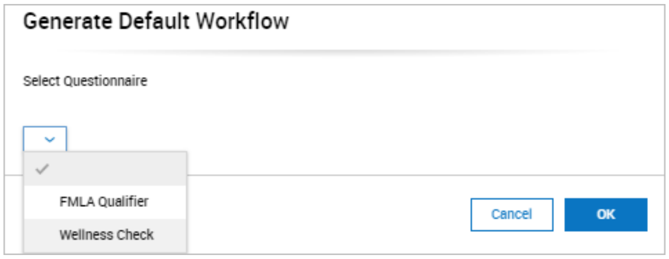
Schedules Automatically Deleted After Termination Date

178907: When terminating an employee through an Employee Import, HR Actions, or manual termination all existing schedules that are in place after the employee's termination date will now be deleted.

Workflows

Wellness Check Workflow Added for Questionnaire Workflow Type

178682: When selecting a *Questionnaire* type workflow, a new ***Wellness Check*** questionnaire has been added as an option to address potential COVID-19 issues with employees. This is available for Default workflows only.

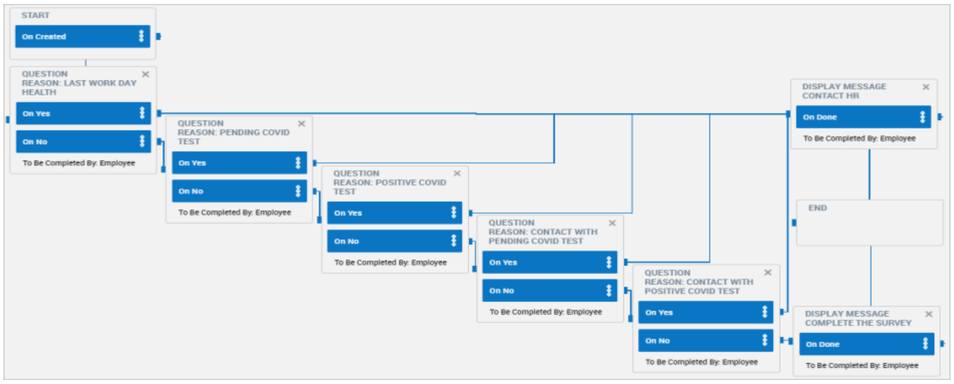


The new workflow will ask the recipient the following questions. Depending how questions are answered, the workflow will either route to the next question, or for Yes responses, will display a message instructing the employee to contact their HR department.

- Since your last work day have you experienced any of the following:

• Cough • Shortness of breath • Difficulty breathing • Chills	• Muscle pain • Sore throat • Loss of taste or smell

- Since your last work day have do you have a pending COVID-19 test?
- Have you tested positive for COVID-19 within the last 14 days?
- Since your last work day have do you been in contact with anyone who has a pending COVID-19 test?
- Since your last work day have do you been in contact with anyone who has tested positive for COVID-19?



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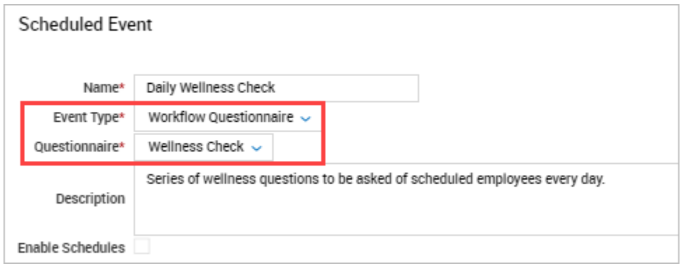
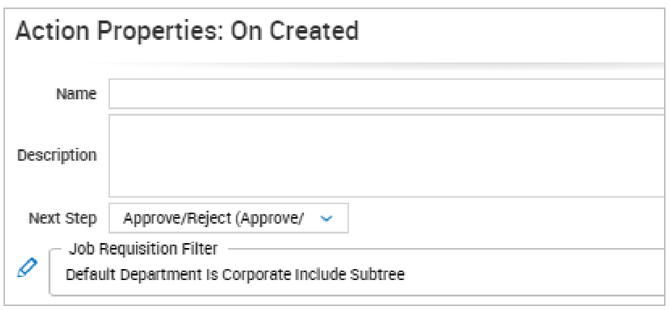
178082: These workflow questionnaires are now available to be added as a scheduled event under *Company Settings > HR Setup > Scheduled Event*. Select *Workflow Questionnaire* as the *Event Type*, and then select the Wellness Check questionnaire you created in the *Questionnaire* field.



Hiring Stage Change Request Workflow: Job Requisition Filter Added to On Create Step

178542: In the *On Created* step of the *Hiring Stage Change Request* workflow, a new ***Job Requisition Filter*** has been added. By having the Job Requisition filters in place at the *On Created* step of the workflow, the filtering criteria can be used to only include job requisitions matching the items included in the filter when the workflow is triggered.

Filtering criteria includes: Country, Default Cost Center, Default Job, EIN, Employee Type, Hiring Manager, Job Category, Type and Is Budgeted.



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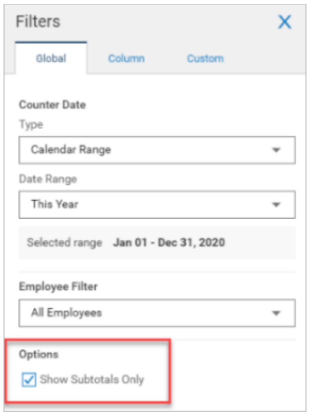
Time and Labor

Accruals Reports – Ability to Subtotal Accrual Balances Report

149440: Previously, it was not possible to only display subtotals, and in the grouping, the accrual liability balances did not sum up.

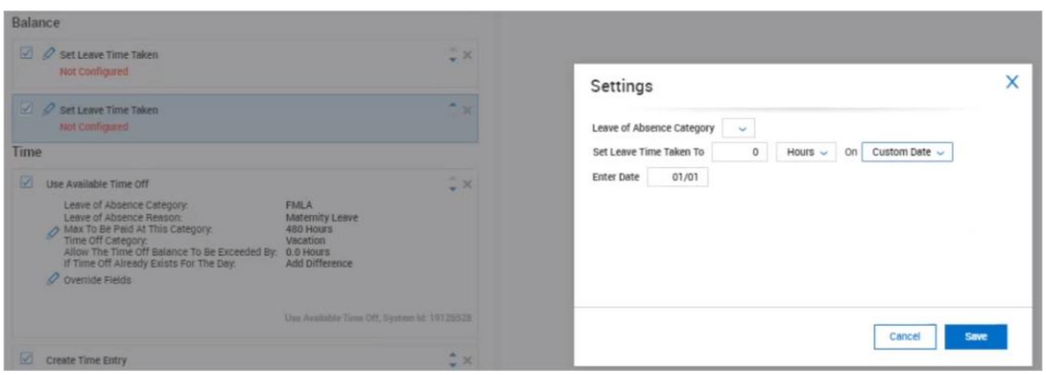
What's new: Users can now sum up all hours/days values and balance liability in report groups, and allow for showing/exporting subtotals only.



Added Calendar Option to "Set Leave Time Taken" to Match DOL Options

170276: The Department of Labor allows companies to reset time taken based on a number of different dates or a number of 12-month periods. Previously, the system could only handle two of these scenarios: expire leave time taken after X number of days or set leave time taken based on a date on the Employee Profile. Admins were not able to set leave time taken at the first of the year or another calendar date, they had to instead manually change leave entitlements or use an import.

What's been added: In the Leave of Absence Profile, within the *Set Leave Time Taken* rule, you can now select *Custom Date* from the *Set Leave Time Taken To* drop-down and specify a date from the *Enter Date* field.



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Added “View Timesheet” and “View Legend” Action Button to Exceptions Report

163034: Previously, when managers viewed the *Exceptions* report in the New Mobile App and the mobile version on desktop, they were not navigated directly to the employee's timesheet that had the exception on it directly from the report. Users were also not able to view the legend for the exceptions from this report.

What’s new: Managers now have the option to view the employee timesheet directly from the *Exceptions* report by clicking the *View Timesheet* icon. In addition, users can pull the exceptions *Legend* to reference by clicking the *View Legend* icon from the report page.

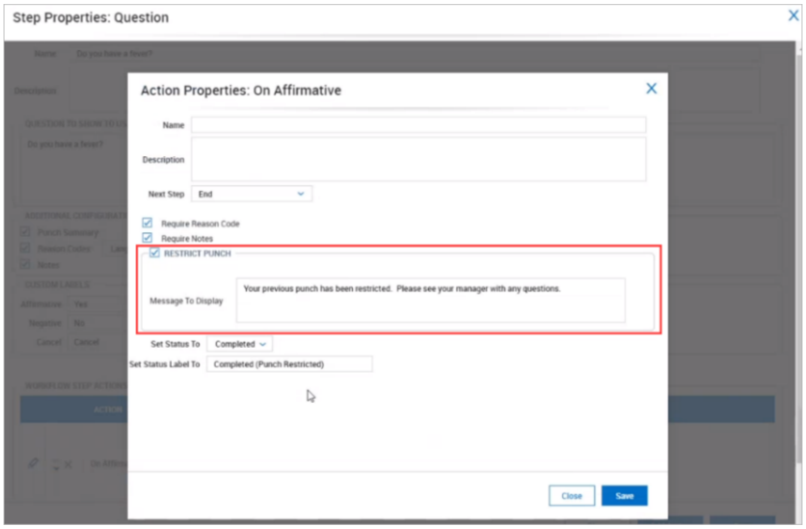
Attestation Configuration

Added “Restrict Punch” Option to Attestation Workflows

Before including any health-related questions in OnePoint HCM Attestation please consult with your legal counsel to ensure you are compliant with applicable privacy laws and regulations.

182475, 183397, 173149, 182458: Attestation workflows can be configured with Custom Punch (In/Out), but the option to remove the previous punch from the employee’s timesheet was previously not available.

What’s been added: For the New Desktop Timesheet and the mobile .clock URL (*Clock* widget), a new configuration option within the *On Affirmative* and *On Negative* Workflow *Step Properties: Question* is available, *Restrict Punch*.



When this is enabled, the system will automatically remove the employee’s last punch and will display the configured message to the employee either as an inline message on the timesheet, as a pop-up message in the mobile version on desktop within the *Clock* Dashboards widget, or as an inline warning message on the login screen in the .clock URL.

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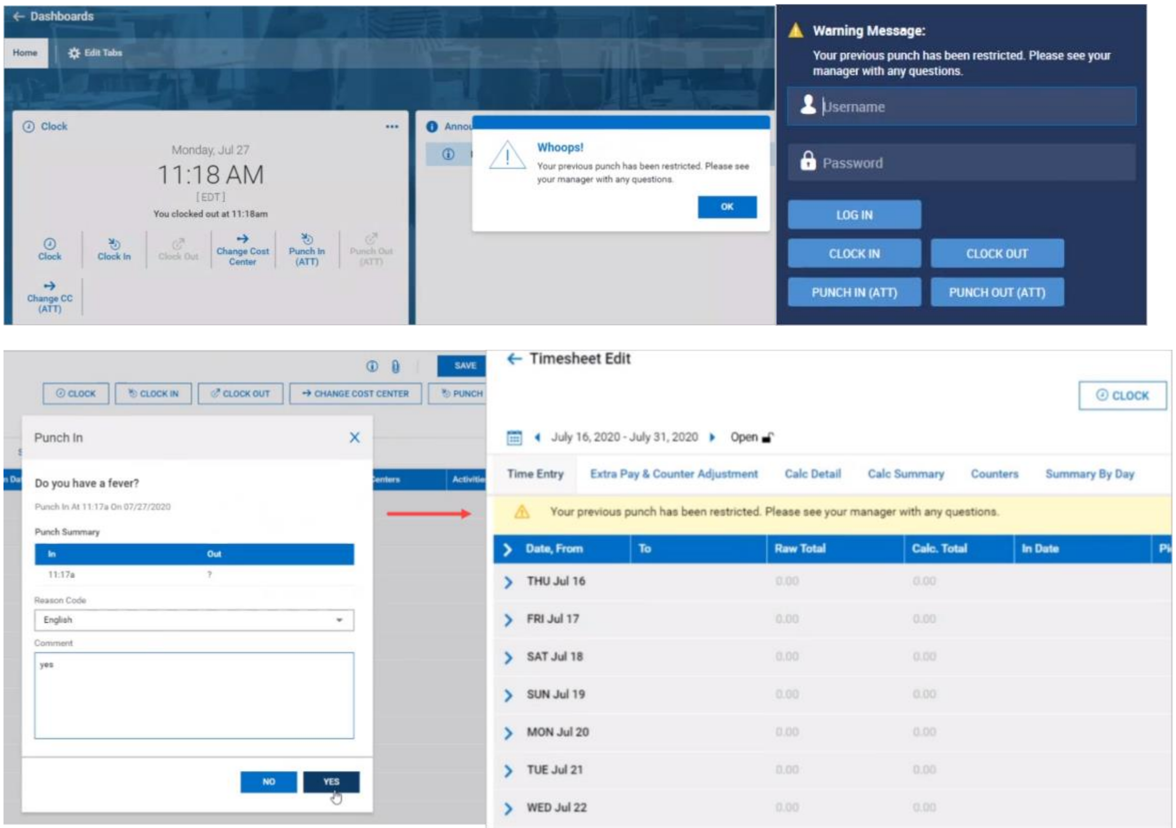

NOTE: The default message that will display is, *Your previous punch has been restricted.* You can enter a custom message in the *Message To Display* field.

If the user were to close the Attestation prompt to do later, the Attestation prompt will be in the user's *My To Do Items*, and the same pop-up message will display there, if applicable.

The automatically rejected (unprocessed) punch due to the Attestation response will then display on the *Unprocessed Punches* and *All Punches* reports with the status, *Restricted From Punching Due To Attestation*. If an error was made with the Attestation response, a manager can go to the *Unprocessed Punches* report (*My Reports > System Reports > System Utilities > Unprocessed Punches*) and select the unprocessed punch and click the *Reprocess* button.

An example situation of when this could be used is the Attestation question asks the employee who is punching in if they have had a fever recently. If the employee answers *yes*, then their punch will be rejected, and a message directing the employee to see their manager would display. If notifications are configured with Attestation, an email would be sent to the manager informing them that they need to see the employee, and that their punch was not processed.

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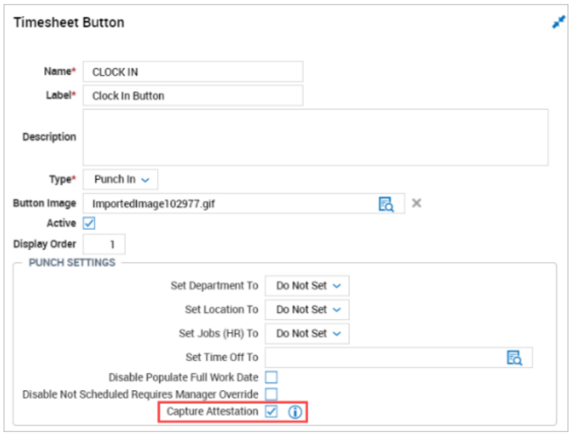
Attestation Punch

Attestation – Trigger Workflow for Extra Buttons [.clock]

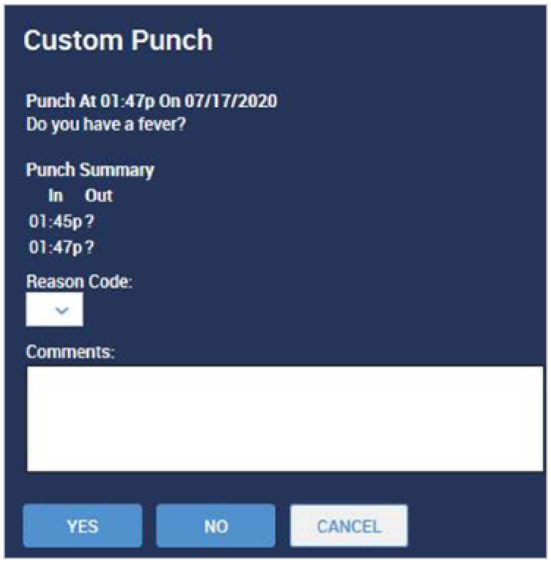
Before including any health-related questions in OnePoint HCM Attestation please consult with your legal counsel to ensure you are compliant with applicable privacy laws and regulations.

174159: The Custom Punch Buttons functionality was previously released on the .clock URL, but the ability to trigger Attestation workflows was not available.

What's new: Custom Punch Buttons that have *Capture Attestation* enabled will now trigger Attestation workflows from the .clock URL. Capture Attestation workflow is available to configure for each Custom Punch Button. Navigate to the *Timesheet Punch Settings* widget in the Timesheet Profile and click the *Extra Buttons* hyperlink. From the *Timesheet Button* page of the Custom Button that you are editing, enable *Capture Attestation*.



Below is an example of a Custom Punch Attestation question.



NOTE: Web clock URL settings can be configured under *Company Settings > Global Setup > Company Setup*, under the *Login Policies* tab.

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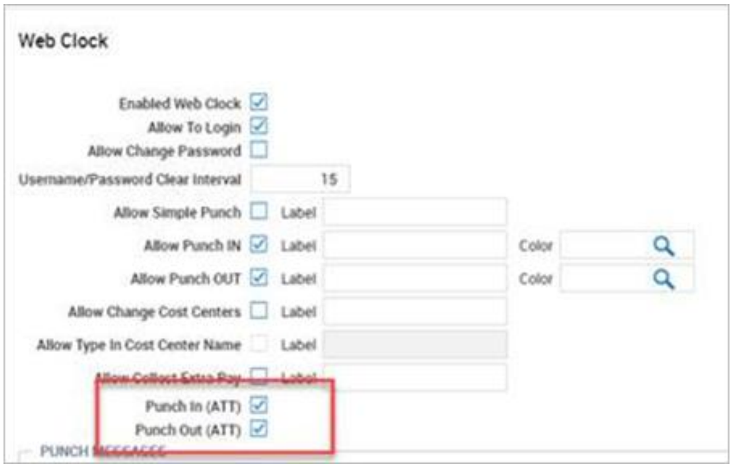


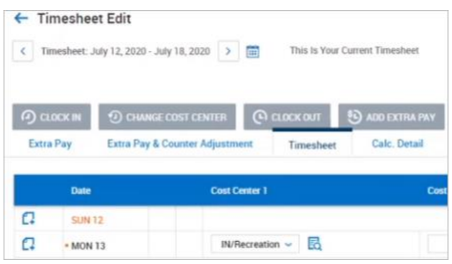
Attestation – Trigger Workflow for Extra Buttons on Clock Dashboard Widget [.home]

177608: Similar to the .clock URL (refer to 174159), when an employee uses Extra Buttons from the *Clock* Dashboard widget in the New Mobile App and the mobile version on desktop, Attestation will trigger. Extra Buttons must be enabled in the Timesheet Profile, and Attestation workflows for these Custom Buttons must also be configured.

NOTE: Extra buttons must also be enabled in the Security Profile within *Mobile Punch Settings* in the *New UI Preferences* widget if they will be used from mobile devices.

Enable Extra Buttons with Attestation in Classic Timesheet

175321: In the previous release, Extra Buttons were available to enable in the New Timesheet Experience, as well as the ability to capture Attestation. This feature was previously not available in the Classic Timesheet. Going forward, Timesheet v1 (Classic Timesheet in the New UI – *Desktop* option enabled in the Timesheet Profile) users will now be able to utilize Extra Buttons and Attestation. For more information on configuring the Extra Buttons and Attestation, refer to the R69 (June) TLM Release Notes.



Redesign of Attestation Page

175363: Previously, there was only one link on Attestation for all Extra Buttons, so users were unable to have different Attestation workflows trigger based on the type of punch using Extra Buttons.

What's new: Users can now configure Attestation workflows specific to a Punch In and Punch Out, or an Extra Button labeled as Punch In or Punch Out. Under the *Attestation Profile* within the *Prompt Settings* section, you can enable *Punch In* and/or *Punch Out*, then select a Workflow for each within the *Condition* widget, as well as add Punch Filters. You can add multiple conditions for each Punch, meaning you can have multiple workflows per Punch In/Punch Out, by clicking the *Add New* button.

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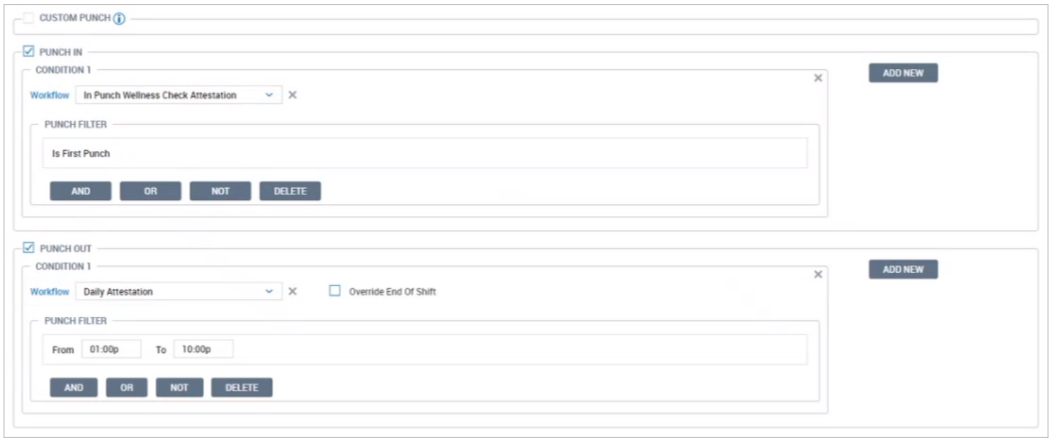


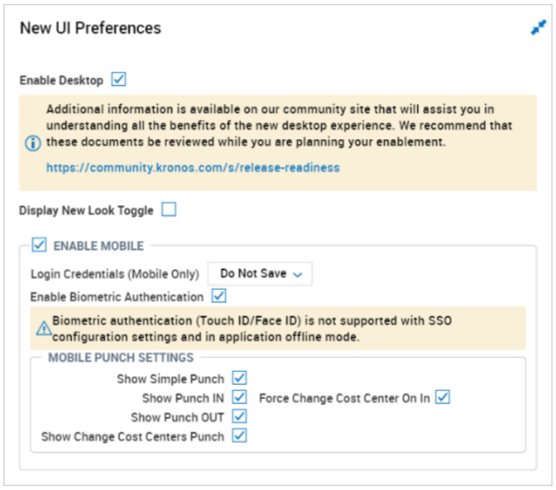
For example, the Punch Filter could be the employee's first punch in the day, which will trigger a specific Attestation question based off the workflow that was selected.

NOTE: This cannot be used in the same Attestation profile as the Custom Punch option.

Security Enable Extra Buttons to Display in Mobile Punch Settings

174918: When users configured Extra Buttons that were enabled in the Timesheet Profile, the Extra Buttons did not display in the Security Profile for Admins to enable in order to give users permission to view and use these buttons in the New Mobile App.

What's new: Under the Security Profile within the *New UI Preferences* section, a *Mobile Punch Settings* widget is available, which will now display the Extra Buttons that were configured in order to be enabled for users.



Current Accrue Rate Not Showing in Accrual Widget in Employee Information

181653: Previously, when the *Current Accrue Rate* setting was enabled (under *Accruals Policies* within the *Visible Columns* widget), the *Current Accrue Rate* column was not displaying in the Accruals balance widget under Employee Information. Going forward, when enabled, the *Current Accrue Rate* column will display in the Accruals balance widget.

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Employee Profile – Expose Personal Rate Table Setup

Added Base Compensation Effective Date to Employee Import File

187090: The Employee Import template now includes a *Base Compensation Effective Date* field. Users can add a date in this field for employees whose base compensation will change, so that the import does not immediately overwrite the employee's existing base compensation.

Employee Profile – Expose Personal Rate Table Setup

155117: Previously in the Employee Profile, managers and admins could not see their employee’s rate table, so they instead had to click the *Rate Table* link, which would navigate them from the Employee Profile, resulting in more clicks.

What’s new: A toggle for *Preview Personal Rate Table* has been added to the *Base Compensation* widget underneath *Rate Tables* in the Employee Profile. When enabled, users will be able to preview what is in their employee’s rate table. When the toggle is disabled, the rate table will collapse. The *Manage Personal Rate Table* link is still available to make edits to the rate table.

Enable ESS Leave Forms if Leave is Enabled without HR and/or Payroll

168756: Previously, if a company did not have HR or Payroll modules enabled, and the Leave module was enabled, managers and employees were not able to access and submit Leave related forms that are available in these other modules.

Going forward, Leave forms will now be available for any company that has the Leave module, regardless of if they also have the HR or Payroll modules.

Geo Restrictions for Web Clock API

155470: Previously, when employee punches were collected using a non-WFR device and API was used to bring the punches into WFR, there was no Geofencing validation available to ensure the punches met all criteria when the punches were imported.

What’s been added: Geofencing support for the Web Clock API is now available. A new setting, *Validate Punches Coming From REST API*, has been added to the *Check Distance* rule in the Timesheet Profile. When this setting is enabled, punches coming from the Web Clock API will be validated against the *Check Distance* rule for the employee that the punch is coming in from.

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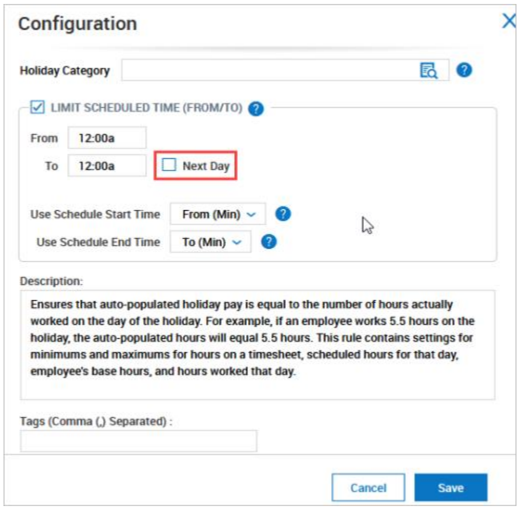
Holiday Pay – Support for Cross Day Cases in Schedule Restriction

120046: You can now configure a start and stop holiday calculation for schedules with working and time off cross day schedules. A new checkbox, *Next Day*, has been added to the Holiday Configuration, within the *Limit Scheduled Time (From/To)* widget. If enabled, employees scheduled on those days will be credited with the correct amount of holiday pay.



Hours Prior To and After Scheduled Time (v.3) was Not Allocating Correctly

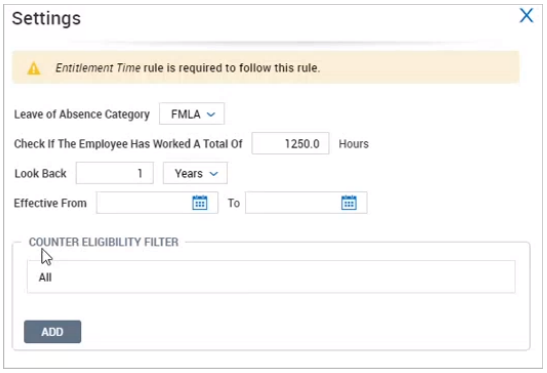
168651: Previously, in Pay Calc 2 companies, the *Hours Prior To and After Scheduled Time* rule in some situations did not allocate the correct number of hours to the designated counter.

What's changed: A new version of the *Hours Prior To and After Scheduled Time* rule will now allocate the appropriate number of hours to the counter of the hours worked or to a specified counter.

LOA – Added "Counters" Filter to Look Back in Pay Calc v2 Companies

168767: Previously, for Pay Calc 2 companies, users were not able to filter for specific counters in the Entitlement *Look Back* rule within the Leave of Absence Profile.

What's new: A new rule has been added, *Look Back (Counter)*, which will allow users to add counter categories via the *Counter Eligibility Filter*.



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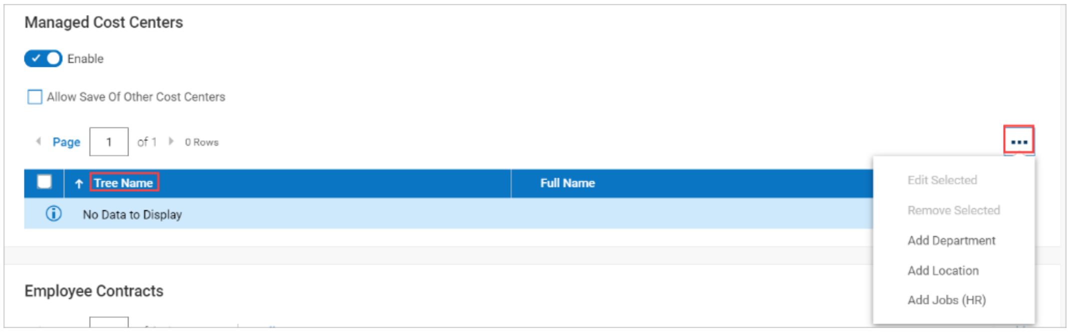
MCC Optimization

Changed the Report Inside MCC Widget to Advance Table

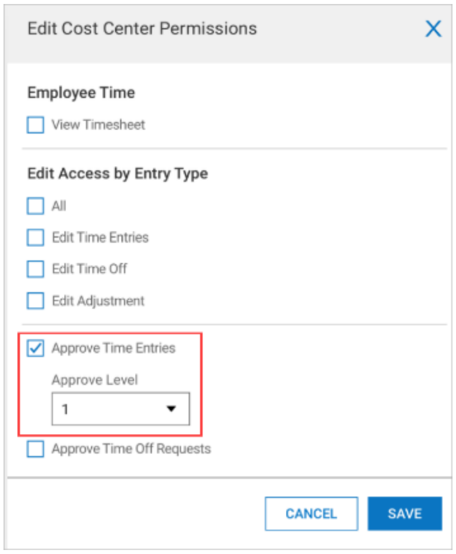
WFR-165893: In the *Managed Cost Centers* widget under *the Employee Profile*, the following actions will now display from a three-dot ellipsis button:

- *Edit Selected*
- *Remove Selected*
- *Add Department*
- *Add Location*
- *Add Project Codes*
- *Add Jobs (HR)*

In addition, the tree name of the managed cost center is now a hyperlink, and when selected, will navigate you to the *Edit Cost Center Permissions* page.



From the *Edit Cost Center Permissions* page, an *Approve Time Entries* setting is now available to enable. This will allow you to choose the approval level for the manager of the selected Cost Center from the *Approve Level* drop-down, which was previously not available.



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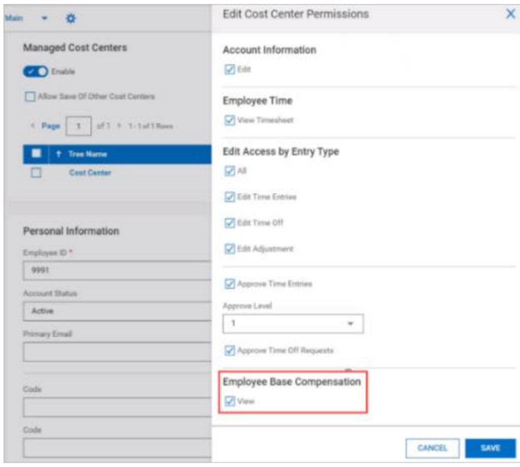
MCC – View Base Compensation Permissions

171706: Previously, when users clicked *Edit Cost Center Permissions* from the *Managed Cost Centers* widget in the Employee Profile, the *View permission under Employee Base Compensation* was not available in the mobile version on desktop.

Going forward, a *View* checkbox under *Employee Base Compensation* will be available to enable.



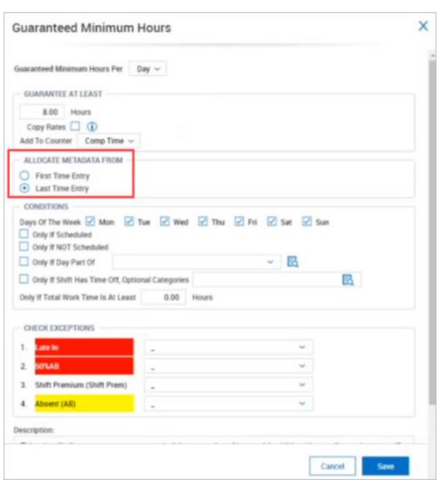
Pay Calc 2

Guaranteed Minimum Hours Rule Not Allocating Metadata

167606: For Pay Calc 2 companies, if for example, an employee was guaranteed 8 hours but worked 6 hours, the *Guaranteed Minimum Hours* rule would allocate the leftover 2 hours to the employee's default cost center instead of the cost center the employee worked at that day.

What's new: The system can now allocate time to a cost center that the employee worked. A new *Allocate Metadata From* section is available in the *Guaranteed Minimum Hours* rule, with options to select *First Time Entry* or *Last Time Entry*. The counter/time entry values calculated by the *Guaranteed Minimum Hours* rule will distribute against the metadata according to the setting specified.

NOTE: If *Time Entry* is selected from the *Guaranteed Minimum Hours Per* drop-down, the *Allocate Metadata From* section will be hidden.



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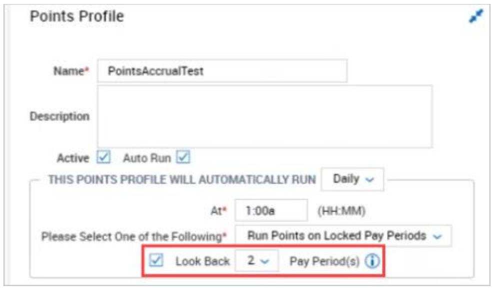
Points – Automatically Recalculate Points for Past Dates

140970: Previously, points could only be automatically recalculated daily.

What's new: The system can now automatically recalculate points for past dates by enabling the new *Look Back* checkbox in the *This Points Profile Will Automatically Run* widget of the Points Profile.

Setting the number of *Pay Period(s)* as 1 will run the look back for the current pay period. Setting the number as 2 will run the look back for the current and previous pay period.



Points – ESS View "Points History" Report in Menu

173671: Previously, employees could only access their Points History from the *Points* widget in their Employee Profile.

What's been added: A new menu item, *Points Balance*, has been added under *My Time > Points Balance*, to allow employees to easily access their *Points History* report from the menu. This report is the same report that employees can access in their Employee Profile, and it can be included in the start widget, employee quick links, etc.

Report Dialogs – Rejected Time Entry Re-Submission

Initiate Notification on Timesheet Submit (Remaining Recipient Types)

166077: Previously, only Cost Center Managers were supported recipients in the *Time Entries Require Manager Approval (On Submit)* global notification. Going forward, all other recipients (Approving Managers, Group, and User) can be selected to receive this global notification.

Reports – Exceptions Entries Audit Trail – More Descriptive "New" and "Old" Values

173651: In a previous release, an *Exception Entries Audit* report was added to determine who had exceptions changed over a given period. However, the *New Value* and *Old Value* columns in the *Exception Entries Audit* report were not descriptive and easy to read. Numeric values displayed instead of the actual exception names/abbreviations, and there were not any set patterns.

What's changed: The *New Value* and *Old Value* columns will now display the exception names/abbreviations. When you click on the exceptions, you will be taken to the timesheet.

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Timesheet Extra Settings – Start/End & Bulk

Remember Timesheet State / Copy Previous Timesheet State

164022, 164023: As seen in the Classic UI in the Bulk timesheet profile, the setting within the *Extra Settings* section, *Remember Timesheet State*, is now available in the New UI. When enabled, empty rows under the *Time* tab will be saved after saving the timesheet, and data in rows, as well as the number of rows, will be saved. If this option is disabled, the additional rows and data will disappear.

In addition, a *Copy Previous Timesheet State* option is available to enable. A list will display, *Edit Fields To Copy*, where you can enable the fields that you want copied to the next created timesheet. If none of the fields in this list are enabled, the new timesheet will contain the default number of rows and data.

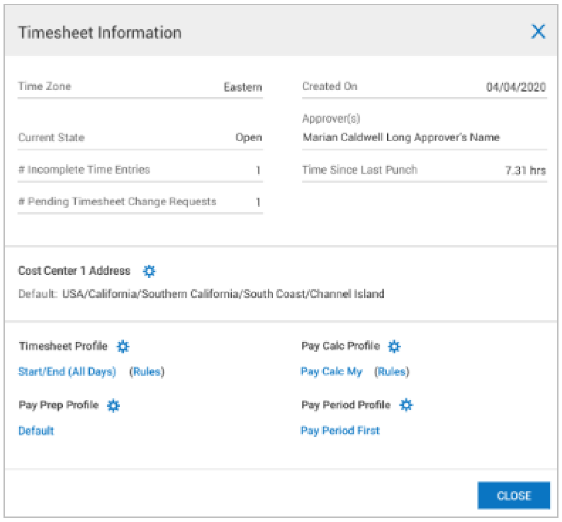
Show Timesheet Information Pop-Up

163955, 164015, 179811: For users who want to see a quick links pop-up from the timesheet so that they can quickly open profiles that are assigned to a user (for ESS and MSS), as well as find timesheet information, a new checkbox, *Show Timesheet Information Box*, has been added to the Timesheet Profile within the *Extra Settings* section.

When enabled, an information icon will display at the top and bottom of the timesheet, and when you click or tap on it, the *Timesheet Information* pop-up window will display.

Information in this pop-up window includes Cost Centers and Profiles (Timesheet Profile, Pay Calc Profile, Pay Prep Profile, Pay Period Profile).

NOTE: The profiles displayed will be those assigned on the first day of the pay period; effective dating will be supported in a future release.



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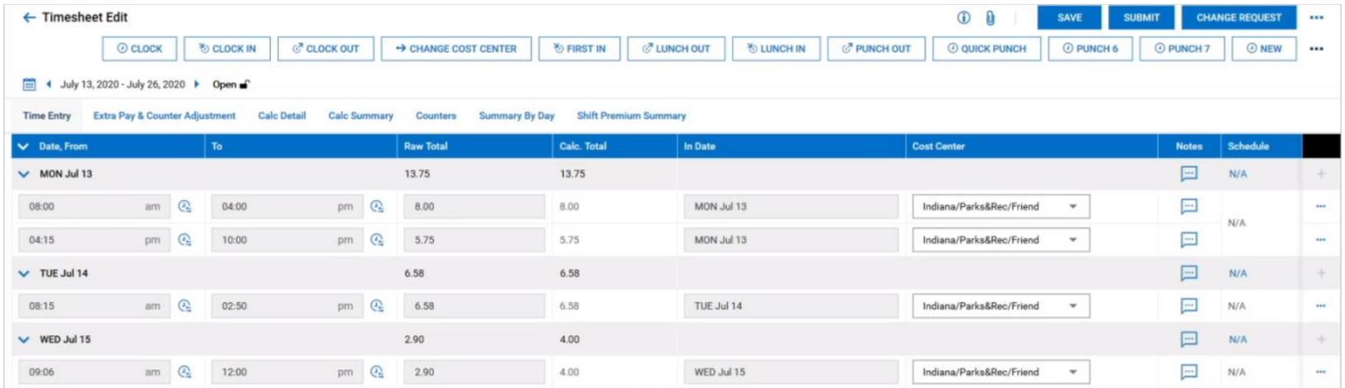
Timesheet Punch Settings

Call Out Clock Options onto Timesheet

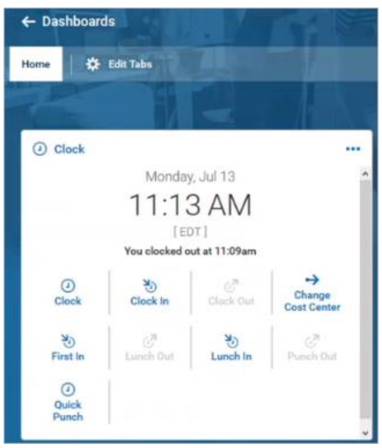
179243: Previously, Extra Buttons that were configured and enabled displayed at the top of the New Timesheet under *Clock Options*.

What's new: The Extra Buttons now display at the top of the New Timesheet in a row of buttons. All functionality is still the same. The number of buttons that display at the top of the timesheet is dependent upon the browser and number of buttons configured. Any additional buttons not displaying can be accessed from the three-dot ellipsis button.



Custom Punch Buttons on the Clock Widget

177464, 181885: All Extra Buttons that are enabled in the Timesheet Profile now display in the employee's *Clock* Dashboards widget. In addition, Attestation tied to the Extra Button(s) will trigger from this widget when the employee selects an option meant to trigger a workflow.



Collect Extra Pay with an OUT Punch

163462: If users want to prompt employees to collect extra pay with every Out punch, the *Time Entry Extra Pay* setting under *Available Functionality* outside the company within the *Pay Calculations* section **should be** enabled. The *Time Entry Extra Pay* setting **should be** enabled if users want extra pay collected on an out punch.

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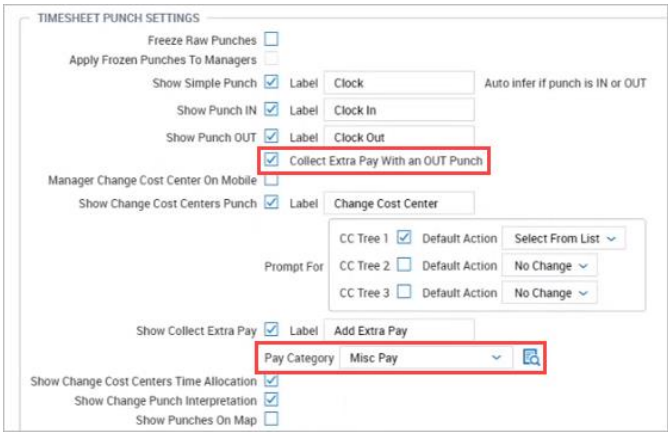
If the *Time Entry Extra Pay* setting **is not** enabled, users will have the ability to add the Extra Button *Add Extra Pay*, which will collect extra pay and connect it to a Counter, such as a Bonus. This is further explained in 162421.

If the *Time Entry Extra Pay* setting **is** enabled, the *Collect Extra Pay With an OUT Punch* setting will be available in the Timesheet settings, and *Pay Category* will display, as opposed to Counter. In this instance, you may need to create pay categories (under *Company Settings > Time & Labor Setup > TLM List Definitions > Pay Categories*). In addition, make sure that the *Pay Category* setting under *Available Functionality* within the *Pay Calculations* widget is enabled.



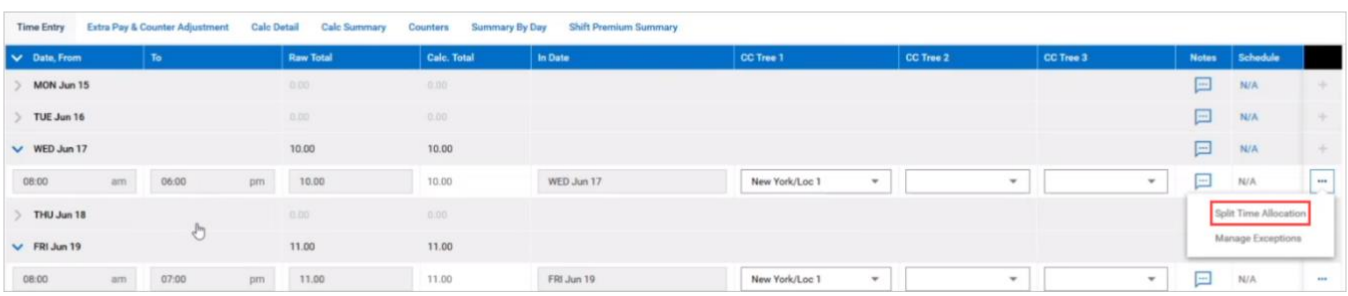
Show Collect Extra Pay

162421: The option to *Show Collect Extra Pay* is available and functional from the *Timesheet Punch Settings* widget under the Timesheet Profile. When enabled, this punch button will display as a button for the employee to select at the top of the timesheet and on the *Clock* Widget.

When employees select this Add Extra Pay button from their timesheet or their *Clock* widget, the *Add Extra Pay* pop-up will display, and the user will be able to specify the extra pay amount to be added towards the specified pay category/counter.

Show Change Cost Centers Time Allocation

163611: As seen previously in the Classic Timesheet, in the New Timesheet Experience, you can now split a time record at a certain time of the day and select a new cost center in which to charge from the *Split Time Allocation* window. After the entry is inserted the system will automatically create In/Out punches for the new time record.



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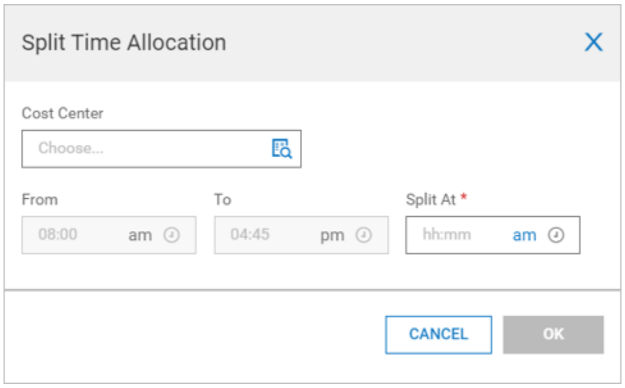
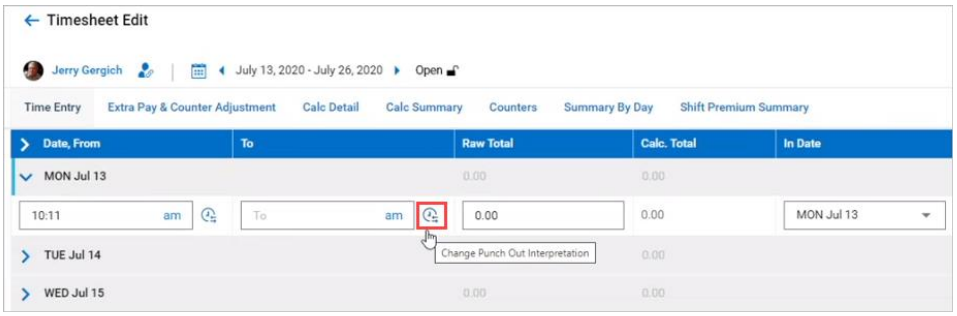


To enable this option, select *Show Change Cost Centers Time Allocation* from *Company Settings > Profiles/Policies > Timesheets* under the *Timesheet Punch Settings* section.

Show Change Punch Interpretation

166866: A newly designed Change Punch In/Out Interpretation icon is now available in the New Timesheet Experience under the *Time Entry* tab. When you select this icon, the punch in time will switch to the punch out field, and vice versa.



Timesheet (New Timesheet Experience) – Manager Policies

Timesheet Changes Made by a Manager will be Returned Back to Employee for Resubmission

164034: For managers, if the option from the Timesheet Profile within the *Manager Policies* section, *Timesheet With Changes Made By Manager Will Be Returned Back To Employee For Resubmission,* is checked, any changes made by the manager in the New Timesheet will trigger for the employee to resubmit in all timesheet stages except for Open. For example, if the manager edits and submits an employee's timesheet and this option is enabled, it will be sent back to the employee for resubmission.

Timesheet (New Timesheet Experience) – Employee Policies

EE Policies – Reopen Timesheet for Bulk and Start/End Timesheets

164035: A new Timesheet setting, *Reopen Timesheet,* is available for employees:

- If the *Reopen Timesheet* setting is not enabled, the *Reopen* button will not display on the employee's timesheet.
- If the *Reopen Timesheet* setting is enabled and *Submitted* is selected from the drop-down, the *Reopen* button will display on the employee's timesheet after it has been submitted to their manager.
- If the *Reopen Timesheet* setting is enabled with any of the levels from *Level 1-5* selected, an employee can reopen a timesheet that was submitted and then approved by the applicable Level manager.

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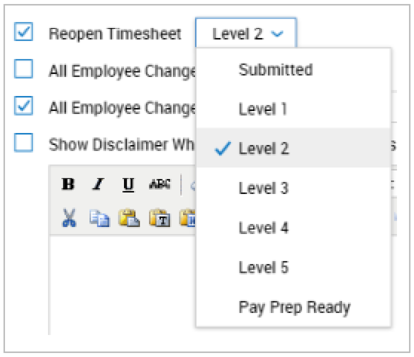
- If the *Reopen Timesheet* setting is enabled and *Pay Prep Ready* is selected, the *Reopen* button will display on the employee's timesheet with Pay Prep Ready.

  NOTE: Once the pay period is locked, this option will not be functional for the employee.



New Timesheet Feature Gaps

Feature	Timesheet Profile Section	Timesheet Type	Planned Release
New Look Toggle in Classic Timesheet	N/A	Start/End All Days & Bulk Hours	R71
Multi-EIN Master Timesheet	N/A	Start/End All Days & Bulk Hours	R71
Historical Timesheet Corrections	N/A	Start/End All Days & Bulk Hours	R71
Piecework Tab	Time Entry Collected Data	Bulk Hours	R71
Manage Exceptions	Exceptions	Bulk Hours	R71
Editable	Exceptions	Bulk Hours	R71
Editable (By Employee)	Exceptions	Bulk Hours	R71
Show Change Punch Interpretation (mobile support)	Timesheet Punch Settings	Start/End All Days	R71
Show Punches On Map	Timesheet Punch Settings	Start/End All Days	R71
Web Punch Access Profile	Timesheet Settings	Start/End All Days	R71
Enable Break/Lunch Time	Start/End Time Entry Settings	Start/End All Days	R71
Enable Break/Lunch Time Label	Start/End Time Entry Settings	Start/End All Days	R71
Prefer Default Cost Center	Start/End Time Entry Settings	Start/End All Days	R71
Approval History	Timesheet > Utilities	Start/End All Days & Bulk Hours	R71
Enable Keyboard Navigation	Extra Settings	Start/End All Days & Bulk Hours	R71
Highlight Edited Time	Extra Settings	Start/End All Days	R71
Show Timesheet Totals	Extra Settings	Start/End All Days	R71
Highlight Weekends	Extra Settings	Start/End All Days	R71
Reject Already Approved Timesheets (Enabled)	Manager Policies	Start/End All Days & Bulk Hours	R71
Reject Already Approved Timesheets (Level)	Manager Policies	Start/End All Days & Bulk Hours	R71

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Feature	Timesheet Profile Section	Timesheet Type	Planned Release
All Manager Changes Require Comment	Manager Policies	Start/End All Days & Bulk Hours	R71
All Manager Changes Require Reason Codes (Enabled)	Manager Policies	Start/End All Days & Bulk Hours	R71
All Manager Changes Require Reason Codes (List)	Manager Policies	Start/End All Days & Bulk Hours	R71
All Employee Changes Require Comment	Employee Policies	Start/End All Days & Bulk Hours	R71
All Employee Changes Require Reason Codes (Enabled)	Employee Policies	Start/End All Days & Bulk Hours	R71
All Employee Changes Require Reason Codes (List)	Employee Policies	Start/End All Days & Bulk Hours	R71
Limit Managers Time Off (List)	Time Off Settings	Start/End All Days	R71
Separate Time Off and Cost Centers	Time Off Settings	Start/End All Days	R71
Show Days	Calc. Detail	Bulk Hours	R71

Reject Already Approved Timesheets (Enabled)	Manager Policies	Start/End All Days & Bulk Hours	R71
Reject Already Approved Timesheets (Level)	Manager Policies	Start/End All Days & Bulk Hours	R71
All Manager Changes Require Comment	Manager Policies	Start/End All Days & Bulk Hours	R71
All Manager Changes Require Reason Codes (Enabled)	Manager Policies	Start/End All Days & Bulk Hours	R71
All Manager Changes Require Reason Codes (List)	Manager Policies	Start/End All Days & Bulk Hours	R71
All Employee Changes Require Comment	Employee Policies	Start/End All Days & Bulk Hours	R71
All Employee Changes Require Reason Codes (Enabled)	Employee Policies	Start/End All Days & Bulk Hours	R71
All Employee Changes Require Reason Codes (List)	Employee Policies	Start/End All Days & Bulk Hours	R71
Limit Managers Time Off (List)	Time Off Settings	Start/End All Days	R71
Separate Time Off and Cost Centers	Time Off Settings	Start/End All Days	R71
Show Days	Calc. Detail	Bulk Hours	R71

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Payroll

Features/Settings in Development

Payroll Types & Pay Period Profile Lists in the Deliver with Payroll Setting

Currently in the New User Experiences, users cannot create, edit, or delete Payroll Types and Pay Period Profile Lists within the *Deliver With Payroll* saved report setting. This functionality is actively in development and will be provided in the near future.

Updates to Successorship Pay Statements (Classic UI & New UI)

Configure a Successorship earnings code

113965: Users can now select Successorship Wages in the Roll-Up Earnings drop-down when adding a new earnings code. The system will exclude Successorship earnings from Gross, Net, W2, and 1099s.

Successorship Pay Statement Type now includes the Tax Settings widget

47038: The *Successorship* Pay Statement Type now includes a *Tax Settings* widget so that users can configure which wages calculate for *Successorship* Pay Statements.

Successorship Pay Statements make automatic calculations

113970, 179081: The Pay Statement Type named *Successorship* now automatically calculates gross wages, gross subject wages, and subject wages. Wages listed on a *Successorship* Pay Statement are applied to wage calculations for all Pay Statements with a current year pay date that is later than the *Successorship* Pay Statement pay date. Successorship earnings are a display item on only *Successorship* Pay Statements. *Successorship* Pay Statements do not display any other earnings.

Predecessor wages and Successorship wages follow the latest regulations

179566, 186829: After users enter predecessor wages in the system, the system applies Successorship wages to applicable wage base limits during Pay Statement processing. Successorship wages apply to only W2 wage calculation. Successorship regulations do not apply to 1099 wages.

Predecessor wages are now considered in regular payrolls for SUTA/SUI and FUTA when users configure those on the Pay Statement Type's *Tax Settings* widget.

NOTE: When configuring the *Successorship* Pay Statement's *Tax Settings* widget, the system currently does not support adding NJ SUTA tax and displays the message: *At this time, the application does not support loading predecessor wages for NJ SUTA, due to the way NJ SUTA, SUI and SDI are associated within the system. We will circle back and address this gap in the future.*

Footnote for Pay Statements with Successorship Wages

113971: To provide clarification about Successorship wages on Pay Statements, the following footnote now appears on statements that include these wages and is visible when users view or print the statement:

> *This pay statement represents earnings paid by your previous employer. Wages on this pay statement are used for tax calculation purposes only and will not appear on your Forms W-2.*

Users at the Company or Employee Self Service level can view or print pay statements and see this footnote.

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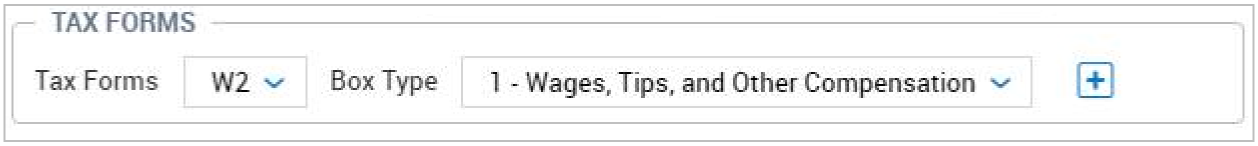
Tax Imports (Classic UI & New UI)

Employee Tax Settings Imports Do Not Include Effective Date (Classic UI & New UI)

182239: The update made for effective dating (WFR-155872) in the June system release has been reverted. Now, Employee Tax Settings imports do not include an effective date. If users import with a template that includes an effective date, the system ignores the effective date, as it did prior to the changes in 155872.

Earnings Codes (Classic UI & New UI)

132381: Company earnings codes that need to be reported on a tax form now require the user to first select the tax form: W2 or 1099, depending on the type of earning. The ability to select a tax form will enable future compatibility for additional tax forms, including 1099-NEC and tax forms for countries outside the U.S. These changes also apply to Administrators when they create Master earnings codes.



Earnings Code Country Selector (Classic UI & New UI)

176373: When users configure Earnings Codes for a multi-EIN company that includes at least one EIN in Canada and one in the U.S., the system displays a *Country* field in which users can select the country for the Earnings Code.

Payroll Country Verification (Classic UI & New UI)

179068: When the system processes a payroll or calculates pay statements, it now verifies that the Country configured for the payroll matches the Country of the active direct deposits for the employees involved.

Employee Setup (Classic UI & New UI)

155374, 156177: During Tax Code configuration, when a Payroll Administrator selects Exempt in the *EE Withhold/ER Withhold* field, an improved Warning message now displays with the following warning:

> Selecting Tax Exempt **stops** the system from calculating both **wages and tax**. No wage or tax will be reported on Tax Returns & Year-End Tax Forms for this tax.
>
> To stop tax from **withholding** but have the system continue to calculate and track the wages, the setting should be set to "Block W/H".

To also assist users before they make their selection in the *EE Withhold* field, a new tooltip is available for the field everywhere it appears. Users simply click the question mark next to the field to see the following tooltip text:

> **If Exempt is used on an EE Tax**, neither Wages nor Tax amounts will calculate or report on the employee's Year-End Tax Forms, potentially requiring a corrected form.
>
> **If Block W/H is used on an EE Tax**, Wages are accumulated, but no tax is calculated or withheld from employee. Depending on the tax, employee could owe additional money.

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Similarly, the *ER Withhold* field also has a new tooltip available everywhere it appears. Its text is as follows:

> **If Exempt is used on an ER Tax,** Wage and Tax amounts will not calculate and will not be available when preparing required agency returns. If chosen in error, this would require amended returns to be filed for the affected agency and could result in penalties and interest for the employer.
>
> **If Block W/H is used on an ER Tax,** Wages are accumulated, but no tax is calculated. If chosen in error and tax should be paid, this could result in penalties and interest due by the employer, if amended returns are required.

WAOT Lookup Period Dates on Pay Statements (Classic UI & New UI)

121069: To accommodate changes to California pay statement requirements, pay statements can now include Lookback period *Date From* and *Date To* information. These dates display on pay statements when employers use the Lookback functionality for Weighted Average Overtime (WAOT).

Date and Years of Service fields for Retirement Plan eligibility (Classic UI & New UI)

154572: To provide added flexibility for companies when configuring Retirement Plan eligibility dates for employees who are rehired after leaving the company, a new date field named *Retirement Plan* is available in the *Dates* widget of employee records:

Users with security profile permissions to edit the *Retirement Plan* field, can add a date in the field. When the field has a date, and the *Match Type* field is set to *Flat Amount (Years of Service)* or *Percent (Years of Service)*, the system uses the *Retirement Plan* date to determine the employer match amount. If the *Retirement Plan* field is empty, the system uses the *Rehire Date* field (if populated) or the *Hire Date* field to determine the employee's eligibility.

If the *Retirement Plan* field is used, users will now see *Years of Service (YOS)* displayed with the total years of service that the system is using for the employee's retirement plan eligibility.

Deduction Wizard now ready for CO garnishment changes (Classic UI & New UI)

119492: For Creditor Garnishments orders with an issue date on or after 10/1/2020, Colorado has changed its maximum garnishment amount to be the lesser of 20 percent of an employee's disposable weekly earnings or 40 times the amount that disposable weekly earnings exceed the state or federal minimum wage. The Deduction Wizard has been updated to follow these rules when the issue date of the order entered is 10/1/2020 or later. Any orders with an issue date of 9/30/2020 or earlier will continue to calculate as they have previously.

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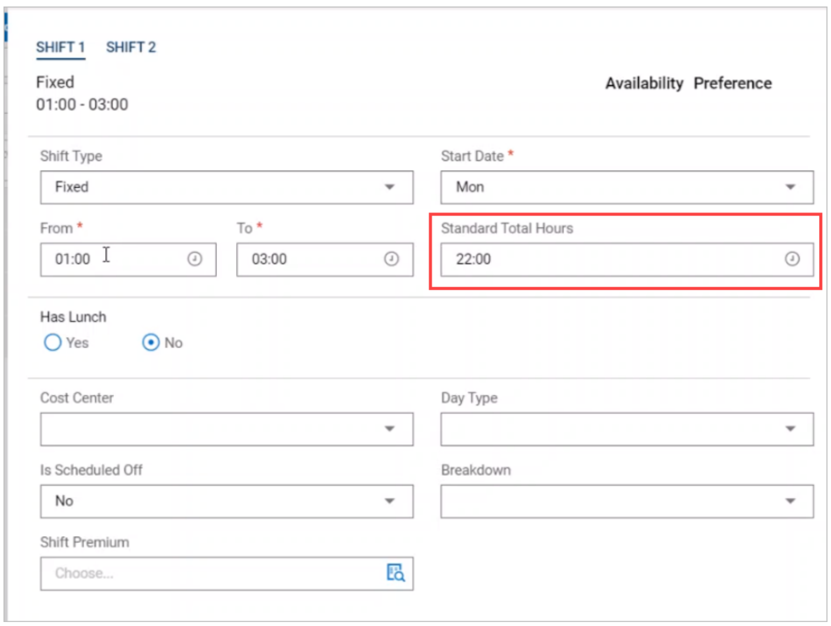
Scheduler

Advanced Scheduler

Total Shift Hours to be Defined in Scheduler Fixed Shifts

169660, 169666, 169661, 170280, 169664, 169668: Previously, Scheduler did not support the basic schedules concept of standard total hours, which forced the scheduled hours amount to be calculated as the full shift length. Scheduled hours in fixed and floating shifts were calculated as shift duration from start to end, minus a lunch if configured, which made users have to enter a lunch time for each shift in order to deduct lunch time from the total hours of the shift.

What's new: Total hours can now be defined for fixed and floating shifts without a lunch time having to be defined. A Standard Total Hours field has been added to scheduler shifts to be used for scheduled hours calculations in TLM functionality and Scheduling engine hourly constraints.



All TLM and Scheduler reports will display and use total hours for shifts when defined. Total scheduled hours can also be defined in all scheduled shifts related imports for the following:

- Workload Templates import
- Schedule Shifts import
- Template Shifts import

In addition, any defined shift hours will convert from scheduler to TLM when a schedule is posted, or a shift is updated to a posted schedule.

Moved Employee Last Name to Next Row When Employee Name Column is Expanded

173863: Previously, the only way to see an employee's full name on a schedule view if their name was long was to hover over the employee's name.

What's changed: For Schedules, Day, Week, and Month views, as well as Schedule Templates, when the *Employee Name* column is collapsed, the last name will be in the next row on its own, similar to the print view when the *Employee Name* column is expanded.

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Separate Schedule Template Permissions from Schedule Permissions

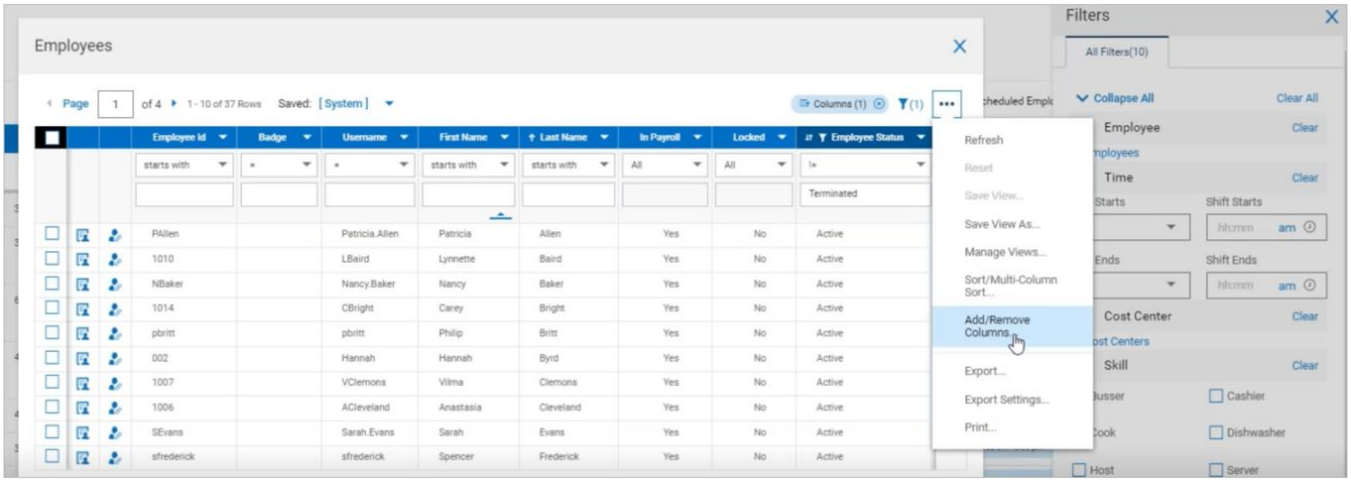
162090: Previously, in the Security Profile, access to schedules and schedule templates were controlled by the same settings, which did not work for users that needed separate permissions for schedules versus schedule templates.

What's changed: Schedule Template permissions are now separate from Schedule permissions. Separate permissions for the Schedule Template security option include *View*/*Edit*/*Add*/*Delete* and *Modify* shifts, *Assign/Unassign* shifts, *View Audit*, and *Override Constraints* options. Permissions for templates have been migrated to mirror what was already defined for schedules.

Updated Schedule Employee Filter Lookup

170118, 170117: Previously in the New UI, the Employees lookup was not a report style, and users could not bring in extra columns to sort by employees.

What's new: When you click the *Employees* link under *Filters* in the schedule Day/Week/Month views, the *Employees* lookup will now display like a report. The lookup view can be saved, managed, and shared, and additional columns can be brought into the lookup, as well as columns can be removed and filtered. You can also apply filters from this lookup, which will be applied to the schedule view.



In addition, when you are assigning employees to shifts, the Employee Selection in the Manage Shift window also contains a similar lookup.

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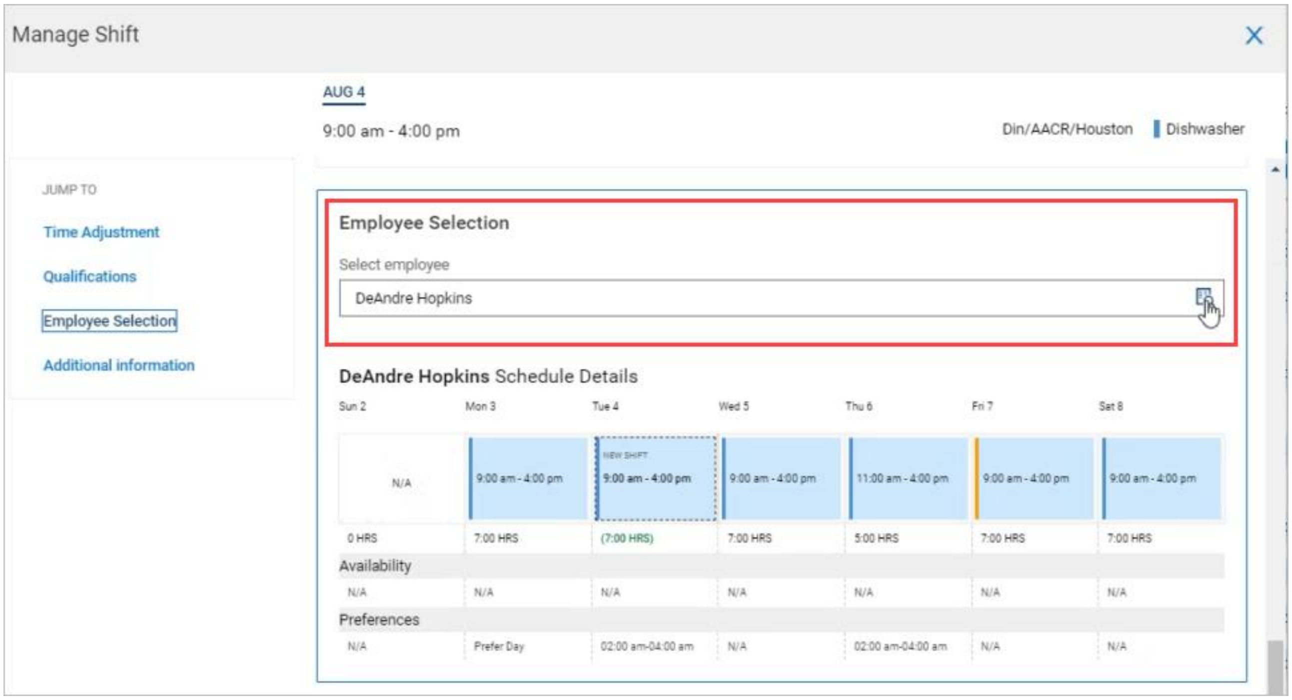
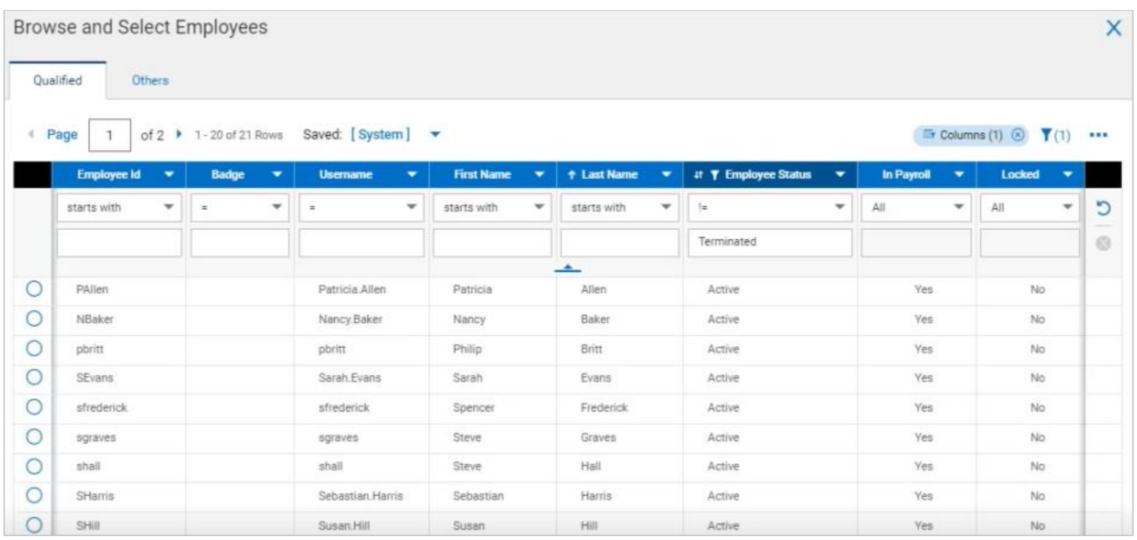


When you click this lookup, a *Browse and Select Employees* window will display with a *Qualified* tab that shows a report-style of qualified employees that you can select. You can also filter and bring in columns. In addition, an *Others* tab will display unqualified employees, but you can still select these employees and all employee violations will be overridden for employees chosen from this tab.



Terminations

Schedules Automatically Deleted After Termination Date

178907: When terminating an employee through an Employee Import, HR Actions, or manual termination all existing schedules that are in place after the employee's termination date will now be deleted.

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Cross Product

Feature/Functionality Retirements

Deprecation Message for Classic Mobile Application

159387: When logging in to the Classic Mobile Application (*Workforce Ready*), users see a message to remind them that the Classic Mobile Application will be retired in the current (August/September 2020) system release. The message also points users to the location to download the New Mobile Application.

ACA

Form 1094-C Employee Count Report

173328: The Export option has been added to Form 1094-C Employee Count report. Click the actions ellipses and *Export* and *Export Settings* will be available. The report is located under *Team > Benefits > ACA > Forms > Form 1094-C Employee Count*.

ACA Reports: Base Compensation Date Reflects Local Date

179519: In all ACA reports, the Base Compensation in the Effective Date column will reflect the local date according to the time zone. For example, the current server date is 6/18/20 and the manager's time zone date is 6/19/20, the *Effective From* date in the reports will show the manager's time zone.

Widget Name Change

124473: The *ACA Employee Status Change History* widget name has been changed to ***Employee Status Change History***, dropping the ACA portion of the name. The ACA functionality will not change. This is just a name change. The change was done to allow companies without ACA enabled to use the widget.

Calendars

Anniversary Calendar in Monthly View Supported on Any Device

176636, 176637, 182108, 181178, 176635, 181151, 176415, WFR-174953: The monthly view of the Anniversary Calendar will now be responsive in the New UI mobile version and the options available from the desktop view can now be accessed on mobile devices.

For managers, the report is accessed under *My Team > HR > Reports > Calendar > Anniversary Calendar by Month*

For employees, the reports is accessed under *My Info > My Reports > HR > Anniversary Calendar by Month*

- Filters are available to select employees, the specific month, and type of anniversary date (Started date, etc.), as well as a selection to include terminated employees.
- Employees existing in more than one EIN will display on the calendar.
- Clicking the employee name will open a pop-up showing their details; date started (based on the Type set in the filter selections), Employee ID, Employee EIN, and Anniversary # (how many years). A Quick Links icon is also available to help you navigate to areas of concern for the selected employee.
- Clicking the date will reveal the report-view of each day's details in a popup.
- If there are numerous listings for a date, an overflow appears below the listed events to indicate the number of additional events available for the date.

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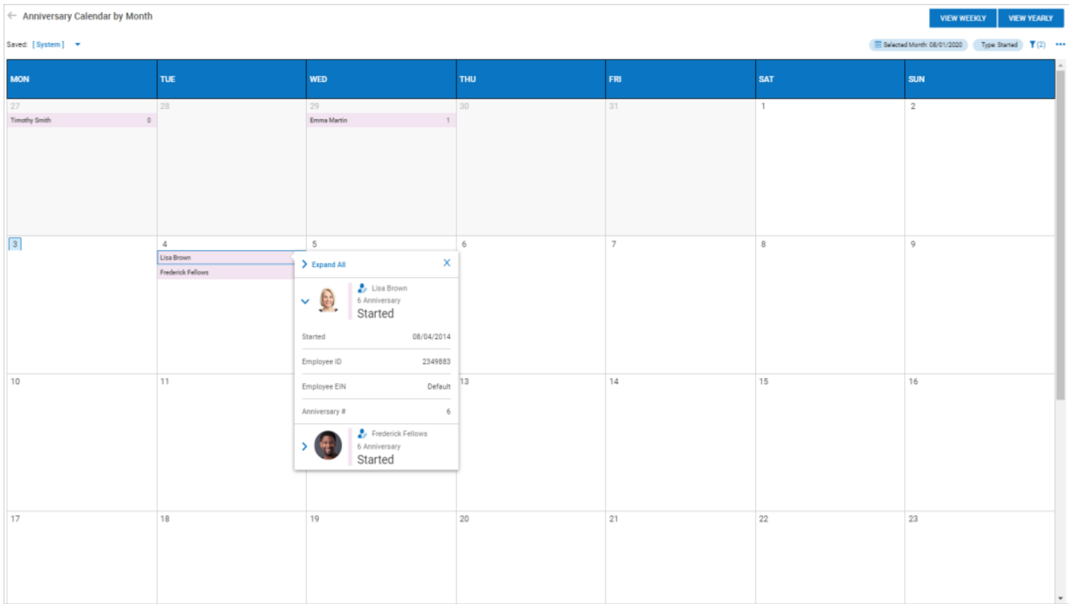
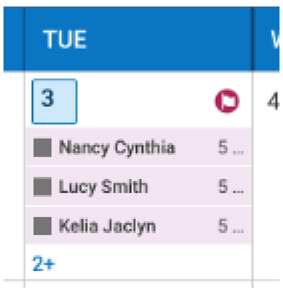
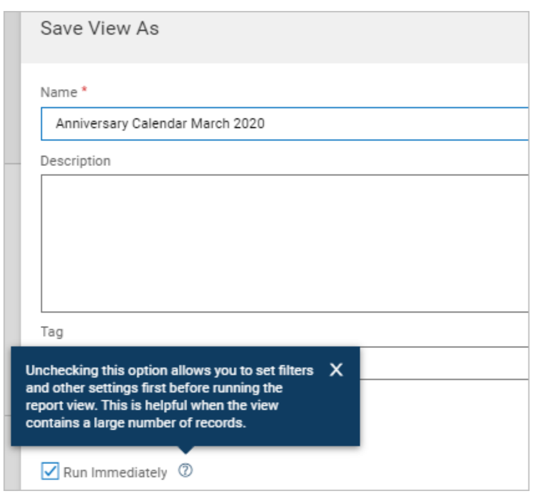




183550: When saving a report view, the *Run Immediately* checkbox has an Info icon to explain the benefits of unchecking the box to assist in system performance.



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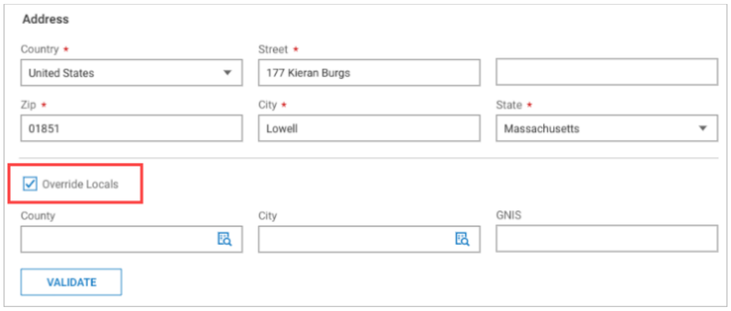
Employee Information

Address ‘Override Locals’ Validation Added to Employee Profiles

179016: Employee address in the *Personal Information* widget of employee profiles will now allow you to select an ***Override Locals*** checkbox. When checked, a new field appears that allows you to input a new address. For example, an employee’s zip code applies to more than one city, but for payroll/tax purposes you need the employee’s city to reflect their actual city or municipality (i.e., Manhattan vs. New York City.)



Employee Profile – Personal Rate Table Setup

155117: Previously in the Employee Profile, managers and admins could not see their employee’s rate table, so they instead had to click the *Rate Table* link, which would navigate them from the Employee Profile, resulting in more clicks.

What’s new: A toggle for *Preview Personal Rate Table* has been added to the *Base Compensation* widget underneath *Rate Tables* in the Employee Profile. When enabled, users will be able to preview what is in their employee’s rate table. When the toggle is disabled, the rate table will collapse. The *Manage Personal Rate Table* link is still available to make edits to the rate table.

New Look Toggle: Default View of Employee Profiles

191013: When opening Employee Profiles in the New UI, the default view will be in the Classic version. You can change your view to the New UI version by changing the New Look toggle at the top of the page.

New Look Toggle: Switching Views Stays on Selected Profile

183707: When using the New Look toggle on the employee profile, the view you’ve selected will remain for all employee profiles even after you’ve logged out and logged back in. You can still change your view at any time via the toggle as well.

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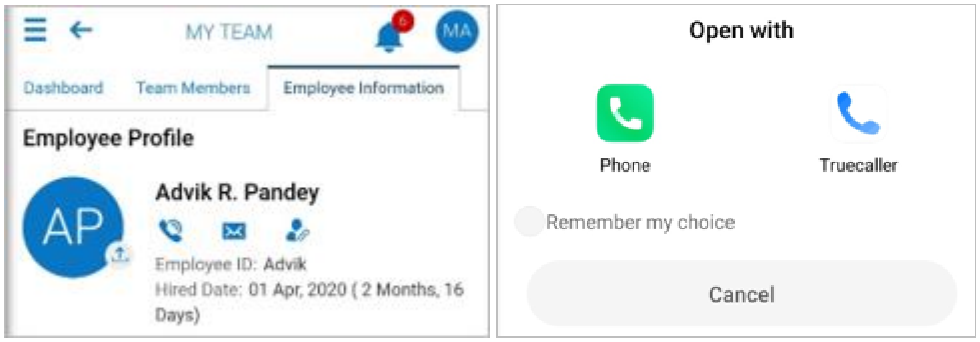
Phone Link in Header of Employee Profile (Mobile Only)

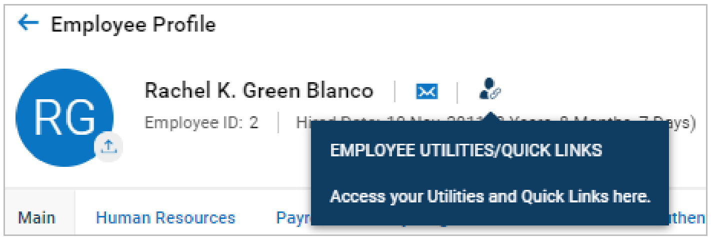
100617: For New UI Mobile users, a phone icon has been added to the header of their employee profile, and when clicked, will call the employee.



- Icon will appear when profile is accessed through mobile device only
- Icon will not appear in the mini header
- When selected, option to call the user will be provided to the user
- Phone number called will be the number identified as the "Primary" number in the Personal Information widget
- If user does not have a phone number identified, the phone icon will not appear
- Manager/user must have security access to employee accounts

Quick Links Icon: Tool Tip Added to Quick Links Icon in Employee Profiles

182250: A new tooltip has been added to the Employee Quick Links icon of employee profiles. The tooltip explains that it holds helpful links and utilities items.



Years of Service Calculation

124473: Within the *Dates* widget of employee accounts, the *Years of Service* calculation was not always accurate. To correct this issue, the *Years of Service* calculation will now be done within the ***Employee Status Change*** *History* (formerly named the *ACA Employee Status Change History* widget.) In this widget, you will see a listing of hiring/rehiring/termination statuses and status changes can be added here. Adding dates to the widget will not update the *Dates* widget on the employee record.

New UI Dashboard

Copy Tabs: Copying Classic UI Dashboard Tabs to New UI Profile from the Profile Schedule

181160: To help with the transition to the New UI structure using existing tabs from the Classic UI's *Dashboard* and *Dashboard Premium* layouts, an option to copy your existing Classic tabs and widgets to

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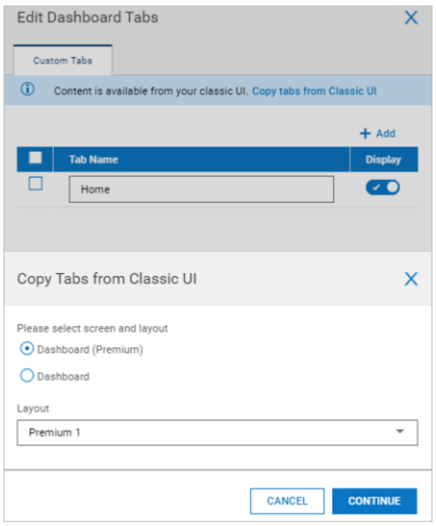
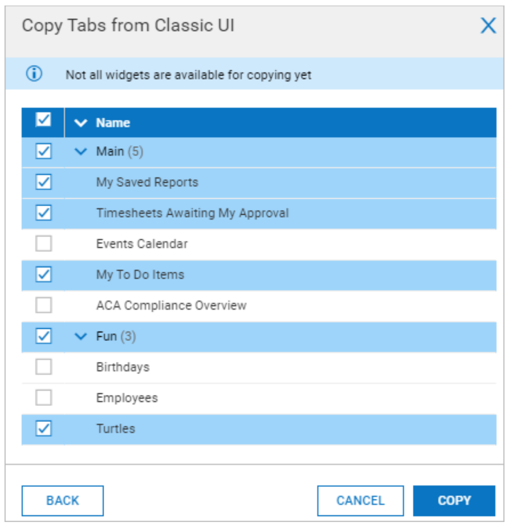
the New UI Dashboards will be available. Data such as Quick Links, Exceptions and more will pull in from the Classic widgets and populate into the corresponding New UI widgets.

- From the New UI Dashboard Layout Profile, click the edit icon in the *Schedule* section.
- Click *Edit Tabs*.
- Click the *Copy tabs from Classic UI* hyperlink.
- Select which Classic dashboard is to be copied and select the Layout from the drop-down. Click *Continue*.

Once copied, you can continue to build and add tabs using the *+Add* button. Or you can remove tabs using the *Remove* button.





Widgets Converted and Available to Copy:

- Accrual Balances
- Announcements
- Attendance Board
- Exceptions
- Missing Punches
- My Mailbox (My To Do & Checklists)
- My Pay
- My Saved Reports
- My Schedule/My Time Off Requests (were two separate widgets in classic)
- Quick Links
- Recruitment (classic equivalent: Job Requisitions)
- Start
- Sticky Note
- Succession Chart
- Team Perspectives
- Time Off Awaiting My Approval
- Timesheet Chart
- Timesheets Awaiting My Approval
- Turtles

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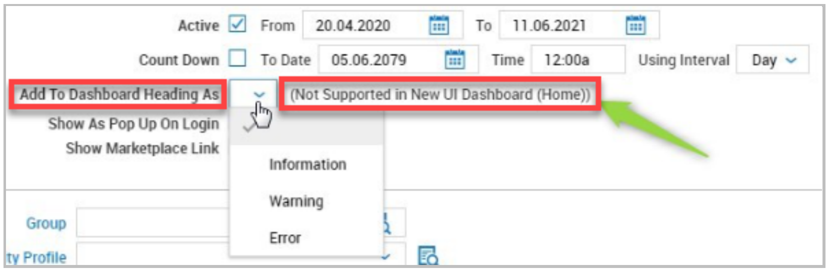
Widgets not yet converted:

- Employees
- Events Calendar
- External URL
- Google Sheet Widget
- Hyperlinks (combined with Quick Links)
- My Notifications (implemented into My Mailbox)

Announcements: Dashboard Header Announcement is not Supported in the New UI Dashboard

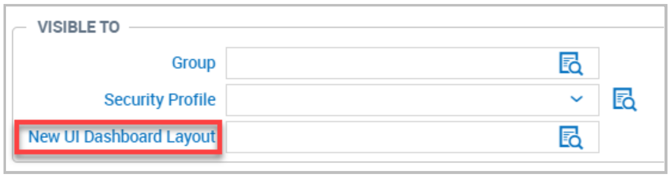
169613: The *Add To Dashboard Heading As* setting is not supported in the New UI Dashboard (*Company Settings > Our Company > Announcements >* Edit existing or Add New Announcement.) The label has been updated and now reads ***Add To Dashboard Heading As…(Not Supported in New UI Dashboard (Home))***.



Announcements: New UI Dashboard Layout field in Announcements Configuration

169611: The *New UI Dashboard Layout* field has been added to the *Visible To* section in the Announcement configuration page (*Company Settings > Our Company > Announcements >* Edit existing or Add New Announcement). This allows Administrators to post Announcements to specific groups based on the New UI Dashboard Layout configuration/profile assigned to users.

If an Announcement is configured with the New UI Dashboard Layout profile specified, the Announcement only displays to users assigned to that profile.



Announcements: Navigation to Announcements from the New UI Dashboard Layout Profile

169649: Administrators can create a New UI Dashboard Layout Schedule for employees (*Company Settings > Profiles/Policies > New UI Dashboard Layout Profile* (Edit)). From the *Schedule* section of the profile, users can navigate directly to the *Announcements* page (*Company Settings > Our Company > Announcements*) by clicking the ***Add Announcement*** link to notify users about upcoming schedule changes.

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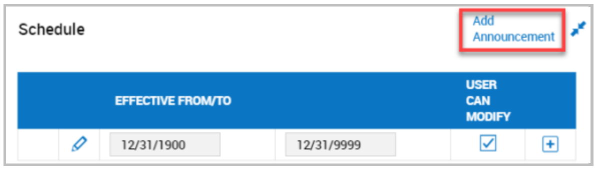
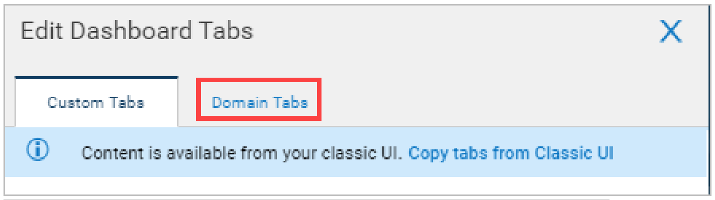
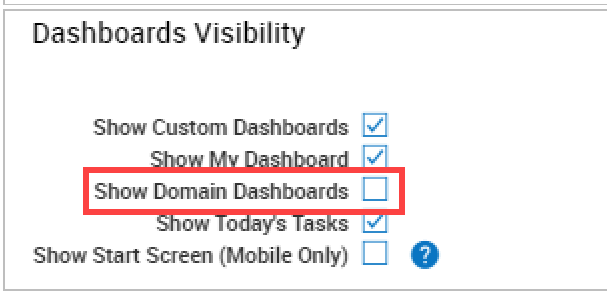


Dashboard/Edit Tabs: Module Tabs Renamed to Domain

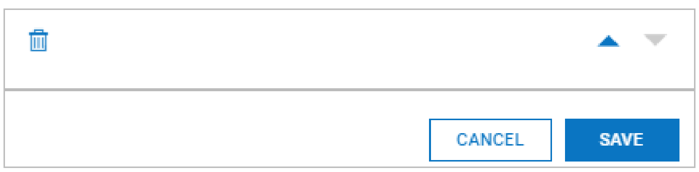
175560: In this release, when using *Edit Tabs* on the home dashboard, the *Module Tabs* section is now be named ***Domain Tabs***. In the New UI Dashboard Layout Profile, in the *Dashboards Visibility* widget, *Show Module Dashboards* is now named ***Show Domain Dashboards***.





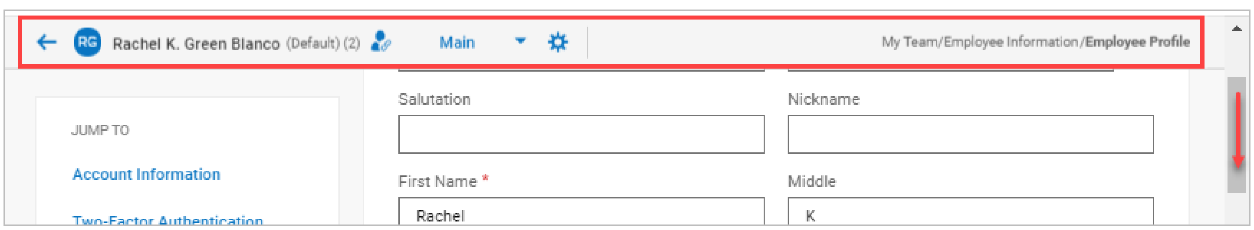
Dashboard/Edit Tabs: Trash Can Icon Replaces Remove Button

183446: When using *Edit Tabs* on the dashboard, the *Remove* button on the pop-up (lower-left corner) has been replaced with a Trash Can icon to be consistent with the other pop-ups in the application.



Dashboard/General: Available Space When Adding Widgets

169605 & 182962: The dashboard has been updated. As users scroll on the page, a mini header with navigation options displays to save space on the page.



Profiles: New UI Dashboard Layout Field Added to the Defaults Section in Cost Center Setup

167880: The **New UI Dashboard Layout** Profile field has been added to the *Defaults* section in the Cost Center setup (*Company Settings* > *Global Setup* > *Company Setup*, *Cost Center Trees* section > *Settings* for the appropriate Cost Centers > *Defaults* enabled in the *Levels* of the Cost Center(s)).

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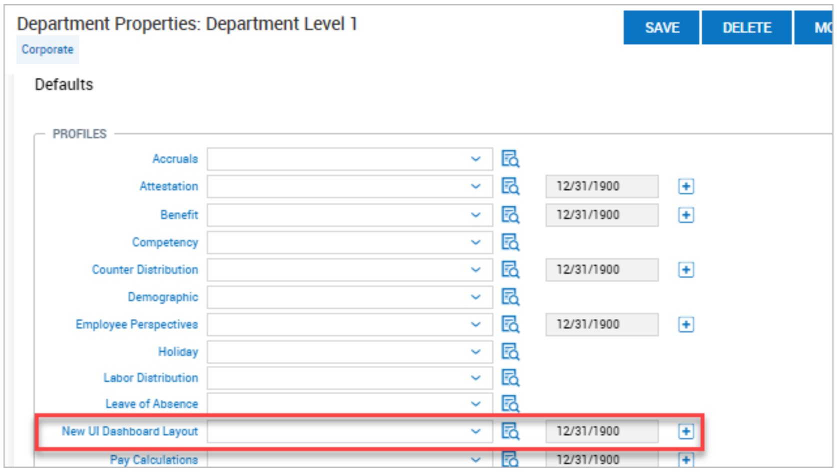
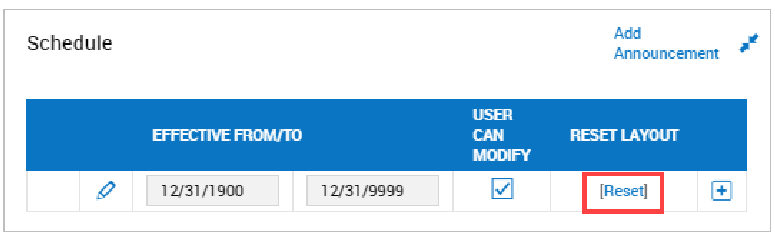
Companies can have different layouts for different Employee Types and it is much easier to set it as a default for the cost center, along with the other profile settings, so the profile automatically updates when the cost center is changed.

The New UI Dashboard Layout Profile is available in the *Profiles* sub-section of the *Defaults* section. Users can assign several profiles with effective dates for each. If a user is assigned to a cost center with a New UI Dashboard Layout Profile selected as a default, the profile is assigned to the employee upon any cost center change.



Profiles: Reset Layout Button for Dashboard Schedules Added to Dashboard Profile

145335: A ***Reset*** button/link has been added to the schedules in the Schedule widget of New UI Dashboard Layout profiles.



When clicked, a confirmation pop-up of the reset will display. When proceeding with the reset, the following will occur:

- The reset mechanism will remove any user-made changes and apply the last saved layout (by the Admin) for any users assigned to that profile.
- The reset mechanism also includes configuration changes for widgets.

Reports/Charts in the Dashboard: Create Chart, Full Screen and Edit Options

169642, 174278, 169619, 174274: : To save you steps when creating/adding charts to the dashboard, you can now create charts through the **+Add** button or from existing reports/charts added in the dashboard. Edit capability has been added. A full screen option can be used in the New UI Mobile version so you can view the chart in a larger format; this also works for the report view.

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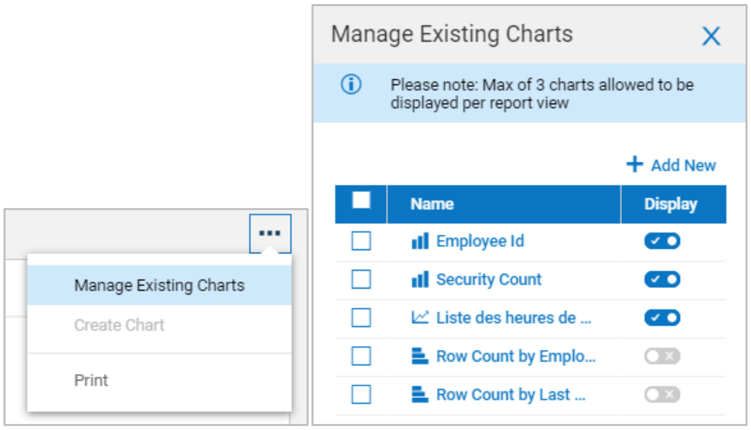
When creating or adding charts in the Dashboard, the previously labeled *Add Chart* option has been changed to ***Create Chart***. The *Add Chart* option was previously only available from report page. We have changed the label in the report page and also added that capability to dashboard.

When the *Create Chart* option is accessed on the dashboard, a create chart side panel will open where you can configure and save a new chart. The chart is then added to the dashboard.

Reports/Charts in the Dashboard: Rearranging Charts on Report Page

169640: Historically, charts on a report page were displayed in chronological order as they were created, and users could not rearrange them. In this release, you will now have the option to rearrange them with the ***Manage Existing Charts*** option, available from the action ellipses on the report page. Three (3) charts are allowed per page. A panel will open where you can select one or more tiles and then use the up/down to move them in the desired order and then save.



Reports/Charts in the Dashboard: Filters Applied When Clicking Chart

177633: When users click a report tile from within a dashboard and are directed to the report page, any filters applied in the chart will carry over to the report view.

Widgets: Notification to Users of New Widgets Added

175923, 169645, 180116, 185641: For users with authority to edit their own tabs, a pop-up will display upon log in to inform the users when new widgets have been added to the system.

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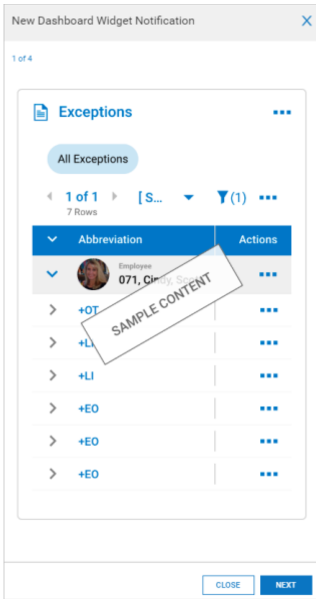
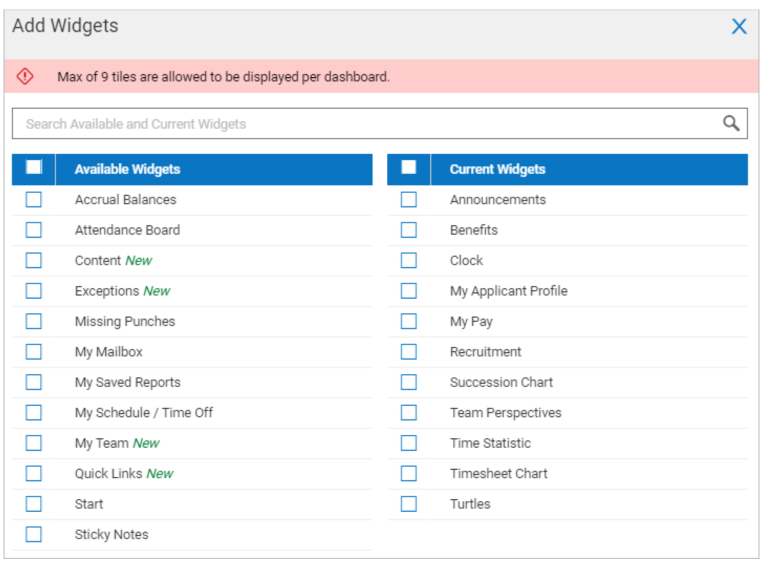
The pop-up will show the number of new widgets (i.e., 1 of 4, with 4 being the total) and examples of what the new widgets will display. Simply scroll through the list to view them and then decide if you want to add them to your dashboard.

This will not apply to users who do not have permission to edit their own dashboards. Users must have the proper security permissions for the type of content contained in the widgets.



You will also see an indicator on the widget selection page the new widgets identified with green text. This list will be updated with each system release Those labeled as 'New' in one release will be rolled off in the next release and the 'New' label will not display again. This way the list is fresh and makes it easy for you to identify the new widgets. In cases where a release has no new widgets, none will be indicated.



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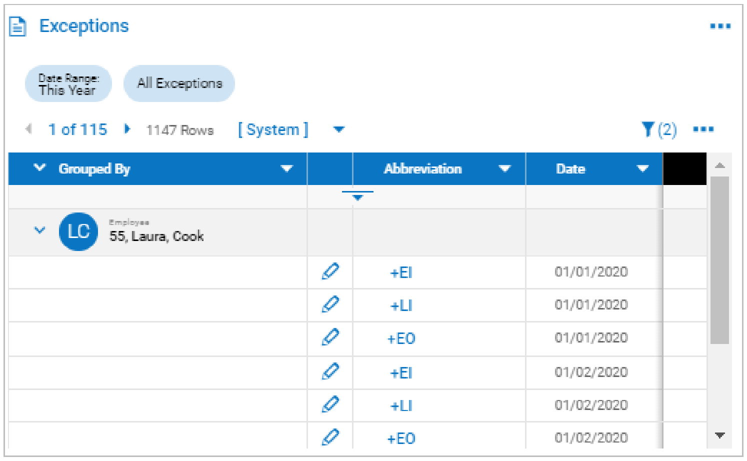
Widgets: Exceptions Widget Added

161407: The ***Exceptions*** widget is now available to be added to your dashboard(s). This widget will have all the same options as it did in the Classic UI and does require the TLM sub-system to be enabled in your company. The widget has a report style view and can be filtered as a report.

The tile can be added via the *Edit Tabs* link and will be shown as a *New* widget in this release.



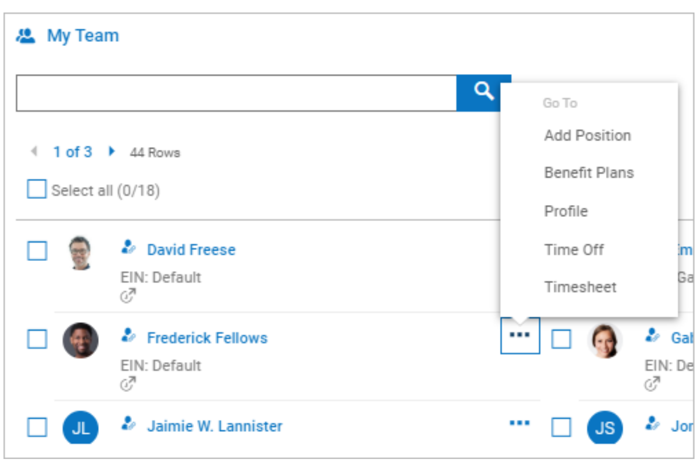
IMPORTANT NOTE: *The Exceptions widget may not be available immediately following the release. These features will be made available via a gradual rollout across the 2 weeks following the September 2020 release.*

Widgets: My Team Widget Added

170647, 174019: The ***My Team*** widget is now available to be added to your dashboard(s). The widget displays the manager's team. Each employee name is hyperlinked, and when clicked, will open the employee's profile. Other actions are available and will vary according to the user's security permissions and modules/functionality enabled in the company.

Clicking the *My Team* title will open the *Team Members* page where all the employees will display in columns, with all the same options available in the tile. If pictures have been added to employee accounts, those will display in the first column.

The tile can be added via the *Edit Tabs* link and will be shown as a *New* widget in this release.



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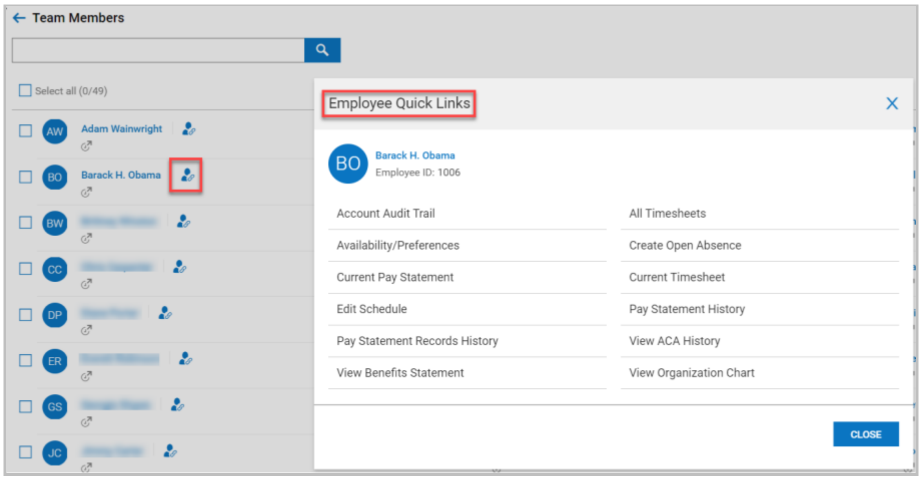
IMPORTANT NOTE: *The My Team widget may not be available immediately following the release. These features will be made available via a gradual rollout across the 2 weeks following the September 2020 release.*

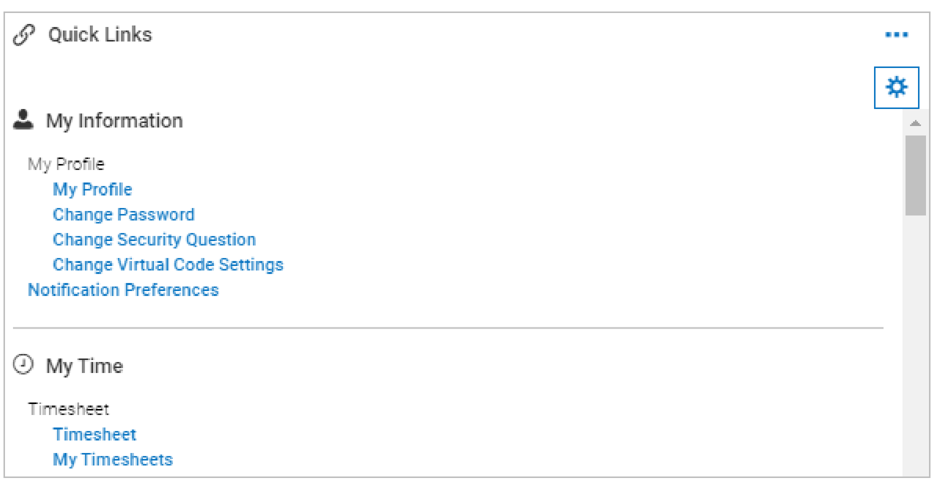
Employee Quick Links from My Team Widget



Widgets: Quick Links Widget Added

177249: The ***Quick Links*** widget is now available to be added to your dashboard(s). This widget is also supported when using *Edit Tabs* in your dashboard and then using the copy feature to bring over the links from the Classic UI.

The tile can be added via the *Edit Tabs* link and will be shown as a *New* widget in this release. The gear icon allows you to enable/disable links in the *Edit Quick Links* pop-up.



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NOTE: The following links may not migrate correctly from the configuration of the Classic UI Quick Links widget to the New UI Quick Links configuration. This is a known issue. To fix, please confirm these links are re-enabled manually in the configuration of this widget.

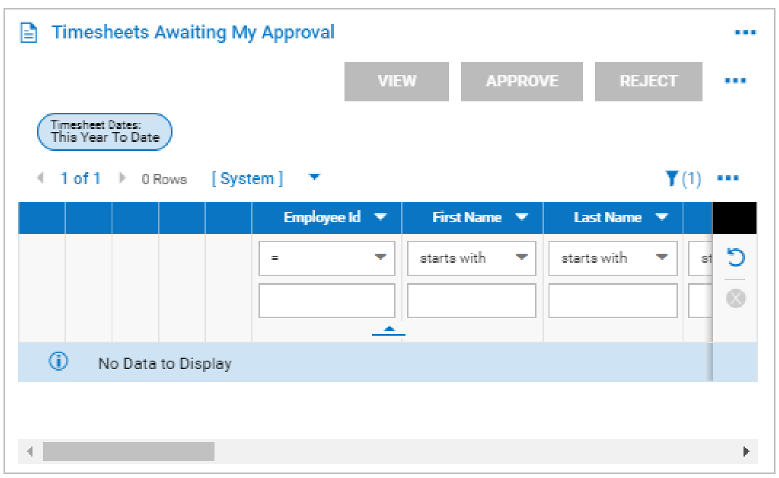
- Admin/Company Settings/Global Setup/Rate Tables
- My Info/My Reports/Pay History/Pay Statement History (Detail)
- My Info/My Reports/System Reports/Access Control/Remote Device Access
- My Info/My Time/Overtime/Awaiting Acceptance
- Team/Benefits/Enrollment Requests/Auto-Enrollment Request
- Team/Benefits/Enrollment Requests/Change Requests Detail
- Team/HR/HR Actions
- Team/HR/Other Forms
- Team/Recruitment/Forms/Government Forms/CC-305
- Team/Recruitment/Pre-Boarding/Applicant Checklists
- Team/Time/Points Balances

IMPORTANT NOTE: ***The Quick Links widget may not be available immediately following the release. These features will be made available via a gradual rollout across the 2 weeks following the September 2020 release.***

Widgets: Timesheets Awaiting My Approval Widget Added

159391: The ***Timesheet Awaiting My Approval*** widget is now available to be added to your dashboard(s).

The tile can be added via the *Edit Tabs* link and will be shown as a *New* widget in this release.



IMPORTANT NOTE: *The Timesheets Awaiting My Approval widget may not be available immediately following the release. These features will be made available via a gradual rollout across the 2 weeks following the September 2020 release.*

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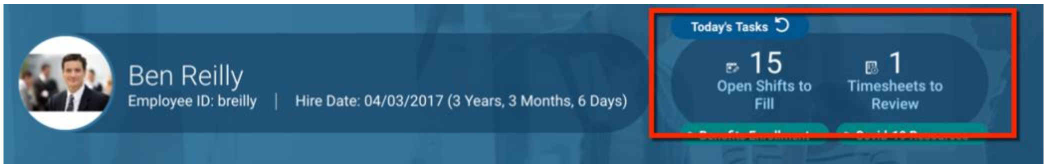
Today’s Tasks in the Dashboard

Today’s Tasks Introduction

Managers have a variety of responsibilities they need to address on a daily basis. To help them quickly target their most pressing tasks, we are introducing Today’s Tasks, which will be available on the Home screen and on module/domain dashboard pages. These quick-hit items are hyperlinked to the appropriate places in the application. The information is dependent on the sub-systems enabled and the user’s security privileges.

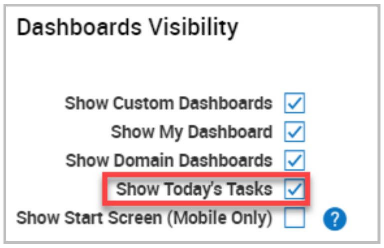
NOTE: This functionality will be available to our Partner resellers so their clients can also take advantage of this new feature.



Today’s Tasks: Show/Hide Visibility Setting

164212: Administrators can enable and disable the entire Today widget for particular groups of users utilizing the **Show Today’s Tasks** setting in the New UI Dashboard Layout profile (*Company Settings > Profile/Policies > New UI Dashboard Layout*, *Dashboards Visibility* section).

The setting is enabled by default, and when selected, any users assigned to the profile are eligible to receive all of the Today widget counters.



Today's Tasks: Available on Module/Domain Dashboards

179189: Users can see Today's Tasks on specific Module/Domain Dashboards so they can see relevant information from there and not only on the Home Dashboard. The specific sub-systems must be enabled for the appropriate Today's Tasks, access must be allowed to specific reports, specific security items must be enabled for the appropriate Today's Tasks and **Show Today's Tasks** must be enabled in the assigned New UI Dashboard profile.

All Today's Tasks appear on the Home Dashboard. They can also appear on the Module Dashboards. If there aren’t any tasks for that module, the Today’s Tasks items will not appear.

The following Today's Tasks are duplicated on specific Module Dashboards:

- Open Shifts Today on the *Scheduler Dashboard*
- Time Entries to Approve on the *Time Dashboard*

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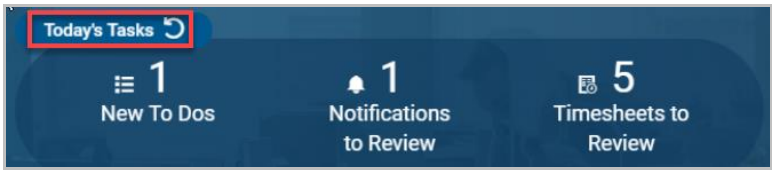
Today's Tasks: Counters for New To Dos and Notifications in Last 24 Hours

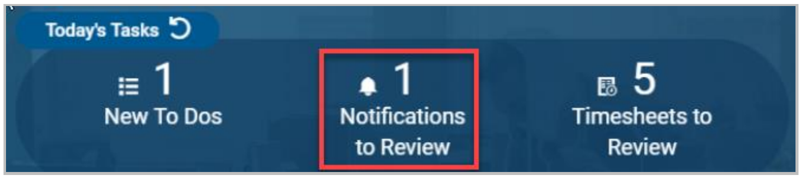
164181: A counter on My Dashboard provides the number of To Do's that have been assigned to a user in the last 24 hours (day). Additionally, users can select the counter to see a more detailed explanation of the To Do's that were assigned to them in that time period. If there are no To Do's that have been assigned in the last day, the counter will not appear on My Dashboard.



Users must have edit access to To Do's (*Company Settings > Profile/Policies > Security > ESS tab > Tools & Documents > My To Do (Mailbox)*), the New UI Dashboard enabled, and **Show Today's Tasks** enabled in the New UI Dashboard profile assigned to them.

166901: Another counter displays on My Dashboard that provides the number of Notifications sent to a user in the last 24 hours.

Users must have access to Notifications (*Company Settings > Profiles/Policies > Security > ESS tab > Tools & Documents > My Notifications (Mailbox)*), the New UI Dashboard enabled, and the **Show Today's Tasks** enabled in the New UI Dashboard profile assigned to them.



By clicking the counter, users are redirected to the Notifications report. The report is filtered by the Created Date To/From = Current Day and Mailbox Status = Unread. If there are no Notifications that have been assigned in the last day, the widget displays the message *You're all caught up!* on the Dashboard. By clicking the reload icon in the title, the data in the widget is refreshed.

Today’s Tasks: Timesheets to Review

164178: In the Today’s Tasks widget of the dashboard header, the number of timesheets needing review will display. When clicking in the widget, users will be redirected to the All Timesheets report where they can then access and review the timesheets.

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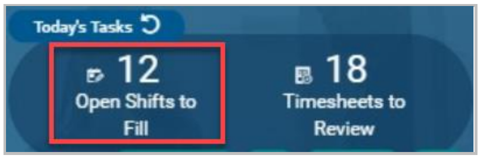
Today's Tasks: Open Shifts to Fill

164177: For companies with the Scheduler sub-system enabled, users with Edit access to *Schedule > Reports > Staffing > Open Shifts* and the New UI Dashboard enabled can see a count of *Open Shifts To Fill* Today displays in the Today's Tasks across all New UI Dashboard tabs. Users can click the count to see a more detailed view (from *Schedule > Reports > Staffing > Open Shifts*).

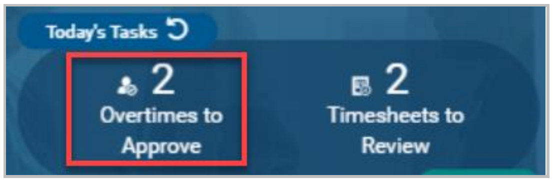


If there are no open shifts, this count/number does not appear on the Dashboard.

Today's Tasks: Overtime Requests Awaiting Approval

170856: Users can see a count of the number of active overtime requests, *Overtimes to Approve*, that are pending their approval on the My Landing Dashboard. The TLM sub-system should be enabled for the company, and the user must have **Approve** enabled for *Overtime Requests* in their assigned Security profile on the TLM tab in *Time Editing/Approving Functionality*.

Users must have access to *My Time > Overtime > Overtime Requests - Awaiting Approval*, the New UI Dashboard enabled, and **Show Today's Tasks** enabled in the New UI Dashboard profile assigned to them.



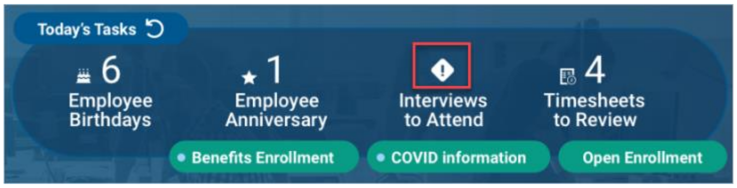
The count will appear across all New UI Dashboard tabs. Users can click the count and be directed to *My Time > Overtime > Overtime Requests - Awaiting Approval*. Within the circle, the following display:

- Count #
- Overtime (Requests) to Approve

If there are no overtime requests waiting on approval that were assigned in the last day, the counter does not appear.

Today's Tasks: Error Tooltip in Today's Tasks Widget

181804: When data within the Today's Tasks widget requires updating, an icon and message will appear to inform users to refresh/update the widget.



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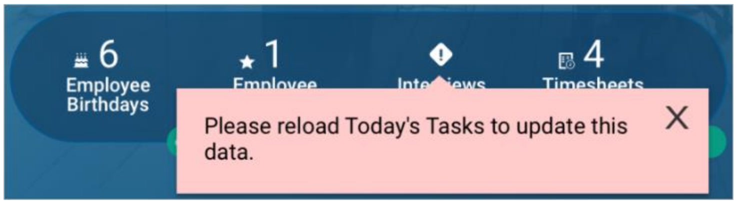

IMPORTANT NOTE: *The Today's Tasks features may not be available immediately following the release. These features will be made available via a gradual rollout across the 2 weeks following the September 2020 release.*

Twilio

SMS Two-Way Communication for Workflow Requests

Users currently have the ability to leverage SMS functionality for workflows through the use of the Twilio marketplace product, however any workflow approvals still require users to log in directly to the product (desktop or mobile) in order to directly approve or reject.

In this release, we are introducing the ability to respond directly to an SMS message in order to complete approve/reject requests stemming from the workflows.

- SMS messages will be in readable text only – HTML formatted messages not supported.
- To Do items prompting users to approve/reject items from workflows will be removed once users do the approval/rejection through SMS.
- Users will receive a follow up text to indicate if their SMS input was successful or not.

This will start with a base set of workflows, and in later releases, more will be added. These workflows are supported in this release:

- Benefit Plan Change Request
- Checklist Item Request
- Custom Form (Applicant & Employee)
- HR Action Request
- Hiring Stage Change Request
- Incident Types
- Individual Data Removal (Data Retention functionality enabled)
- Job Requisition
- Overtime Request
- LOA Request (Leave of Absence)
- Schedule Open Shift (Scheduler)
- Schedule Shift Swap (Scheduler)

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Feature Retirements

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

Retired Features

Product/ Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
Classic Mobile App		N/A	Classic UI	Update to New UI version, HCM to Go	August 2020
Our Company in Company Settings My Company in My Info	Wiki Functionality	*Company Settings > Our Company Also removed from Online Help*	New UI	Functionality Removed	August 2020
TLM > Timesheet Profiles	Non-supported Timesheet Profiles	*Company Settings > Profiles/Policies > Timesheets*	New UI	Non-Supported Timesheet Profiles	October 2020
Platform	Report Retired	ADMIN level Mobile Log Statistic (Unique Users) report	Classic UI and New UI	This report has been removed.	June 2020
Platform	Report Retired	ADMIN level Mobile Log Statistic (Requests) report	Classic UI and New UI	This report has been removed.	June 2020
Platform	Report Retired	ADMIN level Mobile Demo Request report	Classic UI and New UI	This report has been removed.	June 2020
Platform	HTML Code in the HTML Editor	Multiple - System wide	Classic UI and New UI	This feature will be removed due to a potential security vulnerability	December 2019
Scheduler	Menu Removed	*Team > Schedule > Team Schedule View > Overview > Overview*	New UI Desktop	Consolidated the view under one Overview menu item. *Team > Schedule > Team Schedule View > Overview > Schedule Overview*	December 2019
Scheduler	Menu Removed	*Team > Schedule > Team Schedule View > Overview > Overview (Monthly)*	New UI Desktop	Consolidated the view under one Overview menu item. *Team > Schedule > Team Schedule View > Overview > Schedule Overview*	December 2019
Scheduler	Menu Removed	*Team > Schedule > Team Schedule View > Overview > Overview (Weekly)*	New UI Desktop	Consolidated the view under one Overview menu item. *Team > Schedule > Team Schedule View > Overview > Schedule Overview*	December 2019

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Planned Retirements

Product/ Component	Feature	Menu Path	User Experien ce	Reason	Planned Retirement Date
Scheduler> Schedule Templates	Schedule screen	*Scheduler > Schedules > View by Employee*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedule Templates	Schedule screen	*Scheduler > Schedules > View by Cost Center*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedule Templates	Schedule screen	*Scheduler > Schedules > Schedule Table View*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedules	Schedule screen	*Scheduler > Schedules > View by Employee*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedules	Schedule screen	*Scheduler > Schedules > View by Cost Center*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedules	Schedule screen	*Scheduler > Schedules > Schedule Table View*	New UI	Replaced with new schedule views	TBD
Scheduler> Schedules	Schedule screen	*Scheduler > Schedules Overview*	New UI	Replaced with new schedule views	TBD

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