SOFTWARE RELEASE NOTES

OnePoint Human Capital Management

R79 – February 2022

R79- CROSS PRODUCT RELEASE NOTES

Cross Product Hot Features and Enhancements in This Release

Accessibility

Accessibility: Menu Tab and Arrow Key

268010: Users can now tab through the menu without having to tab to each individual menu item. This is applicable for when users are navigating with the Tab key (to move forward) or Shift+Tab (to move backward) only. The tabbing sequence is as follows:

- Employee Image
- Home button
- Pin
- Close
- Search Field
- Tab
- Menu (first top-level item only)
- Home button (bottom)
- Dashboard button

When a user has opened a menu item such as My Team, they can navigate through the pages within that section using the Up and Down arrow keys. The arrow keys also support opening and closing the sub-menus of the main menu. The left arrow closes a sub-menu and the right arrow opens a sub-menu.

Keyboard Navigation Across Tabs

279507: Users can now navigate between tabs using the left and right arrow keys or the Home and End functions. The tab key can be used to move from the list of tabs to the next focusable item.

My To-Do Accessibility

Filter Panel EINs

279494: The EIN options within the filter panel are now grouped, and a screen reader now reads the **EIN** grouping list with X number of items.

Filter Panel Date Lookup

279493: The options within the filter panel for the date lookup are now grouped, and a screen reader now reads the **Created Date** grouping list.

Filter Panel To Do Types

279497: The date options within the filter panel are now grouped, and a screen reader now reads the **To Do Type** grouping list with X number of items.

Pop-Up via Keyboard Navigation

279503: Users can use the up/down arrow keys to navigate into and throughout the items in the My To Do's pop-ups.

My Notifications Accessibility

Filter Panel Date Lookup

282171: The options within the filter panel for the date lookup are now grouped, and a screen reader now reads the **Created Date** grouping list.

Filter Panel Mailbox Status Labels

282173: The options within the filter panel for the Mailbox Status are now grouped, and a screen reader now reads the **Mailbox Status** grouping list, which includes selections for **Read** or **Unread**.

Filter Panel Default Focus State

282172: When a user opens the filter panel in the mailbox, the focus is now on the **X** icon of the panel. This applies to both the My Notifications and the My To-Do filter panels.

Manage Views Actions Label

282179: When the focus is on the Manage Views ellipsis, a screen reader reads a clickable Actions menu button and a collapsed sub-menu of Actions. This change impacts Managed Views for My To Do's and My Notifications.

My To-Do/My Notification Manage Views - Focus on Radio Buttons

288547: When users navigate through the Manage Views for My To Do's and My Notifications, there is a visual focus on the unselected radio buttons. When focused on, the user can select a radio button with just the space bar.

Common Component: Pop-up/Dialog

282163: A Popup/Title dialog is only read once by a screen reader, and when a dialog is opened, the focus is placed on the X icon.

Checkbox ARIA Label (My To Do, My Notifications, People Insights)

288549: When a user navigates through the list of notifications via a screen reader, they now get context of the notification, including when the focus is on the checkbox. An ARIA (Accessible Rich Internet Applications) label has been added to the My Notifications, My To Do's, and the Insights Alerts checkbox. The ARIA label reflects all metadata included in the list. For example, a screen reader may say something like **New Custom Form Added, test@email.com, Jan. 13, 2022 checkbox not checked select**.

Skip Select All When Inactive Using Tab

281918: For non-sighted users utilizing keyboard navigation, all inactive elements are skipped when tabbing. Specifically, when **Select All** is inactive, it is skipped when using the tab key. If **Select All** is active, the tab key will focus on it.

EIN Button Names in Header Employee Drop-Down

273173: When navigating through the list of EINs via keyboard controls, the screen reader now reads **clickable {EIN Name} button**.

Checkbox Color Contrasting

288553: When the checkbox component was used with a darker background in a darker theme, it did not meet color contrast standards. The styling has been updated, and now the checkbox and focus are white when a To Do item is selected. **This change applies to all system themes.**

Timesheet Accessibility: Added Labels to Editable Fields in Timesheet

271325: For employees using a screen reader, when navigating through the editable fields (**From**, **To**, **In Date**, **Cost Centers**, etc.) on the timesheet, the screen reader now specifies which field the employee is editing so that they know if they are in the correct column and day.

Timesheet Accessibility: Added Label to Delete Icon on Piecework Tab

271328: For employees using a screen reader, the trashcan **Delete** icon under the **Piecework** tab in Bulk Timesheet profiles now contains the label, **Delete Piecework**.

Timesheet Accessibility: Added Label to Add Rows Number Entry Field

271316: For employees using a screen reader, the label, **Number of Rows To Add** has been added to the number entry field on the timesheet under the following tabs:

- Time Entry (Bulk Timesheet Profile)
- Adjustments (Bulk and Start/End Timesheet profiles)
- Extra Pay & Counter Adj (Bulk and Start/End Timesheet profiles)
- Extra Pay (Bulk and Start/End Timesheet profiles)
- Piecework (Bulk Timesheet Profile)

Timesheet Accessibility: Updated Expand/Collapse All and Day Labels

271327: For employees using a screen reader, previously the **Expand**/**Collapse** buttons for the entire timesheet (for Bulk and Start/End Timesheet profiles) were for only a single day and used the same label, making it unclear what the user was expanding or collapsing.

The following labels have been updated:

- The Expand button for the entire timesheet label is now Expand All Days
- The Collapse button for the entire timesheet label is now Collapse All Days
- The Expand button on the day row label is now Expand Day
- The Collapse button on the day row label is now Collapse Day

Timesheet Accessibility: Updated Focus When Adding New Row

271329: When selecting with the keyboard or mouse the **+** icon to add a new row on the timesheet (for both Bulk and Start/End Timesheet profiles), the focus will now go to the first field in that newly added row instead of remaining on the **+** icon.

Timesheet Accessibility: Updated Label to Date Column Links to Time Entry Tab

271850: For employees using a screen reader, in the **Calc Detail**, **Shift Premium Summary**, and **Summary By Day** tabs (Start/End and Bulk Timesheet profiles), the label on the date now reads that it is a link to the **Time Entry** tab while also reading the date.

Timesheet Accessibility: Updated Label to Schedule Name/Link in Column

271847: For employees using a screen reader, in the **Schedule** column under the **Time Entry** (Start/End Timesheet profile) and **Calc Detail** tabs (Start/End and Bulk Timesheet profiles), the label on the schedule column link reads the schedule and now also reads the **View Schedule** link/button for accessing the edit schedule pop-up.

Timesheet Accessibility: Updated Missed Punch Highlight to be More Visible

282081: To help better differentiate missed punch fields in the timesheet from other empty fields, missed punch fields are now shaded orange and contain a Warning icon in the field. When you hover your cursor over the Warning icon, a tooltip message will display: **This is a missed punch.**

Timesheet Accessibility: Updated Menu to Work with Keyboard Navigation

282610: Users can now select **All Timesheets** (under **Team > Time > Timesheets**) and all sub-menu items under **All Timesheets** using keyboard navigation.

Employee Documents

Download Employee Documents

276173, 226700: Admins can now download all documents for an employee to paper copies at the same time. A **Download** option has been added under **HR > HR Maintenance > Employee Documents**. This option is inactive until at least one document is selected.

Upon choosing the **Download** button, the selected documents will be downloaded into a zip folder in the user's browser downloads. There is no limit to the number of documents that can be selected and downloaded, but the number of documents selected does impact the speed of the download and zip file creation.

💡🔥 Employee & Applicant Checklists

Checklist Panel: Hide Completed

242681: Users can now hide all Checklist Items that have already been completed so they can see a quick view of the items that are still open. A **Hide Completed** option is now available, and when enabled, the Checklist refreshes, and all completed Checklist Items are not shown. When disabled, the Checklist refreshes, and all Checklist Items display.

If all Checklist Items within a group are completed and Hide Completed is enabled, the group name does not appear. If a Checklist is 100% complete, the **Hide Completed** option is inactive (grayed out).

Checklist Status When Panel is Collapsed

280681: The status of a user's Checklist is available when it's closed so all Checklist functionality (Auto-Progression, Pop-ups, etc.) is provided when the panel is collapsed. Collapse simply hides the panel, and all logic related to the Checklist runs behind the scenes when the panel is collapsed.

Change Collapse and Expand Icons

279178: When using the Checklist panel, the X icon has now been replaced with an arrow icon to expand or collapse the panel.

Modified Close and Redirect Behavior

276104: When users have completed their work within the Checklist and want to exit and return to where they opened the checklist if the user is viewing the Checklist and selects the hamburger menu, the Exit Checklist pop-up is initiated. If the user chooses to exit the Checklist, the user is redirected to where s/he initiated the Checklist (i.e., Checklist report, Checklist widget, My Checklists, etc.).

Active Checkbox for Checklists

260779: Admins may have historical checklists that they no longer assign to employees but cannot delete due to the historical data assigned to them. To keep a record of these checklists they no longer plan to assign to employees, users can now hide them from the available checklists in the Assign Checklist page.

A new checkbox labeled **Active** has been added to the View/Edit Checklist page for Employee and Applicant Checklists. The checkbox is enabled by default. If checked, the Checklist appears as an available option in **Assign New Checklist** under:

- HR > Checklists > Checklists
- Employee Profile > Checklist **Widget**

If **Active** is unchecked, the Checklist does not appear as an available option.

An **Active** column has been added to the Checklists report. If **Active** is enabled, the column displays a Y. If the checkbox is not enabled, the column displays an N.

Mark Checklist Items as Complete on Submit

268138: For many users, Custom Forms and HR Action Checklist Items are considered complete when any user submits the Custom Form or HR Action. Users now have a configurable option that allows them to define if a Custom Form and HR Action item should automatically be marked complete on submit. Additionally, if this is configured, a user completing the Checklist is unable to mark the Custom Form and/or HR Action item complete until they've submitted it. This is applied if the option for **Allow Update Manually** is enabled and the sub-option to **Mark Complete on Submit** is also selected for the Checklist Item. The **Allow Update Manually** option is unselected by default and must be enabled. This also applies to Custom Form Checklist Items within Applicant Checklists.

An informational icon next to the **Mark Complete on Submit** checkbox explains: **If selected, this checklist item will be marked as complete when any users submit the custom form/hr action and a user will be unable to mark this item complete until they've submitted the custom form/hr action**.

Back Button Hidden When Checklist Is Being Viewed

280686: For Checklist Panel users, they do not utilize the back button when using the new checklist experience so their movement out of the checklist-related pages is limited. The Back button is not available on the page to the right of the panel, but users can still utilize the browser Back button.

Upload Documents Checklist Item

246773: A new Checklist Item, **Upload Documents**, is now available for use in Employee Checklists. The following features can be configured for **Upload Documents**:

- Group (the group the item appears in)
- To Be Completed By
- Budget Hours
- Confirmation Required
- Send Reminder Notification
- Name (name that appears in the Checklist panel)
- Rich Text Editor
- Add Document option

The Checklist panel remains open when the **Upload Documents** item is selected, and the panel can be collapsed afterward. An Upload Documents page loads to the right of the panel where users can select an Upload Documents option, and then receive a pop-up prompting them to upload the appropriate document(s) and input the desired information.

Once a document is uploaded, the document link is visible in the intermediary page and the document icon in the checklist also reflects that a document has been uploaded (with a red dot and a number). If a document is added via the Upload Document action in the panel, it is also reflected in the **Upload Documents** Checklist Item. The document is also present in the Employee Documents page/widget.

Users can upload multiple documents, and this checklist item is only supported in the New Look checklist.

Upload Document Checklist Item Notification

279012: Users can now receive a reminder notification when the Upload Document Checklist Item is assigned to them if the **Send Reminder Notification** option is enabled within the Upload Documents Checklist Item. The notification is sent via email and/or their Mailbox (**My Notification** tab) based on the configuration of the **Notifications Through** option for the company (**Company Information > Company Information** widget, Notification).

Cross Product Hot Features in This Release

Dashboard Layout: Content Widget Library

Content Widget Configuration: Content Frames Section

278110: Managers/administrators can now configure a Content Widget using a new carousel mode, which provides a multi-frame slider information delivery experience to end-users. A new section, Content Frames, has been added and includes a radio button with two options:

- **Single Frame** - Allows for a single frame and is selected by default. This is chosen for any existing or newly created Content Widgets.
- **Multiple Frames** - Allow for two or more frames.

A tooltip next to the Content Frames section displays the following message: **The 'Single Frame' option allows displaying only one piece of content all the time. The 'Multiple Frames' option allows displaying multiple pieces of content that are shown one by one in a carousel.**

Content Widget Carousel Configuration

278121: When the **Multiple Frames in the Carousel** option is selected, two sections are available by default. The user can choose the **+Add** button to add up to 5 additional sections that are added below the existing sections. Once 5 additional sections have been added, the **+Add** button becomes inactive.

A **Delete** option allows users to delete sections when more than two sections are displayed. Users can also re-order frames using the Move Up and Move Down actions, which are inactive for the first item and last item listed respectively.

Clone Content Widget Configured as Carousel

278966: When the **Multiple Frames in Carousel** option is selected in the Content widget configuration, users can copy a frame using the **Clone** action so they can easily duplicate the configuration from one frame to another. The **Clone** action is inactive when the maximum number of frames is met.

Content Widget Library: Type Column

278124: Administrators can now view a new column, **Type**, on the Content Widget Library report, which provides information on whether it is a Single Frame or Multiple Frames view. Two values are possible in this column, **Single Frame** (regular Content Widget) or **Multiple Frames** (Content Widget configured as a Carousel).

This column is available in both client and admin-level reports and is available in the report by default.

Content Widget Carousel - Multiple Frames Options

278131: Administrators now have configuration options for the Multiple Frames view, so they can adjust the Carousel widget look and feel. When the Content Frames section is available, a **Random Frame Start** option allows for a random start frame for the end-user.

Users also have an option for **Auto-Forwarding through Frames**, which automatically changes the frames for the end-users. In addition, there is an **Expose Timing per Frame in Seconds** selector, for which users can define the seconds. The default value is 5 seconds, and the value can be between 2 and 10 seconds. This is hidden when the **Auto Forwarding through Frames** option is disabled.

Content Widget Carousel: Switch Between Single & Multiple Frames

278130: Administrators can switch between Single and Multiple frames, allowing created configuration to be transferred between Single and Multiple views. When the Single Frame option is activated and configured, then the Multiple Frames option is subsequently activated, the content is positioned as the first frame and the second frame is blank. When the Multiple Frames option is activated and several frames are configured, then the Single Frame option is subsequently activated, the first frame configuration is displayed, and the configuration of other frames is preserved. The manager does not lose configuration and s/he can re-activate it by selecting the Multiple Frame option again.

Content Widget Carousel End-User View

276366: End users can now see the Content Widget in a carousel mode, which provides a multi-frame slider information delivery experience. Where the Content Widget is configured as a carousel and is included in the dashboard, when the end-user logs in to the application and views the dashboard with the Carousel Widget, **Next,** and **Previous** buttons display, allowing the user to change frames manually.

At the bottom of the Carousel Widget, navigation dots display. Upon clicking a dot, the respective frame is displayed. The Carousel Widget frames are auto-forwarded when the respective option is enabled. With auto-forwarding, the system continues cycling through the frames but will stop auto-forwarding when a user hovers on a frame (or taps hold for Mobile devices).

When the **Randomized** option is utilized, a different, random frame is shown each time the tab is loaded. Once the random frame is shown, the rest of the slides positioned after this frame in the configuration are shown in that order.

When the **auto-size height** checkbox is not selected, the widget size does not depend on frame sizes, and frames with lower heights than the widget are aligned to the center.

Content Widget Carousel Show More Pop-Up

277925: End-users can use the **Show More** functionality on the Carousel Content Widget to view the full content when the height of the widget is shorter than the length of all the content contained in a frame.

Content Widget Carousel Auto-Size and Transparency

277923: End-users can utilize the Auto-Size and Transparency features on the Carousel Content Widget so they can ensure it is consistent with a regular single-frame Content Widget. When the **Auto-size height** checkbox is selected, the widget is sized to the maximum frame height (not more than 545 px) based on the frames configured. A new tooltip next to the **Auto-size height** checkbox and label states: **Applies to full-width widget inside each section. When Multiple Frames and Auto-Size Height are enabled, the frame detected with the largest height is used to determine the overall height, and the maximum height is limited to 545 pixels to prevent frames with larger heights from skewing the viewing experience. When Single Frame mode is enabled, or Auto-Size Height is disabled there is no height limit**.

When the Transparent view is enabled and one or more frames rely on the **Show More** pop-up, it is recommended that the text color be set to a color other than white, such as blue or green. This prevents issues when the pop-up attempts to display the text where the background is white and ensures there is enough contrast between the font color and background color for the font to display clearly.

Dashboards

Default Tabs in Tab Library in New Companies

276575: When an Admin views the Dashboard Tab Library in a newly created company, the system shows a Default Custom Tab and a Default Company Hub Tab in the Dashboard Tab Library report.

Add Tab Templates to Personal Dashboard

275995: Users can now view and add tab templates to their personal dashboards to prevent the need to create them from scratch. When a user creates a new custom tab in the Edit Tabs pop-up and clicks Save, the system shows a blank custom tab in Edit Mode where they are prompted with the phrase **Choose a template for your role** and one or more tab template options in the middle of the screen.

The availability of templates is based on the responsibilities enabled for the Role Profiles assigned to users.

Users must have the **User Can Modify** option enabled in their assigned Dashboard Layout Profile (for end users), and the **Show Custom Tabs** toggle must be enabled.

Edit New Tab on Edit Dashboard Tabs Pop-up

276934: Users are now redirected to a newly created tab in Edit Mode so they can begin creating content. When a user creates a new Custom tab in the **Edit Tabs** pop-up and clicks **Save**, the system shows a blank Custom tab in Edit Mode. If a user creates several tabs at once, the system redirects the user to the last one.

Users must have the **User Can Modify** option enabled in their assigned Dashboard Layout Profile (for end users), and the **Show Custom Tabs** toggle must be enabled.

Re-Arranging Tabs Using Arrows

169029: When choosing any tab (i.e. the first tab) and re-arranging it to the end of the list using arrows, if a user then re-arranges it back to the top without saving first, scrolling now works correctly up and down the list of tabs dynamically.

Track One-click Classic Dashboard Migration

276196: Admins can now see how many users assigned to a Dashboard Layout Profile have completed the Classic Dashboard migration to track the current status. When an admin navigates to the Dashboard Layout Profiles report, they can add the One-Click Classic Migration column to the report via Select Columns. This column displays the number of user accounts that have completed the migration.

Add Description to Content Widgets and Report

273168: Administrators can now add a description to the Content Widget configuration so they can provide more context around its purpose. In addition, **Description** is now included as a column in the Content Widget Library report.

The **Description** field in the Content widget configuration (**Profiles/Policies > Dashboard Layout > Content Widget Library > Edit Content Widget**) allows for multiple lines for text.

A **Description** column has also been added to the Content Widget Library report (**Profiles/Policies > Dashboard Layout > Content Widget Library**) and is included by default.

Preview Content of Templates on User Dashboard

276652: Users can now preview the content of each template so they can select the most relevant material. When a user adds a Custom tab to the Dashboard, the system shows a **Preview** option under the Choose selections in the template tile. When a user selects **Preview**, the system displays the Preview Dashboard Template pop-up with the following:

- The name of the template and its order in the list (for example, Manager (1 of 4))
- An image with the widgets
- Arrows to navigate among templates
- Options for Cancel (closes the pop-up) and **Choose** (expands the template which was displayed).

Dashboard Tab Library

Mass Assign Dashboard Tabs: Publish Upon Assign

272707: In both Admin and client companies, when an administrator uses the **Assign To Profiles** page-level action in the Dashboard Tab Library (**Company Settings > Profiles/Policies > Dashboard Layout > Dashboard Tab Library** or **View Dashboard Tab Library** from the Dashboard Layout Profiles report), the system now also publishes the tab(s) selected, beyond just assigning them to the appropriate Layouts inside the Dashboard Layout Profiles. This allows end-users assigned to the Dashboard Layout Profile layouts to immediately view the tab(s) in their Dashboards. The success message when the **Assign To Profiles** action is successfully completed now reads: **Dashboard Tab(s) were assigned and published successfully**.

The system does not allow assignment of Onboarding, Pre-boarding, and First Day Package, which is explained in the message: **Assign to Profiles from Dashboard Tab Library is not supported for the following tab types: First Day Package Tab, Onboarding Tab, Preboarding Tab**.

Dashboard Tab Library: Unpublish Tab(s) Upon Unassign

272680: The **Unassign** action also un-publishes the tab(s) selected, beyond just un-assigning them from profiles, so that end-users assigned to the Dashboard Layout Profile layouts which previously contained the tab can no longer view the tab(s) in their Dashboards. By clicking **Unassign** and completing the action successfully, the success message now states **Dashboard Tab(s) were unassigned and unpublished successfully**. The system skips Onboarding, Pre-boarding, and First Day Package with the message: **{Name of tab}: skipped**.

Dashboard Widgets

Announcements Widget - Hide Author

212075: Administrators now have an option in the Announcements (Maintenance) page (**Our Company > Announcements**) to show or hide the author's name from the Announcements widget. Users can enable or disable the option to **Show Author Name**, which is enabled by default for existing and newly created announcements, to either show (enable) or hide (disable) the author's name.

When the **Show Author Name** option is unchecked, then:

For the New UI Dashboard, the author's name is hidden from:

- The Announcements widget
- The Announcements pop-up

For the Classic Dashboard, the author's name is hidden from:

- The Classic Announcements Heading
- The Classic Announcements widget
- The Classic Announcements pop-up

Reports

Row-Level Actions in Report/Chart Tiles

203082: Row-based actions that were previously not yet supported for certain reports when they were placed in Report/Chart tiles are now supported. These columns no longer appear without the icons, and users can now execute a particular action (i.e., Edit, View, Preview, etc.). Work is in progress to address any remaining not yet supported actions in upcoming releases.

Checklist Item Report: Item Due Date Column

268125: A new column, **Checklist Item: Due Date**, is now available for inclusion in the Checklist Items Report (**HR > Checklists > Checklist Items Report**). Data for this column is defined by the due date specified for the specific Checklist Item. If no date is specified, the column appears as blank.

Important: *PLEASE NOTE* The Employee Document Download features may not be available immediately following the release. These new features will be steadily rolled out to companies after the initial release date of February 9, 2022. The functionality will be made available via a gradual rollout across the 3-4 weeks following the February 2022.

Employee Documents

Position Management Reports:

Employee Assignment Report: New Base Compensation Columns Added

263886: Within the Employee Assignment report, new columns have been added that will assist with leadership reporting and help prevent the need for multiple reports to be run in order to get important information. This report is used for companies with Position Management enabled and does not apply otherwise.

We added additional columns and they must be added; they are not default columns. They display as of the date selected in the report. From the Base Compensation widget:

- Employee: Hourly Pay
- Employee: Base Compensation From
- Employee: Hours
- Employee: Hours Per

HR Enhancements

The following enhancements have been added to this release.

Custom Forms

Field Order Column & Sort Fields Button Added to Form Page

220812: To provide a more organized experience when configuring a custom form we have added some new options. You can now easily set the field order on the form page using a new button or via manual editing. These new options help you reconcile the order of the fields as they appear in the Form Page with the order they appear in the Fields widget listing.

New Sort Fields Button

A new Sort Fields button has been added to the Form Page and is located at the top of the configuration page. This is accessed from Settings > HR Setup > Custom Forms, and then selecting/adding a new custom form; then selecting/adding a new page, and then editing that page using the Fields widget to add and keep track of the fields.

Every new field added will default to a Field Order of 1. You can then arrange the fields on the page as desired and then use the Sort Fields button to update the field order. When the new button is selected, a warning message displays stating: "You are about to sort the field based on the Field Order column and values. Would you like to continue?"

If OK is selected, the Fields widget list will be updated to reflect the order of the fields in the form. These can be viewed in the new Field Order default column within the Fields widget.

> Note: The new Field Order column is a default column but can be removed via Select Columns under the gear icon.

New Field Order Drop-Down in Fields Configuration Page

Additionally, when opening a field for editing, a new Field Order drop-down will allow for manual selection of a field order (1, 2, 3, etc.) This selection will also be reflected in the new Field Order default column. You might use this field if you have two fields on the same row and want them to both be listed with the same field number

> **Important:** If you make manual edits to the Field Order setting, be careful NOT to use the Sort Fields button again. Doing so will override your manual edits.

Hide Label Added to Custom Forms

220811: A new Hide Label on Form checkbox has been added under the Label field in custom forms. When checked, the label will appear above the input field (right side) of the form when a user completes it but will not appear on the form image (left side) when a user completes it.

Include Tooltip Checkbox Added to Custom Form Configuration

220814: When configuring a field for a custom form, a new Include Tooltip checkbox is now available to be added to the field. When checked, a Tooltip text field will open where you can enter helpful information to the field being added to the form.

- Maximum number of characters allows is 250, including spaces.
- Is available for Applicant Custom Forms
- End users can see the tooltip text by hovering over the field.

Pay Grade Automatic Step Added to Custom Forms

278302: For employees with a Pay Grade Automatic Step in their profile, this step can now be added to Custom Forms. In the Custom Form configuration, this is available under Type: Employee, and Field: Pay Grade Name. When assigning the custom form under Team > HR > Forms > Other Forms, the Pay Grade and Automatic Step will display as read-only fields for informational purposes. It will display as of the system date. If the Automatic Step is later changed, it will not dynamically change on the custom form

Employee Document Enhancements

Employee/Supporting Documents Download By

208286, 270322 : Previously, to view a document, it required the user to download the document, which in turn put the document into Downloads/Cache, leaving documents on the computer/device. This could cause security concerns for those using shared computers and/or concerns about storing sensitive information.

Users can now see/preview a document(s) without the preview remaining on the user's system after closing it and with nothing downloaded, cached or left on the system/device.

In Document Types, a new setting for Download By is now included and is much like the Visible By setting in each document type. For the Download By option, All Accounts is selected by default. A filter can be added to restrict downloading. For example, Security Profile is an option and the appropriate security profiles can be selected to have Download Access.

The **Visible By** settings in **Document Type** are also considered. For example, if it is not Visible, a user cannot see it to download regardless of their download permissions.

Important: : For Evidence of Insurability (EOI) documents, a tooltip has been added to the new company level setting for the EOI document type that explains: **Any filter added to the "Download By" settings in this document type will be followed. Any filter added in the "Visible By" settings in this document type will be handled in a future release**.

Companies can require users to pick a Document Type upon uploading a document. The option for Document Type Required can be enabled within HR Settings under Company Settings > Global Setup > Company Setup. T
The Visible By settings in Document Type is also considered. For example, if it is not Visible, a user cannot see it to download regardless of their download permissions

Preview Option/Button

: A Preview button now appears next to the document(s) uploaded via the Supporting Documents pop-up. Wherever a user has access to view document(s), when selecting Preview, the user can preview the file in a pop-up and the system does not place a copy in downloads or cache. The Preview is available for the following image and document file types: "JPG", "JPEG", "PNG", "GIF", "JPE", "BMP", "JFIF", PDF, RTF, DOC, DOCX, and TXT (Text).

This applies regardless of how the document is added to an employee record, such as via HR Actions, APIs, Imports, Applicants / Employees (Applicant and Employee Document widgets), Employee Documents (HR > HR Maintenance > Employee Documents), the Employee Documents Widget on the Employee Record, HR Action Documents, Applicant Documents and Resumes (Resume tab in .careers, Apply for Jobs in .careers, Download option in Resume Widget on Job Application page), etc.

Note: Viewing an employee's document within Asset Assignments honors the Download By filter. The Preview Icon will be introduced in a future release.

Special Considerations

For many documents, the Document Type is specified when the document is uploaded. However, when uploading an Evidence of Insurability document via any MSS method or any ESS method (Open Enrollment, New Hire Enrollment, Life/Change event), the document type defined for the new Uploaded Evidence of Insurability Document Type setting in Company Settings (Global Setup > Company Setup > Global Policies > Account Policies section) is now assigned. The option and the appropriate permissions for Download By in the document type are followed.
In addition, when a manager or applicant uploads a resume, the document type defined for the existing Uploaded Resume Document Type setting in Applicant Tracking/Recruitment Configuration (HR Setup > Applicant Tracking/Recruitment > Configuration) is assigned.

Important: The new EOI Document Type only applies to EOI documents uploaded moving forward. EOI documents that were previously uploaded do not have the Document Type. A Document Type can be assigned to previous EOI documents individually via the Employee Documents report (Team > HR > HR Maintenance > Employee Documents) if needed

Download Button in Preview Pop-Up

A **Download** option, just like the option within the Pay Statement preview pop-ups, has been added to the document **Preview** pop-up. Users with download permissions for the document can download it from the Preview without having to close the Preview and then download. The **Download** option is available anywhere documents can be previewed, and only appears if the user has permission to download the document type.

Download File Option

The Download File option is hidden if the user does not have permission to download the particular document based on their assigned document type security permissions

Important: ***PLEASE NOTE*** The Employee Document Download features may not be available immediately following the release. These new features will be steadily rolled out to companies after the initial release date of February 9, 2022. The functionality will be made available via a gradual rollout across the 3-4 weeks following the February 2022.

Employee Document Upload

202895: Users can now upload multiple documents for an employee at one time. The Employee Documents Add New action (HR > HR Maintenance > Employee Document > Add New) now allows for the selection of multiple documents and apply the Document Type, Name and Description to multiple documents.

Note: When an applicant/employee uploads a resume in Recruitment currently, they can then immediately download the document just uploaded without the appropriate permissions for the Document Type applied. This may be addressed in a future release. The Manager (MSS) screens have been handled with this release (February 2022).

Forms

California Pay Data: Info Message Updated for Section 1- Employer Information

Due to a recent change to the 2022 file format requirements for the Section I - Employer Information for California Pay Data reporting, we updated the Info message on the California Pay Data form to inform users where to find the employer information. When adding a new entry on the form, the Section I - Employer Information section message now states:

- Employer Information fields can be found and completed directly in the California Pay Data Reporting Portal.

California Pay Data: Submission Upload ID Added under Section II

We have added a new Submission Upload ID (Column A) field to the Section II - Establishment Information area of the California Pay Data form. With the new field, you can enter the ID in the form prior to downloading the form.

Note: Submission ID is a new requirement and has been added to the Excel/CSV file and the UI so employers can enter the Submission ID they receive from the portal and include it in the file as required.

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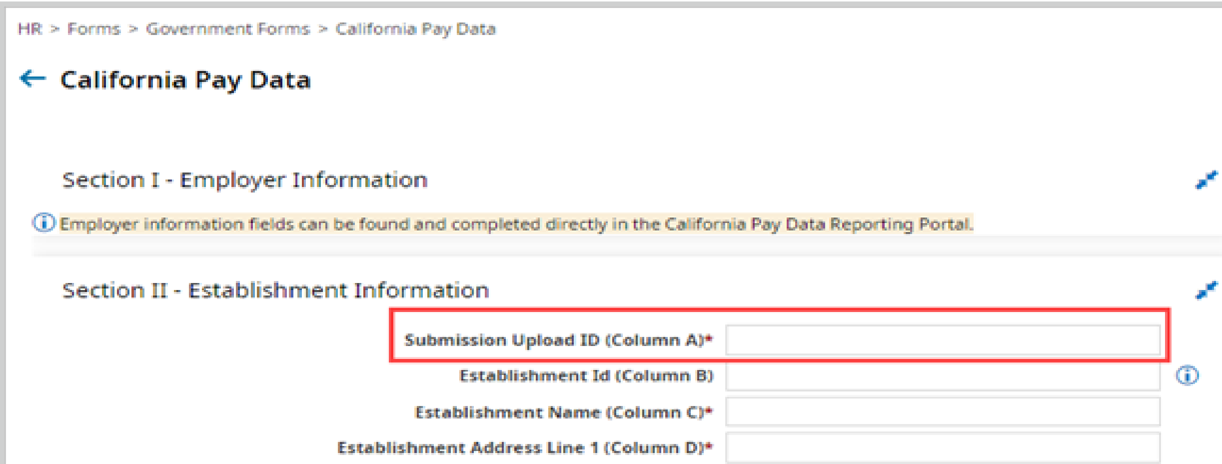


California Pay Data: Will Now Recognize Non-Binary Gender

If an employee profile is set with Gender: Non-Binary, the California Pay Data form will now recognize this gender selection. It will be coded in Section II: Establishment Information and Employee Detail of the form, and in both the Excel and CSV files, in the Race/Ethnicity/Sex* (Column P) column.

California Pay Data: Download File Updated

After adding a form and completing the required information, and then selecting Download File, users will have options to select CSV or Excel for the output file that will be used to file with the state of California. These files have been updated with the most current information to help prevent file rejections from the state and prevent manual work for the user. The following has been updated.

- Section I - Employer Information is no longer included in the Excel file, as this information is now entered directly into the portal itself.
- The headers Section II.A-Establishment Information and Section II.B - Employee Detail no longer appear in the new file, Paydata Report. These two sections have been combined and are now titled, Section II: Establishment Information and Employee Detail.
- The first column in Section II: Establishment Information and Employee Detail is now a new column titled Submission Upload ID.

The position of the Establishment Name and Establishment ID columns in Section II: Establishment Information and Employee Detail have been swapped.

Jobs

HR Jobs Lookup Updates

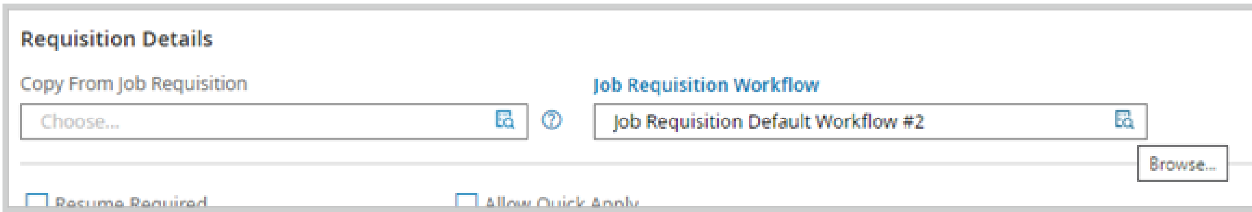
To provide consistency across the HR Jobs area of the product, all cost center lookups have been updated to the most current type used throughout the New UI.

Recruitment

Job Requisition Templates: Job Requisition Workflow Field Added

In the December 2021 (R78) system release, we introduced the ability to add a Job Requisition Workflow within Job Requisitions. We also updated the Job Requisition field within the Configuration page and renamed it to Default Job Requisition. In this release, we are expanding this functionality to include the ability to add default workflows to Job Requisition Templates. Adding a workflow in the template will populate a Job Requisition when this template is applied.

If a default workflow is set in the Applicant Tracking/Recruitment Configuration widget of the Configuration page (Admin > Settings > HR Setup > Applicant Tracking/Recruitment Configuration) that workflow will auto-populate the template field. If you do not want to use that workflow you may select another one.



Job Requisition Templates: Template Field Set as Read Only

When a job requisition is successfully created, either with or without workflow, the Job Requisition Template field will immediately be marked as read-only so that a new template cannot be selected, as the job requisition is already created. Previously, this field would not show as read-only until a job application was attached.

Reports

Turnover Rates (View by Summary): Ability to Filter by Employee Type

The Turnover Rate (View by Summary) report will now allow for filtering by Employee Type. This addition will allow this report to function the same as the Turnover Rate (View by EIN) and the Turnover Rates (View by Cost Center) does and include/exclude employees according to their Employee Type.

Employee Headcount Report: More Columns Added

282636: Multiple columns have been added to the Employee Headcount Report. They can be added to the report and will contain hyperlinked numbers that, when clicked, presents a pop-up showing the employees that make up the numbers.
The following can now be added and are not effective-dated or date-driven. The values will reflect what is showing in the employee record as of the system date.

- Demographics: EEO Classification
- Demographics: EEO-4 Classification
- Demographics: Ethnicity
- Demographics: Gender
- Demographics: Disability
- Demographics: Is Veteran
- Demographics: Primary Language
- Demographics: Worker Type
- Emp. Default: Cost Center (all levels set up)
- Emp. Default: Jobs (HR)
- Employee: Is Primary EIN (only available in Multi EIN companies)
- Employee: Type

The fields below are either effective-dated or date-driven and reflect the As of Date selected in the report.

- Employee: Age
- Employee: Years of Service
- Primary Position Name (if using Position Management)

Important: The numbers presented in the Employee Headcount report are not adjusted based on what is selected in the Employees pop-up. For example, if a user clicks on a value of 100 on the Employee Headcount report, they are taken to the Employees pop-up. If the user then adds fields and filters based on a specific value, such as Employee: Is Primary EIN, they may only see 50 employees in the pop-up based on the selected criteria. When the user closes this pop-up, the Employee Headcount report will continue to show 100.

Leave of Absence

Notification for Leave End Date / Employees are Expected Back to Work

A new Leave Of Absence Case notification has been added, Leave Of Absence Case End Date, which sends a notification n-days before the Leave of Absence Case end date. This gives the ability for managers to be notified of when employees are expected back to work.
Like other notifications, under Global Setup > Notifications, you can configure the recipients and recipient filters, conditions, email message, and SMS, and include tags.

Report on Case Notes in Leave Case Report

A new Notes column has been added to the Leave Cases report (Team > Leave > Cases). This allows managers to be able to view notes from the leave case.
Tip: Notes can be added and deleted only from the Leave Case page.

Prevent Deletion of a Case when Leave and/or Time Entries have been Created

To prevent deletion of a leave case if there are time entries still associated with the case, a Prevent Deletion Of A Case When Time Entries Have Been Created setting (which is unchecked by default) is available in the Restrictions section of the Extra Settings widget in the Leave of Absence profile.
When this option is enabled, users will be unable to delete a leave case if there are leave entries or time entries associated with the case. Once the leave entries or time entries are removed, the leave case can be successfully deleted.

Allow Leave Entries to be Greater than EE Standard Workday

Previously, Leave only allowed entries to a maximum of the employee Standard Workday (which is the value used for 1 day in leave). A new setting has been added, Total time per day cannot exceed employee's standard workday hours (which is checked by default) in the Restrictions section of the Extra Settings widget in the Leave of Absence profile.
When this setting is checked, a message will display, Total time per day cannot exceed employee's standard workday hours, upon attempting to save/submit a Leave of Absence request/case with total hours exceeding the employee's standard workday hours.

Utilization of Entitlement Balances

Previously, when there were multiple categories selected in the Leave Case, the system did not split total time between Categories, it only generated total time for all selected Categories.
What's been added: A new setting, Adjust Leave Entries When Populating Timesheet has been added to the Extra Settings widget in the Leave of Absence profile, as well as an Adjust Leave Entries checkbox in the Populate Timesheet confirmation pop-up and Populate Timesheet step of the Leave of Absence Case workflow. When the Adjust Leave Entries When Populating Timesheet setting is enabled (unchecked by default), the Adjust Leave Entries checkbox will be enabled by default.

If the Adjust Leave Entries When Populating Timesheet setting is enabled, the leave entries will be adjusted based on Time rules configured in the Leave of Absence profile.

R79 - SCHEDULER RELEASE NOTES

Scheduler Hot Features in This Release

Schedules

Added Option to Trigger WS Profile Shift Creation Rule on Existing Schedules

272933: Previously, the **Work Schedule Profile Shift Creation** rule only triggered on a new schedule creation.

What's been added: A new option, **Generate Profile Shifts**, has been added to the **Schedules** page from the three-dot ellipsis icon. When selected, an **Employees** window will display where managers can look up employees and select those for which the **Work Schedule Profile Shift Creation** rule applies to and have shifts assigned to those employees based on their Work Schedule profile.

Remove Scheduled Shift from Employee Equal to Partial Day TOR

281268: Previously, when an employee would request a partial day time off, the system would either remove the employee's shift for that day or leave the shift assigned to the employee and create an open shift equal to that amount.

What's been added: In the **Time Off Policies** widget under **Global Setup > Company Setup**, a new setting has been added, **Remove Scheduled Shifts from Employees Equal to Time Off Requests**. When this setting is enabled, the system will look at the employee's shift and partial time off request and remove only that piece of the shift that is being requested off and create an open shift, while leaving the rest of the shift assigned to the employee.

Example: An employee is scheduled from 8:00 AM - 5:00 PM and they request partial day time off for 10:00 AM - 2:00 PM. In the schedule, the system will adjust their scheduled shift to 8:00 AM - 10:00 AM and 2:00 PM - 5:00 PM, while an open shift will be created for 10:00 AM - 2:00 PM.

Scheduler Enhancements

The following enhancements have been added to this release.

Availability/Preferences

Availability Change Workflow Delegation

255211: Delegated managers now have the option to approve an Availability Change Request workflow. From the Delegations page (My HR > Delegations), select Availability Change Request from Workflow Type in the Workflow Delegation window.

Employee Schedules

Added Lunch Times to Team Schedules View

217892: Previously, the **Team Schedules** view (**My Schedule > Team Schedules**) showed employee schedule times but did not display scheduled lunchtimes.

What's been added: In the **Team Schedules** view, **Lunch To** and **Lunch From** columns with the applicable times have been added for each employee. If the employee does not have a lunch shift, nothing will display.

Schedules

Added Seniority Date and Skill Level as Columns

236510: When managers select **Assign Employee** for an open shift on a schedule, **Seniority Date** and **Skill Level** columns will now display by default in the **Browse and Select Employees** window, which allows managers to sort the employee list by these fields.

Group by Cost Center in Schedule Views in Alphabetical Order

237908: Previously, when **Group by Cost Center** was toggled on in the schedule views, it sorted randomly.

What's changed: Cost centers will now be grouped and listed alphabetically in the schedule views.

Removed Airplane Icon from Time Offs Display

228054: The airplane icon that previously displayed on time offs regardless of the actual time off type has been removed in the following places:

- Schedule Day View, employee's Schedule Details pop-up, print preview
- Schedule Week View, employee's Schedule Details pop-up, print preview
- Schedule Month View
- Manage Shift pop-up
- Employee's My Schedule view
- Availability/Preferences calendar (for ESS and MSS)

> **Note**: The flag icons will still display on public holidays.

Schedule Fairness Adding Shift Update

229734: Previously, if there was an open shift that was going to be assigned to an employee and it required the employee's approval due to Schedule Fairness when the shift was assigned, it remained assigned in the **Open Shifts** section of the schedule until the employee approved it, and the manager could not see that there was an open shift pending approval by the employee.

What's changed: Assigned shifts pending an employee's approval will now display an indicator on the schedule and will no longer display in the **Open Shifts** section.

Schedule Pay Estimation Includes Time Off Hours

220692: Previously, the Schedule Pay Estimation did not include the cost for Time Off on schedules.

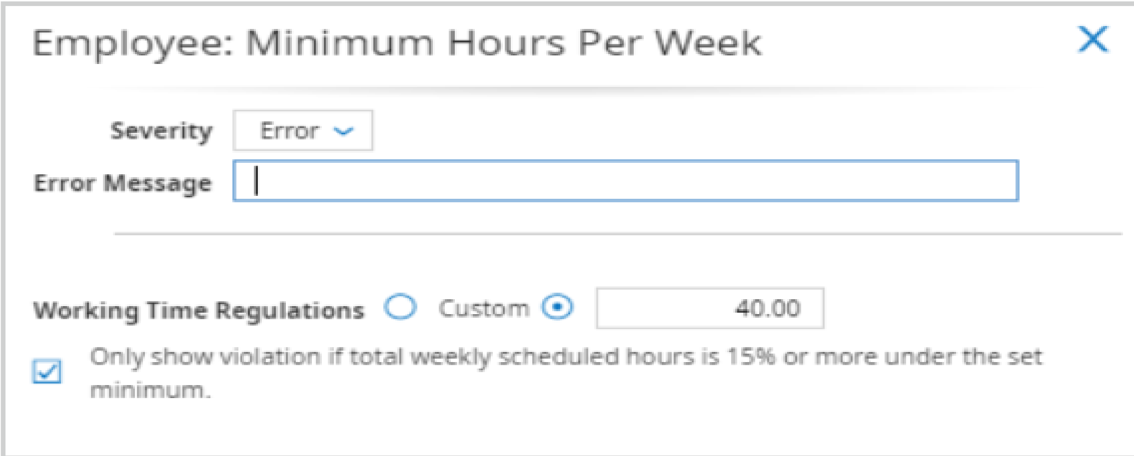
What's changed: If the time offsetting has the option enabled to include **Time Off Hours in Schedules**, then time offs will now be included in the Schedule Pay Estimation (Labor Cost) metrics on the **Schedule Metrics** panel on schedules. This allows managers to have a more accurate cost of schedules.

> **Note**: This is applicable for employees with a Base Compensation profile only and/or employees with Rates and Pay Calculation profiles.

Schedule Fairness

Added Option to Minimum Hours Per Week Constraint

264674: A new option, Only show violation if the total weekly scheduled hours is 15% or more under the set minimum, has been added to the Minimum Hours Per Week constraint. When this checkbox is enabled, the violation will only flag if an employee's scheduled hours are less than their minimum hours by 15% or more.



TIME and LABOR MANAGEMENT RELEASE NOTES

TLM Hot Features in This Release

TLM Clocks

InTouch Biometric Consent

Multiple enhancements have been completed for InTouch Biometric Consent. For more details, see the NEW InTouch Biometric Consent heading.

InTouch TouchFree ID

A new Facial Recognition reader type is now available for InTouch DX devices. Multiple enhancements have been completed; for more details, see the NEW InTouch Facial Recognition / TouchFree ID heading.

General

NFC Tags

Employees can now use their mobile phone to scan NFC Tags to create a Leave of Absence request, Time Off request, Attestation punch, and Change Cost Center punch.

For more details, see the Reading and Writing NFC Tags: LOA, Attestation, Change CC, TO Request heading.

Manager Replacement

Multiple enhancements have been completed for Manager Replacement. For more details, see the Manager Replacement heading.

Time Off Request

Auto Approve Workflow Step

A new workflow step has been added so that time off will be auto approved when the manager requests time off on behalf of an employee. For more details, see the TOR: Auto Approve Workflow Step heading.

Timesheet

Timesheet Workflow

Employees can now accept or reject their submitted timesheet. For more details, see the NEW InTouch Biometric Consent heading.

TLM Enhancements

The following enhancements have been added to this release.

Accessibility

Timesheet Accessibility: Added Labels to Editable Fields in Timesheet

271325: For employees using a screen reader, when navigating through the editable fields (**From**, **To**, **In Date**, **Cost Centers**, etc.) on the timesheet, the screen reader now specifies which field the employee is editing so that they know if they are in the correct column and day.

Timesheet Accessibility: Added Label to Delete Icon on Piecework Tab

271328: For employees using a screen reader, the trashcan **Delete** icon under the **Piecework** tab in Bulk Timesheet profiles now contains the label, **Delete Piecework**.

Timesheet Accessibility: Added Label to Add Rows Number Entry Field

271316: For employees using a screen reader, the label, **Number of Rows To Add** has been added to the number entry field on the timesheet under the following tabs:

- **Time Entry** (Bulk Timesheet Profile)
- **Adjustments** (Bulk and Start/End Timesheet profiles)
- **Extra Pay & Counter Adj** (Bulk and Start/End Timesheet profiles)
- **Extra Pay** (Bulk and Start/End Timesheet profiles)
- **Piecework** (Bulk Timesheet Profile)

Timesheet Accessibility: Updated Expand/Collapse All and Day Labels

271327: For employees using a screen reader, previously the **Expand**/**Collapse** buttons for the entire timesheet (for Bulk and Start/End Timesheet profiles) were for only a single day and used the same label, making it unclear what the user was expanding or collapsing.

The following labels have been updated:

- The **Expand** button for the entire timesheet label is now **Expand All Days**
- The **Collapse** button for the entire timesheet label is now **Collapse All Days**
- The **Expand** button on the day row label is now **Expand Day**
- The **Collapse** button on the day row label is now **Collapse Day**

Timesheet Accessibility: Updated Focus When Adding New Row

271329: When selecting with the keyboard or mouse the **+** icon to add a new row on the timesheet (for both Bulk and Start/End Timesheet profiles), the focus will now go to the first field in that newly added row instead of remaining on the **+** icon.

Timesheet Accessibility: Updated Label to Date Column Links to Time Entry Tab

271850: For employees using a screen reader, in the **Calc Detail**, **Shift Premium Summary**, and **Summary By Day** tabs (Start/End and Bulk Timesheet profiles), the label on the date now reads that it is a link to the **Time Entry** tab while also reading the date.

Timesheet Accessibility: Updated Label to Schedule Name/Link in Column

271847: For employees using a screen reader, in the **Schedule** column under the **Time Entry** (Start/End Timesheet profile) and **Calc Detail** tabs (Start/End and Bulk Timesheet profiles), the label on the schedule column link reads the schedule and now also reads the **View Schedule** link/button for accessing the edit schedule pop-up.

Timesheet Accessibility: Updated Missed Punch Highlight to be More Visible

282081: To help better differentiate missed punch fields in the timesheet from other empty fields, missed punch fields are now shaded orange and contain a Warning icon in the field. When you hover your cursor over the Warning icon, a tooltip message will display: **This is a missed punch.**

Timesheet Accessibility: Updated Menu to Work with Keyboard Navigation

282610: Users can now select **All Timesheets** (under **Team > Time > Timesheets**) and all sub-menu items under **All Timesheets** using keyboard navigation.

Access Control

Access Control Attendance Board Report

286622: The **Access Attendance Board** report is now fully functional in the current environment (New UI). This will allow users to use the report to check Yes and No for incidents.

Attendance Board: Ability to Change Status In/Out

266145: Users can now change the Attendance Status in the **Access Attendance Board** report to Out or In when needed. Two new page level options, **Manual In** and **Manual Out**, are available to use for both Employees and Visitors. A new security setting for **Manual Override of Attendance Status** must be enabled for users to have access to the new options, and this new setting is dependent upon the **Access Attendance Board** security setting.

When a user chooses one or more employees with any status and clicks either **Manual In** or **Manual Out**, the status for the selected employees is overridden with In/Out. A success message displays when the status is changed successfully.

A new column, **Is Manual Punch**, is now available for inclusion in the **Access Attendance Board** report via Add/Remove Columns. Data around Manual In/Out actions is also included in the **Employee Access History** and **Visitor Access History** reports.

Clocks

InTouch DX: Removed Extra Submit Prompt for Attestation

249563: Previously, when employees using the InTouch DX clock submitted their response to their Attestation question, a follow-up screen would display, prompting them to resubmit.

What's changed: Once an employee submits their response to their Attestation question the extra prompt will no longer display.

Replaced the Word "Fingerprints" with "Finger Scan Templates"

279261: All instances of the word fingerprint, it has been replaced by **Finger Scan Template** in the following areas:

Employee Profile Hardware Settings:

- InTouch
- InTouch DX
- ATS
- Synel
- ZK
- Grosvenor

Terminal Reports:

- **View Terminal Accounts**
- **Uses Filters**

Terminal Validation Settings:

- **Grosvenor Terminal**
- **Synel Terminal**
- **ATS Terminal**

Report Hardware Settings Columns:

- Mass Edit Profiles **(report)**
- HR > HR Reports > **HR Maintenance** > **Hardware Settings** (report)

NEW InTouch Biometric Consent

Biometric Consent is required from the user in order to enroll their biometric data (finger scan templates and/or face ID) and is enabled by default for companies in the United States. The Biometric Consent functionality is enabled by default for European and Australian companies but can be disabled by contacting support.

Biometric consent will be triggered in the InTouch V2, InTouchV3 and InTouch DX clock devices that use a biometric reader.

Biometric Consent Message

269797, 270643: Each time a finger template or face template is enrolled by selecting **Enroll Biometrics** on the device, a **Biometric Enroll Consent** message will display, and the user can choose **Accept** or **Decline**. If accepted, the finger/face **Enroll Biometrics** screen will show.

If enrolling multiple fingers in one session (not leaving the enrollment screen) the question will only be asked once. If the user leaves the enrollment screen or ends the session and goes right back, the consent question will be asked again.

Note: The biometric consent message is defaulted to the language that is set for the clock if the enrollment is initiated from the home screen. If the enrollment is initiated from the Manager Menu, the language will default to the manager's locale. The language can be changed by choosing a different language on the clock before enrolling. The available clock languages can be enabled in the Terminal Settings.

Remove Finger and Face Templates when Consent is Declined

269798: If the user declines biometric consent, all their previously approved finger and face templates will be removed from both the clock(s) and the system.

Important: Although clocks can only have one bio reader, the company could have clocks with different types of readers resulting in the employee having face and finger scan templates.

Display Biometric Consent Status on Employee Record

269713: Managers can access the status of their employees' biometric consent. From the **Hardware Settings** widget in the Employee Profile, a **Biometric Consent Status** read-only field will display No, Yes or Not Available for biometric consent, and a **Biometric Consent Date** read-only field will show the date of when consent was given or not given. If the status is Not Available, the employee either has not enrolled a finger or face scan, or they have removed their finger/face templates (not declining biometric consent) either by unenrolling at the clock or removing via the Employee Profile.

Biometric Consent in Report

269714: Once the finger or face scan enrollment is consented, the biometric consent record will be stored in the **Biometric Consent** report under **Time > Reports > Audit Trail > Biometric Consent**. This report contains the following columns/data:

- Account Id
- **First Name**
- Last Name
- Badge
- Prompt Date
- **Consent Message** (the exact message displayed at the time of consent in the original language presented to the user)
- **Biometric Consent Status** (Yes, No, Not Available)
- Device Type
- Device Name

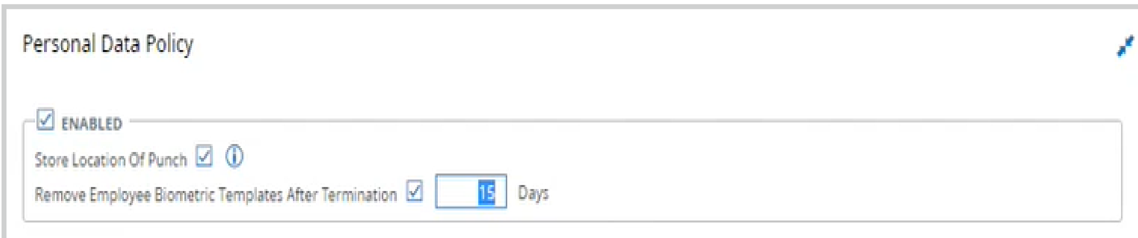
Display Bioconsent/Biometric Template in Report

282454: The following columns have been made available to add to the **Hardware Settings** (**My Reports > HR Reports > HR Maintenance > Hardware Settings**) report:

- **Current Bioconsent Status:** This shows the current status of the employee. If the status is **Not Available**, the employee either has not enrolled a finger or face scan, or they have removed their finger/face templates (not declining bioconsent) either by unenrolling at the clock or removing via the Employee Profile.
- **Most Recent Bioconsent:** Displays the date of the employee's most recent bioconsent.

Biometric Template Auto Removal of Finger / Face Templates after Termination

272960, 285050: In the **Personal Data Policy** widget under **Global Setup > Company Setup**, a new option has been added, **Remove Employee Biometric Templates After Termination_Days**. When this option is checked, enter the number of days that an employee's face and finger scan templates should be automatically removed from the system after they are terminated.



NEW InTouch Facial Recognition / TouchFree ID

A new Facial Recognition reader type, TouchFree ID, is now available for InTouch DX devices. This allows for employees and managers to perform clock actions without having to touch the device screen.

To enroll an employee, select the **Enroll Biometrics** button on the device, then select the applicable employee. The employee will then have to **Accept** or **Decline**. Refer to the NEW InTouch Biometric Consent heading for information on biometric consent.

Added Facial Recognition Identification Modes

282118: To choose between the different Face Recognition Identification modes, navigate to the **Edit Terminal** page and enable **Biometrics**. In the **Biometric Mode** drop-down, choose from the following options:

- **Verification:** At the clock the employee enters their badge number, and the clock verifies their identity by scanning their face.
- **Identification:** The clock uses the employee's face scan to identify which employee they are. If **Identification** is chosen, another drop-down will display with two options:
- **Always On:** The camera is always on; an employee can walk up to the clock and the clock will scan their face and identify them. When the identification occurs, the clock will perform the default action (Simple Punch, Punch In/Out, Smart Punch, etc.) enabled in the **Default** section of **Edit Terminal**.
- **User Initiated:** The employee would have to select the applicable Smart View or punch button in order for the camera to turn on and identify the employee and submit the action.

Tip: The options in the Manager Default Action drop-down are available for any method of identification, not exclusively Always On.

Manager Default Action Option

284368: If **Always On** is chosen for **Identification** in a clock with TouchFree ID (meaning the clock is always on to scan employee faces and perform employee default actions), the manager has the option to access their Manager Menu once they are identified by the clock.

On the **Edit Terminal** page choose one of the following options from the **Manager Default Action** drop-down (available for all InTouch devices):

- Perform Default Employee Transaction: Once the manager is identified, the clock will perform the employee default transaction (defined in the Default section of Edit Terminal). The Manager Menu **will not** be available.
- Login To Manager Mode: Once the manager is identified, the clock will display the Manager Menu so that they can perform manager actions (such as enroll employee).

Display / Remove Face Template on Employee Profile

271832, 271830: If your InTouch DX clock has a TouchFree ID connected and an employee successfully enrolls their face with the TouchFree ID, a template will be sent to Workforce Ready to be stored, and the Face Template field (read-only) in the Employee Profile will be updated to show Yes. If a template is not stored, the field will show No.

A Remove Face Template button is also available in the Employee Profile. Selecting this button will remove the face template from the Employee Profile. This action can also be done through the Mass Edit page.

Only for the United States: The following CMS enhancement is currently available for U.S. users only.

CMS

Allow Both Include and Exclude Cost Center Filters to be Used Together

263337: Previously, users couldn't exclude specific cost centers with the filter while also using the include cost center filter and instead had to manually remove them from reporting.

What's changed: Users can now utilize the Include Cost Center and Exclude Cost Center filters in CMS reporting in order to provide more flexibility in defining which time entries should be pulled into reporting. On the **CMS Submission** page and **Submission** tab the **Only Include Cost Center(s)** and **Exclude Cost Center(s)** can both be selected at the same time.

TLM General

Manager Replacement

Manager Replacement with Import

270463: You can now use the **Employees** import to move To-Do items for a manager assignment change using the Manager Replacement process. The replacement job moves To-Do items related to a change in manager for the following workflows:

- Timesheet
- Timesheet Change Request
- Time Off Request
- Overtime Request

A new message and link is displayed on the **Imports Results** page stating: **The change of Manager has initiated the transfer of To Do items. Check Progress with Manager Replacements Report.**

Note: This works with all Excel import types except XML.

Managers Replacement Report

271439: A new **Manager Replacements** report is now available under **Team > HR > Reports > Employee Maintenance > Manager Replacements**. This report shows the status of the manager To-Do items that are being transferred. This report contains the date of the transfer, who initiated the transfer, the number of To-Dos that were completed or are pending, as well as identify any failures that occurred in the process.

Manager Replacement Using Mass Edit Profiles

270473: Users can now mass edit profiles under **Mass Edit > Mass Edit Profiles** when a new manager is assigned through Manager Replacement. This will automatically move the To-Do items from the old manager to the new manager. When the process has started, the following message and link will display: **The change of Manager has initiated the transfer of To Do items. Check Progress with Manager Replacements Report.**

Changed Manager Replacement Message and Added Warning Message

279884: When changing the manager from within the Employee Profile, the message upon saving previously displayed: **A new manager cannot be assigned until the current replacement process is complete displays.**

What's changed: If the **Use Manager Replacement** option is selected in **Global Setup > Company Setup** and the Manager Replacement process has started, the following messages will display for better clarification of the process:

- A **Saved** message will display when the Manager Replacement process has started and is successfully finished upon page refresh.
- The warning message, **The change of Manager has finished successfully. However, the transfer of To Do items for [Manager 1, Manager 2, ...] has failed. Please see the Manager Replacements report and contact your system administrator**, will display when the Manager Replacement process has started and is unsuccessfully finished upon page refresh.
- The message, **The change of managers has initiated the transfer of To Do items**, will display in case the Manager Replacement process has started but is not finished upon page refresh.

Reading and Writing NFC Tags: LOA, Attestation, Change CC, TO Request

258275, 258270, 260154, 258274, 258276, 258273: Employees can now use their mobile phone to scan NFC Tags to create a Leave of Absence request, Time Off request, Attestation punch, and Change Cost Center punch.

Important: A separate fact sheet document highlighting supported phones and preferred NFC tags will be uploaded to the Community

To enable NFC tag functionality, navigate to **Maintenance > Companies** and enable **NFC Tags** in the **Available Functionality** widget. Once this setting is enabled, you can view, create, delete, or edit NFC Tags from **Global Setup > NFC Tags**.

To create a new tag, select the **New Tag** button on the **NFC Tags** page. From the **Write Tag** pop-up select the **Tag Type**, enter the tag **Name**, enter the **External ID**, and for Leave of Absence tag types select the **Leave Reason**.

To write the tag, you will need the mobile app and a physical NFC Tag to scan. Select the **Write Tag** button from the **Write Tag** pop-up. A message will display: **Ready To Scan**. Tap your phone against the physical NFC Tag in order for it to register. A success message will display that it was written to the NFC Tag.

Employees can then use their phone to tap their physical Leave of Absence Request NFC Tag, for example. The Leave of Absence request will open, and a predefined leave **Reason** will be populated on the **Leave of Absence Request** page (**My Time > Leave > Request**).

Note: If you create an NFC Tag and later update its functionality, all corresponding tags with the same External Id will be updated

Imports

Notification for Leave End Date / Employees are Expected Back to Work

232128: A new **Leave Of Absence Case** notification has been added, **Leave Of Absence Case End Date**, which sends a notification n-days before the Leave of Absence Case end date. This gives the ability for managers to be notified of when employees are expected back to work.

Like other notifications, under **Global Setup > Notifications**, you can configure the recipients and recipient filters, conditions, email message and SMS, and include tags.

Relate LOA Reason to a Leave Category

232112, 232130, 232125: Users can now relate Leave of Absence reasons to a particular Leave Category when setting up the reason in order to be able to determine which category the leave request belongs to.

What's been added: A new Settings Per Leave Type widget has been added to the Reasons page (Profiles/Policies > Leave of Absence > Reasons).

The following settings can be enabled and configured:

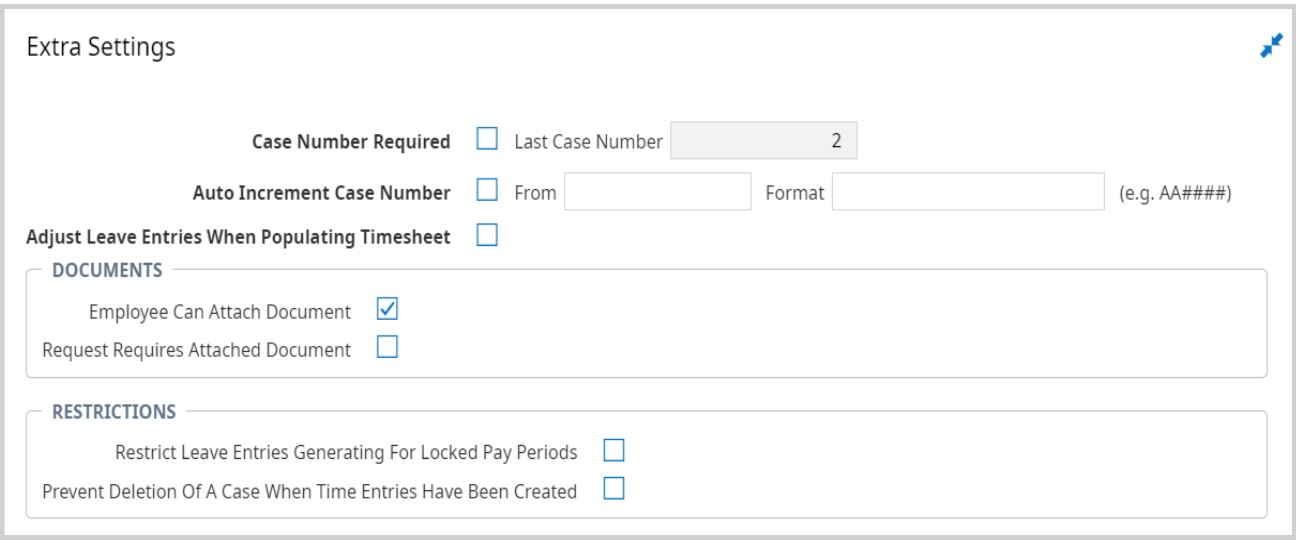
- Continuous Leave Type: Enter the Minimum Time Blocks in Days and Hours.
- Intermittent Leave Type: Enter the Minimum Time Blocks in Consecutive Days and Hours Per Day.
- Intermittent (Weekdays) Leave Type: Enter the Minimum Time Blocks in Consecutive Days and Hours Per Day.

Restrict Leave Entries Creation for Locked Pay Periods

232099: Admins might get informed about leave cases after the pay period has already been closed. Previously, users in this situation would need to reopen the pay period and rerun payroll, which was a slow process.

What's been added: A new **Restrictions** section has been added to the **Extra Settings** widget in the Leave of Absence profile, and in this section, a **Restrict Leave Entries Generating For Locked Pay Periods** setting (which is unchecked by default) is available to enable.

When this setting is enabled, users will be restricted from creating entries in the **Leave Entries** widget on the **Leave of Absence Case** page for locked pay period cells **only.**



Prevent Deletion of a Case when Leave and/or Time Entries have been Created

232116: To prevent deletion of a leave case if there are time entries still associated with the case, a **Prevent Deletion Of A Case When Time Entries Have Been Created** setting (which is unchecked by default) is available in the **Restrictions** section of the **Extra Settings** widget in the Leave of Absence profile.

When this option is enabled, users will be unable to delete a leave case if there are leave entries **or** time entries associated with the case. Once the leave entries or time entries are removed, the leave case can be successfully deleted.

Allow Leave Entries to be Greater than EE Standard Workday

232106: Previously, Leave only allowed entries to a maximum of the employee Standard Workday (which is the value used for 1 day in leave). A new setting has been added, **Total time per day cannot exceed employee's standard workday hours** (which is checked by default) in the **Restrictions** section of the **Extra Settings** widget in the Leave of Absence profile.

When this setting is checked, a message will display, **Total time per day cannot exceed employee's standard workday hours**, upon attempting to save/submit a Leave of Absence request/case with total hours exceeding the employee's standard work day hours.

Utilization of Entitlement Balances

247133: Previously, when there were multiple categories selected in the Leave Case, the system did not split total time between Categories, it only generated total time for all selected Categories.

What's been added: A new setting, **Adjust Leave Entries When Populating Timesheet** has been added to the **Extra Settings** widget in the Leave of Absence profile, as well as an **Adjust Leave Entries** checkbox in the **Populate Timesheet** confirmation pop-up and **Populate Timesheet** step of the Leave of Absence Case workflow. When the **Adjust Leave Entries When Populating Timesheet** setting is enabled (unchecked by default), the **Adjust Leave Entries** checkbox will be enabled by default.

If the **Adjust Leave Entries When Populating Timesheet** setting is enabled, the leave entries will be adjusted based on Time rules configured in the Leave of Absence profile.

Reports

Adjusted TLM Pending Reports to Work for Specific Group

261943, 275214, 275217: Previously, the workflow step set to be completed by a specific group was not creating items in various TLM pending reports, only creating To-Do Items in the manager's bell icon.

Going forward, the following reports will contain the same number of lines as the number of corresponding To-Do Items, as expected:

- **Team > Time > Timesheets > Pending Approval**
- **Team > Time > Timesheets > Change Requests > Pending Timesheet Change Requests**
- Team > Time > Overtime > Pending Approval

Calculated Time Summary Reports Navigation Fixed

243936: Previously, if the Menu search was used to access any of the various Calculated Time Summary reports such as **Detailed Calculated Time**, **Detailed Corrected Time**, etc., when the report was selected from the Menu search, users would be taken to the old version of these reports that do not have the buttons at the top of the page to switch between reports.

Going forward, if you use the Menu search to navigate to any of the Calculated Time Summary reports, you will be taken to the new (correct) version of the report.

Detailed Hours Report Availability with Approval Column

260973: The **Detailed Hours** report now contains information for the Timesheet Approval History. **Approval State**, **Approver**, and **Approval Time** columns have been added to this report.

Timesheet Counter Table Now Includes Percentage

260187: Previously the Counter table in the timesheet **Print Preview** contained the total hours/dollars from the **Time Entry** and **Extra Pay & Adjustments** tabs but did not include percentages.

What's been added: In the timesheet Print Settings, a new checkbox option has been added, Include Counters Percentag**es**. The **Include Counters** option needs to also be enabled. When both settings are enabled, in the **Print Preview** a column will display in the Counter table with percentages and a breakdown of the percentages per grant.

Cost Center	Regular	Regular 2	Regular 3	Total	
N/A Title 1 CIP	3.00	1.00	0.00	4.00	7.8049%
N/A Title 1 Home	3.00	1.00	0.00	4.00	7.8049%
N/A Title 1 Prog	4.00	0.00	5.00	9.00	17.561%
N/A N/A	34.25	0.00	0.00	34.25	66.8293%
Total	44.25	2.00	5.00	51.25	

Time Off

NEW Version of Weekly Responsive Time Off Calendar Report

An updated, fully responsive version of the **Time Off Calendar by Week** report is now available.

Access the new **Time Off Calendar by Week** report from:

- Team > Time > Reports > Time Off Calendar > Time Off Calendar by Week
- My Info > My Reports > Time Reports > Time Off Calendar > Time Off Calendar by Week

This report is available in TLM, HR, and Scheduler companies.

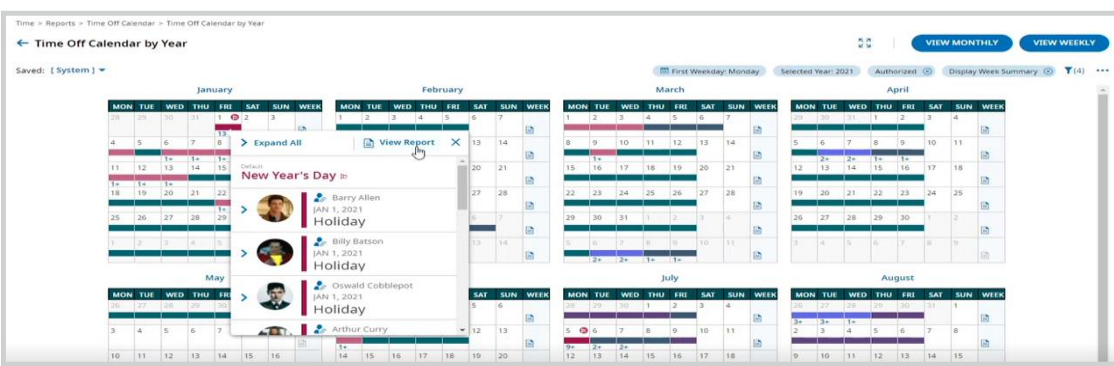
When you select an event in the **Time Off Calendar by Week** report, a pop-over will display all the employee's events for that day and the employee's information. In addition, a **Documents** button is available to upload documents, and **Approve** / **Reject** buttons display for pending time offs.

Weekly Calendar: Week Summary Column

266644: A **Week** column is available to add to the **Time Off Calendar by Week** report. The summary contains the sum of hours/days of time offs grouped by Time Off Type and Approval Status.

NEW Version of Yearly / Personal Responsive Time Off Calendar Report

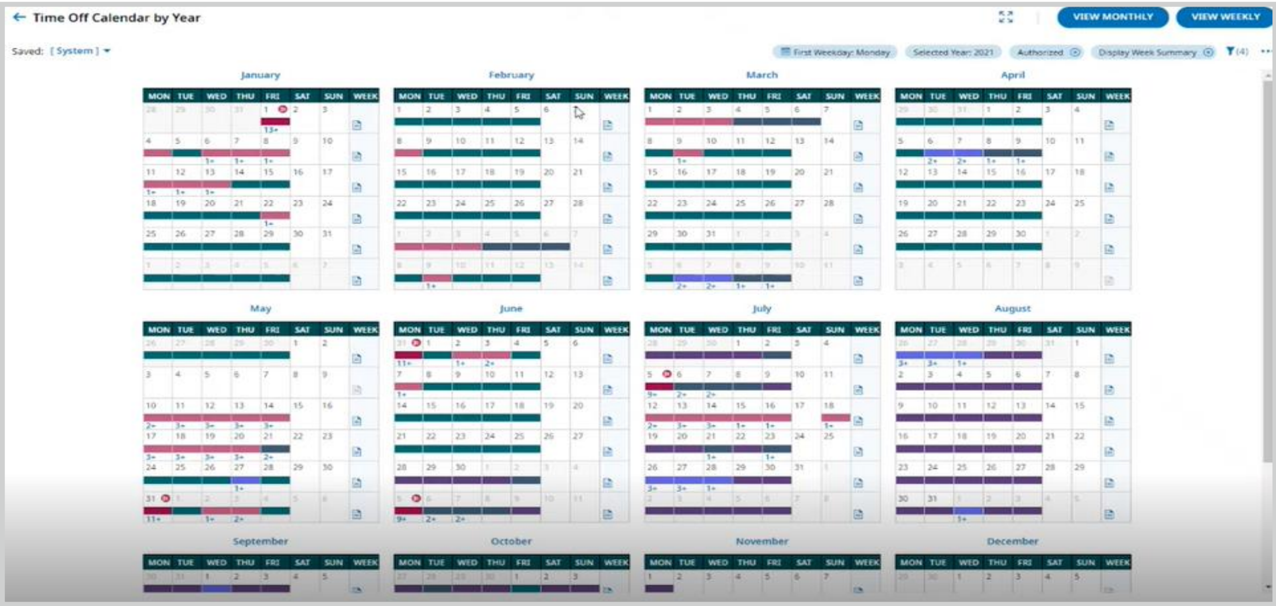
245080, 274638, 271559, 272850: An updated, fully responsive version of the **Time Off Calendar by Year** and **Personal Time Off Calendar** reports is now available.



Access the new **Time Off Calendar by Year** / **Personal Time Off Calendar** reports from:

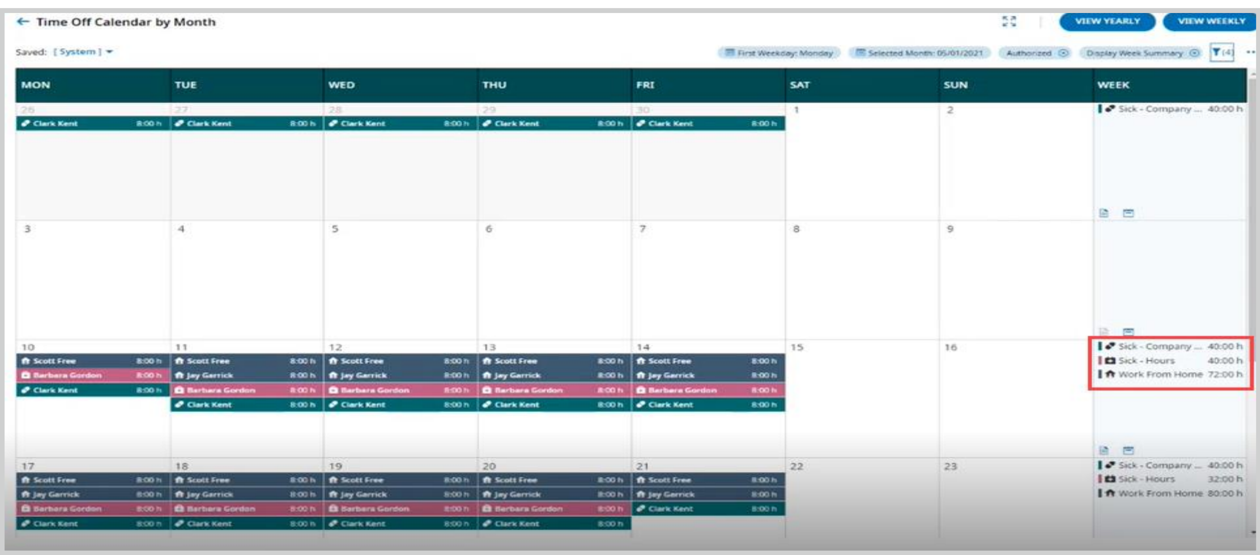
- **Team > Time > Reports > Time Off Calendar > Time Off Calendar by Year**
- **My Info > My Reports > Time Reports > Time Off Calendar > Time Off Calendar by Year**
- My Time > Time Off > Calendar

When you select an event in the **Time Off Calendar by Year** report, a pop-over will display all of the employee's events for that day, the employee's information, and holidays. A **Documents** button is available to upload documents and **Approve** / **Reject** buttons will display for pending time offs. When the **View Report** link is selected, a **Time Off Information** report-style pop-up displays a record of all the employees' time off and the status.



Monthly Calendar: Time Off Icons Added to Week Summary Column

270602: For TLM only, HR only, and Scheduler only companies, Time Off icons for pending and approved time off requests will now display in the **Week Summary** column of the **Time Off Calendar by Month** report.



TOR: DD PC Rule Looks at Work Schedule Profiles for Standard Total Hours

264531, 264546: Previously, the **Dynamic Duration** rule (with the option **Standard Total Hours**) calculated 0 hours when requesting future time off without a posted schedule.

What's changed: The **Dynamic Duration** rule will now grab hours from **Standard Total Hours** set in the Work Schedule profile (with **Is Scheduler** enabled) when they are not yet scheduled.

TOR: Auto Approve Workflow Step

112075: Managers who requested time off for an employee and were the first Approver according to the workflow had to navigate to their To-Do Item in order for the workflow to continue.

What's been added: For TLM, HR and Scheduler companies, a new **On Auto Approved** action step can now be added to the **Approve/Reject** steps in the Time Off Request workflow.

When this step is added, time off will be auto approved when the Approver (according to the workflow) requests time off on behalf of an employee and there are no warnings/errors on approve. To-Do items will not display when the Time Off Request is auto approved.

Timesheet

Added Tooltip to Timesheet is Automatically Submitted Setting

251992: Previously, there was no indication that timesheets that were automatically submitted could potentially be delayed in the submission process.

What's been added: To inform users that auto-submitted timesheets may take a longer amount of time to process, a tooltip message, **Time entered is approximate. Automatic submission is subject to the number of timesheets in process**, has been added next to the time field of the **Timesheet Is Automatically Submitted** setting in the **Employee Policies** widget of the Timesheet profile.

Updated Start/End Time Entry Tab Icon Sizes

267989: Under the **Time Entry** tab for the Start/End Timesheet profile, all icons will now be consistent in size and match icon sizes across the system.

Workflows

New Option in Timesheet Workflow for Employee Accept/Decline

282667, 264024: Previously, employees could only view the final state of their timesheet prior to submitting them. They could not view the edits history nor accept or decline the changes as part of the Timesheet workflow.

What's been added: To allow employees to be able to accept or reject their submitted timesheet, a new step is available, **Employee Timesheet Acceptance**. Options include Approve, Reject, and Expire, as well as a checkbox option, **Include Time Edits History**.

When the employee submits their timesheet, they will then receive an item in **My To Do Items** that will show the history of edits (the time before being edited is grayed out) made to their timesheet and by whom. At the bottom of the To Do item are **Reject** and **Approve** buttons for the employee to decide if they will accept or decline the submitted timesheet. If the employee accepts, the workflow will show as Approved Level 1 and move to the next step. If the employee declines, The timesheet state remains as Submitted.

Option to Hide To-Do Items in Approve/Reject Steps in TOR Workflow

246951: As currently available in the Timesheet and Overtime Request workflows, on the **Approve/Reject** step of the Time Off Request workflow, a **Hide To Do** checkbox is now available. When enabled, time off request My To-Do items will not display.

If the **Data With Hidden To Do Items** checkbox is enabled on the **Pending Approval** report, these hidden To-Do items will display in the report.

R79 Payroll Release Notes

Payroll Hot Features in This Release

Autopay Type

Autopay Type Can Be Set Per Company or EIN

267273 & 284660: In the Account Policies widget under Settings > Global Setup > Company Setup, administrators can now use the **Base Compensation Default Autopay Type** field to select the default Autopay Type for multiple companies or EINs. This enables each company or EIN to configure the default Autopay Type differently to suit their needs. Administrators can view or edit the Base Compensation Default Autopay Type field if they are given view or edit access for Account Policies in Security Items.

For Imports: The **Base Compensation Default Autopay Type** field has also been added to the Company Settings import template, located under Settings > Imports > Overview, then select the Company Settings template. Within the template, the field is in the Account Policies section in the same area as the other Base Compensation fields. Once the template is complete, import back into the system under Imports > Company Setup > Company Settings.

Gender Inclusion and Legal First Name

Multiple updates have been included in the Payroll sub-system for Gender Inclusion and Legal First Name.

Notifications

Notification to Employees that Year End Forms Are Available

266768: The system now includes a notification option named Payroll Year End Forms Available (at Company Settings > Global Setup > Notifications). This notification can be configured to send an email to employees when their payroll year end forms (such as W-2 and 1099) are available to view.

Notification to Employees that W-4 was Rejected

266768: The system now includes a notification option named W4 Rejected (at Company Settings > Global Setup > Notifications). This notification can be configured to send an email to employees if their W-4 withholding form has been rejected.

Pay Statements

Print Pay Statements Without Downloading

267239: Previously, when employees printed their pay statement from the application, a copy of the pay statement was also saved to the Downloads folder of the computer. If the employee printed from a shared computer, this created the possibility that another employee could see the first employee's sensitive data in the computer's Downloads folder. With this release, the Employee Pay Statement Preview now includes a Print button so that employees can print their pay statement without leaving any trace of it on the computer. The Download PDF button is still available for times when employees do want to download a copy of a pay statement.

Payroll Enhancements

The following enhancements have been added to this release.

Quick Payroll Is Available

278341: The New UI changes to Quick Payroll that have been in progress for a couple releases are now complete. You can now access Quick Payroll from the main menu and use it in the New UI.

Deduction Wizard

New Deduction Wizard Settings for Alaska

271321: For employees whose unemployment state is Alaska, the **Deduction Wizard** (at **Payroll > Employee Payroll Maintenance > Deductions**) now includes the following two new toggle settings that appear if you select **State Student Loan**:

- Has the employee been a resident at least 12 months?
- Is the employee supporting a family?

Multiple State Levies

124790: Payroll administrators can now use the Deduction Wizard to determine how to handle multiple state levies. New questions are now included on the State Levy deduction page. These questions can be set to Yes or No.

The questions added are:

- Allow multiple state levies to be withheld?
- Should a combined maximum percent be applied?

If set to Yes, you must enter a Maximum percent %. The first levy (based on issue date) will have priority. If any part of the State Limit is remaining it will apply to the next state levy based on the issue date.

After you enter the maximum percent and save, the following warning will display if the maximum percent is higher than the state maximum:

If set to No, the system takes the state levies based on the issue date. Once a levy has been end-dated or the goal is met, the next levy will start.

Earning Types

ARPA, FFCRA, and CARES Retention Earning Types Expired for 2022

276175: For payrolls with pay dates on or after January 1, 2022, the ARPA, FFCRA, and CARES Retention federal programs have expired. Therefore, the following earning types can no longer be used in 2022 payrolls:

- FFCRA Family Leave 10 Days
- FFCRA FMLA 10 Weeks
- FFCRA Sick Leave 10 Days
- ARPA Family Leave 10 Days
- ARPA FMLA 10 Weeks
- ARPA Sick Leave 10 Days
- CARES EE Retention

If users try to add these earning types to a payroll, the system now provides a message to explain why the earnings can't be used:

> FFCRA earnings, ARPA earnings, and CARES EE Retention earnings cannot be used as of pay date 1/1/2022.

Only for the United States: This Payroll change is applicable for U.S. users only.

Forms

Federal and Year End Form Updates

- 286610: The system now includes the new version of form 8027 for 2021.
- 276958: The system is updated with the latest 1099-MISC form for 2022.

- 288538: The system now includes the newest version of the Federal W-4 form.
- 279514: The system now includes the new version of the federal Colorado W-4 form, Colorado DR 0004.
- 288556: The system now includes the new version of the federal North Dakota W-4 form, North Dakota NDW-4.
- 288557: The system now includes the new version of the federal New Mexico W-4 form, New Mexico W-4.
- 289555: The system now includes the new version of Utah federal withholding form W-4.

State Withholding Form Updates

The following state withholding forms are updated in this release:

- 276165: The system now includes the new version of Mississippi withholding form W-4.
- 276172: The system now includes the new version of Arizona withholding form A-4.
- 279515: The system now includes the new version of Arkansas withholding form AR4EC.
- 276458: The system now includes the new version of South Carolina withholding form SC W-4.
- 277048: The system now includes the new version of New York withholding form IT-2104.
- 283185: The system now includes the new version of Rhode Island withholding form RI W-4.
- 283199: The system now includes the new version of Maine withholding form W-4ME.
- 285639: The system now includes the new version of North Carolina withholding form NC-4EZ.
- 285912: The system now includes the new version of North Carolina withholding form NC-4.
- 285911: The system now includes the new version of Kentucky withholding form K-4.
- 285913: The system now includes the new version of Wisconsin withholding form WT-4.
- 286100: The system now includes the new version of Minnesota withholding form W-4MN.
- 285030: The system now includes the new version of Iowa withholding form IA W-4.
- 286099: The system now includes the new version of Connecticut withholding form CT-W4.
- 287138: The system now includes the new version of Missouri withholding form MO W-4.
- 289769: The system now includes the new version of Louisiana withholding form L-4.
- 273179: The system now includes the new version of Oregon withholding form OR-W-4.

Form Uploading: Errors Generated Uploading 2021 EF 1099 File to IRS

292448: When uploading the 2021 EF 1099 File to the IRS, error messages were generated for forms 1099-MISC and 1099-NEC due to the First Payee Name line missing. Both forms were analyzed according to the IRS requirements and subsequently revised. These forms can now be successfully uploaded to the IRS site.

Government Forms: Gender Inclusion

The system has been updated with the following changes related to gender inclusion.

> Note: Keep in mind that your state might have specific filing requirements regarding gender. For example, Vermont requires Male or Female for tax filings.

Gender Inclusion Support Added to BSI, and Ceridian Files

267202, 263375: For companies who set a Gender in employee records, the system now supports the following in BSI, and Ceridian file exports:

- If Gender is set as Non-Binary, the field is populated as X in the Gender column.
- If Gender is set as Blank, the field is populated as X in the Gender column.
- If Gender is set as Undefined, the field is populated as U in the Gender column.
- If Gender is set as Male or Female, the fields are populated as M or F in the Gender column.

Legal First Name Support

Legal First Name Availability to Payroll Sub-System

261509: In the June 2021 system release, we introduced the **Legal First Name** field in employee profiles and across other areas of the system. At the time of the initial release, this functionality was not yet available within the Payroll sub-system. Work has now been completed for Payroll and this feature will now be available for companies who have the Payroll sub-system enabled.

Security: To enable this option, ensure your security profiles are updated. A checkbox for **Legal First Name** is available in the **View/Edit (Custom)** permission for the **Account/Personal Information** setting in security profiles, located in the **Employee** section of the **HR** tab.

> Note: For more information, please refer to the detailed HR Release Notes for the R75/June 2021 system release and see the Legal First Name Option Added to System heading.

Users will select the **Permissions** button to open a pop-up. An Info icon displays a message that Legal First Name will be displayed on legal documents such as pay statements, withholding forms, year-end tax forms. View and Edit options are available on this pop-up. This permission is also available in the **Employee** section under the **ESS** tab for employees who are allowed to view and/or edit their employee profiles.

Legal First Name Support Added to W-2

229273, 263392, 263400, 265161: At the Administration payroll level and the Company payroll level, for companies using the **Legal First Name** field in employee records, the system now displays the following in W-2 form previews, downloads, and printed versions:

- If Legal First Name is blank, the employee's First Name will be used.
- If Legal First Name is not blank, the employee's Legal First Name will be used.

Legal First Name Support Added to Pay Statements

262560, 263389: At the Administration payroll level and the Company payroll level, for companies using the Legal First Name field in employee records, the system now displays the following in pay statement previews, downloads, and printed versions:

- If Legal First Name is blank, the employee's First Name will be used.
- If Legal First Name is not blank, the employee's Legal First Name will be used.

> **Note:** The First Name will print on the envelope portion (when available) to ensure employees are addressed by their preferred name where the legal name is not required. This complies with certain regulations and helps to foster an inclusive culture within your company.

Legal First Name Support Added to QuickBooks Data Exports

273608: At the Administration payroll level and the Company payroll level, for companies using the Legal First Name field in employee records, the system now displays the following in QuickBooks data export files:

- If Legal First Name is blank, the employee's First Name will be used.
- If Legal First Name is not blank, the employee's Legal First Name will be used.

Legal First Name Support Added to State and Federal Forms and Files

For companies using the Legal First Name field in employee records, the following state and federal forms will now support those entries. When the Legal First Name field is blank, the system will use the employee's First Name. When the Legal First Name field contains an entry, it will be used instead of the First Name entry.

- 265156: Pennsylvania State Export of EF W2 1099-NEC
- 265154: Pennsylvania State Export of EF W2 1099-MISC
- 265153: Vermont State Export of EF W2 1099
- 265150: Oregon State Export of EF W2 1099
- 265135: Creating EF W2 1099
- 265137: Federal Export of EF W2 1099
- 262448: Creating 1099-NEC form
- 265176: Previewing 1099-NEC form
- 263403, 263405: Downloading and printing 1099-NEC form (at the Administration payroll level and the Company payroll level)
- 229274: Creating 1099-MISC form
- 265167: Previewing 1099-MISC form
- 263402, 263404: Downloading and printing 1099-MISC form (at the Administration payroll level and the Company payroll level)

> **Note:** The First Name will print on the envelope portion (when available) to ensure employees are addressed by their preferred name where the legal name is not required. This complies with certain regulations and helps to foster an inclusive culture within your company

Legal First Name Support Added to Vendor Checks

263406, 263409: At the Administration payroll level and the Company payroll level, for companies using the Legal First Name field in employee records, the system now displays the following in the Payment Details section of downloaded and printed Vendor Checks:

- If Legal First Name is blank, the person's First Name will be used.
- If Legal First Name is not blank, the person's Legal First Name will be used.

Legal First Name Support Added to Data Exports

273598: At the Administration payroll level and the Company payroll level, for companies using the Legal First Name field in employee records, the system now supports the following while you create data exports:

- If Legal First Name is blank, the person's First Name will be used.
- If Legal First Name is not blank, the person's Legal First Name will be used.

This support applies to the following exports:

- Outstanding Checks (at the Administration level)
- Positive Pay: (Generic) (at the Administration level)
- Positive Pay: Bank of America (at the Administration level)
- Payroll: Positive Pay: Wells Fargo (at the Administration level)
- Positive Pay: (Generic) (at the Company level)
- Positive Pay: Bank of America (at the Company level)
- Payroll: Positive Pay: Wells Fargo (at the Company level)

Legal First Name Support Added to Electronic Consents

273610: For companies using the Legal First Name field in employee records, the system now supports the following when employees give their Electronic Consent for pay statements and year end forms:

- If Legal First Name is blank, the employee's First Name will be used.
- If Legal First Name is not blank, the employee's Legal First Name will be used.

Reports

View Sync Time Report Link is Renamed

279491: On the Payroll Prep page, the View Sync Time Report link is now renamed to Sync Time. The new link name is meant to clarify that users need to click this link in order to sync the time.

Directions for Expired COVID-19 Programs No Longer Appear

276130: Because COVID-19 related tax programs (such as FFCRA, ARPA, and ERC) have expired, Payroll Recap & Funding reports for payrolls for a pay date on r after 1/1/2022 no longer display directions related to these programs.