Release Notes Summary

June 2017

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Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes.

TLM Enhancements

The following enhancements have been added to this release.

Report Dialogs in Notifications - Approving Time Entries Outside a System Login

Companies will now have the ability to designate that certain users can approve time entries using a secured token within an email link rather than being required to log in to the system. This functionality is named ***Report Dialogs In Notifications*** and may be useful in circumstances where a company has contracted with a third-party company whose employees log time into the system and the contracted company's third-party manager or approver is required to approve that time, but should not log directly into the system to do so.

IMPORTANT NOTE: Separate release notes have been created specifically for this functionality. If you are interested in learning more, please download the ***TLM Report Dialogs In Notifications Release Notes*** document. It will be located with the other TLM release notes and downloaded from your usual document paths.

Attestation: Attestation Profile Column in Employees Import

WFR-32291: Users can now import employees' Attestation Profiles using the Employees import template under *Company Settings* > *Imports* > *Overview*. Additionally, the Effective From date can also be set. The new Attestation columns are not visible by default on the Excel template due to space limitations, but the columns are available to add when another column is removed. The new columns do appear on the Instructions tab. The Excel 2007 template includes the new columns by default, and the columns are also on the Instructions tab.

Bradford Factor: New Setting Added to Inexcusable Absence Settings Rule

WFR-32873: A new setting, ***Exclude Days With No Entries***, has been added to the *Inexcusable Absence Settings* rule for Bradford Factor profiles, under *Company Settings* > *Profiles/Policies* > *Bradford Factor*. This setting will only become available when *Unexcused Time Off Categories* have been defined within the rule. When the new option is selected, days within a timesheet that do not contain a time entry will not be included in the Bradford Factor calculation.

Previously, without this setting, if an employee had a day on their timesheet that was scheduled, but had no time entry or time off entry, the system would count this as an absence, even though there was no time entry record matching the defined Time Off list.

Company Setup: Timesheet Population Can be Set as Required

WFR-3127: The *Timesheet Auto Population Profile* settings can now be set as required within the *Global Policies* widget under *Company Settings* > *Global Setup* > *Company Setup*. Checking this option will require that employees be assigned a Timesheet Auto Population profile within their employee accounts before the employee account can be saved. The setting will also be available within the *Account Policies* section of the *Company Settings* import file, where it can be set to Y/N to be required/not required.

Imports: Employee Import Rate Extension Types

WFR-31899: New options for *Get First Alternative Rate From - ALT2 and Multiply By Rate From - MULT* are now available in all versions of the Employees import under *Company Settings* > *Imports* > *Overview*, in the *Employee Setup* category. These options allow users to import rate table extensions data pertaining to alternate rates and/or multipliers for rates.

Multi EIN: First Weekday Settings in Application

WFR-35151 & WFR-36125: In the February 2017 system release, we added support for the selection of different *First Weekday* settings across EINs. This was done in the *Company Configuration* widget under *Company Settings* > *Global Setup* > *Company Setup* for Multi EIN environments. We allowed for one EIN to choose a certain *First Weekday* setting, and another EIN to choose a different First Weekday setting and the settings in one EIN would not carry over to the other.

We are now in the process of expanding this support to other areas of the application where settings can be affected by the *First Weekday* setting. Due to the extensive nature of this effort, we will roll this out in phases over the coming system releases. We will communicate the completed areas in future release notes.

In this release, we have completed Multi EIN support of the *First Weekday* setting and its related functionality for all reports in the system where there is a *Calendar Range* or *Date Range* selector.

Please see the full TLM June 2017 release notes for a list of the updated areas.

InTouch: Cost Center Sorting

WFR-21921: When adding a Cost Center Limit List to an employee profile, added cost centers were listed in order by External ID. However, the InTouch *ESS/Change Cost Centers* soft key listed the cost centers in random order. To address this issue, we have added a new option in the soft key configuration.

When configuring or editing an InTouch terminal under *Company Settings* > *System* > *Terminals (External)* > *Edit Terminal*, the *ESS/Change Cost Centers* soft key setup will now have a ***Sort Cost Centers By*** option. The dropdown contains options for either *External Id* or *Alphabetically*. The setting will default to *External ID*. This setting will also include Cost Center Limit Lists when assigned to employees.

Pay Calculations: Projected Hours Rule Behavior in Timesheets

WFR-26836: When using the ***Projected Hours*** pay rule in Pay Calculations 1.0 or 2.0 profiles, blank timesheets can now be populated according to the settings in the rule, and is supported using the following processes:

- *Manage Payroll* > *Manage Payrolls* > *Process Timesheets* (PC1 and PC2)
- *Manage Time* > *Manage Timesheets* > *Reapply Pay Calculations* (PC1 and PC2)
- *Manage Time* > *Manage Timesheets* > *Compare Time Entries* (PC1 and PC2)

Previously, all blank timesheets were skipped during these processes, but now, the *Projected Hours* rule will run for empty timesheets. Additionally, within Pay Calculations 2.0 companies, this functionality with the *Projected Hours* pay rule is also supported when using the *Recalc On Pay Calculation Profile Change* setting under *Company Settings* > *Global Setup* > *Company Setup*, at the bottom of the *Account Policies* widget.

Pay Prep: Timesheet Approval State for Records

WFR-19592: Within the ***Extra Pay Entries*** and ***Adjustment Pay Entries*** records in Pay Prep Profiles under *Company Settings* > *Profiles/Policies* > *Pay Prep*, we have added ***Timesheet Approval State*** functionality.

- The Timesheet Approval State setting contains a drop-down containing timesheet approval options for All, Open, Submitted, Approved (1), Approved (2), Approved (3), Approved (4), and Approved (PayPrep Ready).
- After making a selection in the drop-down list, you can further qualify the setting by checking the Or Above checkbox. For example, you can select Submitted and Or Above and the system will include all timesheet approval states at, or above the Submitted status.

Pay Prep: Option Added to Import Accrual Balances v2 Record

WFR-37461: To allow accrual balances from multiple buckets to be able to be added together within the *Import Accrual Balances v2* Pay Prep Record, a new ***Hours Remaining (Last Day Of Period)*** option has been added to the *Import* drop-down setting. This new option will allow hours to be associated with the last day of the pay period.

NOTE: This will also allow you to add any number of time off buckets together, which can be done using the *Sum Up Time Records* rule.

Reports: Timesheet ID on Approval History Report

WFR-37282: A new column, *Timesheet: System Id*, is now available for inclusion on the Timesheet Approval History report under *Manage Time* > *Manage Timesheets* > *Timesheet Approval History* using *Select Columns*. The column displays on the report as *System Id*, and represents the *Timesheet Id*.

Reports: View Timesheets Button Added to Exceptions Report

WFR-22875: A new **View Timesheets** button has been added to the *Exceptions* report under *My Reports* > *Time & Labor* > *Time Allocation*. This report will allow for the selection of one or more employees and when clicking the *View Timesheets* button, the corresponding timesheets containing the exceptions will open for viewing and possible editing.

Reports: New Column Added to Timesheets Approval History Report

WFR-33096: A new ***Timesheet: Is Auto Timesheet Action*** column has been added to the *Timesheets Approval History Overview* report under *Manage Time* > *Manage Timesheets* > *Timesheets Approval History* and can be added to the report by using the *Select Columns* link.

This column will display a Yes/No if timesheets have been automatically approved. If *No* is present in the column, this indicates to the user that the timesheet still requires approval and action can be taken to approve those timesheets. If *Yes* appears in this column, this indicates that the timesheet was automatically approved, as set in the *Manager Policies* widget of Timesheet Profiles.

Schedules: Work Schedules Population Setting

WFR-36121: A new ***Schedule Population Policy*** setting has been added to the *Work Schedules Policies* widget on the *Global Policies* tab under *Company Settings* > *Global Setup* > *Company Setup*. This setting allows employee schedules to be populated into the future and works in conjunction with, or as an override to the ***Work Schedule Profile*** within employee accounts under Employee Information.

Time Off Planning

In the April 2017 release, we introduced Time Off Planning functionality to help companies manage and control time off requested by employees. The functionality provides the capability to determine the maximum number of employees who can have time off at any given time. For example, your business may have a rule that determines only X number of people in a team can have vacation in a normal working week. Within Time Off Planning, the maximum number of people who can be off work is a limit known as available time off slots.

In that release, we provided a subset of our planned functionality and identified the relevant menu options as *Beta*. With this release, we have added functionality to address the limitations:

Time Off Planning: Assuming Mon-Fri and Skips Days

WFR-32687: Currently, if a Time Off Type is set to not populate scheduled days off, it is assumed that the employee works Mon-Fri and weekends are skipped when making a Time Off Request; weekends are assumed to be non-working/unscheduled.

We will now provide the same functionality when using the calendar view in Time Off Requests, independent of the Time Off Planning Profile. Skipped days are now displayed as non-working days. Time Off Request validation, based on the Time Off Planning rules, will ignore these skipped days.

Additionally, where employees have not yet started working, or begun their employment duties (there is no employee Started date in their employee account), those days will show as non-working days. Any dates after a Termination will be marked as non-working. These additions are supported for Multi-EIN environments, where separate EINs have their own Started/Terminated dates.

Time Off Planning: Manager Restriction Override in Groups

WFR-29000 & WFR-36163: Options have been provided to allow an approver to override an error message generated from the Time Off Planning Rule so that a Time Off Request can be approved by a manager. For example, there are no time off slots available for Monday, but an employee requests a half day of vacation for that day. The manager decides that even though there are no slots available, the group can withstand this employee being absent for half a day and overrides the error message received during the approval process.

This will work for Time Off Requests submitted by managers submitting on behalf of an employee, on modifications of requests, and approval of requests.

Time Off Planning: Validation of Timesheet & TOP Rules

WFR-33991: The Timesheet Profile rule, ***Time Off Validation***, which is available in both the *On Approval* and *On Save* categories of Timesheet Profiles, under *Company Settings > Profiles/Policies > Timesheets*, will now validate time off slots when using Time Off Planning functionality. This rule controls time off entered directly on a timesheet. When using the Time Off Validation rule, the system will now validate against Time Off Planning profile rules in addition to the Time Off Request rules.

Time Off Planning: Validation of Modified Time Off Requests

WFR-37937: Previously, when modifying a Time Off Request, if employees were also assigned a Time Off Planning Profile, validation for the Time Off Planning restrictions were not taken into account and validated during the modification process. The system will now validate Time Off Planning Profile settings during the modification of Time Off Requests. Users will now receive messages in pop-up windows and reports, and the message displayed will depend how the Time Off Planning Profile is configured.

For example: If there are no available slots, an error message is displayed and modifications are not allowed. User must select *Cancel*.

Time Off Planning: Validation of Existing Time Off Requests in Calendars

WFR-34005: Previously, if employees had approved time off for partial days, a slot within the Time Off Planning Calendar was consumed for the entire day. We have now changed the behavior so that if a time off request contains both a start and stop time for a partial day request, the system will consume a slot only for the relevant time frame. If start and stop times (calculated time) are defined for approved time off requests (i.e., now Time Entries in the timesheet), then these start and stop times will be used to identify the time period for the slot consumed.

NOTE: Partial day Bulk time off requests (no start/stop time) will still consume a slot for the entire day.

Time Off Planning: HR Action to Include Time Off Planning Profile Item

WFR-32366: For companies that have both the HR and TLM sub-systems enabled, the Time Off Planning Profile has been added to HR Actions items. This will only be available to be added as an *Action Item* for the *My Employee Action Request* type under *Company Settings > HR Setup > HR Actions*. Adding this item will allow managers to update the Time Off Planning Profile during the workflow process.

Time Off Planning Rule: Filters Added to Time Off Planning Rule

WFR-29096, WFR-29097 & WFR-32594: Within the Time Off Planning Profile rule, multiple filtering options have been added. When configured, these filters will include only the time offs that match the chosen criteria when processing time off planning slots. The filtering criteria added are: *Employees/Employee List, Schedules/Daily Rules* & *Schedules/Day Types*. Without an employee filter, or any other type of filter set, all time offs from all employees are considered, resulting in a scenario where more slots are more likely to be taken.

Time Off Planning Rule: Time Offs Entered on Timesheets

WFR-32910: Previously, the Time Off Planning rule would only consider time offs entered via Time Off Requests. Now, the system will consider time off entered directly in timesheets, whether as bulk entries or start/stop time entries. Pending Time Off Requests are still evaluated based on the TOR information, but otherwise timesheet entries are used. Time off planning will only consider actual, calculated data and will ignore historical edits.

Time Off Planning Calendar: View for Partial Day Shifts

WFR-33997: Previously, the Time Off Planning calendar would show an employee as not working when part of the day was scheduled for time off and part of the day was worked. Now, when the employee has a time off that does not cover the whole of their shift, the calendar will show the employee as working that day.

Time Off Planning Calendar: From/To Times Can be Set in Calendar

WFR-33851: The ability to select dates within the Calendar view of Time Off Requests is now available. Users can select one, or multiple days by right-clicking on a date. A pop-up will display where users will to set the appropriate date and this will automatically populate in the Request Settings section.

Time Off Planning Calendar: View Details to Show Dynamic Duration Types

WFR-34182: When Dynamic Duration Types (Pending/Approved/Manually added on timesheet) are used for time offs, a ***Duration Type*** column is added to the ***Bulk Time Off Info*** section of the Calendar. All Dynamic Duration Time Offs are displayed (Full Day/First Half/Second Half/Half Day/Fill Day.) If a non-dynamic time off is requested, or is not enabled in the timesheet profiles, the Duration Type column will not be displayed in the details.

Time Off Planning Calendar: Day Status in Calendar

WFR-35842 & WFR-35971: For scheduled employees, previous behavior of the day Status in the Time Off Planning calendar showed a status of *May Not Be Available* instead of *Unavailable* when the scheduled time was not available, but slots were available outside the schedule.

Moving forward, the status of a day on the calendar will be shown based on the Schedule versus the Time Off. This means if a Time Off covers the entirety of the scheduled period, and it meets the criteria of any Time Off Planning Profile rule, the day will now be shown as *Not Working* for the employee, and other users will see that day as *Unavailable* (assuming only 1 slot is available.) This is supported for Start/Stop time offs, as well as Bulk time offs.

Time Off Planning Calendar: View Details Report Available

WFR-32970: A new ***Time Off Details*** report is available within the *Slots Info* section of Time Off Planning Calendars. The report is accessed by clicking the ***View Details*** icon.

Time Off Planning: Security Settings Added

WFR-28803: A new ***Time Off Planning Calendar Details*** section has been added to the TLM and ESS tabs of security profiles under *Company Settings* > *Profiles/Policies* > *Security*. These settings control the details a manager or employee will have access to within time off planning calendars.

Time Off Planning Imports: Override Permission in Company Settings Import Template

WFR-35474: A new column, *M1 TOP Restriction Override*, has been added to the Company Settings import template under *Company Settings* > *Imports* > *Overview*, in the *Company Setup* category. This column allows users to import the *Allow Time Off Planning Restriction Override* settings available in *Edit Manager Permissions* within Groups under *Company Settings* > *Global Setup* > *Groups*.

Timesheet Profiles: Display of Scheduled Cost Centers & Multiple Shifts

WFR-26384: Previously, when multiple shifts for a day were entered into a timesheet and each contained different scheduled cost centers for the shifts, the scheduled cost center from the first shift was applied to the other shifts instead of applying their assigned scheduled cost centers. This occurred when the additional time entries had an In Punch that was prior to the scheduled In time.

To address this issue, new settings have been added to the ***On IN Punch Use Scheduled Shift Cost Centers*** setting within the *Punch Settings* section of Timesheet Profiles. These settings can only be used with Fixed schedule types.

Timesheet Profiles: Auto-Approve Timesheet After Time Entries Approved

WFR-1250: Within the *Manager Policies* widget of Timesheet Profiles under *Company Settings* > *Profiles/ Policies* > *Timesheets*, two new settings have been added to control automatic approval or rejection of submitted timesheets.

- The ***Submitted Timesheet Is Automatically Moved To Approved [status] If All Time Entries Are Approved*** setting will automatically move a submitted timesheet to approved status after all individual time entries within the timesheet is approved. You can select approval statuses of Level 1-5, or Pay Prep Ready.
- The ***Submitted Timesheet Is Automatically Moved To Rejected If Action Has Been Taken On All Time Entries With At Least One Rejected*** setting will automatically reject a submitted timesheet if at least one of the individual time entries has been rejected.

Timesheet Profiles: New Setting Added to "Restrict Punches By Schedule" Rule

WFR-36778: When using punch restrictions based on the employee's schedule, the system did not allow an overnight, i.e., third shift, employee to punch back in from lunch due to the *Restrict Punches By Schedule* timesheet rule settings and the system day divide. The system assumed the employee was attempting to punch in to their scheduled shift when they were actually punching back in from lunch.

To address this issue, a new checkbox named ***Ignore day divide*** has been added to the *Restrict Punches By Schedule* timesheet rule. The rule is located under *Company Settings* > *Profiles/Policies* > *Timesheets* in the *On Punch* category. When checked, the rule will take into account schedules from the previous or next day, depending on the schedule time and punch time. When punching, the rule will look at the nearest schedule time that applies to the settings and allows or restricts the punch.

HR Enhancements

The following enhancements have been added to this release.

Everything Benefits

EverythingBenefits is a new Marketplace product that specializes in providing a range of services to streamline and automate much of the manual, repetitive, and error prone benefits communication and management services. **EverythingBenefits** is a trusted partner and connects to the system every day to extract necessary information for its services. Health and voluntary data, as applicable, is validated and transformed into the formats requested by the outgoing vendors and communicated to them electronically.

IMPORTANT NOTE: An ***EverythingBenefits Marketplace User Guide*** is available to further explain how to configure and use this functionality. Please download the ***EverythingBenefits Marketplace User Guide*** from your normal document path.

- **For Partners -** To view the ***EverythingBenefits Marketplace User Guide*** associated with this functionality, log in to your Admin account and go to: *Distribution* > *Tools* > *Download Documents*. The guide will be located under the Marketplace heading of the navigation tree (*Marketplace then User Guides*).

- **For Workforce Ready Clients -** To view the ***EverythingBenefits Marketplace User Guide*** associated with this functionality, log in to your account and go to: *Our Company* > *Service Provider Documents*. The guide will be located under the Marketplace heading of the navigation tree (*Marketplace then User Guides*).

eQuest Premium Job Boards

The eQuest Premium Job Boards Marketplace product is a cloud-based service that can be used to post job requisitions to paid job-site boards using the eQuest portal. This product differs from the free eQuest Advantage Network, in that this premium product will incur fees to post your job requisitions to major job boards.

After enabling the application in our system, eQuest will provide special credentials that will allow you to verify your connection, sign-in and manage your job postings directly through the eQuest portal. During the configuration and verification process with eQuest you will request the job boards for which you wish to post your job requisitions. We provide tools within our application to help you successfully post your job requisition to eQuest and allow you to view the status of each posting.

IMPORTANT NOTE: An ***eQuest Premium Job Board User Guide*** is available to further explain how to configure and use this functionality. Please download the ***eQuest Premium Job Board User Guide*** from your normal document path.

- **For Partners -** To view the ***eQuest Premium Job Board User Guide*** associated with this functionality, log in to your Admin account and go to: *Distribution* > *Tools* > *Download Documents*. The guide will be located under the Marketplace heading of the navigation tree (*Marketplace then User Guides*).
- **For Workforce Ready Clients -** To view the ***eQuest Premium Job Board User Guide*** associated with this functionality, log in to your account and go to: *Our Company* > *Service Provider Documents*. The guide will be located under the Marketplace heading of the navigation tree (*Marketplace then User Guides*).

Compensation Management: Lump Sum Payout

WFR-19334: Users can now generate a lump payment for a specified Earnings Type under *HR Setup* > *Compensation Management* > *Compensation Setup*. A new option for *One Time Payment* and an *Earning* dropdown are now available in the new *Pay Change Types* section of the *Compensation Cycle* widget. The *One Time Payment* is a checkbox that can be enabled or disabled. The *Earning* drop-down is only available if the *One Time Payment* is selected. A *One Time Payment* is not applied to Base Compensation.

Benefit Enrollment: Approval Step for Evidence Of Insurability Process

WFR-6321: For Benefit Plans that have the *Use Units* enabled within the *Benefit Plan* widget under *Company Settings* > *Profiles/Policies* > *Benefits* > *Plans*, users can now specify who the *Evidence Of Insurability (EOI)* must be reviewed and ultimately approved by using the *Need To Be Reviewed By* option. Once enabled, the user can select the *Employee's Manager*, a *Specific Account*, or a *Specific Group*.

During Benefit Enrollments, an approval step must be completed before the system allows the guarantee amount to be overridden, giving the employee higher coverage amounts. The user(s) defined for the *Need To Be Reviewed By* should navigate to *My Account* > *My To Do Items* to complete the Review step for the EOI by selecting *Review* and then *OK*. Once the Review step is complete, the reviewer can then *Approve* or *Reject* the EOI.

Group Term Life: GTLI Settings and Calculation

WFR-2662: The Group Term Life Insurance (GTL or GTLI) functionality has been enhanced to ensure that the GTLI coverage and earning amounts are calculated appropriately according to the federal standards. The additional functionality streamlines the setup of GTLI.

Please see the full HR Release Notes for more information about the areas of the product that were updated.

Forms: OSHA 300A

WFR-36237: Users can now download the OSHA 300A form in CSV format using the *Download CSV* option under *My Employees* > *Forms* > *OSHA 300A*.

NOTE: This functionality was built to comply with the Electronic Filing requirement that OSHA planned to begin on July 1, 2017. Currently OSHA is not accepting Electronic submissions and intends to propose pushing out the begin date for the new requirement.

HR Actions: HR Action to Include Time Off Planning Profile Item

WFR-32366: For companies that have both the HR and TLM sub-systems enabled, the Time Off Planning Profile has been added to HR Actions items. This will only be available to be added as an *Action Item* for the *My Employee Action Request* type under *Company Settings* > *HR Setup* > *HR Actions*. Adding this item will allow managers to update the Time Off Planning Profile during the workflow process.

Marketplace: easyBackgrounds - Download Signed Authorization Form

WFR-36141: Users with the appropriate security permissions can now download the Background Check agreement form signed by the employee. An icon to *Print*, and within it the option to *Download PDF*, is now available within the *Background Checks* widget, which can be added to a tab using *Edit Tabs* under *My Employees* > *Employee Information*.

Open Enrollment: Add Custom Forms to Open Enrollment

WFR-5271: Users are now able to add a Custom Form to the Open Enrollment tabs for employees to complete in addition to their benefit elections. Within Benefit Plans under *Company Settings* > *Profiles/Policies* > *Benefits* > *Plans*, users can specify a Custom Form utilizing the *Custom Form* field in the *Benefit Plan* widget. When completing the steps of the Open Enrollment, employees will see a new option to *Submit For Benefit*, which will submit the completed Custom Form. Managers will see options to *Verify For Benefit* and *Reject For Benefit*, which they can use to either verify or reject the completed Custom Form.

Open Enrollment: Multiple Attachments

WFR-1440: Users can now include multiple attachments on a Benefit Plan via the *ESS* widget under *Company Settings* > *Profiles/Policies* > *Benefits* > *Plans*. The user has options to *Download Document*, *Remove Document*, or select which document(s) will be visible during Open Enrollment from ESS. A maximum of ten documents can be uploaded. Users can download documents from Open Enrollment, New Hire Open Enrollment, Life Change Events, the *My Benefit Selections & Options* widget, and from within the following reports under E*mployee HR Maintenance* > *Benefits: Change Requests Detail* and *Change Requests Summary*.

Performance: Enhanced Security for Performance Reviews

WFR-4262: A new option, *Manage For All*, can be enabled in the *Employee* section on the *HR* tab within a Security Profile under *Company Settings* > *Profiles/Policies* > *Security*. When this is selected, it allows users full access to all functionality for all Performance Reviews. Users can view and manage all Performance Reviews for all employees in the company, even those the user is not a manager of.

Once this setting is enabled, all permissions in the Performance Reviews including View, Edit, Add, and Delete will be available for users assigned to the Security Profile. Additionally, users with this setting enabled can initiate a Performance Review for themselves. For the Company Administrator Security Profile, this will be automatically enabled by default.

Performance: Enhanced Goals Widget

WFR-34111: The *All Goals* widget, which includes information regarding employee Goals such as the *Goal Name, Goal Due Date,* and *Rating*, is now available in the following areas:

- The employee edit screen under *My Employees* > *Employee Information* > *Edit Employee*.
- The employee Profile under *My Account* > *My Profile*.
- Within the Dashboard.

Please see the full HR Release Notes for information about this functionality.

Performance: Mass Delete Performance Reviews

WFR-3738: The option *Mass Delete Reviews* is now available and can be used to mass delete Performance Reviews under *My Employees* > *Employee HR Maintenance* > *Performance Reviews*.

Performance: Performance Review Rating Value

WFR-32774: A new column, *Rating Value*, is now available for addition to the Performance Review Report under *My Reports* > *HR* > *Performance Reviews Report* and Performance Reviews under *My Employees* > *Employee HR Maintenance* > *Performance Reviews* using the *Select Columns*. When users have defined a *Value* for a Performance Review Rating under *Company Settings* > *HR Setup* > *Performance Reviews* > *Ratings*, this column will display the specified *Value*.

Recruitment: Additional Actions for Applicants

WFR-33659: Users now can email resumes for selected Applicants to hiring managers once the search results from the *Resume Search* functionality have been returned using the *Send Selected Applicants* and option under *Recruitment* > *Applicants*. Additionally, users can also modify the hiring stage of selected applicants using the *Edit Selected Applicants* option.

Recruitment: Find Applicants Within Specified Kilometers

WFR-28445: Users can now search for Applicants within a specified number of Kilometers as well as Miles under *Recruitment* > *Applicants, using Find Applicants Within __ Miles* or *Kilometers*. In addition, the *Distance In* can now be set to either Kilometers or Miles, and the appropriate selections for both can be saved as defaults in the report under *Settings* > *Save Settings*. This ensures that companies in countries where kilometers are used for measuring distance can utilize their standard measurement type when searching for applicants.

Recruitment: View Applicants on Map

WFR-35533: Users can now control the applicable settings from within the Applicants Map itself under *Recruitment* > *Applicants* > *View Selected Applicants On Map*.

Reports: Data on Performance Reviews Report

WFR-33584: The Performance Reviews Report under My Reports > HR > Performance Reviews Report has been updated as follows:

- The existing column Employee Name has been renamed and now displays as Employee Full Name.
- When the checkbox *Use Workflow For Performance Review* is disabled in the *Workflow Policies* widget under *Company Settings* > *Global Setup* > *Company Setup*, the Performance Reviews report will not be displayed in the *My Reports* > *HR menu*.
- The employees that have a Performance Review Profile with an Internal Workflow assigned will not be displayed in the report, even when *Include Employees Without Performance Review* is selected.
- The report will display only the data for Performance Reviews that do not have an *Approval Status* (a column within the report as well as under *My Employees* > *Employee HR Maintenance* > *Performance Reviews*) that is blank, even when *Include Employees Without Performance Review* is disabled.

NOTE: When *Include Employees Without Performance Review* is selected, all employees that have been assigned a Performance Review Profile will display, but no Performance Review data will be shown. Only the employee name, profile, frequency and other employee specific columns will be populated.

Reports: New Columns Color and Percentage Bar

WFR-37425: Two new columns, *Goal Status: Color* and *Percentage Bar*, are now available for inclusion using *Select Columns* in the following reports and widgets:

- Performance Development report (*My Employees* > *Employee HR Maintenance* > *Performance Development*)
- My Goals report (*My Account* > *My Goals*)
- All Goals widget (Employee Information)
- My Goals widget (*My Profile, Dashboard*)

The *Color and Percentage* can be configured within the Goal Status under *Company Settings* > *HR Setup* > *Performance Review* > *Goal Statuses*. The appropriate *Percentage Complete* and *Status* can be defined for each Goal under *My Employees* > *Employee HR Maintenance* > *Performance Development*.

NOTE: The new columns for Color and Percentage Bar are not currently included in the exports of the reports. The ability to export these columns will be considered in a future release.

Payroll Enhancements

The following enhancements have been added to this release.

ACH: WY EFT Child Support Requires 9 as a Prefix to EIN

WFR-35429: A new option, 9 + *Company EIN*, is now available for the Company Identification setting in the *ACH Batch Header* section for Originating Banks under *Company Settings* > *Payroll Setup* > *Originating Banks*. This option can be utilized to accommodate the requirement for Wyoming Child Support EFT files which specifies that the Company Identification line include 10 characters; the employer FEIN with a prefix of 9.

Autopay Schedule: Effective Dates

WFR-38113: A new Effective Date field is now available for use with Autopay Schedules in the *Base Compensation* widget on the *Main* tab under *My Employees* > *Employee Information*. The Effective Date field can also be added to the Autopay Schedules via Mass Edit in the *Base Compensation* section under *My Employees* > *Employee Maintenance* > *Mass Edit*.

The Autopay Schedule Effective Date can also be assigned to employees using the Employees import template (Excel and XML).

NOTE: This functionality was added to ensure correct calculation of Retro pay when there is a change to an employee's Autopay Schedule within the same Pay Period as a pay increase. Retro pay functionality is currently planned for a future release (August 2017).

Batches: Add (Prior) Pay Period Lookup in Batch Edit Screen

WFR-25382: A new column, *Pay Period*, is now available for inclusion using the *Select Columns* on the Batch Edit screen under *Manage Payroll* > *Manage Payrolls* > *View All Payrolls*, *View/ Edit Batches*. Users can utilize this column to enter hours under a prior Pay Period earnings by selecting the appropriate Pay Period.

General Ledger: New Filter for General Ledger Overrides

WFR-34990, WFR-3972, WFR-6268: For companies with Multi-EIN functionality, a new *Payroll: EIN* filter is now available for use within the General Ledger Overrides under *Company Settings* > *Payroll Setup* > *General Ledger* > *Settings*. This allows users to filter as well as allocate expenses and liabilities to different GL strings based upon the EIN for the payroll.

Multi-EIN: Warning upon Saving New Configurations without an EIN

WFR-26651: A pop-up warning, *Company EIN is not specified*, now displays when new Earnings Codes, Deduction Codes, Vendors, and Workers Comp Carriers are saved without selecting a Company EIN under *Company Settings* > *Payroll Setup*, as well as Jobs under *Company Settings* > *HR Setup* > *Jobs*.

Paycheck Simulator: Standard Pay Periods

WFR-34960: Moving forward, the selections for the *Pay Period* drop down within the Paycheck Simulator are *Weekly, Bi-Weekly, Semi-Monthly* and *Monthly*. The system default is set to *Bi-Weekly*.

Payroll Settings: Pay Statement Warnings When Local Addresses are Overridden

WFR-28141: A new option, *Display Warning on PST – Overridden Local Address*, is now available in the *Payroll Settings* widget under *Company Settings* > *Global Setup* > *Company Setup*, on the *Payroll* tab. When enabled, a warning message will display if a local address is overridden in a Pay Statement during the payroll process. The check box defaults to selected to display the warning message.

- When *Home Address (Override)* is selected in *Utilities* > *Options* within a Pay Statement, a warning message displays to remind users to verify that the wages and taxes are correct.
- A warning also displays under the *Pre Process Payroll* step of the Payroll Prep Process under *Manage Payroll* > *Manage Payrolls* > *View All Payrolls*.

Scheduler Enhancements

The following enhancements have been added to this release.

Employee Self Service – Now Available

Effective with this release, employees will have the opportunity to take advantage of several self-service options as it pertains to scheduling. These self-service features are all tied to a new workflow and notifications are provided throughout each process. The new self-service offerings are made up of three separate pieces of functionality. These pieces are: Shift Swaps, Request for Coverage, and Open Shifts.

To learn more about how to use and configure the necessary elements to use the above functionality, a separate guide has been created and is available for download.

- **For Partners -** To view the ***Scheduler Module Employee Self Service Guide*** associated with this functionality, log in to your Admin account and go to: *Distribution* > *Tools* > *Download Documents*. The guide will be located under the Scheduler heading of the navigation tree (Scheduler then User Guides)
- **For Workforce Ready Clients -** To view the ***Scheduler Module Employee Self Service Guide*** associated with this functionality, log in to your account and go to: *Our Company* > *Service Provider Documents*. The guide will be located under the Scheduler heading of the navigation tree (Scheduler then User Guides)

Audit Trail: Employee Data Columns in Schedule Audit Trail

WFR-35239: Employee-related data columns such as *Employee First Name, Employee ID,* and *User First Name* now display on the Schedule Audit Trail report from within a Schedule under *Scheduler* > *Schedules* > *View By Employee* or *View By Cost Center* > *Utilities* > *Audit Trail*.

Cost Centers: Floating Scheduled Cost Centers

WFR-32833: Scheduling managers may need to fill open shifts on a schedule in a way that requires an increased pool of employees. These employees, who may not be regularly scheduled in the designated cost centers, need to be made available so that they can help fill gaps.

Users can now identify certain Scheduled Cost Centers as *Floating* when configuring employee profiles under *My Employees* > *Employee Information*, in the *Scheduled Cost Centers* widget, on the Schedules tab. When an employee is configured to float to a certain scheduled cost center, that user will not be scheduled automatically or be shown as an option for that cost center if scheduling manually. They must first be enabled on a Schedule under *Scheduler* > *Schedules* or a Schedule Template under *Scheduler* > *Schedule Templates*.

Credentials and Certifications

Constraints: Shift Credentials and Certificates

WFR-35088: For companies using both the Advanced Scheduler and HR modules, when a Credential or Certification is assigned to a Shift, the Scheduler Engine will not auto assign employees to the Shift unless they have the specified Credential or Certification in their Employee Profile.

NOTE: When the *Certification Requirement Override* and/or *Credential Requirement Override* are/is enabled for an employee within *Override Constraints* under *Scheduler* > *Schedules* or *Scheduler* > *Schedule Templates*, the engine will not require an employee to have the Credential and/or Certification to be qualified for the shift.

Workload Templates: Credentials and Certifications in Workload Templates

WFR-35083: For companies using both the HR and Advanced Scheduler modules, *Certification* and *Credentials* are options now available for use within the shifts in Workload Templates under *Company Settings > Scheduler Setup > Workload Templates*. This will allow users to define a specific *Credential* and/or *Certification* for shifts within the Workload Template. Once added to a Workload Template and converted into shifts to be used on Schedules, the Scheduling Engine will view this as a firm qualification when assigning eligible employees.

Schedules: Is Schedulable Option for Credentials and Certificates

WFR-35081 & WFR-37177: For companies using both the Advanced Scheduler and HR modules, users can now specify that *Is Schedulable* applies to a Credential or Certificate under *Company Settings > HR Setup > Credentials* and *Company Settings > HR Setup > Education > Courses/ Certifications*. This allows the Credential or Certificate to be used as a part of the Advanced Scheduler functionality to add further qualifications for employees to be assigned to shifts.

Schedules: Certification and Credential Requirement Overrides

WFR-35089: Users can now enable a *Certification Requirement Override* and/or a *Credential Requirement Override* for employees within *Override Constraints* under *Scheduler > Schedules or Scheduler > Schedule Templates*. When enabled, the engine will not consider Credential or Certification constraint(s) for the employee(s). These overrides can be used prior to using the auto-assignment functionality or when making manual shift edits.

Employee Information: Widgets Now Available for Time Off Only Employees

WFR-37190: Previously, for companies who had the TLM sub-system enabled, along with the Scheduler module, if an employee was assigned to a Time Off Only Timesheet Profile, the *Work Time Availability* and *Work Time Preferences* widgets were not available to be added to their employee accounts under *My Employees > Employee Information*. We have now made these widgets available to be added for all employees regardless of the Timesheet Profile, if the Scheduler module is enabled.

Imports: Floating Designation in Scheduled Cost Centers Import

WFR-35109: A column for *Is Float*, used to identify a Cost Center as *Floating*, has been added to the Scheduled Cost Centers import template in the Scheduler category under *Company Settings > Imports > Overview*. This can be used to designate a Scheduled Cost Center as *Floating* for each employee's profile, similar to the *Home* Cost Center flag. Multiple Cost Centers can be identified as *Floating*, but a *Home* Cost Center cannot be marked as *Floating*.

Imports: Skills on Cost Centers Import

WFR-35549: The Cost Centers import template under *Company Settings > Imports > Overview > Company Setup*, now allows for up to 20 Skills, each with its own column, to be added. These columns can either be used or not used; they are not required. However, the ability to accurately create shift requirements for Scheduler is dependent on the relationship between Cost Center and Skills, so this provides a quick path to update this information.

Only Skills that have been defined as Schedulable using the *Is Schedulable* option within the Skill can be imported. If a Skill not identified as *Is Schedulable* is included in the import, an error message stating *Skill is not classified as schedulable* will display, and the data will not import successfully.

Profile Constraints: Actual Time in Constraints

WFR-28758: When *Actual Time* is enabled within an employee constraint in a Scheduler Profile under *Scheduler* > *Scheduler Profiles*, the Scheduler engine will now use the actual time recorded in TLM for days prior to the current day and scheduled total time for the current day going forward when edits are being made to the schedule.

Schedule Settings: Schedulable Cost Center Required

WFR-32836: Previously, *Schedule Settings* under *Scheduler* > *Schedule Settings* were allowed to be saved without designating at least one schedulable cost center in the *Use Cost Center For Scheduler* widget, which is a requirement for the scheduling engine.

We will now require the designation of at least one schedulable cost center in order to save the settings. We will display an error message to users when attempting to save the settings without one or more cost centers in place.

Schedule Settings: Maximum Budget Constraint

WFR-24908: In order to provide a more accurate schedule cost, the ***Maximum Budget Constraint*** under *Scheduler* > *Schedule Settings*, will now calculate the schedule cost using the employee's Base Compensation rate rather than using the Skill's average cost.

NOTE: If the *Do Not Exceed* setting is selected, an entry must be made in the *Maximum Budget* field of the *Schedule Settings* widget. If selecting the Schedule Budget option, an alternate amount can then be entered in the field to the right of the setting and this amount will be used instead.

Schedules: Schedule Cost Using Employee Base Compensation

WFR-35582: The column ***Total Sch. Cost*** is now available for inclusion using *Select Columns* in the *Schedule By Employee* and *Schedule By Cost Center* under *Scheduler* > *Schedules*. The employee hourly rate is based on the employee Base Compensation rate, and is used when validating the *Schedule: Maximum Budget* constraint, specified in the Schedule Settings under *Scheduler* > *Schedule* Settings, is applied.

NOTE: The employee Base Compensation rate has an *Effective From* date, therefore the rate will depend upon the effective dates and the date the request is submitted to the Engine.

Schedules: Help for Calendar Synch Setup

WFR-24129: A note has been added to assist users with the Sync Calendar option under *My Account* > *My Schedule* > *Sync Calendar*. The note explains that the user should copy the link address and use the Add by URL process in his/her personal calendar to add the item.

Schedules: Override Constraints Window

WFR-36330: When clicking the Override Constraints button under *Scheduler* > *Schedules* or under *Scheduler* > *Schedule Templates*, the *Override Constraints* window will now freeze the *Employee ID* and E*mployee Name (W/Mouse-Over Info)* columns as users scroll through the listed columns.

Schedules: Cloned Schedules and Terminated Employees

WFR-35323: Terminated employees will now be automatically removed from Schedule Templates and cloned Schedules after the employee's Termination Date.

Cross Product Enhancements

The following enhancements have been added to this release.

ACA: Aggregated ALE Group – Ability to Select EINs for Form 1094-Cs

WFR-21629: For multi-EIN companies with ACA, a new *Part of the Following ACA ALE Group* widget is now available to be added to a tab using *Edit Tabs* under *Company Settings* > *Global Setup* > *Company Setup*. Within this new widget, users can create a list of EIN's that should be included in a specific Aggregated ALE Group. The EINs that will be populated in Part IV of the Form 1094-C will be driven by the lists the EIN is a part of.

When the *ALE Member is a member of an Aggregated ALE Group for at least one calendar year month* setting is checked and months are selected in the *ER is part of an Aggregated ALE Group for the following months* section on the 1094-C *Populate Form* pop-up, the following data will be populated on the Form 1094-C:

- Line 21 on the form will be populated as *Yes*.
- Part III (d) will be populated with the months selected.
- Part IV of the form will be populated with the EINs which are on the same list as the EIN for which the Form 1094-C is populated.

ACA: Form 1094-C Questionnaire Confirmation Popup

WFR-24426: The Form 1094-C questionnaire confirmation pop-up under *My Reports* > *ACA (Affordable Care Act)* > *Form 1094-C* > *Populate Form* has been modified to more closely follow the instructions for the population of Form 1094-C. Instead of four initial questions, there are now only two:

- Once the user indicates the form is to be the Authoritative Transmittal, additional questions which will assist with the automatic population of Part I and III of the Form 1094-C are presented.
- Once the user indicates the ALE offered Minimum Essential Coverage to at least 95% of Full Time employees and dependents, the user will be presented with the option to select the appropriate months for automatic population of Part III (a) of the Form 1094-C.

ACA: Form 1094-C Part IV EINs

WFR-20394: For companies with Multi-EINs, the EINs that are populated on Part IV of Form 1094-C are now those that satisfy the following criteria:

- The EIN should be on the same list as the EIN for which the Form 1094-C is populated.
- The EIN should have *Active* selected for the Company EIN in the *Company EIN* widget under *Company Settings* > *Payroll Setup* > *Company EINs*.

The EIN should be Active for the specified reporting year, meaning the year should lie within the *Start Date* and *Maximum Year Forward* date range for the Company EIN in the *Company Configuration* widget under *Company Settings* > *Payroll Setup* > *Company EINs*.

ACA: Form 1094-C Warnings for Aggregated ALE Group

WFR-33817: New warning messages are now displayed as per the following scenarios:

If an EIN is not included in any ALE list, and the *ALE Member is a member of an Aggregated ALE Group for at least one calendar year month* setting is checked and months are selected in the *ER is part of an Aggregated ALE Group for the following months* section, the following warning message displays upon Populate of the Form 1094-C:

If an ALE is part of an Aggregated ALE Group, all associated ALE's should be listed in Part IV of Form 1094-C. The selected EIN has not been assigned to an EIN List and Part IV has not been populated. Please either correct both Line 21 and Part III (d) or manually enter the associated EIN's into Part IV or assign this EIN to an EIN List and repopulate this form.

If an EIN is a part of a list, but there is no other EIN on the list, and the *ALE Member is a member of an Aggregated ALE Group for at least one calendar year month* setting is checked and months are selected in the *ER is part of an Aggregated ALE Group for the following months* section, the following warning message displays upon Populate of the Form 1094-C:

Please be sure to populate Part-IV of Form 1094-C with the other members of the Aggregated ALE Group prior to Save.

ACA: Initial and Standard Measurement Periods Considered for Variable New Hires

WFR-27724: When an employee transitions from the Initial Measurement Period to the Standard Measurement Period, there will likely be an overlap. If an employee's ACA Status was initially ACA PT (averages less than 130 hours per month) but then measures as ACA FT (averages 130 hours per month or more) at the end of the overlapping Standard Measurement Period, the ACA Status will be updated within the employee's ACA Timeline for the corresponding Standard Stability Period, and a new line will display within the debug information for the month in which the status change took place. The new line reads *Calculate ACA Status: ACA Status changed based on average hours in first complete standard measurement period*.

NOTE: This will only occur in the given scenario. If an employee measures as ACA FT during the Initial Measurement Period and ACA PT during the Standard Measurement Period, the ACA FT status will prevail for the remainder of the Initial Stability Period.

ACA: Mask SSN on Form 1095-C

WFR-18462: A new option, *Mask SSN*, is now available within the *ACA Settings* widget under *Company Settings* > *Global Setup* > *Company Setup*. When enabled, Social Security Numbers will be masked on the Form 1095-Cs shared with the employee.

ACA: Security Settings for ACA Reports

WFR-31110, WFR-32113: A new security setting, *ACA Employee Form Delivery*, is now available on the *Global* tab of the Security Profiles under *Company Settings* > *Profiles/Policies* > *Security*. This new setting can be used to enable View and/or Edit permissions to the ACA Form 1095-C.

Multi EIN: First Weekday Settings in Application

WFR-35151 & WFR-36125: In the February 2017 system release, we added support for the selection of different *First Weekday* settings across EINs. This was done in the *Company Configuration* widget under *Company Settings* > *Global Setup* > *Company Setup* for Multi EIN environments. We allowed for one EIN to choose a certain *First Weekday* setting, and another EIN to choose a different *First Weekday* setting and the settings in one EIN would not carry over to the other.

We are now in the process of expanding this support to other areas of the application where settings can be affected by the *First Weekday* setting. Due to the extensive nature of this effort, we will roll this out in phases over the coming system releases. We will communicate the completed areas in future release notes.

In this release, we have completed Multi EIN support of the *First Weekday* setting and its related functionality for all reports in the system where there is a *Calendar Range or Date Range* selector.

Please see the full Cross Product June 2017 release notes for a list of the updated areas.

Online Documentation: Security Setting Added to Control Visibility

WFR-35073: A new security setting has been added to security profiles to control the visibility of Online Documentation. The ***Show Documentation*** setting is available in the ***Online Documentation*** section of the ***Modules*** tab within security profiles. It will be enabled by default. If users wish to turn off the availability of Online Documentation within a company, or for a specific security profile, this setting can be unchecked so that when users click the **?** icon in the application, the documentation will not display. This is available to both Partner and Client companies.

- For Partners, access this setting from: *Maintenance* > *Admin Company* > *Configurations* > *Security Profiles*. As a reminder to Partners, this setting can be changed via Mass Edit of security profiles.
- For Clients, access this setting from: *Company Settings* > *Profiles/Polices* > *Security Profiles*.

Security: Maximum Timeout Limit Increased

WFR-36250: The maximum amount of time that can be defined for the ***Max Inactive Time (sec)*** setting in the *Timeout Settings* section of the Security Profiles under *Company Settings* > *Profiles/Policies* > *Security* has been increased. Users can now enter a value up to 28800 seconds, or 8 hours, for the maximum inactive time. If a value greater than 28800 is entered, the system will automatically change the value to the maximum of 28800 upon saving the profile.

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