HR Release Notes
October 2020
R71

This document contains detailed descriptions of release notes for the release date/month shown above, as well as explanations of resolved issues.

Enhancements

We are listening! Enhancements marked with the light bulb icon are a direct result of IDEAS submitted in Community. Visit Community Ideas, upvote the best items, and keep the feedback coming!
The following enhancements have been added to this release.

Australia Superannuation Form

Reject Option Added to Superannuation Form

WFR-177403: The superannuation standard choice form will now have a ***Reject*** button option to handle scenarios such as when an employee submits a form without proper documentation or incorrect information, and it is determined the employee needs to revise and re-submit the form.

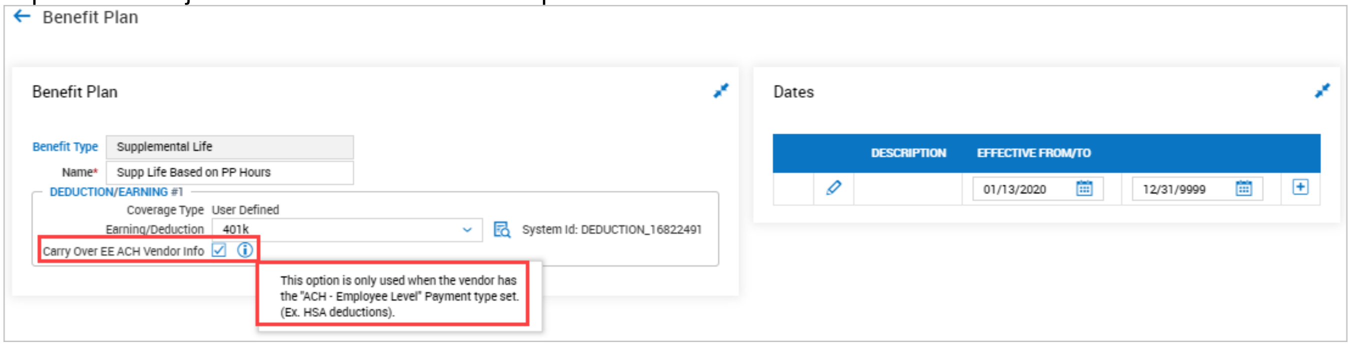
Label Change to Submit Form Button

WFR-189709: In the ESS version of the Superannuation form, the ***Submit Form*** button has been relabeled to ***Submit***.

Benefits

Deduction Info Carries Over to Next Enrollment Period

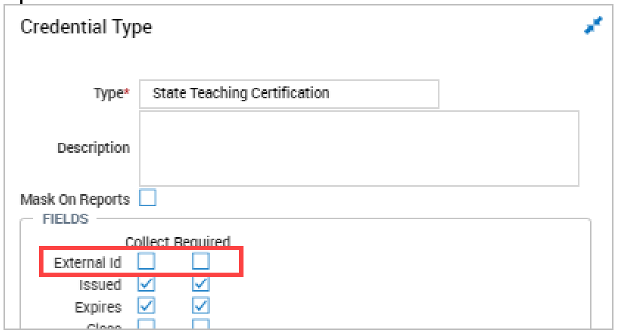
WFR-14701: For Benefit Plans containing a Deduction with an associated Vendor, that allows for employee-level ACH information, a new ***Carry Over EE ACH Vendor Info*** checkbox has been added to Benefit Plans. When checked, the vendor and the associated employee-level banking information will carry over during enrollment events, which helps prevent missed payments to the vendors during the transition period of an employee selecting a new plan.
NOTE: This new setting will also work if the benefit plan is added manually, or through and HR Action or import. It is not just limited to ESS enrollment periods.



Credentials

External ID Field Added to Employee Credentials

WFR-169068: An ***External ID*** field has been added to Credential Types, located under *Company Settings > HR > Credential Types*.
When importing credentials, the document number and credential type are used to match the record from the import to the credential record. Because multiple credentials of the same type can be created with the same document number this makes importing credential record updates impossible in some scenarios. If there are multiple credentials of the same document number and credential type, the first credential is updated by the import. This new field allows for a unique identifier to be applied to credentials when importing, allowing unique credentials with the same credential type and document number to be updated.



Custom Fields

Dates in Custom Fields Display in User's Format

WFR-181995: Custom field values of date types will now be stored in the user's format as follows.

- Custom Fields are shown in the user's date format in reports (new entries) - HR Custom Fields, Demographic Custom Fields, Time Entry Extra Fields, Applicant Custom Fields, Job Requisition Custom Fields.
- Custom Fields are shown in the user's date format in PDF.
- Employees Import: User should use Date Format column for entering a date in the desired format (see Instructions tab in the import template.) Otherwise, the user's date format will be used. Note: dd (lower cases) - days, MM (upper case) - month, yy or yyyy (lower cases) - year.

Custom Forms

Custom Form Signature Fields

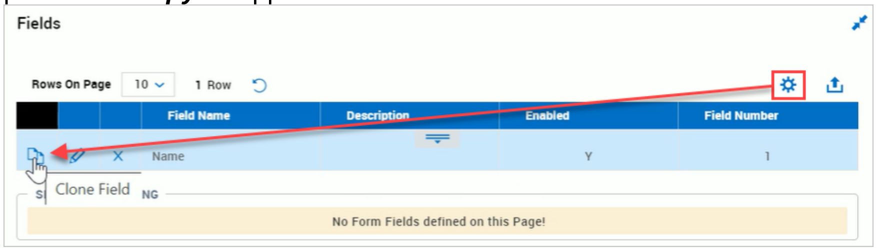
WFR-126352: Signature fields added to a custom form will now present to the user in the order they are configured in the custom form. Previously, no matter where a signature field was placed, end users could not sign them until they reached the end of the form. Now, users can sign the fields no matter where they are placed in the form.

Custom Form Date Format in Report Columns

WFR-104142: Previously, when creating a custom form using date fields, the resulting date format shown in the date columns of the Custom Form report page defaulted to the system date format and not to the date format set in the Locale section of the Company Setup page. Moving forward, these columns will now reflect the date format the company is using rather than the system date format.

Clone Option Added to Custom Form Fields

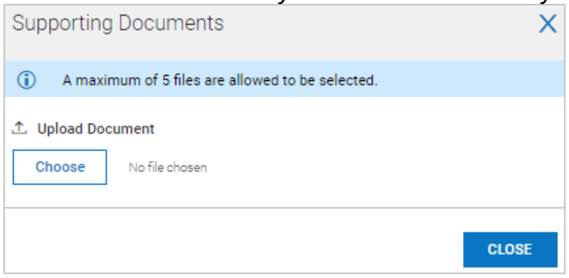
WFR-179787 & WFR-179786: To help speed up the building of Custom Forms, a ***Clone Field*** option is available to add the ***Fields*** widget of the Custom Forms edit page, located under *Company Settings > HR Setup > Custom Forms*, edit a page. Users require *Custom Form Edit* permission in their security profiles. Once the form is assigned, users can no longer delete cloned fields.
To add the button, click the gear icon and choose *Select Columns* and add the ***Button: Clone Field*** column to the *Selected Columns* panel. To easily identify a cloned field, it will display in the *Form Page* panel with ***Copy of*** appended to the name.



Documents

Multiple Uploads Allowed Across Platform

WFR-184745: To prevent users from having to access a document upload link/button multiple times in order to upload multiple documents, all document upload pop-ups/screens will now allow users to upload up to 5 documents without leaving the page. Upon clicking *Choose*, you can select multiple documents by using the *Ctrl* or *Shift* key on your keyboard and selecting between 1 and 5 documents from your computer at the same time. The documents will load, and you can then add an optional *Document Type* or use the *Trash* icon to remove an unwanted documented. After clicking *Upload*, all the selected documents will be added.
NOTE: This functionality is not available in any of the Classic UI views across the platform.



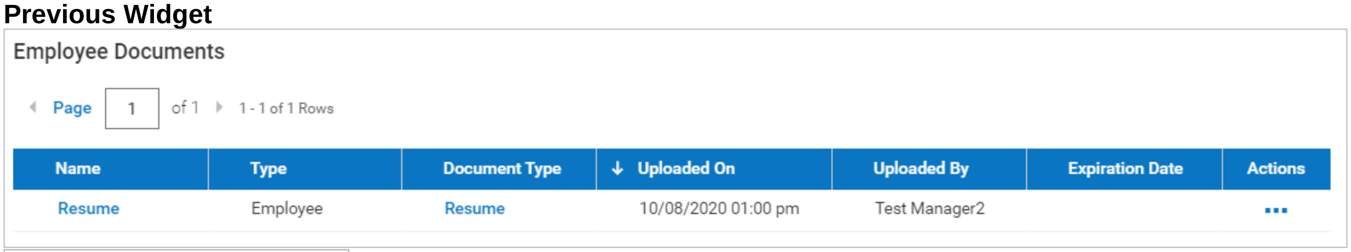
Employee Information

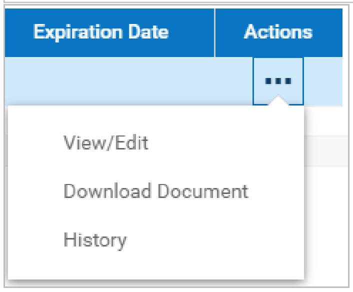
The following enhancements were made within the new employee information experience. Users can choose to use the new employee experience as their default when clicking the New Look toggle. 

Employee Documents Widget Converted to Report

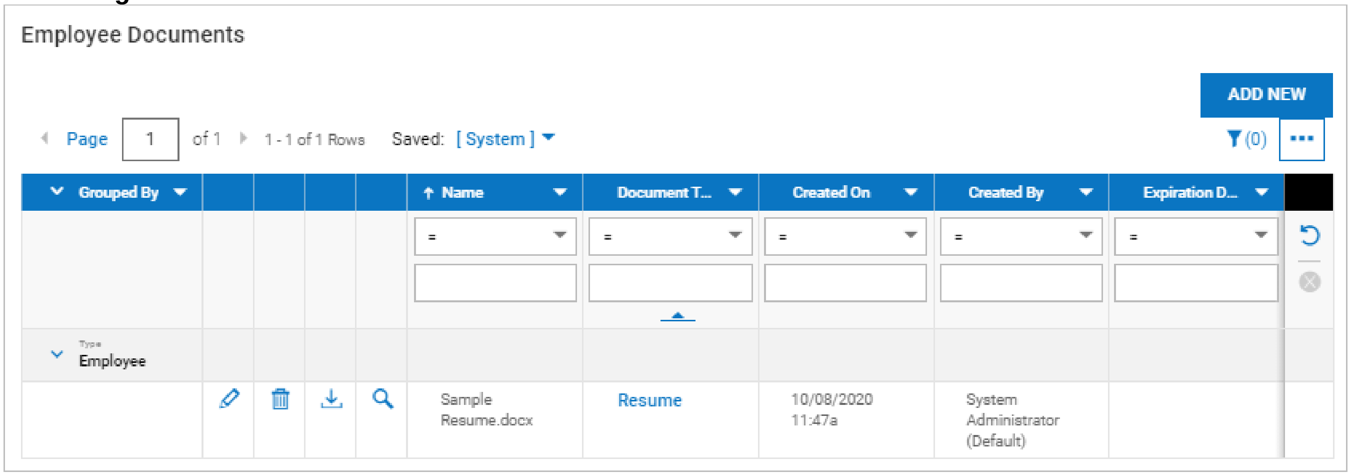
WFR-195371: The Employee Documents widget has been updated as a report widget. Document can now be added directly from the widget. Each column now has the standard filtering options and additional reporting options are available from the actions ellipses. Row level actions are now available to edit, delete, download, and view download history.

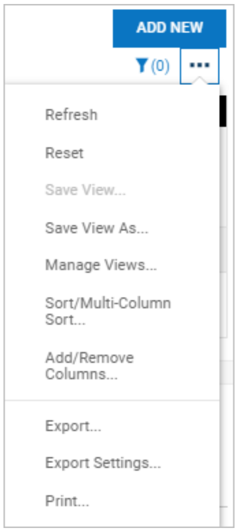
Previous Widget





New Widget





Viewing Compensation in Job Change History Widget

WFR-183910: Previously, users with View or View/Edit permissions to Job Change History without View or View/Edit access to Base Compensation records were able to see salary amounts in the *Annual Amount* column within the *Job Change History* widget of employee accounts. Moving forward, the security setting controlling access to compensation records will now prevent users from seeing these fields, and any other compensation fields, unless they have View or View/Edit access in their security profiles to Base Compensation.

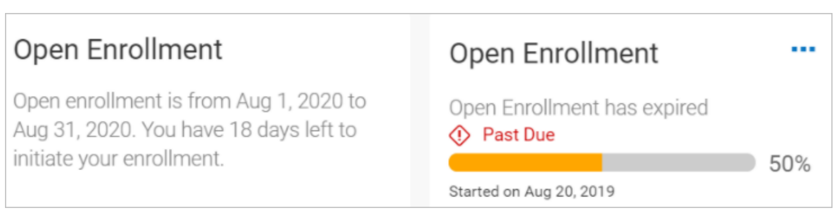
Enrollments

Expiration Message Updated for New and Open Enrollments

WFR-169176: The user message displayed when an Open Enrollment and/or New Hire Enrollment expires has been updated. Previously the message stated the employee had 0 days left for enrollment and to complete enrollment even though they could not complete the enrollment since it is expired. It will now state the enrollment has expired.

Before

After



Forms

VETS 4212 From Updated for 2020

WFR-166888: The VETS 4212 form has been updated to the current form for year 2020. The form is located under *Team > HR > Forms > Government Forms > VETS-4212*.

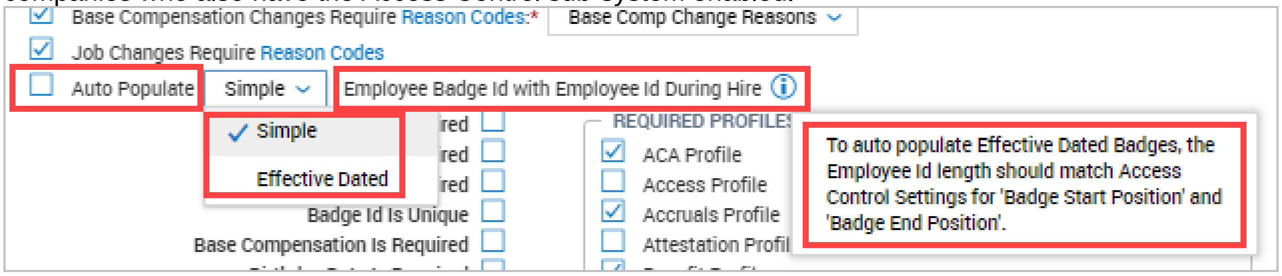
Hiring

Auto Population of Effective Dated/Simple Badges Added to Hiring Process

WFR-180411: An option is now available in Company Setup to auto-populate simple or effective-dated employee badges during the hiring process whether using a Hire HR Action or through manually hiring in Employee Information.

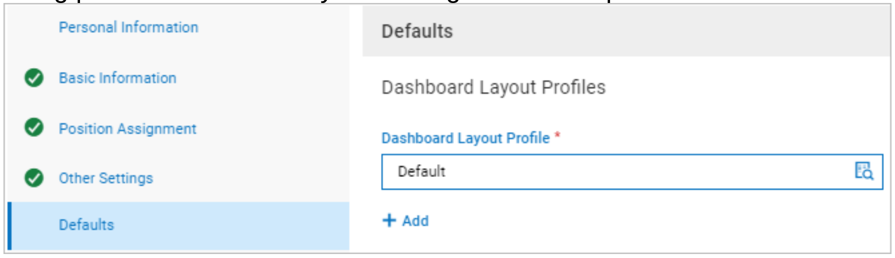
- This will work if Employee IDs are being auto-generated.
- If using Effective Dated badges, the employees Hire Date will be used as the badge's Start Date.

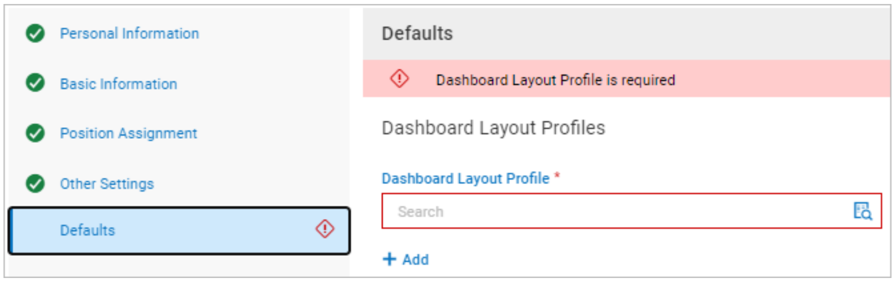
In the Account Policies widget of Company Setup, an ***Auto Populate*** field has been added with options to select ***Simple*** or ***Effective Dated*** badges. The Info icon message on this field will only display for companies who also have the Access Control sub-system enabled.



Manual Hire: Dashboard Layout Profile Options

WFR-163251: To help users select the correct Dashboard Layout Profile during the manual hire process, we have made some changes to the behavior of the default profile that is auto-added when enabled in Company Setup.
Previously, when a Dashboard Layout Profile was set as a default profile to be added during the hiring process, the field was then uneditable until the hiring process was complete; then users could come back and edit the profile.
In this release, users with the proper security permissions can now swap out the profile during the manual hiring process even if the system assigns a default profile.



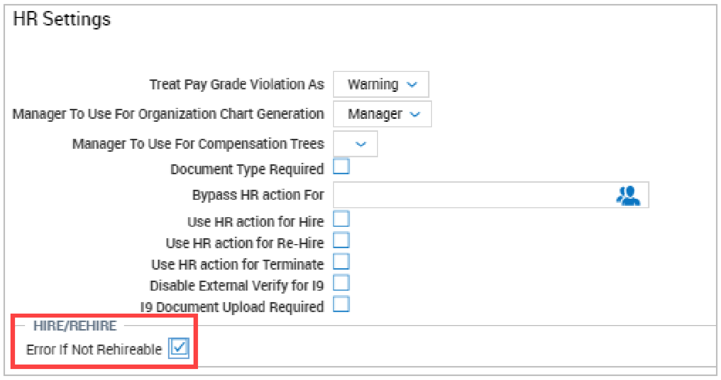


Additionally, if the Dashboard Layout Profile is set as required in the Account Policies widget of Company Setup, the profile must be added at the time of manual hire and be assigned to employees at all times during the employee life cycle.
If there is no default profile set in Company Setup, the field will be blank and editable during the manual hire, and if required, must contain a value.

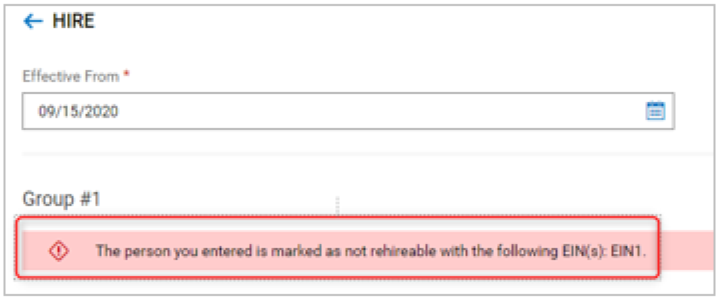
Rehireable Error Checkbox Added to Company Setup/HR Settings

WFR-188830, WFR-188023, WFR-187426: To prevent hiring managers from hiring a previously terminated employee from one EIN into another who was not designated as Rehireable, an error message can be enabled to stop the hiring process.
A new ***Error if Not Rehireable*** checkbox has been added to Company Setup. This will be available for the default company as well as for each EIN. As with other Company Setup settings, this will carry over to any newly created EINs.

- *Company Settings > Global Setup > Company Setup* in the *HR Settings* widget
- *Company Settings > Global Setup > Company EINs* in the *HR Settings* widget



When checked, if a terminated employee does not have the *Rehireable* checkbox checked in their *Termination Detail* section, users will receive an error and the hiring process will be halted.
In the event the employee should be hired, the employee's *Termination Detail* will need to be edited with the *Re-Hireable* checkbox checked and the hire process attempted again.
This error message will be generated for all methods of hire/rehire (HR Action or Manual hire).



HR Actions

Base Compensation/Pay Grade Updates in HR Actions

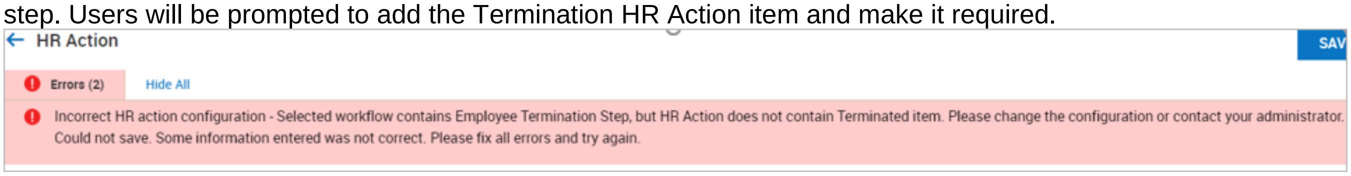
WFR-134153: In a future dated HR Action to change a pay grade and base compensation, an error sometimes displayed Employee pay is not within selected pay grade. The system has been updated to now apply the HR Action's effective date (not today's date) to the pay grade and to compare that date to the base compensation changes, allowing them to update and be approved without an error if the base compensation is within the assigned pay grade for that future date.

Pay Grade/Currency Mismatch Warning in HR Actions

WFR-186447: In the *Pay Information* widget of employee profiles, a currency mismatch warning message displays when an employee's default currency does not match the currency from the selected pay grade. This same warning will now display when updating an employee’s base compensation and pay grade via an HR Action containing the *Treat Pay Grade Violation As* rule and it’s set to any of the following: *Warning, Error* or *Ignore*.

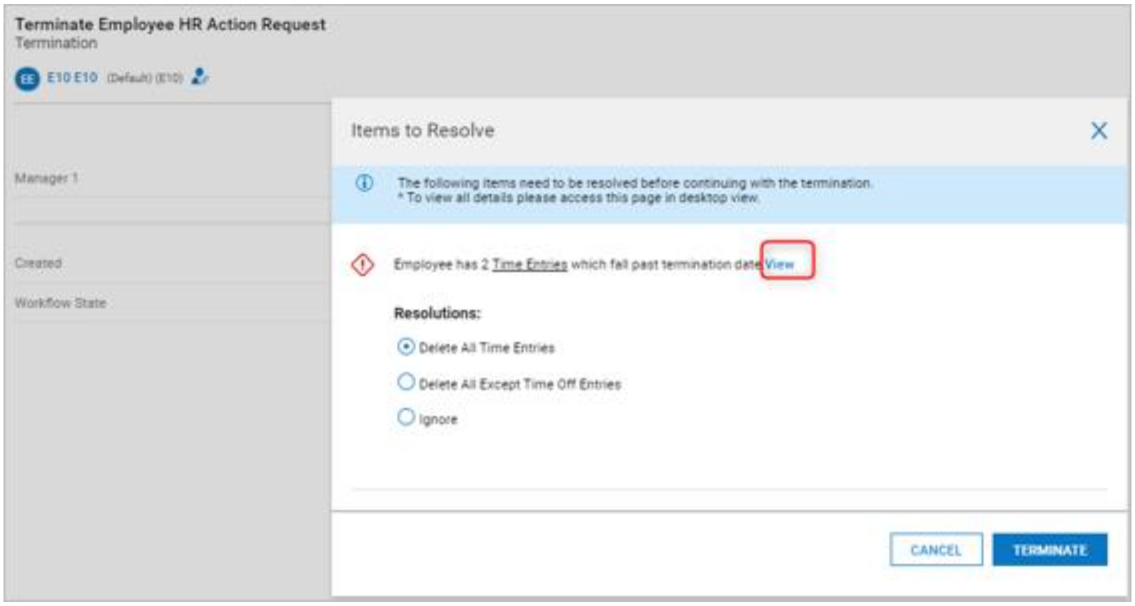
Terminations: Error Warning Added When Termination HR Actions Set Up Incorrectly

WFR-173135: To prevent downstream errors for users attempting to terminate an employee, a warning message has been added when users create an HR Action containing a workflow with the Termination step. Users will be prompted to add the Termination HR Action item and make it required.



Terminations: Hyperlink to View Missing Information Added to HR Action

WFR-177683: When terminating an employee via an HR Action Termination action, if there are pending timesheets that require attention, a hyperlink to the timesheets will now be available so users can process the timesheets and then complete the termination. This functionality exists when manually terminating an employee and is now available in Terminate HR Actions.



Imports

Employees Import: Demographic Custom Fields Added

WFR-162055: Custom Demographic fields added under *Company Settings > Profiles/Policies > Demographic > Custom Fields* can now be imported through the Employees import process, using the xml version of the Employees import template and then importing through *Company Settings > Imports > Employee Setup > Employees*.

Employee Position Assignments Import: Ability to Delete Position Assignments

WFR-196116: An ***Is Deleted*** column has been added to the Employee Position Assignments import template. This column can be set to Yes or No.

- If set to Y, if there is any update for the assignment in the template within the same row or subsequent rows, the delete option will not be considered and a warning is shown to the user.
  - "Deleted assignment cannot be created. The employee's assignment has been created ignoring the deleted column value. Please review the employee assignments and adjust as needed."
- If set to N, and an invalid value (other than Y or N) is entered in the column, the row will not get deleted and a warning is shown to the user.
  - "The value for Is Deleted is invalid. Valid values are Y/N. The employee's assignment has been updated without this information. Please review the employee assignment."

PAYPRO
Workforce Management

Job Boards

Indeed Link on Job Board Directing to U.S. Indeed Page for AUS & EU

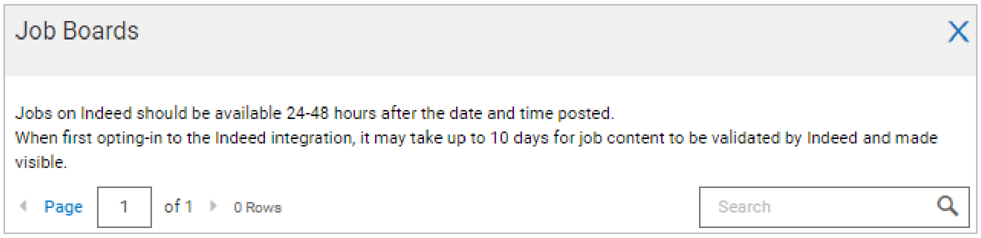
WFR-187631: Previously, the Indeed Job Board link was directing AUS and EU users to the U.S. Indeed page instead of the correct page for these countries. The link will now point to the proper country site if a job is posted to a different country. The country is determined based on the Country selected in the Location widget of the Job Requisition. If the job is for an unsupported country, users will be directed to the U.S. site.

New Pop-Up Message Added to Job Boards

WFR-194738: The message that displays when clicking the *View Status On Job Boards* button in the *Job Board* widget of job requisitions has been updated as follows:

- Jobs on Indeed should be available 24-48 hours after the date and time posted.

  When first opting-in to the Indeed integration, it may take up to 10 days for job content to be validated by Indeed and made visible.



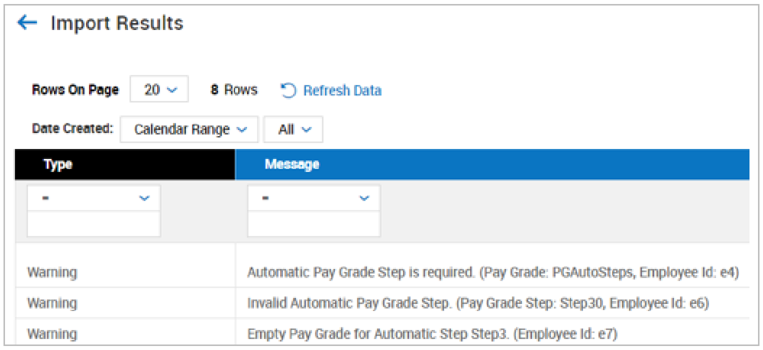
Summary Tab Included in Job Description

WFR-197319: The Summary tab of Job Requisitions will now be included in the XML feed Job Description sent over to Indeed.

Pay Grade & Steps

Warning Added for Empty Fields in Pay Grade and Steps via Employees Import

WFR-177532: A warning has been added to the Employees import when using the Pay Grade and Automatic Step fields. If a Pay Grade is changed through the import, and the new Pay Grade has automatic steps, a warning will be generated if the Automatic Step fields is left blank.
The warning will display in the *Import Results* page after running the import.



New Notification When Base Comp is Changed via Automatic Pay Grades/Steps

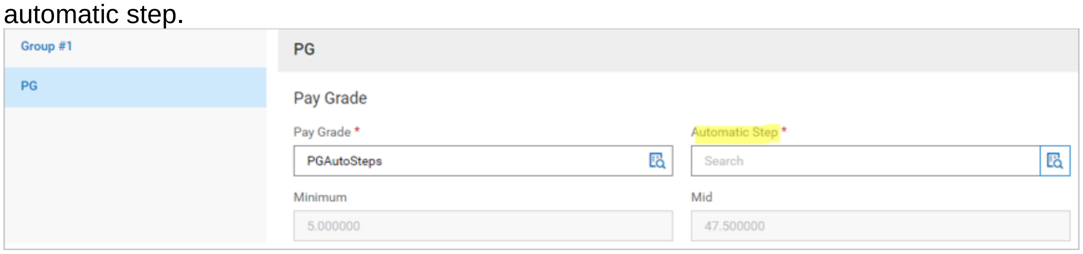
WFR-173840: A new ***Base Comp Record Change Automatic Step*** notification has been added to the system to inform users when an employee's base compensation has been changed through Automatic Pay Grades/Steps. The notification will trigger when there are step changes in base compensation as well as if the step change results in the same base compensation. The notification is available in the *Account* category under *Company Settings > Global Setup > Notifications*.

New Notification When Last Step Reached via Automatic Pay Grades/Steps

WFR-173841: A new ***Last Automatic Pay Grade Step Reached*** notification has been added to the system to inform users when the last step in Automatic Pay Grades/Steps has been reached. The notification is available in the *Account* category under *Company Settings > Global Setup > Notifications*.

New Automatic Step Field in HR Actions

WFR-173846: User can now indicate which Automatic Step an applicant or employee should be assigned to, so the process can be completed in one place rather than having to go to the employee record or create another HR Action once the Hire, Rehire, or Regular HR Action is approved.
When the *Pay Grade* item is added to a Hire, Rehire, or Regular HR Action, and the Pay Grade selected by the recipient is configured with automatic steps (and the recipient has edit permission for Pay Grades), an ***Automatic Step*** field will be added within the HR Action so the recipient processing it can add an automatic step.



Performance Management

Profiles: HR Action Added to Review Effects in Performance Review Profiles

WFR-5123: Within the *Review Effects* widget of Performance Review Profiles, a new ***HR Action*** checkbox has been added. When checked, the drop-down will become active and users can select an HR Action to add to the profile.

The *Review Effects* update employee accounts and with the addition of the HR Action, a series of events can then be triggered to flow through specific channels prior to updating employee accounts. This will be shown to the Finalizer on the *Summary* tab of performance reviews, just as the other options do.

Profiles: More Employee Profile Fields Added to the Reviews to Finalize Report

WFR-155361: In the *Reviews to Finalize* report, all standard employee centric fields will now be available to be added as columns within the report page. The report is located under *Team* > *Talent* > *Performance* > *Reviews To Finalize*.

Profiles: Performance Profiles Added to Required Profiles

WFR-66787: The Performance Review Profile has now been added to the *Required Profiles* section of the *Account Policies* widget in *Company Setup* and in the *Profiles* section of the *Defaults* widget in *Cost Centers*.

Profiles: 'None' Grade Method Added to Performance Review Profiles

WFR-77812: Previously, when creating a Performance Review Profile, the only options available for Grade Method were Average and Total. We have now added the option of ***None*** for cases where ratings do not have values associated with them. When ***None*** is selected, the Final Grade option in the Performance Review Profile will also default to None and weights will be disabled.
When Grade Method is selected as ***None***, the Final Score, Total Scores section on the Summary tab will be hidden. Similarly, no total(s) will be shown in the Core Values and Competencies section.
WFR-188135: In the Review Steps of a Performance Review Workflow, the Percent for Review weight must total 100%. If the total does not equal 100%, the user receives a warning on the Review step and receives an error on the actual workflow when saving. Ratings are allowed to be configured with no value, so it is possible to need 0.0% weight total in the workflow. The workflow will now allow for 0.0% as well as 100%.

Reviews: Configuration Error Message for Incomplete Performance Reviews

WFR-168700: To prevent configuration errors, performance reviews where *Ratings* are enabled (*Functionality* widget) and *Final Grade* (*Options* widget) is set to either *Calculated*, *Selected (Numeric)*, or *Calculated (Numeric)*, and final grades are not added to the *Ratings* widget in the *Configuration* tab, users will now receive an error message. Previously, only a warning message displayed, allowing incorrect configurations to be saved.

Reviews: HTML Editor Added to Entry Tab Comments

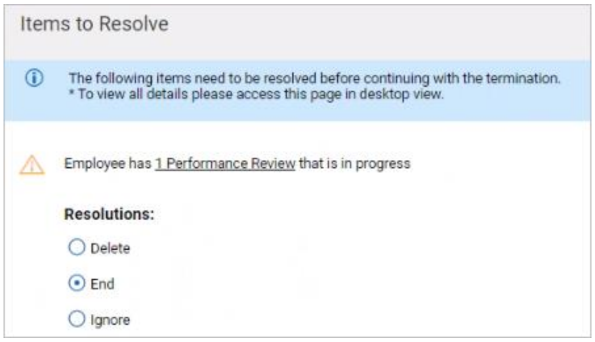
WFR-100779: Performance Review comments that are added by reviewers in the Entry tab of performance reviews will now have more options available in the text editor. We have added a full HTML editor containing bold/italics/colors and more so you can format your comments. When printing in PDF, the formatting will not display in the PDF.

Reviews: Performance Review Options Upon Termination

Option to End Performance Review for Terminated Employees

WFR-192855, WFR-124928: When terminating an employee manually or via an HR Action, the *Items to Resolve* pop-up that displays when terminating the employee will now include options for performance reviews that are currently Scheduled and/or In Progress.
If the employee being terminated has a *scheduled* performance review, options will display to Delete, Initiate, Skip, or Ignore.
If the employee being terminated has a performance review *in progress*, options will display to Delete, End the performance review or Ignore.

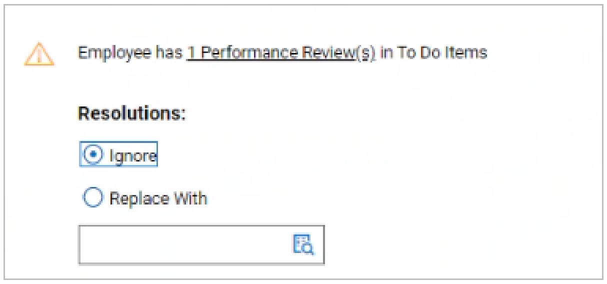
- If users select *End* (a new option) the performance review will be saved on the Performance Reviews report page and show a status of *Ended*. Any pending To Do Items will be removed, and the Review will become read only.



NOTE: When terminating an employee from the Employee Information page, you must toggle the New Look on for the Performance Review items to appear in the *Items to Resolve* option.

Option to Reassign To Do Item for Terminated Managers

WFR-189076: If a terminated manager has pending performance review To Do Items that require attention, resolutions will be offered in the *Items to Resolve* pop-up to Ignore or Replace With (with a field to select the user to assign to.) If reassigning the To Do Item, it will immediately be moved to the new user's To Do list.
This will trigger when terminating a manager who has existing Performance Review To Do Items (i.e., the user was a manager that was part of the Performance Review Workflow to Review, Check, Finalize etc.)
It won't trigger for the To Do Items of an employee of the terminated manager who needs to process their own review.

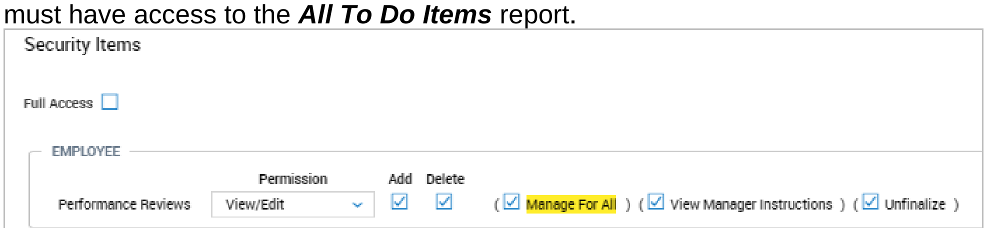


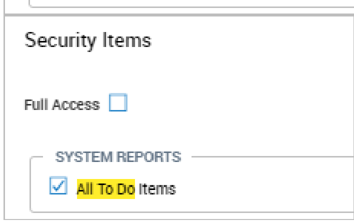
NOTE: When terminating an employee from the Employee Information page, you must toggle the New Look on for the Performance Review items to appear in the *Items to Resolve* option.

Option to Bypass Employee Signature Step in All To Do Items Report

WFR-187133: When an employee is terminated with a pending Sign To Do Item for a performance review, other administrators can access the To Do Item from the All To Do Items report and process it. If the item has an employee signature included from the workflow, an option will become available to allow the manager/administrator to bypass the required employee signature (since the employee is terminated and cannot sign.)

The bypass will take the workflow to the next step in the workflow following the Sign path and allow the item to be completed. This requires ***Manage for all*** to be enabled in user security profiles; and the users must have access to the ***All To Do Items*** report.





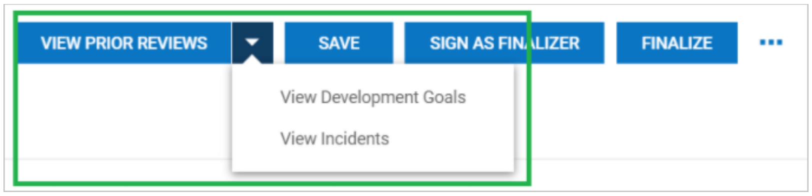
Reviews: Selecting Ratings During the Performance Review Process

WFR-99371: When selecting ratings during the review process, only the ratings configured in Performance Review Profiles will display in the *Legend* pop-up next to the *Ratings* drop-down. These rating selections can be set in the profiles by editing Core Values, Competencies, Goals, etc. and adding a selection list in the *Choose Rating* field. If no list is attached, the entire list from the *Ratings* widget will be available in the *Legend* pop-up.

Reviews: Label Name Changes for Prior Reviews Button & Viewing of Incidents

WFR-189709, WFR-111833: The ***Prior Reviews*** button in Performance Reviews has been updated to more accurately reflect its purpose and has been renamed to ***View Prior Reviews***. Additionally, a new ***View Incidents*** option has been added to the list of options in the drop-down of the button.
New Name(s):

- **View Prior Reviews** (main button)
  - **View Development Goals** (drop-down option from button)
  - **View Incidents** (drop-down option from button)
    - **Note**: This option is new and will only display for users with security permission to at least view Incidents (*Employee* section of *HR* tab)



Reviews: Finalize Process Changes

WFR-182223: On the Finalize step when managers click the *Finalize* button to finalize a performance review from a To Do Item, the system will send them to ***Summary*** page instead of the *Instructions* page. Additionally, the ***Finalize*** button has been moved out from the action ellipses and is now prominent on the page.

Personal Email

Personal Email Field Added to Custom Forms & Questionnaires

WFR-182509: In the Custom Forms setup, the ***Personal Email*** field has been added in the list of options when clicking *Add New Field* and selecting *Type: Applicant* (if applicant form) or *Type: Employee* (if employee form).

- When this field is added to a custom form and the user completes and submits the form, once it is approved, it will update the Personal Email Address on the applicant's or employee's record.

In the Questionnaire setup, the ***Personal Email*** field has been added in the list of options when the user clicks *Add New Question* and selects *Type: Employee*.

- When this field is added to a questionnaire and the user completes and submits, it will update the personal email address on the employee's record.
  - The system currently does not support adding an applicant Type to a questionnaire.

PAYPRO
Workforce Management

Position Management

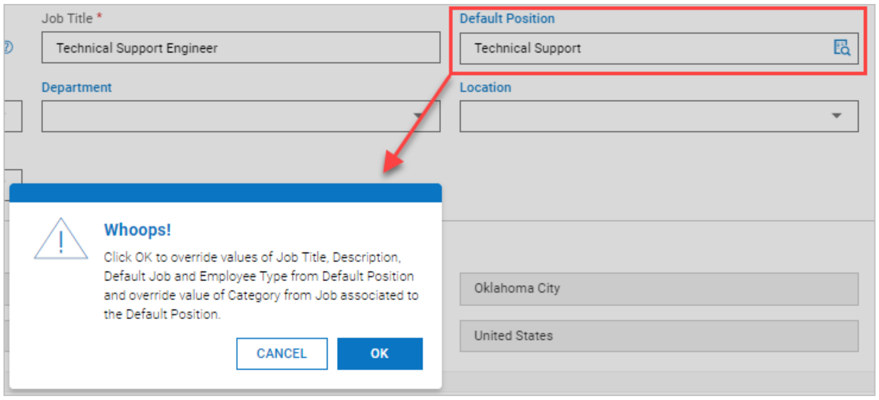
Delete Logic Added to Employee Position Assignment Import

WFR-195836: To help companies mass delete employee position assignment attributes, a new ***Is Deleted*** column has been added to the Employee Position Assignments import template. In this column, you can type Y to delete the assignment for the given row(s). Left blank, the system will assume a No answer.
Only an Assignment Number and Y are required to delete an existing assignment.

Position Management & Recruitment

Position Management Fields Added to Job Requisition Templates

WFR-170442, WFR-170444, WFR-170484, WFR-170447, WFR-170445, WFR-170499, WFR-193672: A new ***Default Position*** field has been added to Job Requisition Templates. This field will allow the template to pull in information from the Position entered and be applied to any Job Requisitions created from the Job Requisition Template.
A pop-up will inform users that any Job Title Description, Default Job and Employee Type from a Default Position will be overridden by the new Default Position selected. Adding a value to this field will override any previously copied information that was populated as a result of using the *Copy From Job Requisition* value.



Pre-Requisites

- Position Management enabled in the company
- Users must have security permissions to access, create or edit a Job Requisition Template.

Validations

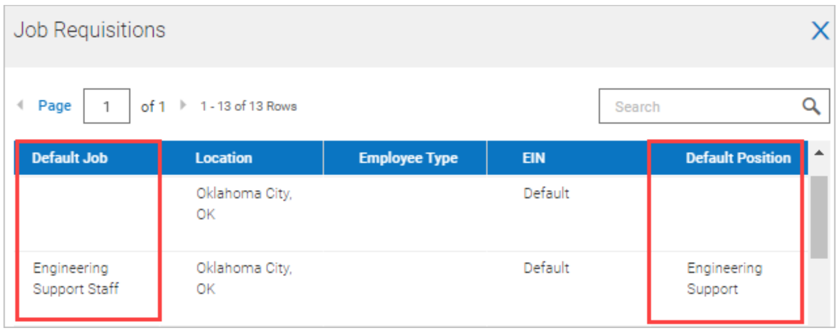
- If a Position is marked inactive and if the user edits the Job Requisition Template for that Position, the user will receive an ***The default position selected is invalid*** error message when saving.
- If the Position is deleted, the Position will be de-linked from the template and the Default Position fields will be blank.

Position Updates and Default Positions

- If certain fields within a Position are updated, the impacted fields in the associated templates will be automatically updated, whether active or inactive. These fields will be updated.
  - Default Job
  - Job Title
  - Description
  - Employee Type
  - Category #1

Copying From Job Requisitions – Position/Job Values Displayed

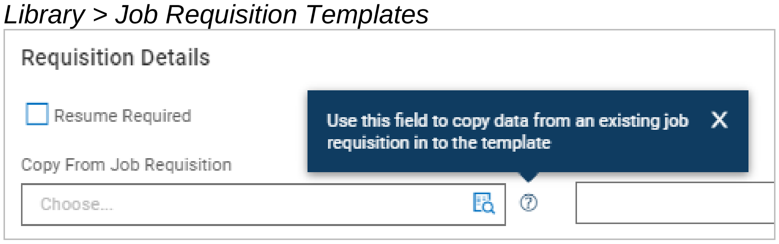
Within the Job Requisition Templates, you can copy data from an existing job requisition into the template. When Position Management is enabled, you will see the ***Default Job*** and ***Default Position*** columns displayed in the pop-up when selecting a value for this field. These values will display whether the Position is active or inactive.



Copying Behavior in Job Requisition Templates

Users can select a Job Requisition in the *Copy From Job Requisition* look up.

Access the option from *Company Settings > HR Setup > Applicant Tracking/Recruitment > Templates Library > Job Requisition Templates*



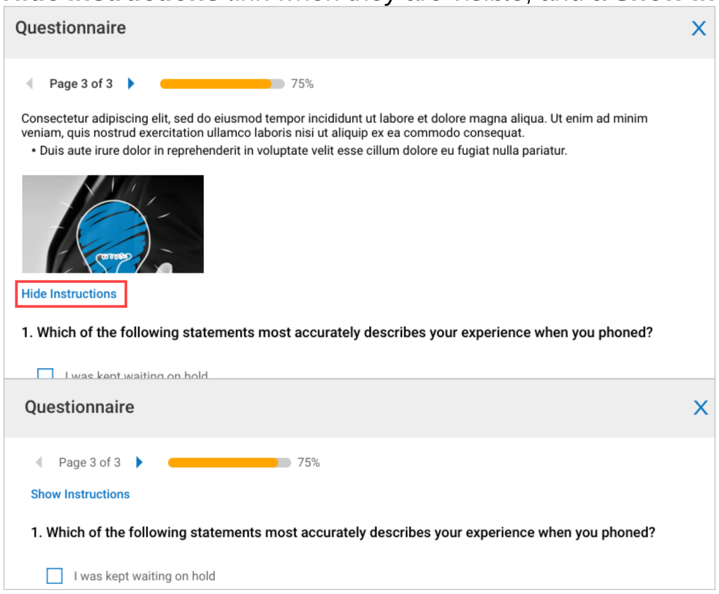
- *Copy From Job Requisition* will show all the requisitions (Active, Completed etc.)
- Once a Job Requisition is selected for the copy, all the fields in the template will be auto-populated with data from the Job Requisition selected.
- If the selected Job Requisition has a Position available in the Default Position field, the following 4 fields will be updated with the latest data from the Position (as defined in the specified position page) and the rest of the fields will be copied from selected Job Requisition:
  - Default Job
  - Job Title
  - Description (Updated from Position Description)
  - Employee Type

- Job Category #1 is updated from the Job.
  - All these fields will be read-only once the Position is selected. If the Position is cleared, the fields will be enabled for editing again.
- If the selected Job Requisition has no Position defined in the Default Position field, data is copied as-is from the requisition.
- If the Position in the Job Requisition is set as Inactive, an error message will be generated when saving.
  - Error message is: *Selected position is inactive. Please select a valid position*.
  - If a Position is being used in a Job Requisition, that Position cannot be deleted.

Questionnaires

Hide Instructions Option Added

WFR-177156: When end users are filling out questionnaires, they will now have the option to hide Instructions to gain more screen space. This option will allow the toggling on/off of the Instructions with a ***Hide Instructions*** link when they are visible, and a ***Show Instructions*** link when they are hidden.



Recruitment

Applicants: Forgotten Usernames

WFR-178068(EPIC) & WFR-184572, WFR-134542, WFR-184561, WFR-184558, WFR-184567, WFR-184563, WFR-184571, WFR-184569, WFR-184568, WFR-184564, WFR-188415, WFR-184566, WFR-184565, WFR-184562:
To help applicants retrieve forgotten usernames, a ***Forgot Username*** option will now display on the login page under the *Username* field. When selected, users will be presented a series of questions. Depending how they answer the questions, along with the information entered, will determine subsequent options. After selecting the link, the first screen displays the following fields.

- **Have you ever worked at (company name) before?** This will have ***Yes*** and ***No*** radio buttons. (Company name is pulled from Company DBA. If company DBA is blank, then it will use default EIN name.)
- **First Name** field
- **Last Name** field

Yes Response

Drop-down will display an *Identity Question* and will include:

- Date of Birth –or-
- SSN/Primary National ID (Full) or last 5 digits

These screens will include *Continue* & *Back to Account Login* options

If system can identify applicant, options expand to include:

- Prior Password
- Email (primary, secondary, personal
- Phone (work, home, cell)
- Employee ID
- Termination/Hire Dates
- Security Question/Answer (if configured)

Applicant selects *Continue* and system cannot validate – Message is generated directing user to reach out to the company for assistance.

Applicant selects *Continue* and system can validate – Message is generated with a list of options user can select to receive their username (typically email or phone.)

The username will be sent to Personal Email (if on file), Primary Email (if on file and is not a duplicate of Personal Email), Secondary Email (if on file and is not a duplicate of Personal or Primary Email), Cell Phone (if company has SMS turned on and user has a cell phone on file).

User makes selection, selects *Submit*.
System confirms Username was sent with instructions for logging in.

User Logs in to account

No Response

Email field displays.

User enters email and selects *Continue*

These screens will include *Continue* & *Back to Account Login* options

If system recognizes the email as an Active employee, error message generated informing user to contact system administrator.

If system validates the email as a former applicant, a list of options displays and user selects one option to send the Username to, usually email or phone.
Additional messaging states if they do not have access or do not receive a response, to reach out to the company for assistance.

User makes selection, selects *Submit*.
System confirms Username was sent with instructions for logging in.

User Logs in to account

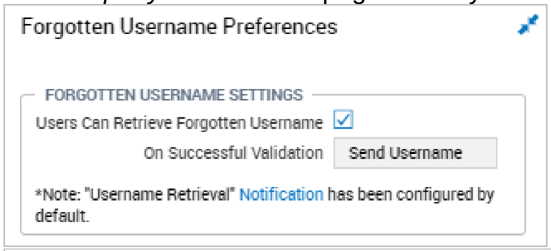
Notification Sent to Applicants

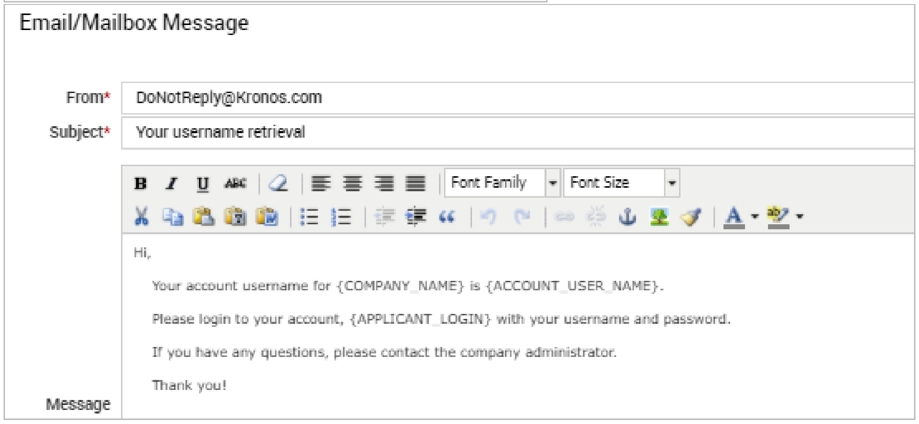
Upon selecting the *Submit* button, if the system can identify and validate the user in the company database, the system will send the user an email notification that includes their username and instructions for logging in. By default, only email will be used to send the notification. If you want to include SMS notifications, you will need to enable the SMS Integration with Twilio Marketplace product and set up an account with Twilio, which may involve additional fees.

Enabling Configuration of Forgotten Username Preferences

A new ***Forgotten Username Preferences*** widget has been added to the *Configuration* page for Recruitment. In this widget, administrators can enable the above process which will add the Forgot Username links for applicants on the log in page. This widget will not be added to the page by default but can be added using the *Edit Tabs* link.

Upon enabling the option, the *Username Retrieval* notification will be created. A hyperlink will take you to the *Company Notifications* page where you can view or edit the notification.





Job Requisitions: New Font Added

WFR-186690: In the text editor of Job Requisitions, the Roboto family of fonts have been added.

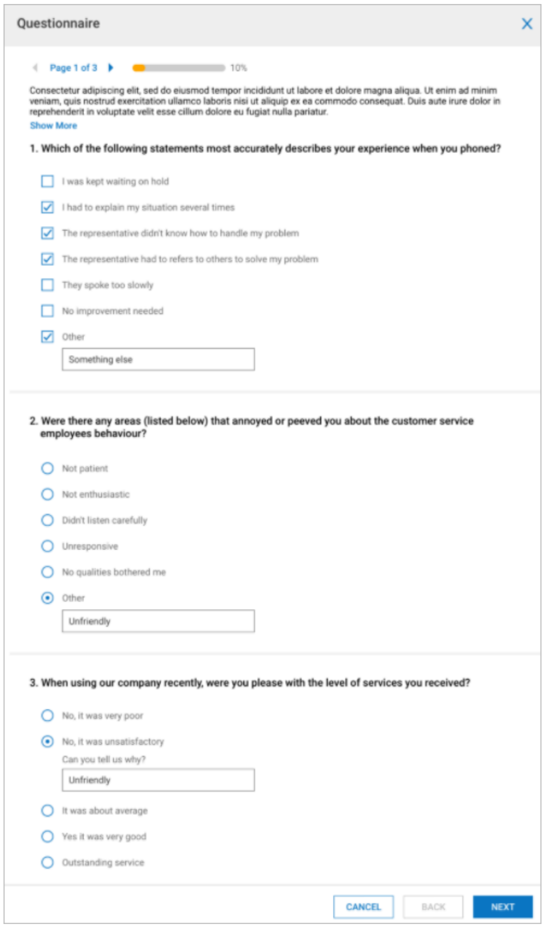
Job Requisitions Template Report – New Columns Added

WFR-170446: When Position Management is enabled in your company, the following columns will be available to be added to the Job Requisitions Template report page, located under *Company Settings* > *HR Setup* > *Applicant Tracking/Recruitment* > *Templates Library* > *Job Requisition Templates*. Additionally, the ***Jobs (HR)*** column has been renamed to ***Default Job***.

- **Job Requisition Template: Default Position** – the information in the column will be in the form of a clickable link in the desktop version; not currently available for mobile.
- **Job Requisition Template: Position Id** – the information in the column will be in the form of a clickable link in the desktop version; not currently available for mobile.
- **Job Requisition Template: Position Abbreviation**

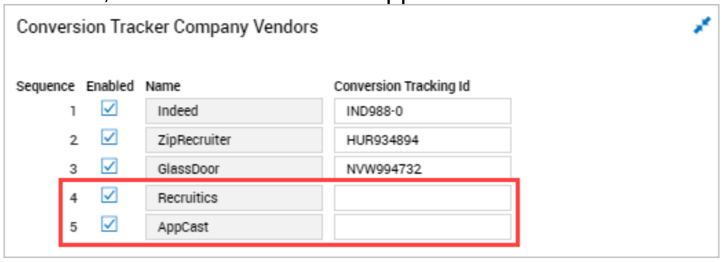
Quick Apply: Questionnaire Pop-Up Updated

WFR-173190: The Questionnaire that Quick Apply Applicants use has been updated to correspond with the standard format used throughout the application. A Page link and status bar will appear at the top, and the buttons have been updated for both single and multi-page questionnaires.



Vendors Added to Conversion Tracker Company Vendors Widget

WFR-189524: The system is now updated to work with Recruitment vendors ***Recruitics*** and ***AppCast***. On the Applicant Tracking/Recruitment Configuration page, under Conversion Tracker Company Vendors, two new checkboxes appear so that users can select these vendors.



Conversion Tracker Company Vendors

Sequence	Enabled	Name	Conversion Tracking Id
1	☑	Indeed	IND988-0
2	☑	ZipRecruiter	HUR934894
3	☑	GlassDoor	NVW994732
4	☑	Recruitics	
5	☑	AppCast	

Signature Settings

Form I9 Wet Signature & Biometric Signature Support

WFR-169191, WFR-191548: Users can now “wet sign” the I9 Form document in cases where an actual written signature is required. A **Form I9** checkbox can be selected in the *Wet Signature* section of the

Signature Settings widget (*Company Settings* > *Global Setup* > *Company Setup*) to enable this functionality.

Wet signature displays within the Download and Print functions.

- If Biometrics is configured, the user is prompted for the biometrics entry, but can access the Wet Signature option if needed.
- If Wet Signature and Biometrics are not configured, the form is signed with the standard signature type.
- If Wet Signature is configured and biometrics is not configured, the user does not have the availability to sign the form with the standard signature type, as Wet Signature will substitute for the functionality of standard signature type.

When the user adds a signature, selects *Clear Signature* and then selects *I Agree*, a red frame in the signature field is displayed and the user cannot proceed.
When an I9 form is signed with a Wet Signature, the audit reports will show **Wet** under Signature Type.

Biometrics Signature

WFR-172218: Users can now sign with biometrics on their mobile devices using either their face or Touch ID.

Pre-Requisites

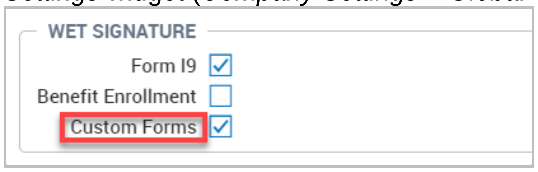
- *Company Settings* > *Global Setup* > *Company Setup* > *Global Policies* > *Employee Signature Uses* with the *If possible: use Biometric (mobile) signature* option is selected.
- Employee has enabled e-signature within My Profile - Biometrics widget. Unchecked by default.

Using Biometric Signatures

1. The employee user can proceed with signing the I9 Form by selecting the *Submit I9* button in both enabled and disabled Biometrics widget flows.
2. In an enabled flow, the employee user is presented with a biometrics message.
3. In a disabled flow, the employee user can opt-out and enter their company configured signature.
4. The manager can sign their part of the I9 form by selecting the *Save and Verify* button in both enabled and disabled Biometrics widget flows.
5. Biometrics authentication will be shown only when the user has the option enabled in their Biometrics widget in their employee profile.
6. A Success inline message will be shown if the form is successfully signed; the signature will be populated in the I9 signature field.
7. The Failed message will be shown if the signature is unsuccessful; limits for Touch Id: Android - 5 tries, iOS - 3 tries; Face Id - no limits.
8. Audit Reports are properly updated on the successful signing of an I9 form.
9. FaceID and Touch ID is supported for iOS phones. Android phones will revert to TouchID only, even if the phone supports FaceID.

Custom Forms Wet Signature Support

WFR-171025: Users can now “wet sign” Custom Forms in cases where an actual written signature is required. A **Custom Forms** checkbox can be selected in the *Wet Signature* section of the *Signature Settings* widget (*Company Settings > Global Setup > Company Setup*) to enable this functionality.



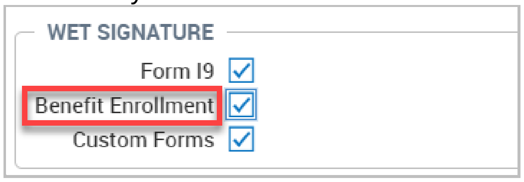
Wet Signature displays within the Signature section of the Custom Form, and users can use Wet Signature for the signing of the Custom Form. Wet Signature is displayed within the Download and Print functions.
When a Custom Form is signed with a Wet Signature, the audit reports will show **Wet** under Signature Type.

- If Biometrics is configured, the user is prompted for the biometrics entry, but can access wet signature option if needed.
- If Wet Signature is not configured and Biometrics is not configured, the form is signed with the standard signature type.
- If Wet Signature is configured and Biometrics is not configured, the user does not have the availability to sign the form with the standard signature type, as Wet Signature should substitute for the functionality of the standard signature type.

When a user enters his/her signature, chooses *Clear Signature* and then selects *I Agree*, a red frame in the Signature field is displayed and the user cannot proceed.
NOTE: This functionality excludes Applicant Custom Forms.

Benefit Enrollment Wet Signature Support

WFR-193118: Users can now “wet sign” a Benefit Enrollment form in cases where an actual written signature is required. A **Benefit Enrollment** checkbox can be selected in the *Wet Signature* section of the *Signature Settings* widget (*Company Settings > Global Setup > Company Setup*) to enable this functionality.



Wet signature is displayed on a Printed/Downloaded enrollment document after it is signed.
Admins can configure Benefit Enrollment within the Signature Settings widget under *Company Settings > Company Setup > Global Policies*. Users can use Wet Signature to sign a Benefit Enrollment request (*Confirm & Submit* step and *Modify* step). If a user does not have permissions for MSS, the e-signature audit report will show the text **Benefit Enrollment** in the *Signature Details* column.
When Benefit Enrollment is signed, the audit reports will show **Wet** under Signature Type.

- If Biometrics is configured, the user is prompted for the biometrics entry but can access the Wet Signature option if needed.

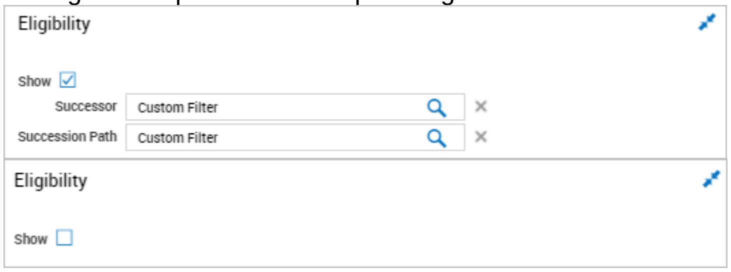
- If Wet Signature is not configured and Biometrics is not configured, the request is signed with the standard signature type.
- If Wet Signature is configured and Biometrics is not configured, the user does not have the possibility to sign the Benefit Enrollment with the standard signature type, as Wet Signature substitutes for the functionality of standard signature type.

When a user enters his/her signature, chooses *Clear Signature* and then selects *I Agree*, the signature field frame becomes red and the user cannot proceed.

Succession Management

Option to Hide/Show Eligibility Fields in Succession Plans

WFR-51713: A ***Show*** checkbox has been added to the *Eligibility* widget in Succession Plans. This checkbox will default to show the *Successor* and *Succession Path* fields. Uncheck to the checkbox to hide the options. For example, you may not want to use these fields but do want to use the rest of settings in the plan for career planning.



Trainings/Certifications

Adding Employees to Groups When Adding Trainings/Certifications

WFR-152660: When adding trainings and certifications to multiple employees at the same time, the Company Groups option will now be available when using the employee filter after selecting *Add New > Employee(s) Drop-Down > Browse*. If the user does not have access to all the employees in the group, a message will be generated showing how many employees were not included and why. Company Profiles and the Advanced Filter are also available for selecting employees. This is done under *Team > Learning > Trainings/Certifications*.

Workflows

Generate Notification Step: Specific Email Address Added to Other HR Workflows

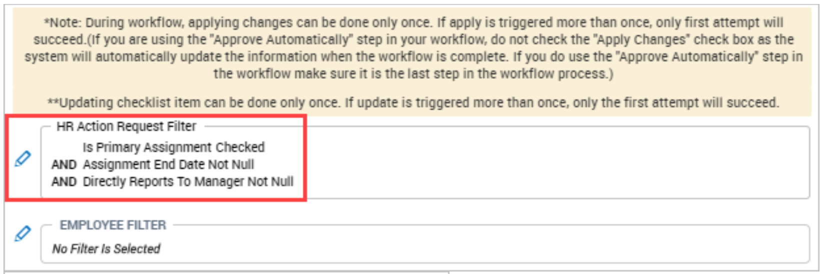
WFR-45789: Previously, the ability to select a specific email and enter the email address in the *Notification To* option inside the *Generate Notification* step of a workflow existed only in the Benefit Change Request workflow. This option is now available in all workflows. :

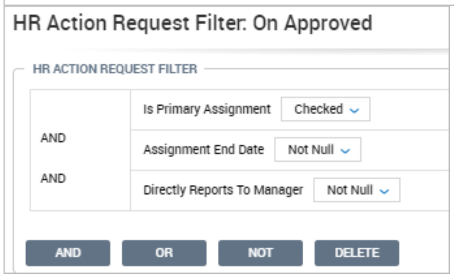
Position & Base Compensation Fields Added to HR Action Request Filter

WFR-187469 & WFR-187479: Administrators who oversee users with access to enter Position Assignment information into HR Actions will now have filters available within HR Action Request workflows. These filters can be used to route the workflow a particular way if the users forget to fill in a field or fill in a field they are not supposed to resulting in only properly completed requests moving through the approval process.
The following filters have been added to HR Action Request workflows for the *Start/On Created* and *Approve/Reject* (On Approved, On Modified, and On Rejected) steps.

Position Fields

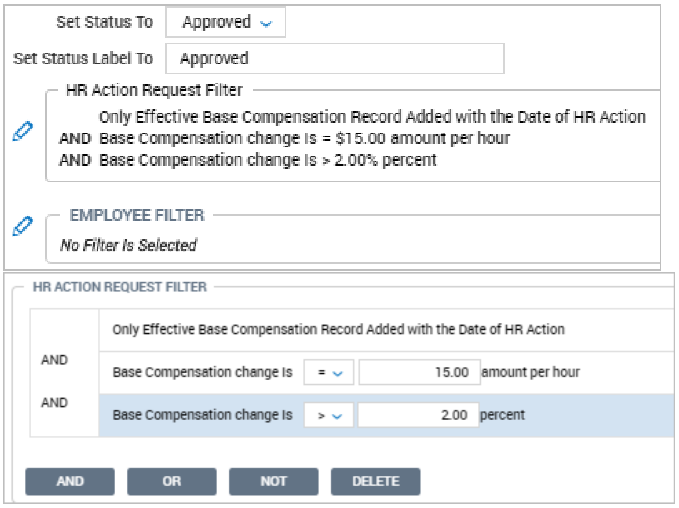
- **Position Directly Reports To Manager** (Options to select Null or Not Null)
- **Position Assignment End Date** (Options to select Null or Not Null)
- **Position Assignment is Primary** (Options to select Checked or Unchecked)





Base Compensation Fields

- **Only Effective Base Compensation Record Added with the Date of HR Action** – will ensure that the Base Compensation effective date is the same date as the effective date of the HR Action itself.
- **Base Compensation** – will trigger if a change is made to any Base Compensation record that meets the criteria specified in the filter (this includes historical records)
- **Base Compensation Percent Change** – will trigger if a change is made to any Base Compensation record that meets the criteria specified in the filter (this includes historical records)


Set Status To
Approved
Set Status Label To
Approved
HR Action Request Filter
Only Effective Base Compensation Record Added with the Date of HR Action
AND Base Compensation change Is = $15.00 amount per hour
AND Base Compensation change Is > 2.00% percent
EMPLOYEE FILTER
No Filter Is Selected
HR ACTION REQUEST FILTER
Only Effective Base Compensation Record Added with the Date of HR Action
AND
Base Compensation change Is
=
15.00
amount per hour
AND
Base Compensation change Is
>
2.00
percent
AND
OR
NOT
DELETE

Bug Fixes

The following issues have been resolved with this release.

Applicant Profile: Ethnicity field didn’t enforce configuration as required

WFR-177382: When an Applicant Profile is configured to include *Ethnicity* as a required field, applicants who don't complete the *Ethnicity* field now see an error message explaining that the field is required. Previously, applicants did not see the error message and could continue without completing the required field.

Benefits: Error occurred when adding more than 24 list items

WFR-181951: On the *Custom Field Property* page for Benefit Plans, users can enter more than 24 list items and save as expected. Previously, when users entered more than 24 list items, an error sometimes occurred.

Benefits: Warning message meant for Benefits profile displayed for LOA profile

WFR-193838: On the *Edit Employee* page, when users edit the employee's Leave Of Absence profile, the system does not display the warning message *The Benefit Profile has been changed. Click here to access the enrollment override widget to adjust enrollment dates if needed.* Previously, the system did display this warning message, which should have displayed only when the Benefit profile was edited.

Benefit Enrollments: Could not print when employee had long confirmation list

WFR-147638: In *Employee Information*, printing an employee's Benefit Enrollment confirmations when the printed output would equal 10 pages or more resulted in a *404 Error*. This is fixed, and these longer printouts now print as expected.

Benefit Enrollments: Contact Type had no default selection

WFR-160842: On the *Account Contacts* page, when users add a new contact, the *Dependent* checkbox under *Contact Type* is selected by default, as expected. Previously, no checkbox under *Contact Type* was selected by default.

Benefit Enrollments: Employee could not begin enrollment

WFR-195821: When employees started their benefit enrollment and the system was configured to automatically add two benefit plans with the same earning or deduction code, the system gave an error and would not allow enrollment to begin. This is fixed, and employees can now enroll in benefits configured in this way without receiving an error.

Benefit Plans: Could not download Benefit Plan

WFR-175975: When users downloaded one Benefit Plan that was not completely configured in a single download or with a group of downloads (via *Download All*), the system would freeze and not complete the downloads. This is fixed, and users can now download incomplete Benefit Plans.

Checklists: Employee information action request disappeared from checklist

WFR-193209: On an employee record's *Checklist* page, users can edit an employee information action request in a checklist as expected. Previously, when users edited this type of action request, it disappeared from the checklist.

Checklists: Checklist widget numbers were slightly off

WFR-194716: On the *Edit Employee* page's *HR* tab, the *Checklist* widget now displays the correct numbers of checklists for *Open* and *All*. Previously, these numbers sometimes were slightly inaccurate.

Checklists: Hyperlink Within System didn’t work for two types

WFR-196327: On the *Checklists* page, when users create a new checklist, select *Add Item*, select *Hyperlink Within System*, and select *1095-C (Government Forms)* or *Employee Roster (HR Maintenance)*, the system adds those links as expected. Previously, for these two link types, the system left the *Link* field blank.

Compensation Management: Incorrect rounding caused HR Action error

WFR-193254: When a percentage-based merit increase was applied to an employee through *Compensation Management*, the calculated base compensation record was not rounded properly based on the *Round Base Compensation Hourly Rate* setting in *Global Policies*, which then caused the error *Information of at least one base compensation is invalid* in HR Actions that included Base Compensation. This is fixed and rounding now adheres to the setting in *Global Polices* so that the HR Actions complete without error.

Contracts: Field placeholder text didn’t include ideal French translation

WFR-200751: For French users, on the *Add New Contract* page, the placeholder text in each field now includes a correct French translation: *Entrez les heures* or *Entrez le montant*.

Custom Forms: Users couldn’t see Supporting Document in a Custom Form

WFR-172729: In Employee Self Service, when a Custom Form includes a Supporting Document, users who have the correct permissions can see the Supporting Document as expected. Previously, users with some permissions configurations were incorrectly prevented from seeing the Supporting Document.

Custom Forms: Australian currency format displayed incorrectly in PDF

WFR-189201: For users with the Australian locale and currency, when Custom Fields of Type: Currency are created, PDF downloads that include the field display the currency in the expected format configured for the locale. Previously, the PDF sometimes displayed the currency in an incorrect format.

Dashboard: Start widget drop-downs didn’t work on some iPads

WFR-181219: When using the Mobile App on some Apple iPads, the dashboard *Start* widget drop-downs did not open correctly. This is fixed, and the drop-downs now function as expected.

Employee Information: Error occurred when sorting Categories column

WFR-183108: On an employee record's *Pay Information* page, clicking in the *Default Jobs* field and then clicking to sort the *Browse and Select Jobs* window's *Categories* column sometimes resulted in an *Internal System Error*. This is fixed, and users can now sort the column as expected.

Employee Information: Hours miscalculated for Current Compensation

WFR-186248: In an employee profile with *New Look* toggled On, the system sometimes displayed a slightly different calculation for the Pay Period hours under *Current Compensation* than appeared in the *Hours* column. This is fixed, and these calculations now match exactly, as expected.

Employee Information: Print Settings items weren't translated to French

WFR-189394: For French language users, previously untranslated items on the *Print Settings* page's *Cost Centers* and *Annual Compensation Graph* areas are now translated to French.

Employee Information: Cost Center items in list and not in list were the same

WFR-192103: On the New UI *Employee Information* page, when users edit Cost Centers, the items in the *List Items* column and the *Items not in List* column correctly display the items that are or are not in the list. Previously, *List Items* and *Items not in List* were displaying the same items.

General: I9 Instructions link was outdated

WFR-187501: On the *Form I9* page, when users clicked *View Instructions*, the system opened an outdated link for the form instructions on the uscis.gov site. This is fixed, and the system now opens the current link to the instructions.

HR Actions: Edit icon was missing for step in HR Action Request workflow

WFR-150685: On the *HR Action Requests* page, when users clicked the Edit Workflow button, the Edit icon was sometimes missing from a step in an active workflow. This is fixed, and the Edit icon now displays on all steps, as expected.

HR Actions: Deletion confirmation message in French was incorrect

WFR-191026: For French users, the confirmation message when deleting an HR Action did not use the ideal French translation. The message is now fixed to read: *Supprimer la demande d'action des RH? Impossible d'annuler cette action. Voulez-vous vraiment supprimer cette demande d'action des RH?*

HR Actions: Assigning an employee ID that existed in another EIN wasn't allowed

WFR-196046: When users in a multi-EIN company use an HR Action with a manual approve step to hire an employee, the system now allows the new employee to have an employee ID that is also used in another EIN. Previously, the system didn't allow hiring an employee in this way if the employee ID already existed in another EIN.

HR Setup: Employee Age was updated according to UTC time zone

WFR-184362: In some cases, the *Employee Age* field in an employee record was being updated when the employee's birthdate arrived in the UTC time zone, not in the local time zone. This is fixed, and the system now updates the age for these employees according to the local time zone.

Imports: More than one Effective Pay Grade displayed after import

WFR-182252: After users imported pay grades, the *Pay Grade* page (*Company Settings > HR Setup > Pay Grades > Pay Grade*) sometimes displayed multiple Effective Pay Grades when only one Effective Pay Grade was imported. This is fixed, and the correct number of Effective Pay Grades now displays after the import.

Imports: Error occurred when importing Automatic Pay Grade Step

WFR-184503: When users performed an Automatic Pay Grade Step import (*Company Settings > Imports > HR > Company Setup > Automatic Pay Grade Steps*), the system gave an error if the import template included more than one pay grade at a time. This is fixed, and users can now import multiple pay grades in a single import template as long as none of the pay grade steps have the same rate.

Manual Hire: Sort order of lookup lists was incorrect

WFR-190279: In the New UI, when users manually hire an employee, the *New Employee* page now displays Account Extra Field lookup list items in the configured sort order, as expected. Previously, these lookup list items were sometimes in the incorrect sort order.

Performance Management: Korean characters did not display correctly

WFR-179271: On the *Performance Core Values* page, if users entered Korean language characters into the *Core Values* column, the characters displayed as question marks. This is fixed, and the *Core Values* column now displays Korean characters as expected.

Performance Management: Translation of Check was not ideal

WFR-199724: In the *To Do* and *Workflow* areas, the word *Check* now has an improved translation of *Vérifier* for French and French Canadian languages.

Performance Management: Error with Performance Review Report columns

WFR-200227: On the *Performance Review Report*, including the columns *Employee: Hourly Pay* and *Employee: Base Compensation From* sometimes resulted in a *Difficulty retrieving data* error. This is fixed, and the report can now be viewed with these columns included.

Performance Reviews: Audit list was unordered

WFR-138898: On a Performance Review's *Info* tab, the *Audit* section now displays items in chronological order, as expected. Previously, the items were not ordered correctly.

Performance Reviews: Clicking Notes icon did not display notes

WFR-151621: In a Performance Review's *Employee Sign* step, clicking the *Notes* icon sometimes displayed the message *No notes to display*, even when notes should have displayed. This is fixed, and users can now access notes from the *Employee Sign* step.

Performance Reviews: Clicking Sign As Employee caused error

WFR-191161: When employees accessed their Performance Reviews by navigating from a To Do item, clicking the Summary tab, and clicking Sign As Employee, they received a *Security Violation* error. This is now fixed, and employees can sign their reviews via these steps.

Position Control: Employee Assignments report displayed more than one employee

WFR-194936: In one employee's *Employee Profile* with *New Look* toggled On, clicking *View Report* for a position under *Assignments To Position* opens the *Employee Assignments* report filtered to display items for only the one employee. Previously, the *Employee Assignments* report opened without filtering, and displayed items for multiple employees.

Recruitment: Resume Received numbers did not match on Dashboard and report

WFR-182231: In some cases, the Dashboard *Recruitment* widget displayed a different number for *Resume Received* than was displayed on the *Job Application* report. This is fixed, and these numbers now match as expected.

Recruitment: API document was missing some fields

WFR-189819: The system's API documentation is now updated to include fields from segments such as *professional_reference* and *education/schools/school*. Previously, these fields were not yet in the API documentation.

Recruitment: Some users couldn’t view Applicant Information

WFR-197616: When clicking to view *Applicant Information* pages, some users received the error *The application is unable to process your request. Please try again later.* This is fixed, and these users can now view the pages as expected.

Recruitment: Users without View Job Requisition permission couldn't edit job application

WFR-198091: Hiring managers can now edit job applications that are visible to them even when they do not have the *View Job Requisition* permission. Previously, not having this permission incorrectly prevented some users from editing some job applications.

Recruitment: From address sometimes caused error

WFR-200210: On the *Applicants* page, when users click *Communicate*, enter a *From* address with the format *Text Text <text@text.com>*, and click *Send*, the system sends the communication as expected. Previously, *From* addresses in this format caused the error *From has invalid format*.

Reports: Issue with viewing timesheets and time off en masse

WFR-200397: In .HCM, the capability to view timesheets and time off en masse is no longer available on the *Team Members* page and in the *My Team* widget, but this capability is still available in the mobile app.

Copyright

When using and applying the information generated by SaaShr products, customers should ensure that they comply with the applicable requirements of federal and state law, such as the Fair Labor Standards Act. Nothing in this Guide shall be construed as an assurance or guaranty that SaaShr products comply with any such laws.

Published by SaaShr / A Kronos Company