HR Release Notes

June 2021
R75

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

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R75 HR Release Notes

This document contains detailed descriptions of release notes for the specified release, as well as explanations of bug fixes.

Release Dates

A System Release will take place on the following dates and times for the following servers. System downtime for each respective release can be expected during the maintenance windows:

- **EU Server:** June 14, 2021 at 11:00pm – 3:30am BST
- **POD 60:** June 15, 2021 at 11:30pm – 4:00am EDT
- **U.S. Server POD2:** June 16, 2021 at 11:30pm – 4:00am EDT
- **U.S. Server POD5:** June 23, 2021 at 11:30pm – 4:00am EDT
- **U.S. Server POD4:** June 23, 2021 at 11:30pm – 4:00am EDT
- **U.S. Server POD3:** June 24, 2021 at 11:30pm – 4:00am EDT
- **AUS Server:** June 24, 2021 at 12:00am – 4:30am AEST
- **U.S. Server POD6:** June 24, 2021 at 11:30pm – 4:00am EDT

Supported Operating Systems and Browsers

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

Note: All of these operating systems and browsers are supported, but some may not be actively tested.

Platform	OS Version
Desktop	
Windows	10
Mac	10.13.4 (High Sierra)
Mobile	
iOS	11.4.1 -> latest
Android	6.0.1-> latest

Browser	Version
Microsoft Edge	latest
Google Chrome	latest
Mozilla Firefox	latest
Safari	latest

Hot Features in This Release

Social Security Number Verification Service (SSNVS) is Back!

Only for United States: SSNVS is only available for U.S. users.

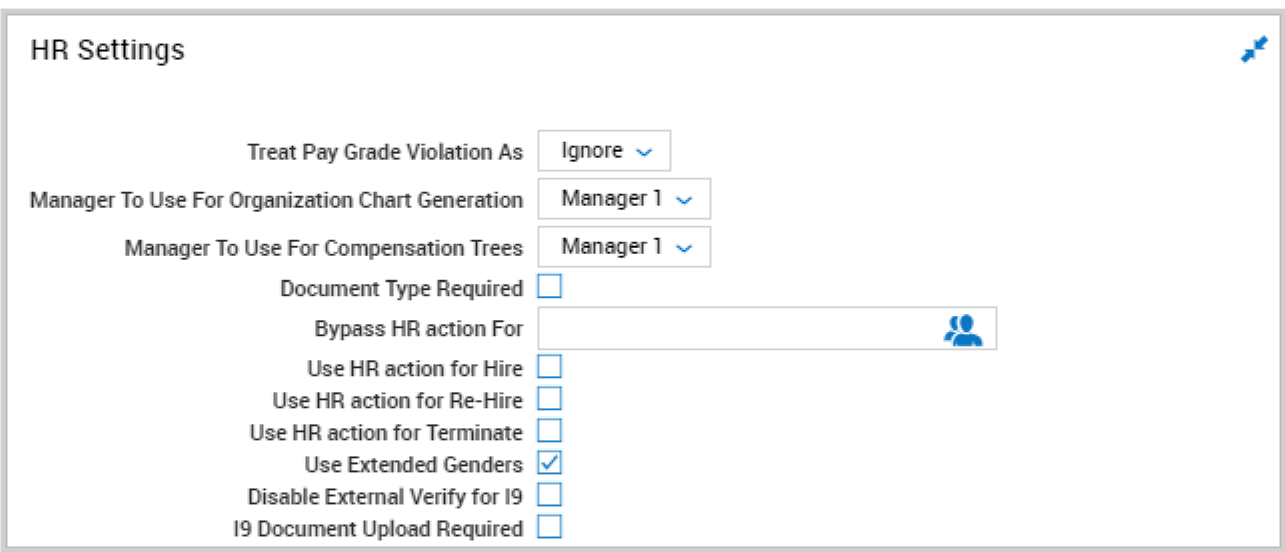
WFR-206152: We are happy to announce the return of the **Social Security # Verification** button and functionality for those companies who have the SSNVS marketplace product enabled. The button can be found in the following areas of the product:

- Employee Information: Manual Hire Page
- I9 Form: Team > HR > Forms > Government Forms > I9s

Gender Inclusion

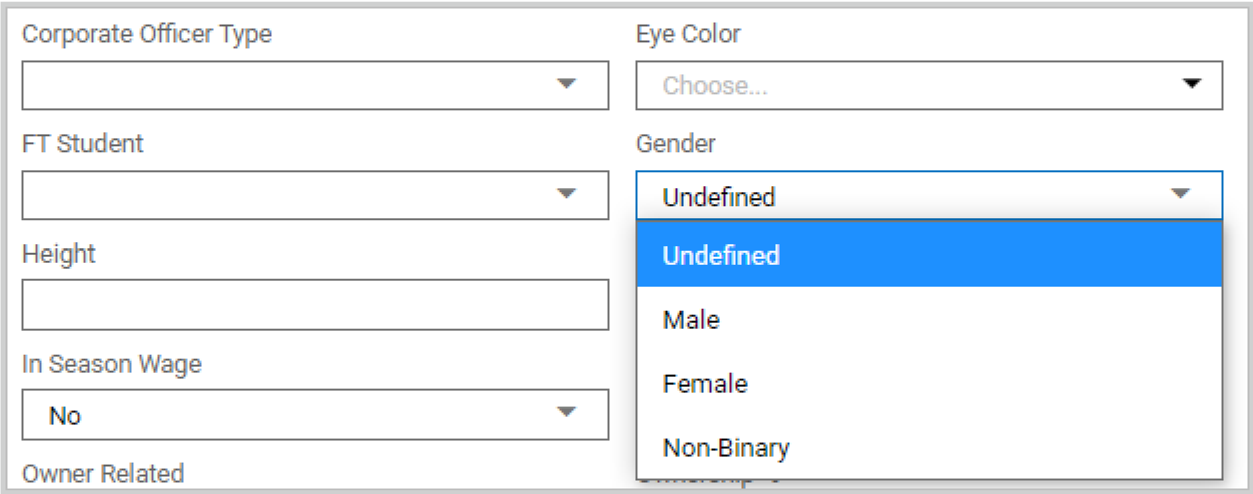
Non-Binary Gender Option Added to System

EPIC WFR-226699: To provide more options for gender inclusion, the system will now provide a new Non-Binary/X option. The **Use Extended Genders** setting is available in Company Setup, located in the **HR Settings** widget under **Company Settings > Global Setup > Company** Setup.



Note: This setting will be checked by default for all U.S. Pods, as 20+ states have regulations recognizing gender Non-binary/X . For EU and Australian Pods, the setting will be unchecked by default since not as many countries/territories, etc. have this regulation in place.

When the setting is checked, a **Non-Binary** option will display in the list of options under the **Gender** drop-down in the **Account Demographics** widget of employee profiles.



The gender code for Non-Binary will be **X**. Current codes: Undefined = U, Male = M, and Female = F. This code will display in the **Gender** column of reports where the column is available and added. The new gender option will also be available for PDFs.

Once this option has been selected for at least one employee, the option in Company Setup cannot be turned off (unchecked). An error message will display informing the user why the option cannot be turned off. The setting will be checked by default for all companies and all EINs.

Opting Out

For companies who choose not use this option, or may have religious exemptions, or are simply not required to provide this option per the laws of their state, they may uncheck this setting. Opting out will hide the option from selection and reporting. The Undefined option will still be available.

HR Actions

HR Actions will recognize the **X/Non-Binary** gender code so users will not have to update employees manually as they are hired or processed. Assuming the **Use Extended Genders** setting is enabled in Company Setup, the following can be expected.

- HR Action Sub Type = Hire, Re-Hire, or Regular: The **Gender** drop-down will include the **Non-Binary** option.

Note: The Manual Hire Process will include the Non-Binary option in the Gender drop-down field.

Employees Import

The Employees Import template is updated for the use of the X gender code. This affects the XLS, XLSX, and XML options. Assuming the **Use Extended Genders** setting is enabled in Company Setup, the following can be expected. If this field has not been enabled, using Gender X will result in processing the import and then present users with a warning that Gender X is invalid for the employee(s).

- The Instructions tab is updated in the Description of the Gender row. Valid values include: M, F, U, or X.

- The Template tab will validate the values and recognize X as a valid option.

Company Settings Import

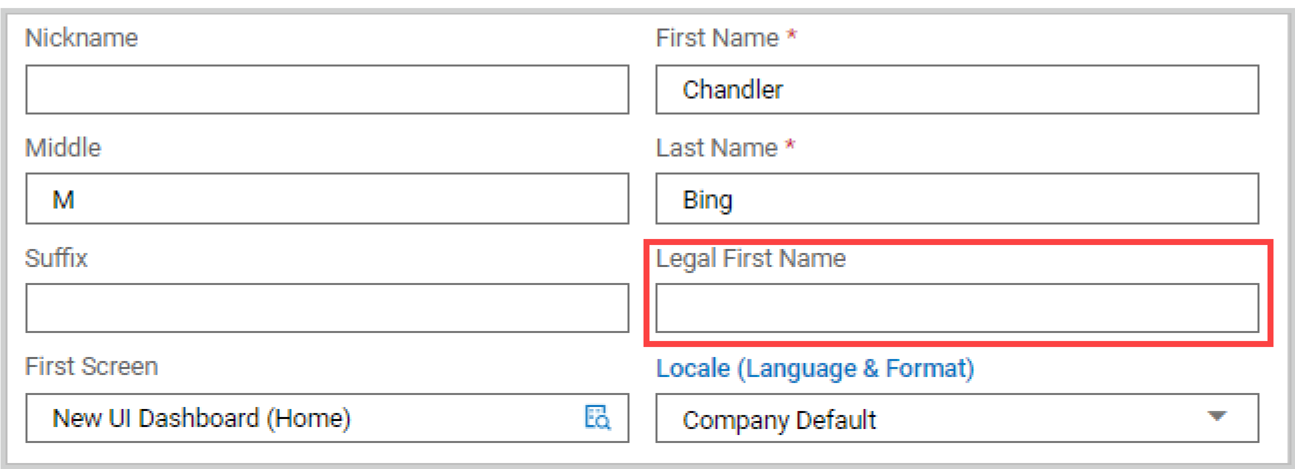
The Company Settings Import template is updated with field name **Use Extended Genders** which allows you to determine via import if the non-binary gender option is available. This field has been added to the HR Settings section of the Instruction tab of the template. The column is not a default column in the Template tab and must be added. Y and N are valid values to determine if the setting will be enabled or not. If the value is not specified or is invalid, the system does not change the value in the company. If at least one employee in the company is listed as Gender X/Non-Binary and the value in the column is N, the value is not processed and an error displays.

Legal First Name Option Added to System

Important: In this release, the **Legal First Name** field will not be available if the Payroll sub-system is enabled. This field is coming to Payroll companies in a future release.

In addition to offering the Non-Binary option for gender identity, a new **Legal First Name** field has been added to employee profiles. Employees' preferred name can be added to the **First Name** field and their legal first name can be added to the new field, as there are still cases and places in the system where their legal first name must be used. This will allow employees to be addressed by their preferred name when the legal name is not required.

The field is located in the **Account Information** widget between the Suffix and First Screen fields.



- **Security**: A new checkbox for **Legal First Name** is available in the **View/Edit (Custom)** permission for the **Account/Personal Information** setting in security profiles, located in the **Employee** section of the **HR** tab. Users will select the Permissions button to open a pop-up. An Info icon displays a message that Legal First Name will be displayed on legal documents such as pay statements, withholding forms, year-end tax forms. View and Edit options are available on this pop-up.

  This permission is also available in the **Employee** section under the **ESS** tab for employees who are allowed to view and/or edit their employee profiles.

> **Note:** For companies with the Payroll sub-system enabled, the security fields will be temporarily unavailable and grayed out until a future release.

- **HR Actions**: HR Actions can contain the **Legal First Name** field so users will not have to update employees manually as they are hired or processed. Assuming the **Legal First Name** permission is enabled (View or View/Edit) in the security profiles, the following can be expected.

  HR Action Sub Type = Hire, Re-Hire, or Regular: The **Legal First Name** field will display and can be used.

  > **Note:** For the Legal First Name field to be available in the Manual Hire process, the security permission must also be enabled.

- **Custom Forms**: When selecting **Type: Employee** in a custom form page, **Legal First Name** will be available as an option from the drop-down. For this to be available, users must have security permission to the Legal First Name field. Users without this permission will not see it in the drop-down, and users without permission will not see the field in the form.

- **Reports**: The **Legal First Name** column can be added as a column to the Employee Information report and other employee related reports. The column is not displayed by default and must be added.

- **I9 Forms**: If a **Legal First Name** has been specified, the system will use this name over the preferred name listed in the First Name field. This will also apply when using E-Verify.

- **W4 Withholding Forms**: For companies without the Payroll sub-system enabled, if a **Legal First Name** has been specified, the system will use this name over the preferred name listed in the First Name field. Existing forms will not be updated but can be manually edited. This impacts all withholding forms, both federal and state. Security Permissions for Legal First Name do not affect visibility of Legal First Name in Withholding Forms.

- **New Hire Reporting**: If using Legal First Name along with First Name in employee records, the Legal First Name will be used in system Data Exports (Company Settings >System Data Export > Data Exports). This will be available for the New Hire Reporting exports for all states, including the Generic Version, the Faxable Version, and SSNVS.

- **Employees Import**: The Legal First Name field has been added to the XLS and XLSX versions of the Employees import template. The field is explained in the Basic Employee Information section of the Instructions tab. On the Template tab, the field is located between the First Name and Last Name fields.

- **Employee Profiles**: The Legal First Name field, if used, will be included in the Employee Profile PDF.

- **Other areas affected by Legal First Name field**:

  Group Permissions: new field included

GDPR requirement met

Language localization supported

Available in mobile app

NOT available for the Applicant Profile page: only available for hired employees

Audit Reports support new field: Account Info report (located at My Reports > System Reports > Audit Trail), and Master Data Changes report (located at System Reports > Audit Trail)

Search: Users with permission to view and use Legal First Name fields will be able to use Search to locate employees by their legal first name. Users without this permission will not be presented the results.

🔥 Job Applications PDF Download

EPIC WFR-203730: Recruiters and managers can now view and download job applications in PDF, including questions/answers and applicant signatures. This option is located under **Team > Recruitment > Candidates > Job Applications** in the **Quick Actions** menu, under the **More Actions** drop-down. Applicants will also have the ability to download their complete job application in its entirety, including their job related questions and signature.

We have added to the system a downloadable PDF of the Job Application Summary that includes the header from the configuration, job title for the application, opening/intro verbiage provided by your company, all fields in the My Applicant Profile, all questions and answers completed in the job questionnaire (if applicable), the consent/acknowledgment verbiage provided by your company, and the signature with date stamp (if applicable). This is a point-in-time PDF.

We have designed the Job Application Summary to behave slightly different from the Applicant Summary. Here is why:

- **Applicant Summary** : When electronic signature is enabled, the applicant signs once and is never presented the ability to sign again, even if they make changes to their profile information.

- **Job Application Summary**: When electronic signature is enabled, the applicant always has the ability to sign for every application. The Job Application Summary is a snapshot in time at the time of signature. So when you look at the Job Application, the signature is for the information contained and can never be changed after the signature.

If signature verbiage from the Applicant Summary tab should be the same in the Job Application Summary PDF, make sure to copy the verbiage to both Summary tabs

Job Applications: Choosing Company Name in PDF

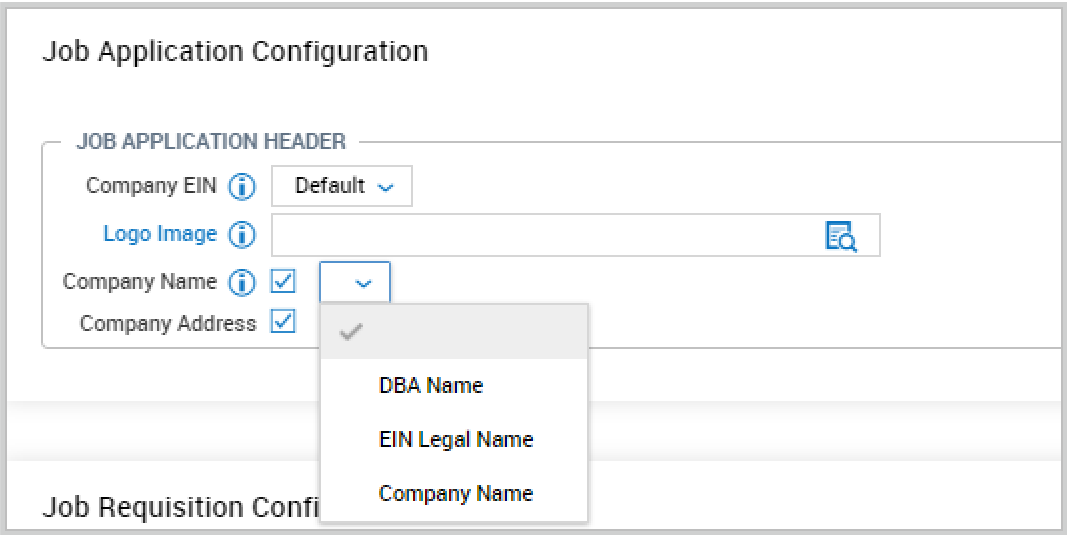
WFR-220225: A drop-down field has been added next to the **Company Name** field in the **Job Application Configuration** widget within the **Configuration** page under Company Settings > HR Setup > Applicant Tracking/Recruitment > Configuration. The options here include DBA Name, EIN Legal Name, and Company Name. These selections will display on the Job Application Downloaded PDF.

The company names are pulled from the **Company Address** widget in the **Company Setup** page, located under Company Settings > Global Setup > Company Setup. An Info icon tells you how the system will cycle through the names if left blank (unchecked.)

- If blank: the Company Name shown on Job Application will be DBA

- If DBA blank: system uses EIN Legal Name

• If both DBA and EIN Legal Name blank: system Company Name is used



Offer Letter Workflows

EPIC WFR-181788: In the December 2020 system release, Offer Letters functionality was released. In this release, we are adding Offer Letter workflows. The workflow will be available as an editable default workflow or can be manually built. The workflow contains many of the standard steps, actions, and filters just as other workflows do. Workflows are located under Settings > Global Setup > Workflows.

- **Where it is used**: The workflow is placed in the Offer Letter Workflow field in the Applicant Tracking/Recruitment Configuration page, located under Settings > HR Setup > Applicant Tracking/Recruitment > Configuration. The field name is hyperlinked and when selected will open workflow maintenance.
- **Why it is used**: The workflow is meant to give the user the ability to configure in such a way that multiple managers can take action (approve/modify/reject) and finalize accordingly.
- **How it triggers**: As soon as a user fills out the details in the Offer Letters page and submits, the offer letter workflow is triggered provided the user has selected a workflow in the Offer Letter Workflow field on the recruitment configuration page. One the workflow is initiated, editing of the offer letter will not be allowed.
- **Report columns**: In the Offer Letters report page, you can add two new columns, Workflow Status and View Workflow. The status of workflow will change in the Workflow Status column as the workflow goes through its process.
- **Approval/Rejection behavior**: Once the workflow is approved and completed, the offer status will change to Offer Generated and then a PDF is generated. If not approved and completed, the offer status will be set to Rejected and the offer letter page will be read-only without any action buttons.
- **Deleting an active workflow**: When there are offer letters with a workflow in progress and the workflow is removed from the configuration page, the following can be expected:

- All the offer letters will be generated regardless of the state they are in the workflow.
- All the related To-Do's will no longer be displayed.
- The offer letter report will remove the workflow & workflow status for the associated offer letter when they are in progress. For all the offer letters for which workflow is completed, the workflow & status will still exist and will not be affected.
- If the workflow is modified or deleted or the applicant hired, we will capture a point-in-time snapshot to be displayed in the report for all completed offer letter workflows (either approved or rejected).

- **Managed Cost Center (MCC) Permissions**: MCC managers will have the ability to select a cost center manager within the Approve/Reject step of the Offer Letter Workflow if they have the following permissions set within their Managed Cost Centers widget in their employee account.
    - Within the **Managed Cost Centers** widget, select the **Edit Cost Center Permissions** action for the desired cost center. Check **Approve HR Action Workflow** and set the **Approve Level** and save.

🔥 Preboarding/Onboarding

In this release, we are pleased to introduce Preboarding and Onboarding. Onboarding can be a critical part of the new employee experience. Many studies have shown that a properly onboarded employee is far less likely to leave their new employer within the first year of being hired.

The new UKG Ready Preboarding Portal and Onboarding Dashboard tab can be utilized to increase engagement and promote company culture for new hires from the time their offer letter is signed through their first year of employment and beyond.

The preboarding period, in this context, is defined as the time between the new employee signing their offer letter and starting their first day of work. The preboarding portal allows you to maintain a level of engagement by allowing a new employee to access information about your company culture and work environment as well as the opportunity to start their new employee paperwork (I-9, withholding forms, etc.)

In order to utilize the functionality, the new employee needs to be hired into the UKG Ready system as an employee and assigned an onboarding profile. At that point, they can be provided with a link and login credentials to the preboarding portal.

We have created a simple user guide explaining how to configure your preboarding elements and onboarding profiles, and information and examples of the employee experience. Please download the **Onboarding User Guide** from the HR User Guides directory.

- UKG Ready Customers: My Info > Help > Download Documentation
- Partners: Distribution > Tools > Download Documents

🔥 Performance Goals: Cascading and Aligning Public/Private Goals

💡 WFR-228758 & WFR-218584: A new option to set goals as **Public** or **Private** is now available. Public goals can be cascaded and aligned to other employees while private goals cannot. This option is available for managers and for employees who are allowed to edit their own goals.

Cascade and Align Goals

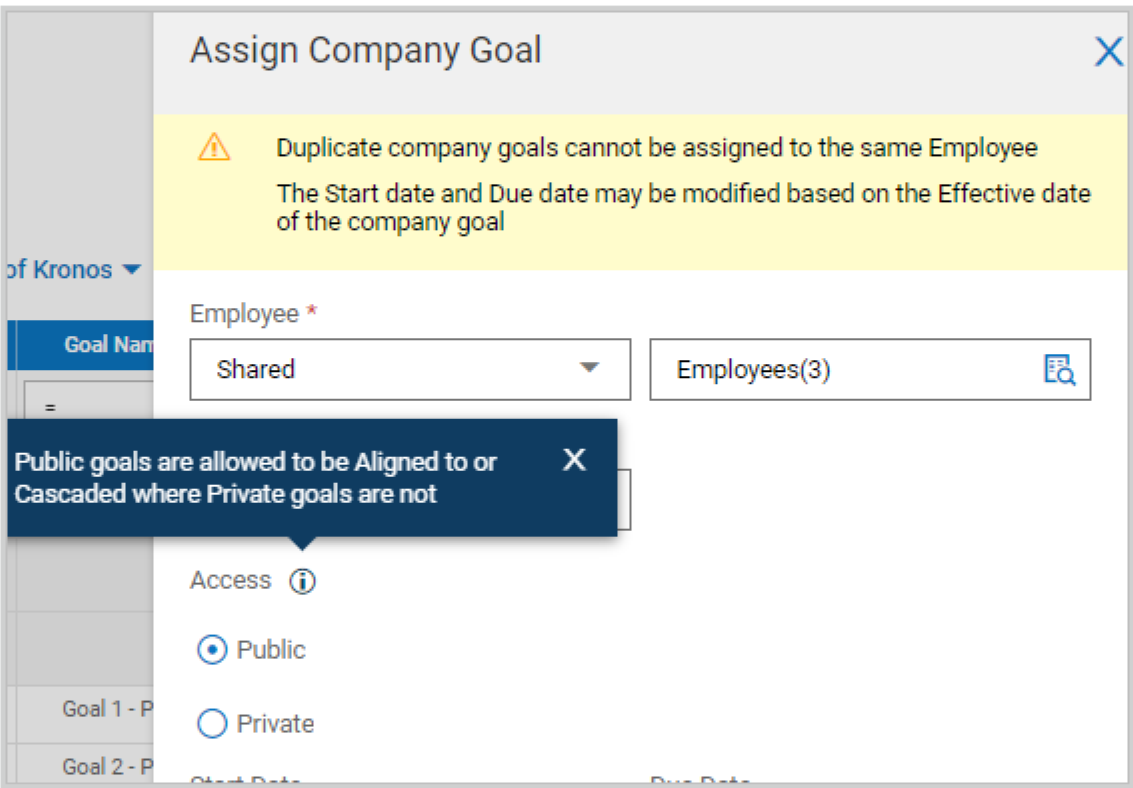
When choosing the edit option for a goal, option buttons for **Cascade Goal** and **View Goal Tree** are available. Using the **Cascade Goal** button opens a **Browse and Select Employees** page where you can select one or more employees who should also receive the goal.

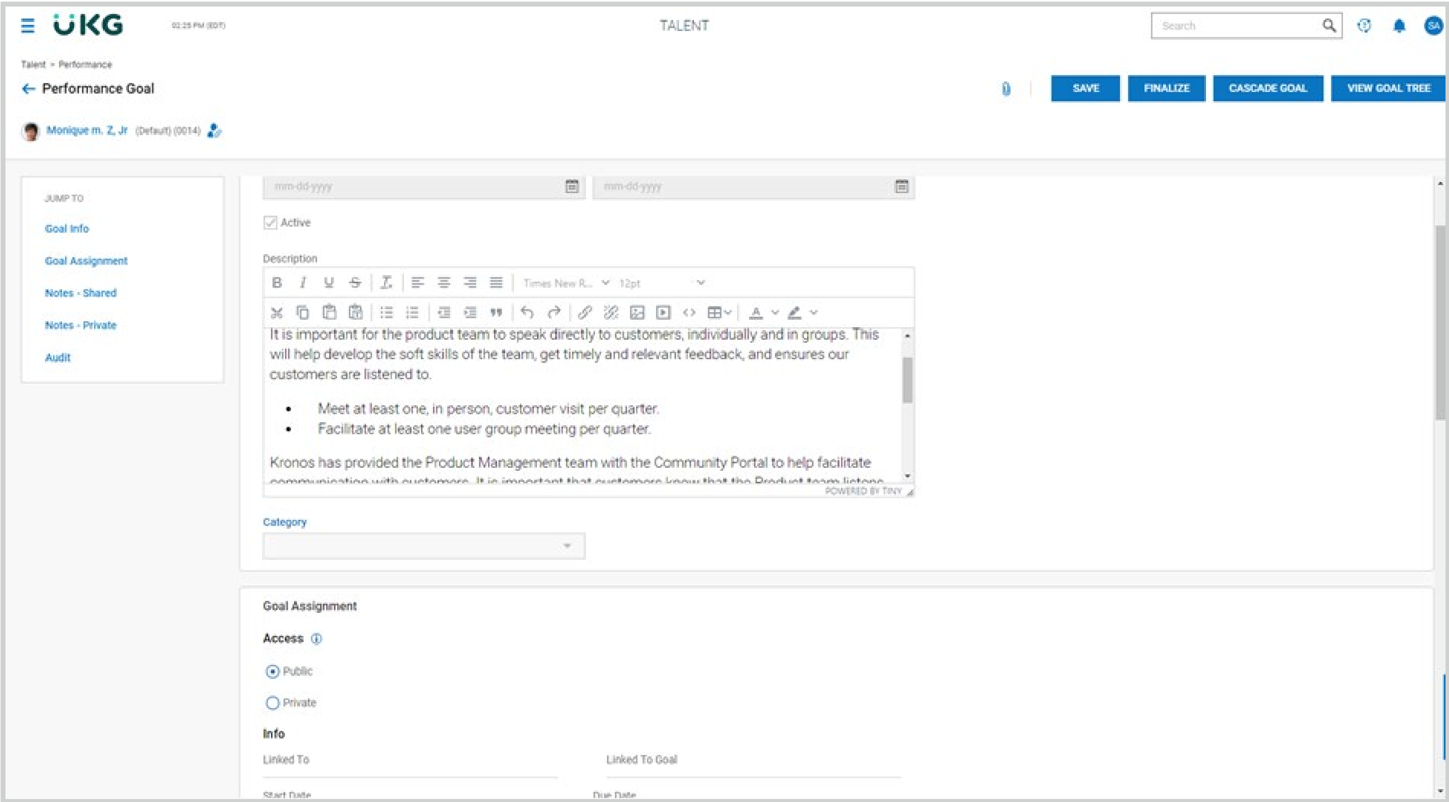
While assigning or editing a company goal, you can designate the goal as public or private. An Info icon contains a tooltip reminding users that only public goals can be aligned and cascaded. It will default to Private on all existing goals to ensure backwards compatibility, but this field can be edited.

- Cascade Goal uses the concept of Copy but also links the associated goals together so they can be seen as impacting each other. Cascading can only happen if you have subordinate employees.

- Align is the same as cascade except it is associated up to a manager's goal. Aligning is based on the 6 Manager slots.

- The view is available for both managers and employees with security permission to access their own performance reviews.





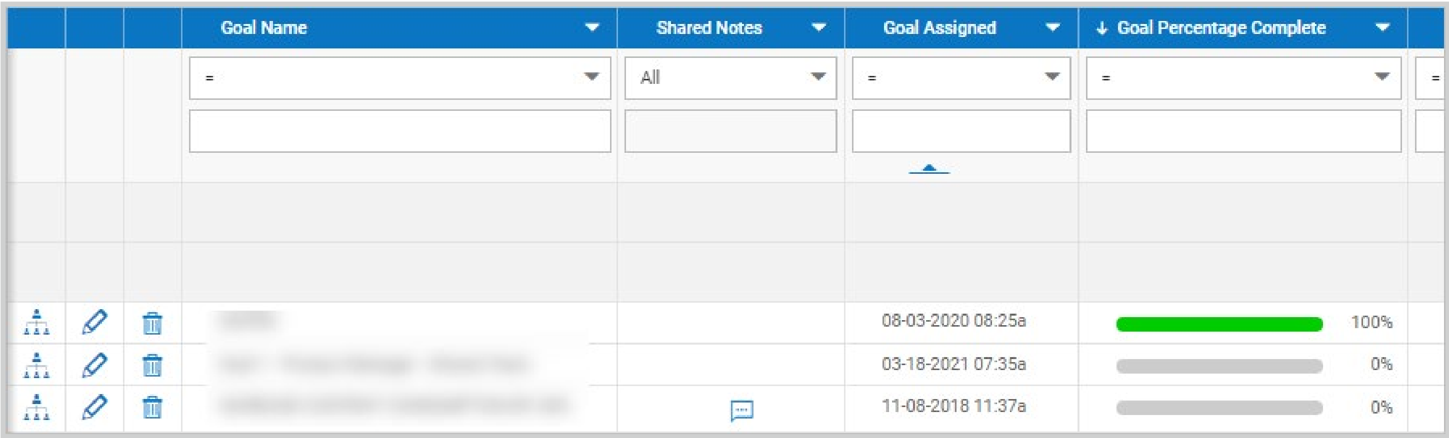
Goal Tree View

A **View Goal Tree** icon/button is available to be added to the Performance Development report page. When selected, a graphical view of the goals will display showing cascaded and aligned goals and how they impact each other. Within the tree view, a percentage complete indicator will display for each goal and each employee for whom a goal has been assigned.

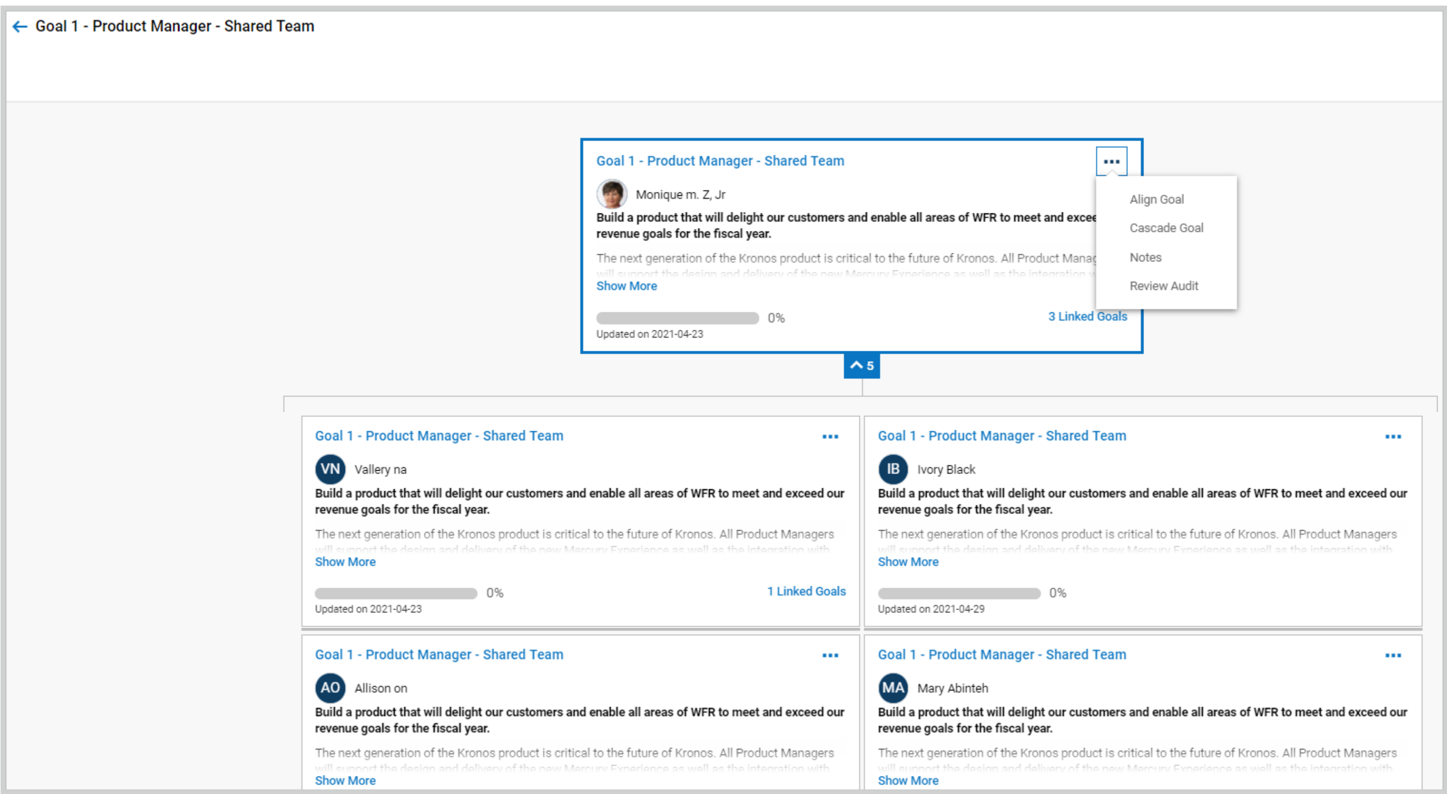
For the goals, manager options are available within the tree view to:

- **Align Goal**: A list of the manager's direct reports will display. Clicking/selecting an employee from the list will align the goal to that employee.
- **Cascade Goal**: A Browse/Select Employee pop-up will allow managers to select employees for the cascading of the goal.
- **Notes**: Jumps to the Notes widgets of the goal.
- **Review Audit**: Jumps to the Audit widget of the goal.

For employees in the tree who have linked goals, the option of **Remove Linked Goals** is available. A warning will display to the user before proceeding. Removing linked goals remove the link between those two employees.



Goal Name
Shared Notes
Goal Assigned
Goal Percentage Complete
All
08-03-2020 08:25a
100%
03-18-2021 07:35a
0%
11-08-2018 11:37a
0%



Goal 1 - Product Manager - Shared Team
Monique m. Z, Jr
Build a product that will delight our customers and enable all areas of WFR to meet and excee
revenue goals for the fiscal year.
The next generation of the Kronos product is critical to the future of Kronos. All Product Manag
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3 Linked Goals
Updated on 2021-04-23
Align Goal
Cascade Goal
Notes
Review Audit
5
Goal 1 - Product Manager - Shared Team
VN Vallery na
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1 Linked Goals
Updated on 2021-04-23
Goal 1 - Product Manager - Shared Team
IB Ivory Black
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Updated on 2021-04-29
Goal 1 - Product Manager - Shared Team
AO Allison on
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MA Mary Abinteh
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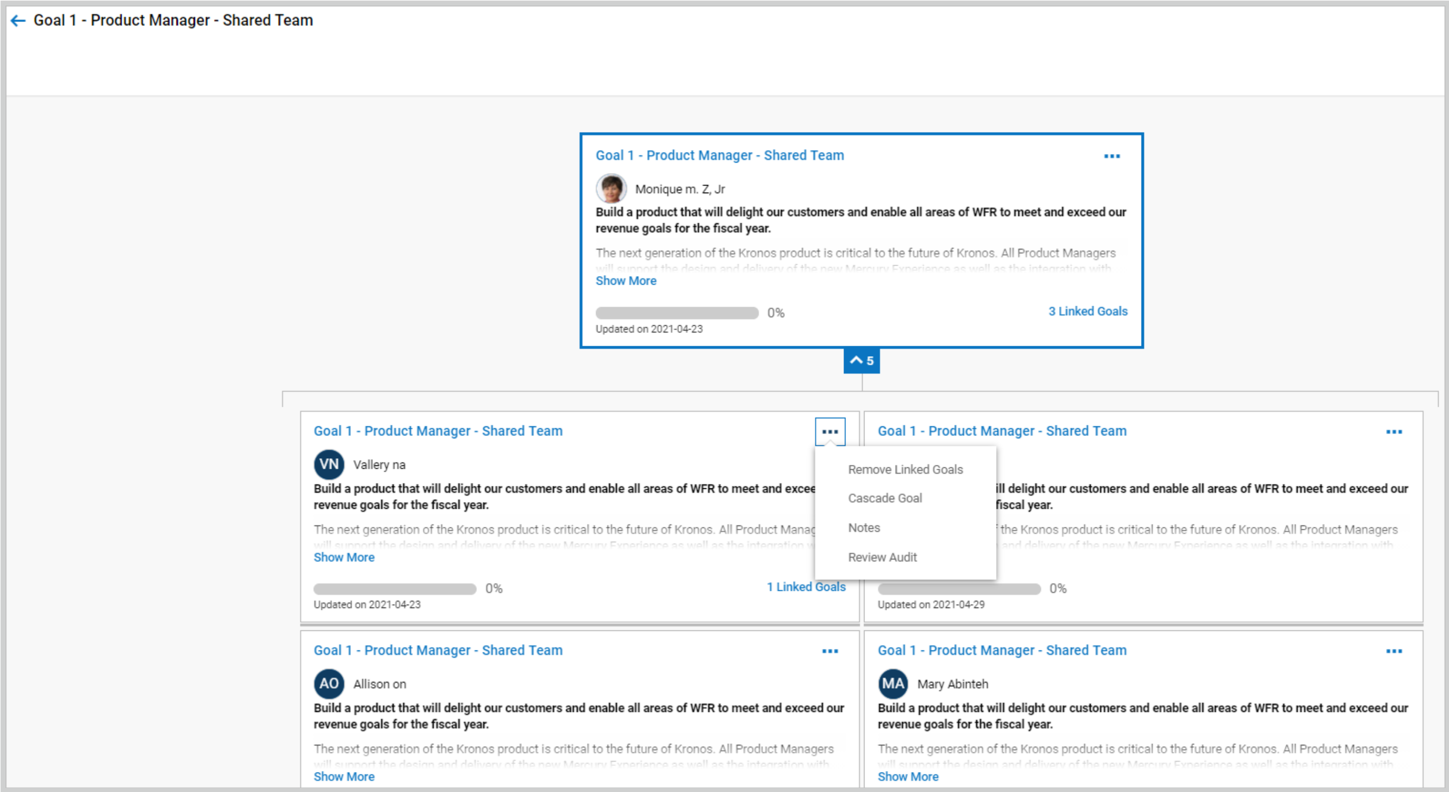
Show More



Color Coded Goal Percentage

Additionally, the color coded Goal Percentage Complete column is back! This column is available in the Performance Development report page under Team > Talent > Performance > Performance Development and also for employees under My Info > My Career > Performance > My Goals.

Copying Goals

WFR-200369: Historically, the creation of a goal has been accomplished via the performance review or through manual assignment.

What's New: In this release, managers will be able to open a Personal, Company, or Shared goal and select **Copy**. This will make the goal available to be added to other employees. The copy will not carry over the Status, Percentage complete, Audit History, or any Private Notes from the original goal upon copy.

Goals Created in Performance Review Available in Performance Development

WFR-87379: Previously, goals added only to a performance review did not become available in Performance Development. This one-sided creation of the goal made it difficult for managers to work through the goal during the review period, thus making it so the goal was essentially used at the end of the review period.

What's New: All goals, including those added from a performance review will flow down to the Performance Development screen. This allows managers and the employees to work those goals throughout the year or review period and still review them with ease at the end of the cycle. Ensure goals are set with the **Add To Performance Development** checkbox checked, otherwise it will not flow down to the employees.

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.

Base Compensation

Menu Path for Base Compensation Maintenance

WFR-231562: The menu path to access Base Compensation Change Reason Codes has been changed to **Company Settings > Global Setup > Global List Definitions > Base Compensation Change Reason Codes**. This change was made to allow Payroll-only companies to access and customize their Base Compensation Change Reason Codes. The Base Compensation required checkbox in the Account Policies widget of Company Setup will now be hyperlinked for both HR and Payroll only companies. The hyperlink will take you to the menu option mentioned above.

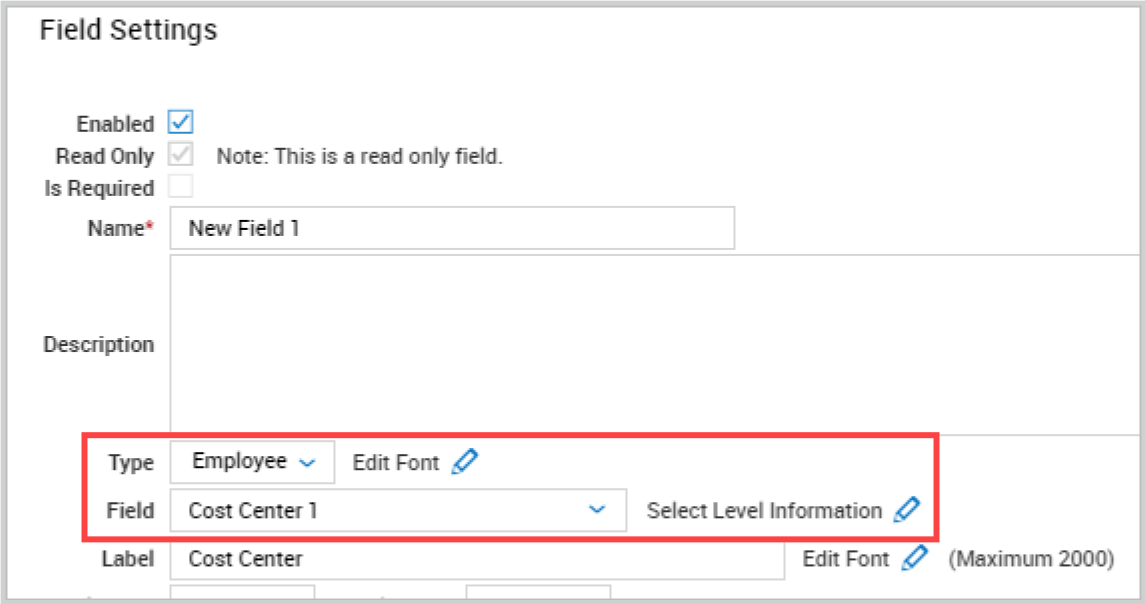
Note: If a company containing both HR and Payroll sub-systems is copied and HR is then disabled in the copied company, the new menu option and hyperlink will be available in the copied company containing only the HR sub-system.

Custom Forms

Select Level Information Added for Custom Form Field Settings

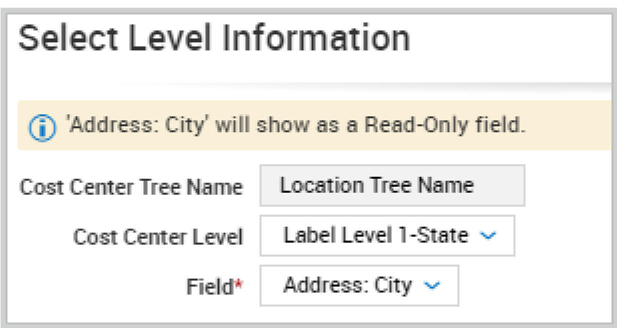
WFR-223990: When creating a Custom Form, such as for an employment contract, users can select cost center(s) which will populate the default cost center from the employee record but could not pull additional cost center level information that could provide more detail needed for managers and others.

What's New: We have added **Select Level Information** to the Cost Center Field in custom forms where the user can select the cost center level and field (Name, Abbreviation, Description, Address fields) from the cost center to populate as a read-only field on the custom form.



- From the Field Settings in a Custom Form configuration page, select **Type: Employee**
- Select Cost Center 1-9

The **Select Level Information** option will become available. Select the edit icon.



The **Cost Center Tree Name** is grayed out. You can choose the **Cost Center Level** and **Field**. The options in these drop-downs will be validated according to how the cost center is set up and which fields in the cost center are enabled, labeled, etc. The system validates against what is set up in the cost center(s).

This only affects Employee custom forms and is not available for Applicant custom forms since applicants do not have assigned cost centers. The additional cost center information will display as read-only, preventing users from editing the cost center information from the custom form.

Points Details Field Available for TLM Only Companies

WFR-223126: In the February 2021 system release, we added a **Points Details** field in Custom Forms for **Type = Employee**. In that release, this field could only be used by TLM companies who also had the HR sub-system enabled.

What's New: In this release, we have added the **Points Details** field for TLM only companies. This is configured under **Team > Time > Points > Custom Forms**. Select **Type = Employee** and the **Field** drop-down will display only the **Points Details** option.

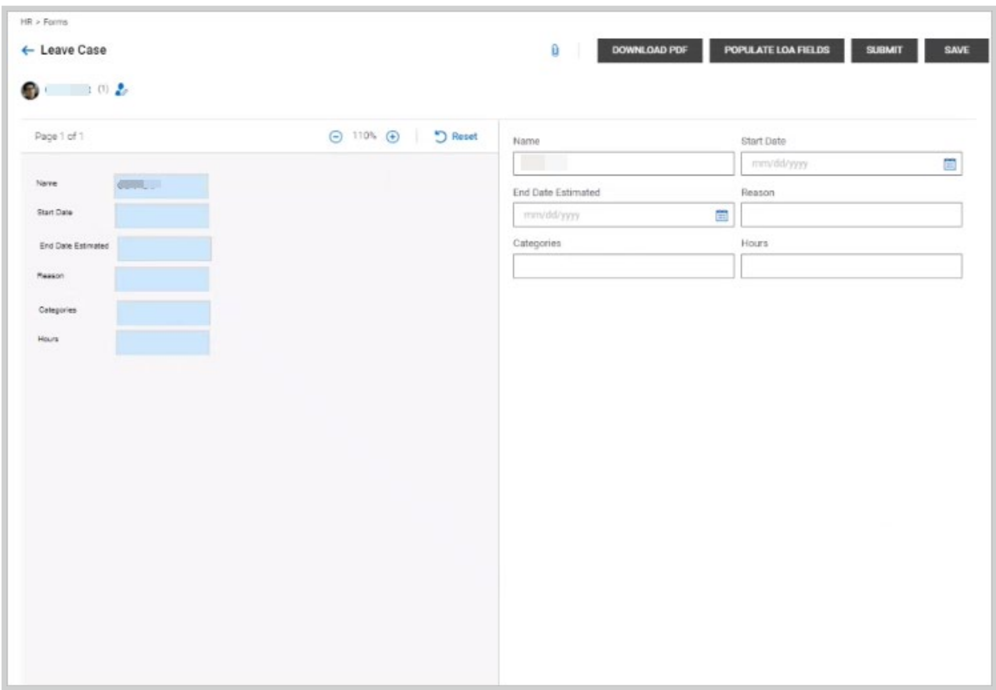
The Points Details field is still available in HR only companies.

Custom Forms Available for LOA Companies

WFR-232100, WFR-238925: Users can now set up Leave of Absence custom forms in companies, providing the **Leave of Absence** setting is checked in the **Available Functionality** widget of the company (Admin level). The form is available only for employees and is not available if the **Is Applicant** checkbox is checked.

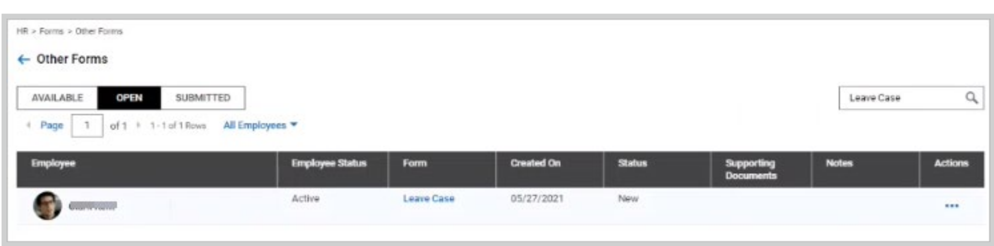
When creating or editing a form, a new field from the **Fields** widget. In the **Field Settings** widget, a new option, **LOA Case**, can be chosen from the **Type** drop-down. You can then configure more information about the LOA case, such as the number of hours, start and estimated end dates, and reason.

Once you are finished setting up the custom form, it can then be assigned under **Team > HR > Forms > Other Forms** from the **Available** tab by selecting **Assign** next to the applicable leave case. On the next screen, select the **Populate LOA Fields** button. A **Populate LOA Fields from LOA Case** pop-up window will display, which will show all the employee's leave cases. Select the radio button next to the applicable case, and the **Leave Case** screen fields will populate with the data. If ready, you can then select the **Submit** button.



You can download a print version of the populated leave case by selecting the **Download PDF** button.

From the **Open** tab of the **Other Forms** page, select the hyperlinked form name in the **Form** column to view the open case. From there, you can submit the form if not done previously. You can view submitted forms on the **Submitted** tab. In the **Actions** column, you can edit, download a PDF of the form, upload a document, assign another employee, view the history, delete, and view the detailed record.



Documents

Benefit Plan Documents During EIN Transfer

WFR-234928: When performing an EIN transfer for an employee who has Benefit documents on file in their current EIN, such as EOI, those documents will be copied/moved over to the new EIN without creating new additional documents in the new EIN. This will prevent your company's document storage from becoming overinflated.

Easy Backgrounds

Name Change of Easy Backgrounds

WFR-213424: The easyBackgrounds marketplace product has undergone a name change due to a merger/acquisition. It is now known as GHRR (Global HR Research) and multiple areas of the application have been updated to reflect this change. This affects the New easyBackgrounds marketplace app.

Settings > Marketplace > Marketplace Setup

- New easyBackgrounds renamed GHRR Background Check. All terms/widgets/labels inside the marketplace configuration page are renamed GHRR.

My Info > My Information > My Profile > easyBackgrounds Credentials

- The credentials menu item renamed GHRR Credentials. The widget on the page renamed GHRR.

Settings > Profiles/Policies > Security

- Under the Marketplace tab of security profiles, the easyBackgrounds sections renamed GHRR.

*****Partners Only*****

Maintenance > Companies > Marketplace

- New easyBackgrounds renamed GHRR Background Check. All terms/widgets/labels inside the marketplace configuration page are renamed GHRR.

Maintenance > Configuration > Marketplace Product Settings

- Name updated

Maintenance > Admin Company > Marketplace Products

- All terms/widgets/labels inside the marketplace configuration page are renamed GHRR.

Maintenance > Admin Company > Configurations > Security Profiles

- Under the Marketplace tab of security profiles, the easyBackgrounds sections renamed GHRR.

Maintenance > System Configurations > Marketplace Products

- All terms/widgets/labels inside the marketplace configuration page are renamed GHRR.

Reports > Marketplace Reports > easy Backgrounds

- Menu item changed to Reports > Marketplace Reports > GHRR > (Client Requests, Partner Requests, Invoice Items)

HR Actions

Clone Option Added to HR Actions Configuration

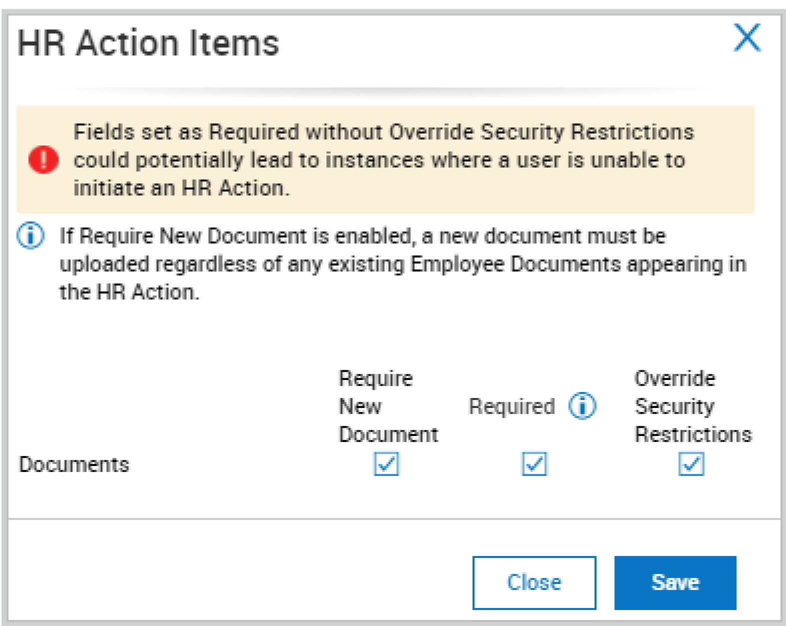
WFR-5165: You will now be able to clone HR Actions on the configuration page, located under Settings > HR Setup > HR Actions. A new Clone button column is available to be added to the report page. This will not be on the page by default and must be added. It will be available in each row as you create HR Actions. Cloning enables you to copy an existing HR Action and then rename and edit it.

'Require New Document' Setting Added to Documents HR Action Item

WFR-194985: When the **Documents** action item is included to an HR Action and marked as Required, the user is required to upload a document and cannot proceed until this condition is satisfied. However, if there were already document(s) uploaded/saved prior on the employee record, the system saw the previously existing documents, which satisfied the validation requirements and did not require the user to upload any new documents. Therefore, the uploading of the newly required document could be bypassed.

What's New: We have added a **Require New Document** option to the **Documents** HR Action Item which will require a new document to be uploaded as part of that HR Action. When checked, even if documents already exist for the employee, they must upload a new document and the system will validate the field as required and not let the employee proceed until the document is uploaded.

Info icons have been added to the **Documents** HR Action item to inform users how the required checkboxes work.



Imports

Employees and Employees Contacts Imports: Non-Supported Lines in Address Ignored on Import

WFR-217294: Historically, when importing non-supported lines in an employee address using the **Employees** or **Employees Contacts** import templates, the system allowed the import to complete without warning the user about the invalid information.

What's New: Now, when a user enters invalid address information for an employee or employee contact, such as adding an address line that does not exist on the employee account, the system will ignore the invalid fields and provide the user with a warning on the Import Results page.

Incidents

More Required Fields Added

WFR-203393: In Incident Types (Settings > HR Setup > Incidents > Incident Type) we have increased the ability to mark certain fields as required.

Under **Incident Info Required Fields** section:

- **Violation** (if enabled in Settings widget on same page)
- **Workers Claim** (if enabled in Settings widget on same page)
- **Employee Signed** (if Signatures is enabled in Settings widget on same page and Incident Types workflow is not enabled in Workflow Polices widget of Company Setup, as the workflow would handle these functions via the Sign steps)
- **Reviewer** (if Signatures is enabled in Settings widget on same page and Incident Types workflow is not enabled in Workflow Polices widget of Company Setup, as the workflow would handle these functions via the Sign steps)
- **Review Signed** (if Signatures is enabled in Settings widget on same page and Incident Types workflow is not enabled in Workflow Polices widget of Company Setup, as the workflow would handle these functions via the Sign steps)

Jobs

Job Attributes Limit Increased to 25 Items

WFR-230432, WFR-230433, WFR-232422: The limit for Job attributes created in the Jobs report page have been expanded from 10 to 25. This page is located under Company Settings > HR Setup > Jobs. On this page, attributes are added via the Define Attributes button. These attributes will display and can possibly be edited in a defined Job within the Job Attributes widget. The following areas will allow for up to 25 job attributes:

- The Jobs report page
- The Jobs Import template

- The Job Info History Report: job attributes display in the Field column with Old/New Value.
- The Job Attributes widget in Employee Profiles: as jobs are added to employees, any attributes associated with the job will display in this widget as read-only field. If the job attributes on the assigned job change, these fields will change as well.
- Employee Information report page: as job attributes are added to an employee, a corresponding column will become available to be added to the report page.

User Locale Settings for Job Attributes

WFR-207510: When defining custom fields within Job Attributes, the attribute types of Date, Numeric, Currency, and Time will now be shown according to the user's locale settings. The job attributes display in the format specified in the user's locale from their employee profile and will display this way in reports and imports.

Notifications

Name Change to Created Event

WFR-228046: To better clarify the purpose of the notification event name **Created**, the name has been changed to **Account Created**. The updated name will display in the Event field of the Notification Description section.

Performance Management

Goals: Character Limit Tool Tip Added to Name Field

WFR-218141: Goal Categories, located under Company Settings > HR Setup > Performance Review > Goal Categories, have a 35 character limit and a tool tip has been added to **Name** field to inform users of this limit and prevent errors when entering names that exceed this value.

Position Management

REST API: Position Assignments Changed API Added

WFR-232645: A new GET API has been added for **Position Assignments Changed** . This will return the information of all the assignments that have been created/modified/deleted in given time frame. The API will also allow users to specify the details for the assignment. By default only the basic assignment details will be returned.

- URL: https://wfrsecure.int.kronos.com/ta/rest/v2/companies/{comp_id}/position/position-assignments/changed

REST API: Positions API Added

WFR-232704: A new GET API has been added for **Positions**. This will return the information of active positions and will allow users to specify position details.

- URL: https://wfrsecure.int.kronos.com/ta/rest/v2/companies/{comp_id}/position/positions

Position Assignment History Report: Action Column Added & Date/Time Column Includes Seconds

WFR-211237, WFR-211238, WFR-242858: The time in the **Date/Time** column of the Position Assignment History report will now include seconds and display the time in Hours/Minutes/Seconds. The date and time will display in the user's preferred and set format.

An **Action** column is available to be added to the **Position Assignment History** report which will populate with data showing if a record was deleted, modified, or created. This will help users easily identify which assignments were manually edited versus an edit via an import.

Note: This column will populate with created, modified, or deleted records made prior to the creation of the Action column.

The report is located under My Info > My Reports > System Reports > Audit Trail > Position Assignment History.

All HR Actions Requests Report: Primary Position Columns Added

WFR-226697: Position columns for Primary Assignments are now available to be added in the All HR Action Requests report page. These are not default columns and must be added. This will allow users to see the details of a primary assignment of an employee to be shown (the one for whom the HR Action is initiated), effective as of "today". They are:

- Primary Position Name
- Primary Position ID
- Primary Position Start Date
- Primary Position End Date
- Primary Position Abbreviation
- Primary Position Description

Positions Import: Counter Distribution Column Added

WFR-225525: A new **Counter Distribution** column has been added to the Positions import template. If using Counters in the TLM sub-system, this column will import the Counter Distribution name as defined in the company and will display in Positions and in the Position History report.

Positions Report: Cost Center Levels 6-10 Added

WFR-226115: Cost Centers 6-10 (when configured in a company) are now available to be added to the Positions report page, located under Settings > HR Setup > Positions.

Recruitment

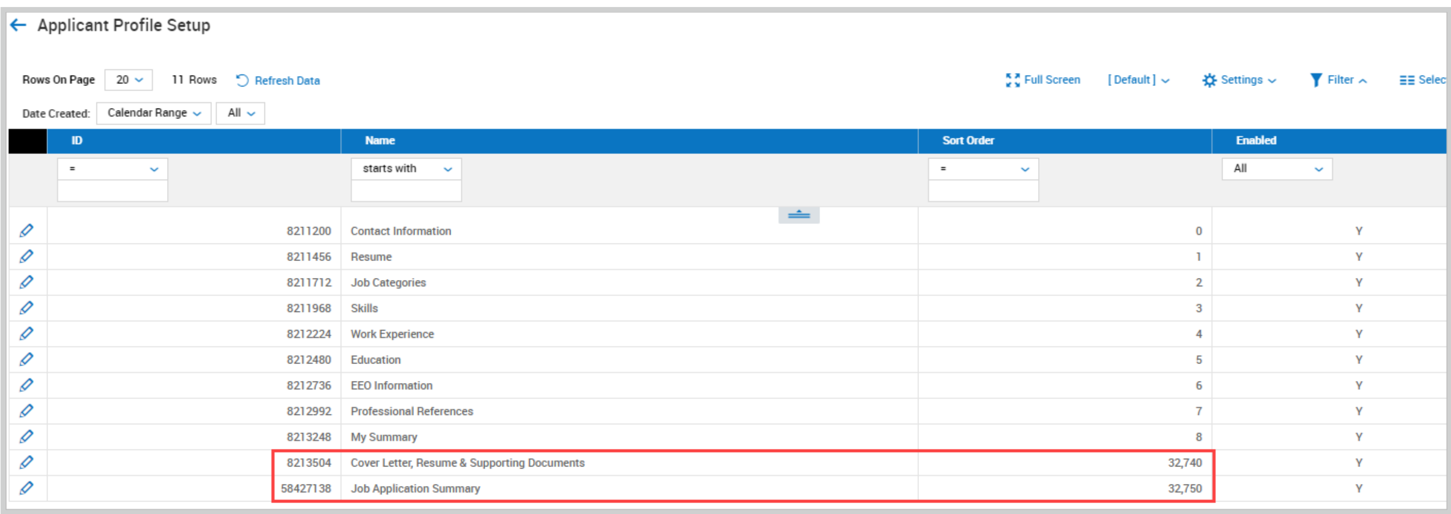
Applicant Profiles: Single/Multi View Toggle

WFR-235632: A **Single-Column View** toggle has been added inside applicant profiles. Switching the toggle on will re-order the widgets in a single column. Switching it off will return the page to a multi-column view. This will not affect the Jump To panel on the left.

Applicant Profiles: Position & Order of Tabs

WFR-214390: In the Applicant Profile Setup page, located under Company Settings > HR Setup > Applicant Tracking/Recruitment > Applicant Profile Setup, we have placed high numbered sort orders for the tabs: **Cover Letter, Resume & Supporting Documents** (32,740) and **Job Application Summary** (32,750). These sort order numbers are not editable and are set high to ensure these two applicant tabs always appear second to last/last and in proper order as applicants work through their job applications.

Important: This change will impact all existing companies.

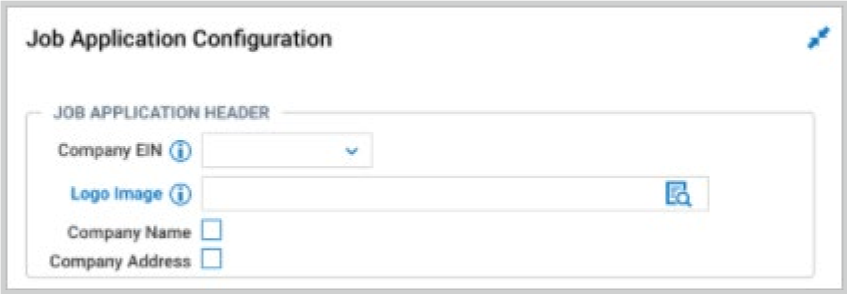


ID	Name	Sort Order	Enabled
8211200	Contact Information	0	Y
8211456	Resume	1	Y
8211712	Job Categories	2	Y
8211968	Skills	3	Y
8212224	Work Experience	4	Y
8212480	Education	5	Y
8212736	EEO Information	6	Y
8212992	Professional References	7	Y
8213248	My Summary	8	Y
8213504	Cover Letter, Resume & Supporting Documents	32,740	Y
58427138	Job Application Summary	32,750	Y

Job Application Updates: Adding a Logo and Header Information

WFR-205641: A new **Job Application Configuration** widget has been added to the Applicant Tracking/Recruitment Configuration page. In this widget you can add a logo image, company name, and/or company address to the header page of your job applications. If you are multi EIN, you can select an EIN to apply the changes. You may need to add the widget via the Edit Tabs option.

The Logo Image title is hyperlinked and when clicked will link out to **Company Settings > Global Setup > Look & Feel > Upload Images**. Here, you can upload and manage images. This information will be shown on downloaded PDFs.



Recruiting Workspace

Recruiting Workspace: Workspace Toggle

Over the next couple of system releases the **Try the New Workspace** toggle located within Job Requisitions will be phased out and no longer available. The default view when opening a job requisition will be the workspace view.

Recruiting Workspace: Vertical Label Names

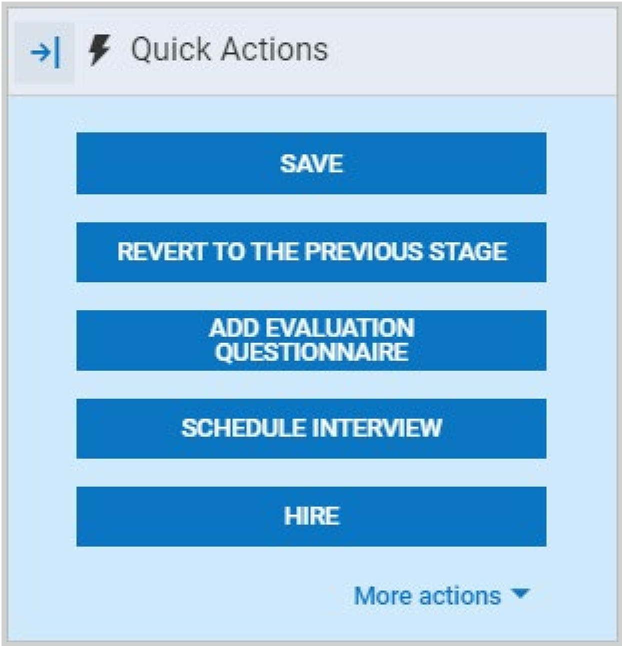
WFR-215986: The left and right panels of the Recruiting and Employee Profiles workspaces will now display vertical labels along with the icons when those panels are minimized. This will allow you to see which options are available without having to memorize the icons. You will be able to select the options in the panels and that option will pop out without the need to pop out the entire panel.

Recruiting Workspace: Hiring in Job Applications from Applications Tab

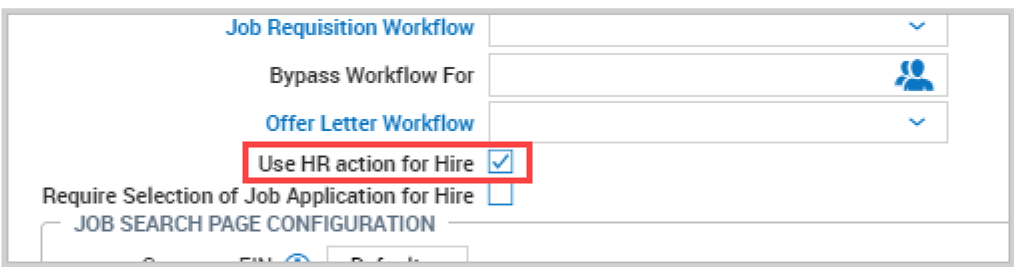
WFR-228765 & WFR-227048: A **Hire** button option that will invoke a Hire HR Action is now available. After accessing the workspace by opening a Job Requisition, you will select the Applications tab and then in the Applications widget select the View Job Application icon for the desired applicant. The **Hire** button is in the **Quick Actions** section of the right panel.

- This button only works with Hire HR Actions and will be routed through the workflow assigned to the HR Action.
- On successful hire, the Time to Hire Report will display the record for the new hire.
- Other job applications of the same applicant will become internal applications (since the applicant was hired into another job) and no Hire button will be available.
- If an employee record is created prior to going through the hire process, the Hire button will not be available.

When the button is selected, a pop-up containing the available HR Actions will display. If there is only one HR Action, the system will automatically open it. If there are multiple HR Actions, you can select which one to use. Continue the hiring process.



To Hire using HR Action, check the Use HR Action for Hire checkbox in the Applicant Tracking/Recruitment Configuration widget, located under Company Settings > HR Setup > Applicant Tracking/Recruitment > Configuration.



Recruiting Workspace: Applicant Questionnaire Status Column Added

WFR-246133: To give recruiters/managers more visibility about the status of applicant questionnaires, a new **Applicant Questionnaire Status** default column has been added to the **Applications** widget in the Job Requisition workspace. The widget is located under the Applications tab of the workspace.

Reports

OSHA and Worker Claim Forms Pull Data from Claim to Form

WFR-217282: Users with access to OSHA 300A reports will now be able to run reports based on the location where an employee's accident took place. When the OSHA 300 or OSHA 300A forms are populated, employee Incidents are included based on the cost centers from the employees' worker claims and not from the default cost centers for the employees.

Bug Fixes

The following issues have been fixed in this release.

Actions: Upload Document button was disabled for training items

WFR-176590: In an HR Action with a **Training/Certification** item, the **Upload Document** button sometimes was disabled and did not display the number of uploaded documents. This is fixed, and the **Upload Document** button now functions and also displays the number of uploaded documents.

Actions: Pay Grade field was editable, not read-only

WFR-239481: When users run an HR Action with a Pay Grade, the **Pay Grade** field is now filled with the **Job** value and is read-only. Previously, in this situation, the **Pay Grade** field was sometimes editable.

Actions: ESS Screen Message displayed unexpectedly in an HR Action

WFR-239680: The **ESS Screen Message** configured in the Benefit Profile sometimes displayed in an HR Action that included an action item for the related Benefit Plan. This is fixed, and the configured **ESS Screen Message** now displays only during Enrollments, not in HR Actions, as expected.

Actions: My Employee HR Action didn't change salary on the configured date

WFR-241902: When a My Employee HR Action with a Salary Change Request was configured to change the salary on a future date, it sometimes did not change the salary. This is fixed, and these HR Actions now change the salary on the configured date, as expected.

Additional Compensation: System didn't process a Mass Edit on Accruals Profiles

WFR-233284: When users performed a Mass Edit on Accruals Profiles, the system sometimes froze and didn't complete the Mass Edit. This is fixed, and the system now processes these Mass Edits as expected.

Base Compensation: Payroll-only company could not access Base Compensation Change Reason Codes

WFR-231562: The menu path to access Base Compensation Change Reason Codes has been changed to the following: **Company Settings > Global Setup > Global List Definitions > Base Compensation Change Reason Codes**. This change was necessary to allow companies that use only the Payroll module to access and customize their Base Compensation Change Reason Codes.

Benefit Plans: User did not have option to create a Benefit Plan without required information

WFR-238479: When a user created a new Benefit Plan but did not enter all the required information, the system showed only the option to go back to the Benefit Plan page. Now, in this situation, the system shows the following new message: **Leave Page Without Required Information? There are required fields missing data. If you leave this page, the employee will have a benefit plan with required data missing, which may impact enrollments and payroll deductions. Do you wish to continue exiting?**

Benefits: Space was missing between benefit plan and coverage level

WFR-226404: On an employee's **My Info** tab **Benefit Plans**, the benefit plan and coverage level were pushed together without space between them. This is fixed, and these items are now separated by a space as expected.

Benefits: Qualified dependent caused error in Benefit Change Request

WFR-233009: Some users received a **Cannot Enroll Dependent** error message when they attempted to approve a Benefit Change Request that included a fully qualified dependent who was also marked to be always eligible for Benefit Plans. This is fixed, and these Benefit Change Requests can now be approved.

Benefits: Reject reasons were missing

WFR-242964: In Benefit Change Request To Do items and in the **Reject Reason** column on the **Benefit Change Request Summary** report, reject reasons sometimes did not display. This is fixed, and users now see the expected reject reasons in these areas.

Custom Field: Fields displayed only 100 characters when the limit was 255 characters

WFR-232426: Previously, the system truncated some HR Extra Fields in an Employee Profile at 100 characters. These fields now display their full limit of characters, which is 255, as expected.

Demographics: New Visa types were needed

WFR-231558: The following Visa types for employee accounts are now available in the system:

Visa Name	Visa Code
Asylee	A5
Asylum applicant w/ pending asylum application who filed for asylum on or after Jan 4, 1995	C8
Adjustment of status applicant	C9
Alien who has been granted Deferred Action for Childhood Arrivals	C33

Employee Information: Cost Center section was missing from downloaded PDF

WFR-205545: When users selected multiple Employee Information records, including their own, and downloaded them as PDF, the Cost Center section was missing in only their own PDF. This is fixed, and in this situation, the user's PDF now displays the Cost Center section.

Government Forms: Could not add a new EEO form

WFR-243361: When users tried to add a new EEO form in **Government Forms**, the **Create New** button was missing from the **Select Cost Center List** dialog box. This is fixed, and the **Create New** button now appears, and functions as expected.

HR Actions: Address dropped when updating HR Action

WFR-245989: When a user updated an HR Action containing an item with the employee's address, the system cleared the address number upon submitting. This is now fixed, and the system will not clear the address field.

Imports: Employee Import made unexpected changes to Primary phone setting

WFR-240427: When users did an Employee Import, the import sometimes changed employee records with the Primary phone set to **Cell Phone** to have a Primary phone of **Home Phone**. This is fixed, and Employee Imports no longer make these unintended changes to Employee phone settings.

Insurability: Evidence of Insurability message displayed in the wrong situation

WFR-216387: When a benefit plan was configured with **Enable EOI by Enrollment Type** turned on and the **Require evidence for unit values greater than setting** was configured with an amount, the system sometimes showed the **Evidence of Insurability is required** message for amounts where the message should not have been shown. This is fixed, and the system now does not display that message when the amounts do not match what was configured to make the message display.

Manual Hire: Employee couldn't be hired into new EIN

WFR-229221: When an employee's profile didn't have any phone number selected as Primary, the system would not complete the hiring process to hire that employee into a new EIN. This is fixed, and these users can now be hired into the new EIN without a Primary phone number.

Onboarding: Only the first link item would function in Content Checklist

WFR-232608: In a Content Checklist with more than one link item, only the first link was functional. This is fixed, and now all link items function as expected.

Pay Grades: Thousands of pay grades caused report latency

WFR-237386: When a company had thousands of pay grades, the **Pay Grades** report sometimes was slow to respond. This is fixed, and the report is now optimized to perform normally when thousands of pay grades are present.

Recruitment: Hire button didn't display in Applicant record

WFR-149317: The system did not display the **Hire** button in Applicant records to users who did not have permission to add employee information enabled in their security profile. This is fixed, and users no longer need the permission to add employee information in order to see the **Hire** button.

Recruitment: Internal applicant couldn't complete job application

WFR-179082: Some internal applicants who applied for a job received the error **Job application already in progress** when they should not have. This is fixed, and these internal applicants can now apply for the job as expected.

Recruitment: Saved Background Checks report didn't display some buttons

WFR-198954: When users created a saved report from the **Background Checks** page, the saved report did not display some of its buttons. This is fixed, and these saved **Background Checks** reports now display all expected buttons.

Recruitment: Forms from deleted Applicant record weren't deleted

WFR-201762: When users deleted an Applicant record, the system sometimes did not delete all the forms tied to that applicant. This is fixed, and the system now deletes all forms tied to the applicant when it deletes the Applicant record.

Recruitment: Time to Hire days weren't updated to reflect updated hire date

WFR-226113: When users updated a hire date after the original hire date, the **Time to Hire** report sometimes did not update to the correct number of days for the **Time to Hire** field. This is fixed, and the **Time to Hire** days are now accurate in this situation.

Recruitment: Unintended iCalendar attachment was included with an applicant notification

WFR-227428: When an Applicant Profile was configured to send an SMS notification to the applicant, the notification sometimes included an unintended iCalendar attachment. This is fixed, and the system no longer includes any unintended attachments.

Recruitment: Preview displayed Undefined instead of Year, Week, or Hour

WFR-234938: When users configured a job requisition's Compensation Base Pay fields, the job requisition preview sometimes displayed **Undefined** in place of the Year, Week, or Hour label. This is fixed, and previews now display Year, Week, or Hour as expected.

Recruitment: Unexpected Indeed URL appeared in an Applicant Custom Field

WFR-238507: When the system brought an Indeed applicant's information into the system, it sometimes displayed an unwanted Indeed URL in a Custom Field in the Applicant Profile. This is fixed, and the system no longer displays this unwanted URL.

Recruitment: Job Requisition did not post at future date

WFR-240429: In a future-dated Job Requisition, when users check the **Status & Visibility** checkbox and Save, the system retains that change and posts the Job Requisition at the future date, as expected. Previously, the system sometimes did not retain the check in the **Status & Visibility** checkbox after saving, so the Job Requisition was not posted.

Recruitment: System error when posting Job Requisition to Indeed using other EINs

WFR-246451: After selecting an alternate EIN to submit Job Requisitions to Indeed, a system error was generated when viewing the status on the Job Board widget of the Job Requisition. This has been corrected and Job Requisitions can now be submitted to Indeed using the EIN selections set up in the company and they will be available on the Job Board widget.

Recruitment: Applicant address disappeared after changing EIN

WFR-243446: When users manually hired an Applicant and then changed the Applicant's EIN from the company default EIN, the system removed the Applicant's address. This is fixed and changing the EIN in this situation no longer affects the Applicant's address.

Talent: Set Status Label To field wasn't updating

WFR-204773: In a Performance Review workflow, the **Set Status Label To** field in each step sometimes did not update to reflect the current step. This is fixed, and the **Set Status Label To** field now updates for each step as expected.

Talent: Hired applicant's first performance review wasn't generated

WFR-220168: When users hired an applicant via an HR Action Request that also assigned a Performance Review Profile, the system did not automatically generate the hired applicant's first scheduled Performance Review. This is fixed, and the system now generated the Performance review as expected.

Talent: Australian Check step was spelled Cheque

WFR-239198: For Australian language users, a Performance Review's **Check** step was spelled **Cheque**. This is fixed, and the **Check** step now uses the correct spelling.

Talent: Review Notes weren't visible after the review was finalized

WFR-239240: When a user finalized a Performance Review, the system hid Notes made by other users in the review. This is fixed, and users can now see review notes from other reviewers after the review is finalized.

Talent: Changing a review tab's label affected Hide settings

WFR-240919: When users configured a Performance Review with tabs and then changed the label of a tab, the system no longer enforced the settings for **Hide for Reviewee** or **Hide for Reviewer**. This is fixed, and users can now change a tab label while still hiding or showing the tab for reviewers or reviewees.