Summary Release Notes

February 2021
R73

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

Release Information

Release Dates

There will be a System Release taking 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** – February 8, 2021 at 11:00pm - 3:30am GMT
- **POD 60** – February 9, 2021 at 11:30pm - 4:00am EST
- **U.S. Server POD2** – February 10, 2021 at 11:30pm - 4:00am EST
- **U.S. Server POD5** – February 24, 2021 at 11:30pm - 4:00am EST
- **U.S. Server POD4** – February 24, 2021, at 11:30pm - 4:00am EST
- **U.S. Server POD3** – February 25, 2021 at 11:30pm - 4:00am EST
- **U.S. Server POD6** – February 25, 2021 at 11:30pm – 4:00am EST
- **AUS Server** – February 25, 2021 at 12:00am - 4:30am AEDT

Supported Operating Systems and Browsers

The table below shows currently supported operating systems and browsers.
NOTE: The list shown in the table below are operating systems we support, though they may not be actively tested.

Platform	**OS Version**		**Browser**	**Version**
Desktop			Internet Explorer	11
Windows	10		Microsoft Edge	latest
Mac	10.13.4 (High Sierra)		Google Chrome	latest
Mobile			Mozilla Firefox	latest
iOS	11.4.1 -> latest		Safari	latest
Android	6.0.1-> latest			

PAYPRO Workforce Management

TLM Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ****For full details on any of the following enhancements, including screen shots, please see the detailed HR release notes for February 2021.*****

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!

Timesheet

NEW Timesheet v2 – Timesheet Metrics

Configuration Widget/Metrics Bar

WFR-200560, WFR-200564, WFR-200567, WFR-208700, WFR-200566, WFR-208703, WFR-219616: Users can now configure timesheet metrics in order to more readily access an overview of timesheet data in the New Timesheet.
What's been added: In the Timesheet Profile for Start/End (All Hours) and Bulk Hours timesheet profiles, a new widget has been added, *Timesheet Metrics*. From this widget, enter a *Label* and enable the checkbox next to *Display*. *Raw Total* and *Calc. Total* and their configurations will display by default.
Timesheet Metrics that are configured and enabled will display for users to view from their timesheet in a static metrics bar.

Timesheet v2

Inform Users of the DST Changes

WFR-210489: As previously available in the Classic Timesheet, in the New Timesheet, during the week of Daylight Savings Time according to the user's time zone, a static inline information message will display when users open their timesheet to inform them of the DST changes.

Calc Detail Tab – Display Info Column

WFR-211221: In the New Timesheet, if the Pay Calculations 2.0 rule *Calculate Holiday/Time Off Based On Average Hours Worked Prior* is configured, an *Info* column will display in the *Calc Details* tab when an information message is generated by this rule.

Customize Order of Time Entry Collected Data

WFR-116865: In the New Timesheet, when *Mobile* is selected for the *Timesheet View*, you can now reorder the columns in the header of the timesheet in the *Time Entry* tab. From the *Time Entry Collected Data* section of the Timesheet Profile, define the order by clicking the up/down arrows next to each column label.
NOTE: The *From* and *To* action columns cannot be re-ordered.

Simple Punch with Populate Full Day on First Punch Timesheet Rules Ignored Check Distance

WFR-180819: Previously, when Simple Punch was used in conjunction with *Populate Full Day*, the Geofencing timesheet rules were being ignored, which allowed employees to punch in from outside the set range.
What's new: In order to allow employees to use Simple Punch without Geofencing rules being ignored, a new setting has been added to the *Check Distance* rule, *Treat first simple punch of the day as punch in*.
If this setting is enabled along with *Populate Full Day*, the first punch of the day will consider what is configured in the *Check Distance* rule. If this setting is disabled and *Populate Full Day* is enabled, the first punch of the day will populate the configured time and skip the *Check Distance* rule.

Timesheet Change Requests

TSCR – Reprocess Punches when Punches are Added to the Day

WFR-160369: Previously, when punches were added to a day via Timesheet Change Request and punches already existed for the day, the punches would be placed out of order and new rows were added.
What's been added: A new setting has been added to the *Change Requests Employee Can Perform* section of the Timesheet Profile, *Reprocess punches for the day*. When enabled, options for *Add Punch In* and *Add Punch Out* will display to enable. If enabled, when punches are added to a day via Timesheet Change Request, the system will reprocess all punches in the day to ensure they are properly ordered.

Timesheet Punch Settings

Clock Widget – Show Collect Extra Pay

WFR-189067: The *Show Collect Extra Pay* setting is now available for the *Clock* widget. When enabled, the *Add Extra Pay* icon will be available in the *Clock* widget for users to select in order to add extra pay.

TLM Timesheet Workflow Migration

Timesheet, Overtime, TSCR, Time Off Request Workflow Migration

WFR-140083, WFR-180095, WFR-138293, WFR-180098: Users are required to initiate the workflow migration, and it is suggested to do so. In order to help this process, timesheet workflow migrations will now be automated for all users who have not initiated the workflow migration.

TSCR Workflow Migration

Time Off Pending for Cancellation Cannot be Chosen for Modify Time Off TSCR

WFR-151957: Previously, in Desktop, Mobile, and the Mobile Version on Desktop, employees were able to submit a Modify Time Off Change Request for time off that was in progress of being cancelled by the manager.
What's changed: If *Modify Time Off* is selected for *Change Type* in a time off that is in the process of being cancelled, the *Submit Changes* button in the *Change Request* pop-up will be grayed out so that employees cannot submit the request.

Attestation

Attestation Configuration

InTouch – Attestation Workflow "Remove Punch" Option

NOTE: Before including any health-related questions in UKG Ready® Attestation please consult with your legal counsel to ensure you are compliant with applicable privacy laws and regulations.
WFR-181734: In Release 70 (September 2020), a *Restrict Punch* option was introduced in the Attestation Questionnaire workflow in the action properties setup for web punch and timesheet punch buttons in Desktop, Mobile, and the Clock widget. When a user is restricted, a custom warning message will display, and the punch will be restricted from being added to the timesheet.
In this release, the *Restrict Punch* option is now available for InTouch v2, v3, and DX devices. If a punch is restricted from the InTouch device, the punch will be included in the *Unprocessed Punches* report with the status, *Restricted From Punching Due To Attestation*.

Attestation Punch

Capture Expired Attestation in Questions and Answers Report

WFR-184705: Previously, the *Questions and Answers* Attestation report (under *My Info > My Reports > Time Reports > Attestation > Questions and Answers*) only captured questions that received a response; the report did not track Attestation questions that were left unanswered and expired. The *Completed* column always displayed *Yes* because the Attestation workflow was completed, but it did not display specifically if the question was answered.
What's changed: The *Completed* column in this report is now hidden and has been replaced by a *Request Type* column. The *Request Type* column will display either *Negative* (if the employee answered No), *Affirmative* (if the employee answered Yes), or *Expired* if the question was not answered.

Custom Punch Attestation when Punch In/Punch Out Attestation Enabled

WFR-209695: In Release 69 (June 2020), the *Custom Punch* option in the Attestation Profile was made available, and in Release 70 (August 2020), this option was removed.
What's been added: The *Custom Punch* option in the Attestation Profile has been made available again for Desktop, Mobile, Mobile Version on Desktop, and InTouch devices. For

users who want a separate button that employees can press at any time of the day outside of the normal punch in/out buttons, *Custom Punch* can be enabled with its own workflow.
In addition, *Override Custom Punch* checkboxes have been added to *Punch In* and *Punch Out* in the event that *Custom Punch* is set to the same time as Punch In/Out, and the *Custom Punch* option needs to be overridden by the In or Out punch.

Cost Centers

Managed Cost Center

MCC "To Be Completed By" Option for TSCR Workflow

WFR-71003: Timesheet change requests can now be processed by Cost Center managers (up to manager 2).
What's been added: *Cost Center Manager* has been added as an option to the *To Be Completed By* drop-down in the *Step Properties: Approve/Reject* step of the Timesheet Change Request workflow.

MCC – Approve TSCR

WFR-71226: In order for system admins to regulate MCC managers' access to processing timesheet change requests that contain a particular MCC, a new permission is now available to enable.
What's been added: The option *Approve Timesheet Change Request* has been added to the *Managed Cost Centers* widget (click the edit pencil icon to access *Edit Cost Center Permissions*). If this option is enabled, a To-Do item for the timesheet change request will be generated and sent to the manager of the cost center specified in the change request.

Pending Change Requests Report

WFR-206127: The number of pending change requests in the *Pending Change Requests* report will now match the number of outstanding My To-Do Items related to timesheet change requests pending manager approval.
Previously, the outstanding change requests in a manager's My To-Do Items did not match the number in this report.

InTouch

InTouch Smartview Translations

WFR-164699 (EPIC): Smartview transactions for the InTouch V2, V3, and DX will now be translated to the language set in the employee locale from the employee's profile, overriding the clock primary language.

Leave of Absence

Removed 365 Day Length Limit on Leave of Absence Cases

💡WFR-6783: Previously, leave cases could not be opened or saved for a date period extending past 365 days.

What's changed: The 365-day limit on leave cases has been removed, allowing cases (both new and existing) to extend past 1 year, with a 10-year limit. An existing leave case can be saved with a start and estimated end date that is greater than 365 days.

Updated All FMLA Forms

WFR-192414 (EPIC): The following FMLA forms (under *My Team > Leave > Forms*) have been updated to match the most recent version provided by the Department of Labor:

- WH-384
- WH-385
- WH-385-V
- WH-380-E
- WH-382
- WH-381
- WH-380-F

Pay Calculations

Generate Calc Start / End Time for Bulk Time Offs

Updated Generate Calc Start / End Time to Allow Users to Specify Start Time Manually and to Use Work Schedule Profile when No Schedule is Present

WFR-197548, WFR-208932: Previously, for companies using the *Calculate Time Off Dynamic Duration* Pay Calc 2 rule, when schedules were not populated, or Advanced Scheduling was used in the company, start/end times were not available to populate the calculated start and end times.

What's been added: A new option has been added to the *Calculate Time Off Dynamic Duration* rule in the *Set Start and End Time for Bulk Time Offs* widget, *If Schedule Is Not Set Use*, with a *Start Time* field. In this field, you can enter a time for when the schedule starts for the time off.

You also have the option to have the system populate on the timesheet schedules defined in the Work Schedules Profile. From the same Pay Calc rule, select *Use Schedules Defined In Work Schedule Profiles*, then in *Required Settings*, disable the *Match Bulk Entries To First Schedule* setting.

The system will not look at schedules but will pull in the schedule defined in the Work Schedules Profile.

Guaranteed Minimum Hours – Allow 2 Decimals

WFR-67839: Previously the Pay Calc 2.0 *Guaranteed Minimum Hours* and *Guaranteed Minimum Hours (Counters)* rules did not allow for two decimal places. Going forward, two decimal places can be added to the *Guarantee At Least* and *Only If Total Work Time Is At Least* fields in these rules.

Holiday Pay

UK Holiday Pay – Calculate Holiday/Time Off Based On Average Hours Worked Prior (v.2 & v.3) – Updated Lookback Range and Added New Divided By Options

WFR-208630, WFR-208631, WFR-209831, WFR-209459: The United Kingdom has specific rules concerning the payout of holidays, which are based over the prior 52 weeks (extended for non-working weeks). The average of those 52 working weeks is calculated and paid out to employees respectively when they request a vacation day.
According to updated legislation the Pay Calc rules should be able to look back to 104 weeks to be able to find 52 weeks with eligible time.
What's new: In the *Average Hours* section of the Pay Calc 2.0 rules, *Calculate Holiday/Time Off Based On Average Hours Worked Prior* and *Average Hours Based on Period*, the *Stop After* field will now allow values up to the following:

- 104 weeks
- 730 days
- 24 months
- 730 pay periods

The *Total Hours For Prior* and *Qualifying Period* fields will remain at the same limits (52 weeks; 365 days; 12 months; 365 pay periods).
In addition, in the *Average Hours* section of both Pay Calc rules, two new options have been added to the *Divided By* drop-down:

- Contracted Days
- Scheduled Days

Pay Calc 2.0

Chicago Right to Rest Law – Apply Back Pay Hours Only on the Next Day's Shift

💡WFR-207334: Previously, the *Apply Back Pay Hours* rule would only apply to any shift that fell within the *Rest Period* threshold; this rule should also apply to shifts that are within the Rest Period threshold **and** the shift starts on the next day.
What's been added: A new setting, *Apply Only If Next Shift Begins The Next Day*, has been added to the *Apply Back Pay Hours* rule. When enabled, the rule will allocate hours to a specified counter only if the shift that falls into the rest period starts on the next day. If the shift begins on the same day that the previous shift is in, hours won't be allocated.

Daily Overtime – Only Time Off Entries

WFR-126718: Users now have the ability to apply daily overtime on a time off day to overtime.

What's been added: A new option, *Time Off Entries Only*, has been added to the *What Counts Toward* [counter] section in the *Daily Overtime* Pay Calc rule. When this option is enabled, Daily Overtime will be calculated only for time off entries.

Time Entry Extra Field Data in Timesheet and Pay Prep Profiles

WFR-199597: In Pay Calc 1.0, time entry extra fields are captured by the Pay Prep profile and grouped with exported time entries. Previously in Pay Calc 2.0, there was no way to group a Time Entry extra field with a counter and include the data on payroll export files.
What's been added: *Group by* settings for time entry extra fields have been added to *Counter Records* in pay prep profiles in Pay Calc 2.0.

Payroll Export

Enabled "Employee Contract" for Spells of Absence Time Off Hours in Payroll Export Format for UK Companies

WFR-202481: Previously, in the *Payroll Export Format*, when *Spell of Absence* was enabled for *Time Off* record, *Employee Contract* was not an available option to select for *Scheduled Hours* for United Kingdom users.
Going forward, in the *Spell of Absence* for *Time Off* record, users from all countries will be able to select *Employee Contract* for *Scheduled Hours*.

Payroll Export Format – Added "dd-MMM-yy" (Ramco) Format

WFR-201734: Previously, the dd-MMM-yy date format was not an available format in the payroll export format configuration.
What's been added: The dd-MMM-yy date format, which is known as Ramco Format, is now available in the payroll export format. For example, if the date is 10/16/2020 it will be formatted as 16-Oct-20.

Points

Points – Added Points Category Filter to "Create Custom Form" Rule

WFR-196661: Previously, users could not choose which types of point categories should trigger different custom forms to be created so that they would not have to manually create and assign them when employees' points balances reached a certain threshold.
What's been added: A *Category List* option has been added to the *Create Custom Form* Points profile rules. The sum of all categories in the configured list will trigger the custom form to be created.

Rate Table

Personal Rate Table Reason Codes

Rate Tables – Added Reason Code to Rate Table Import Table

WFR-202998: The setting, *Require Reason Codes for Personal Rate Tables*, has been added to the Rate Tables import template so that users will be required to add reason codes for personal rate changes if made through the import when *Require Reason Codes for Personal Rate Tables* is enabled globally.

Rate Tables – Include Rate Table Changes in Job Change History Report

WFR-201770: Rate table changes and reason codes have been added to the *Job Change History* report.

Rate Tables – Require Reason Codes for Rate Table Entry Changes in Company Settings Import

WFR-201778: In the previous release, a global setting was added, *Personal Rate Table Changes Require Reason Codes*, that would require a reason code for every rate table entry change. In this release, a column has been added for the *Personal Rate Table Changes Require Reason Codes* setting in the Company Settings import template so that users do not have to perform this manually.

Rate Tables

Display Parent/Child CC to Match System Display Settings

WFR-183887: Previously in Desktop, Mobile, and the Mobile Version on Desktop, only the last child cost center displayed in the *Rates* table

What's new: The parent/child cost centers will now display in the *Rates* table, if configured in company settings.

Filter for Active Only Rates in Personal and Global Rate Table

WFR-183900: Previously, there was no way to filter through rate tables.

What's been added: An *All* drop-down has been added to the personal and global *Rates* table to allow users the ability to see all rates. You can also choose to see only Active rate tables or Inactive rate tables. This will allow users to easily find the currently used rate, especially for companies with many rates.

Reports

Deprecation – "Time Entry Approval" Setting in Detailed Hours Overview Report

WFR-206436, WFR-208951: In the Mobile Version on Desktop, the *Time Entry Approval* setting in the *Detailed Hours Overview* report is no longer supported.

Mass Data Export

Added Columns to Company Report: "All Punches Summary"

WFR-211620: *Gender* and *Ethnicity* are now available columns to add to the *All Punches Summary* report in Mobile and the Mobile Version on Desktop.

PAR Reporting

PAR Reporting in Printed Timesheets – Main Table / Extra Pay & Counter Adjustment / Summary Table

WFR-199209, WFR-212493, WFR-212492: The Personnel Activity Report (PAR) is required for school districts K-12 that are being funded by multiple sources and one of the sources is a federal grant. This reporting is a federal mandate for teachers and the school to report on time percentages and dollars that are spent in the grant.
The printed Timesheet report will now include the needed information for PAR such as the hours worked by cost center, as well as the dollar amounts and percentages in a summary table.
From the timesheet, click the three-dot ellipses button, then select *Print*. If *Extra Pay & Counter Adjustment* is enabled in the Timesheet Profile, an *Extra Pay & Counter Adjustment* widget will display in *Print Settings*. A *Counter Summary Totals* option is available to enable, which will display Percentages and Cost Centers to enable.
In addition, an approval history and attestation statement will display on the report.

Print Preview Did Not Sort Based on Saved Report Settings when Using Select All

WFR-215459: In the *All Timesheets* report, when users clicked *Select All* and selected *Print Preview*, the report would lose its sort settings and display with the default sort. This is fixed, and the report now retains the saved sort settings, as expected.

WFM Report Conversions

Detailed Hours Overview – Report / Embedded "View Timesheets" Report from Detailed Hours Overview

WFR-182700, WFR-213342: The non-PDF version of the *Detailed Hours Overview* report is now available in Mobile and the Mobile Version on Desktop under *Team > Time > Reports > Time Allocation > Detailed Hours Overview*. You can select the cells from this report to get to the timesheet. When selecting multiple employees and clicking on the *View Timesheets* button, you will be directed to a separate report with the appropriate employee/date filters.

Time Off

Added Document to Request Time Off / Modify Time Off

Attach/Delete Documents in Time Off and Modify Pop-Ups

WFR-198074, WFR-208097: An *Upload Document* section with a paperclip icon now displays above *Projected balance* in the *Time Off Request* pop-up, and is also available in the *Modify Time Off* pop-up if the setting, *Employee Can Attach Document*, is enabled in the *Settings Per Time Off* widget of the Time Off Request Profile.

Security Settings for Time Off Documents

WFR-211225: From the Security Profile, under the *TLM* tab, a new section has been added, *Time Off Documents*. From here, you can give permission to *View*, *Add* and/or *Delete* Time Off Documents.

Require Attachments

WFR-198570, WFR-209202: Managers can require users to submit an attachment in order to track the reason for their time off.

In the Time Off Request profile, within the *Default Settings* section, a new setting has been added, *Request Require Attached Document*. When enabled, a red asterisk will display next to *Upload Document*, indicating that it is a requirement for the user to upload a document with their time off request, otherwise they will not be able to submit the request. The trash can icon to delete **will not** display so that users cannot delete the required attachment.

Settings Per Time Off

WFR-209204: In some cases, managers will want attachments required for specific time off requests, but for other time off requests, they may not want an attachment required.

For users with the *Request Require Attached Document* setting enabled, when you configure the time off setting in the *Settings Per Time Off* widget, you can specify for each time off type if employees can attach documents and if that should be a requirement by selecting *Yes* or *No* next to *Employee Can Attach Document* and *Request Requires Attached Document*.

To-Do Items

WFR-198077: Managers can view attached Time off Documents in their *My To Do Items* to properly track the reason for taking time offs. A *View Documents* link is available to click within *Approve/Reject Time Off Request* in *My To Do Items*.

Attached Documents in Time Off Reports

WFR-198079: Any attached documents in time offs will be included in all time off reports (*All Open*, *Pending Time Off*, and *Approval History*). You can add the *Attached Documents* column to these reports, which will display the paperclip icon with the number of attachments associated with that time off. Click the icon to access the attached document(s).

Delete and Edit Hidden for Attached Time Off Documents in Employee Documents

WFR-215155: From the *Employee Documents* report, employees will only be able to view/download the attached documents, not edit/delete. The only reports with attached documents that can be deleted are from time off management reports.

Adding Time Off Documents to Timesheet

WFR-198078: For approved time offs with documents attached, *Time Off Documents* will be an available option to select in the open timesheet from the three-dot ellipsis action button. When this option is selected, a *Time Off Documents* pop-up will display with information about the attached documents, as well as the ability to download the documents.

To allow users to select the *Time Off Documents* option from the timesheet, navigate to the Security Profile and enable under *Reports*, *Employee Time Reports: All Time Off Documents*.

Time Off Request

Time Off Request – Timeline in Request Time Off Pop-Up

WFR-118645: In Desktop, Mobile, and the Mobile Version on Desktop, the timeline will now display in the header of the *Request Time Off* pop-up for the requested range. This will make requesting time off easier because users will not have to refer back to the Time Off Calendar to make sure they do not have any restrictions or are scheduled on the day.

Scheduler Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. *****For full details on any of the following enhancements, including screen shots, please see the detailed Scheduler release notes for February 2021*.****

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!

NEW Work Schedules in Advanced Scheduler

Previously, Work Schedule Profile was only available for TLM Basic Scheduling.
What's changed: The Work Schedule Profile is now available for Advanced Scheduling. This is beneficial for employees who have a static schedule or recurring schedule patterns and do not need the engine to auto assign their shifts from week to week. Utilizing Work Schedule Profiles will save time and manual work.

Added Scheduler Fields to Daily Rules and Work Schedule Profile

WFR-206408, WFR-210491: To start creating a Work Schedule Profile, you first need to build a Schedule Daily Rule. Navigate to *Edit Schedule Daily Rules*, under *Company Settings > Profiles/Policies > Schedules > Daily Rules*. A checkbox, *Is Scheduler*, has been added to the *Schedule Daily Rule* widget, which will make the Daily Rules and settings only used for Advanced Scheduler scheduling and not TLM Basic Scheduling.
IMPORTANT NOTE: Once *Is Scheduler* is enabled and saved, this cannot be undone.
Next, you will need to create a Work Schedule Profile from *Company Settings > Profiles/Policies > Schedules > Work Schedules*. From *Edit Work Schedule Profile*, the *Is Scheduler* option is available to enable, which will change the columns to match what was configured in the Daily Rules.
You can define shifts for up to 364 days or 52 weeks from *Days In Cycle*.

Assigning Scheduler Profile and Work Schedule Profile in Employee Profile

WFR-206423: Previously, when an employee was assigned a Scheduler Profile and a Work Schedule Profile, a warning message displayed, letting the user know that the Work Schedule Profile would be ignored because TLM Work Schedules Profiles did not work in Scheduler.
What's changed: Because you can now assign a Scheduler Profile and a Work Schedule Profile to an employee, the warning message will no longer display, and you will be able to successfully assign both if needed.

Added "Convert Work Schedule To Shifts" Rule in Schedule Settings / Create Scheduler Shifts Based on Work Schedules

WFR-206421, WFR-206422: In order to control when the system should use Work Schedules to create shifts on schedules, a new shift creation rule has been added to *Schedule Settings* (under *Company Settings > Schedule Setup > Schedule Settings*) called *Convert Work Schedules To Shifts*. Click the *Add Shift Creation Rule* button then select this rule.
When this rule is added, the system will automatically create and assign scheduled shifts to employees based on an assigned Work Schedule Profile so that you will not have to manually assign these shifts.
If a Cost Center from the Daily Rule assigned to a Work Schedule Profile differs from a Cost Center on the Schedule to be created, the shift created based on the Daily Rule will be skipped.
NOTE: This rule is only available for Scheduler + TLM companies.
The system will assign shifts to employees based on the cycle date of the work schedule profile and cycle length and start date of the schedule. Shifts will be created and assigned to employees based on daily rules in the work schedule. Shift dates will be based on the work schedule cycle date, schedule cycle length, and start date of the schedule.
When using a Work Schedule Profile, all engine functionality is still available: constraint violations will be triggered when applicable by the engine; if an employee cannot work a shift, the shift can still be posted as an open shift for employees to request; shift swaps and coverage requests can still occur; assigned shifts will be frozen to employees so that they are not considered by the engine for auto assignment.

Added "Is Scheduler" Column to Daily Rules and Work Schedules Profile Reports

WFR-210519: For companies with Daily Rules and Work Schedule Profiles defined as *Is Scheduler*, an *Is Scheduler* column has been added to the *Company Daily Work Schedules* and *Company Work Schedule Profiles* reports. The Y (for yes) or N (for no) under this column will allow users to easily identify which rules and profiles are used for Scheduler.

Updated Schedule Daily Rules Import for Scheduler

WFR-206888: In order to be able to import Scheduler daily rules, the following fields have been added to the *Schedule Daily Rules* import template:

- Is Scheduler
- Require Scheduled Cost Center
- Skill
- Credentials (if the HR subsystem is enabled)
- Certifications (if the HR subsystem is enabled)

Adjusted Time Off Display in Day View (Bulk Type Only)

WFR-207335: Previously, Bulk time off on the schedule Day View would only display when the timeframe for the day was between 12a-8a for a full day or partial day (bulk) time off. This could be confusing to managers, as it indicated that the employee was only off during those hours but may be available outside those hours.
What's changed: The Bulk type of time off will now display in the Day View for all hours of the day, no matter which hours are filtered on the schedule, so that managers can always see that the employee has a time off.

Display and Action Updates to Schedule Views

Added Start Time in Sort Option in Week and Month Views

WFR-187253: In the R68 (May 2020) release, a sort option in the Day View was added, *Shift Start Time*. When selected, the schedule will be chronologically ordered by the earliest shifts to the latest, along with the option to sort ascending or descending.
In this release, this feature has been made available for the Week and Month Views.

Shift Color Now Displays in Entire Shift Box

💡WFR-181142: Previously, skill colors displayed on the edge of shifts in schedules.
What's new: Skill colors will now fill in the entire shift box in schedules, as well as shift boxes in the *Open Shifts* panel, the employee row, *Employee Schedule Detail* (*Scheduled* and *Qualified Open Shifts* sections) and *Schedule Details*. The filled in color will also apply to print and PDF versions of the schedule.

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Mass Edit Cost Center and Skills Fields

WFR-209995: In the *Summary By Employee* report, when managers mass edit shifts, they can now choose a *Primary Cost Center* and *Skill* to mass edit from the *Manage Shift* pop-up so that they no longer have to make individual shift changes for cost centers and/or skills.

Mass Edits Pushed to TLM in Real Time

WFR-209998: Mass edits to shifts on posted schedules will now be sent to TLM automatically so that users do not have to run TLM shift creation rules manually. Changes will be reflected in the employee's timesheet, the employee's schedule, and all TLM reports that contain shift data.

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Show Time Off Types Name in Weekly Schedule Report

WFR-197054: Previously, the *Weekly Schedule* report showed that there was time off and the number of hours, but it did not display the name of the time off type.

What's changed: The name of the time off type is now available to display on the *Weekly Schedule* report. A new setting has been added in the *Settings* section of Time Off Properties, *Show Name in Weekly Schedules*. This setting will be disabled by default. If you do want the time off name displayed, enable this setting.

HR Enhancements

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Account Contacts

Options Added to Require, Hide, and Display Fields in Account Contacts

WFR-189552, WFR-208805, WFR-210557, WFR-217165: A new widget called Account Contacts is now available in Company Settings. In the ***Account Contacts*** widget, customization has been added to allow you to require or not require contact types in account contacts on the employee profile, enable or disable certain contact types and to display or require certain fields for the enabled contact types.
NOTE: This is an extensive write up with multiple facets. Please download the HR February 2021 release notes.

Account Demographics

Visa Type 482 Added to System

WFR-207122: Visa form type 482 has been added to the system and is available for employees in the Account Demographics section of employee profiles. This form is a temporary work visa used to sponsor persons to work in Australia. It will be available in the Applicant Profile and will also be available for HR Actions, Imports and will display in PDFs. Form 482 replaces outdated form 457.

Bank Accounts

New Zealand Bank Accounts to Allow 15 Digits

WFR-204626: For employee(s) that live in New Zealand with New Zealand bank accounts, the validation of the account number will allow for 15 or 16 digits. Previously, the system only allowed for 16 digits.

Benefits

Localization of Fields in Approve Change Request Pop-Up

WFR-207294: The Approve Change Request pop-up used by managers to approve/reject a benefit change request will now be localized to the Locale settings within Company Setup. If an employee has a different locale assigned, the manager will see the fields based on the company locale.

Checklists

New! Content Checklist Item Added to Checklists

WFR-180465: A new **Content** checklist item is now available to be added to checklists. This item allows you to add specialized content such as rich text, images, videos, links, tables and more. When the recipient opens their checklist, the created content will display. This item can give the recipients an engaging experience when working through their checklist. This is located under *Company Settings > HR Setup > Checklists*.

Company Settings

Primary Phone Default Setting Added to Company Setting Defaults

WFR-207775: Previously, when hiring an employee, the Primary Phone defaulted to the Home Phone and users did not have the option during the hiring process to default this to another option such as Cell Phone.
To address this, a primary phone default setting has been added to Company Settings so you can designate the default primary phone to be either the Work, Home or Cell Phone upon hire. This is located in the *Account Policies* widget under *Company Settings > Global Setup > Company Setup > Defaults*.

Primary Phone Number in Employees Import Template

WFR-16682: *Primary Phone* has been added to the *Instructions* tab. This allows you to set whether Home Phone, Cell Phone, or Work Phone will be the primary phone for employee accounts. Will be available in Excel, Excel 2007 and XML versions.

My Information HR Action: Ability to Set Primary Phone Number

WFR-207766: Employees filling out a My Information HR Action request can now designate which of their phone numbers are primary. Previously, they could list their phone numbers (Home, Cell, Work) but could not designate a primary.

Custom Forms

Employee ID & Approved/Rejected Columns Added to Custom Forms Details Report

WFR-208891, WFR-174170, WFR-212342: Previously, this report contained only the Approver's Name that completed the latest Approve step of the workflow. But users could not see when (timestamp) an approval occurred. Also unavailable were Employee ID and Rejecter information.
For both the **Employee ID** and **Approved On** columns:

- If a workflow has multiple approver steps, these columns in the report will display data for the most recent approver.
- Does not apply for auto-approved workflow steps. It only applies to the actual approver(s).
- These columns are available for employee or applicant type forms.

The following columns have now been added:

- **Approver Employee ID** (only available for MSS report) - This column will populate with the approver's employee ID.
- **Approved On**
- **Rejecter Full Name**
- **Rejecter First Name**
- **Rejecter Last Name**
- **Rejected On**
- **Rejecter Employee ID** (only available for MSS report) - This column will populate with the approver's employee ID.

Points Details Field Added to Custom Forms

WFR-196666, WFR-217308: When editing a page in a custom form, a **Points Details** field has been added to the *Field* drop-down when selecting *Type: Employee*. This is only available if the Points module is active and in use within your company.
When selecting this points field, points details will that are automatically created by the points engine will now be included in the custom forms, giving employees quick visibility to the points details that triggered the form to be sent. Including the details prevents employees from having to manually hunt for the information and can limit employee challenges due to inadequate information.
Points details will be available whether the custom form is manually created or is part of an HR Action or Checklist.

Position Assignment Fields Added to Custom Forms

WFR-184364, WFR-206919: The following Position Management fields have been added to Custom Forms. When added, these are read-only fields. These fields are available in the *Field* drop-down when selecting *Type*: *Employee.*
When added, they will populate with the employee's Primary Position Assignment. If the employee does not have a primary assignment, the fields will display as blank.

Employee Profiles

Reason Code Generated for Automatic Pay Grade Steps Update

WFR-177569: To create Reason Codes, a new **Base Compensation Change Reason Codes** menu item has been added under *Company Settings > HR Setup > Base Compensation Changes Reason Codes*.

- This opens the same maintenance page that is available from the hyperlinked portion of the title for the *Base Compensation Changes Require Reason Codes* setting in Company Setup.

Within Pay Grades that are configured with Automatic Pay Grade Steps, the system will automatically generate an **Automatic Pay Grade Step** Reason Code that will populate the automatic entry in the employee's Base Compensation widget in their employee accounts.

Job Change History Widget Updated

WFR-203060: When the **New Look** is switched on, the *Job Change History* widget was previously missing the *Salary Change Reason* and *Termination Reason Code* columns. Those have now been added to the New Look view and can be added using the Add/Remove Columns option.

Other Settings Widget in Employee Profiles

WFR-207175: When hiring employees either manually or through an HR Action, any Extra Fields that are left blank will not be validated for effective dates that are before the latest one. If an Extra Field is required when adding a new line, only the latest line will be marked as required.

HR Actions

Updated Lookup for Default Job and Other HR Action Items

WFR-214845, WFR-214580: When an HR Action contains a Default Job item, the user processing the action will now see an updated lookup when clicking the icon in the Default Job field. The previous lookup pop-up page used a single selection. The new lookup page is now the company standard report page style. This updated lookup page applies to all other action items as well. Items that are date sensitive, such as Benefit Plans, will be presented with a date picker.

Updated Single Select Lookup for Pay Prep Profile/Workday Breakdown Template – TLM & HR

WFR-208850, WFR-208849: In Desktop, Mobile, and the Mobile Version on Desktop, the *Pay Prep Profile* HR Action Item now utilizes a single select lookup. In addition, the *Workday Breakdown Template* inside the corresponding HR Action also contains the new single select lookup.

Imports

Cost Centers Added to Workers Claim Import

WFR-208590: The cost centers associated with a workers claim will now be included in the Workers Claim import template. They will be shown as Cost Center 1, Cost Center 2…up to Cost Center 9. The Instructions tab has been updated with the cost center information as well. If a Cost Center is specified in the import template, when a workers claim is processed, the *Specify Cost Center* checkbox is selected, and cost center-related fields are populated. The Address is populated automatically according to the Cost Center address.
Exception: If the cost center specified in the import template is equal to the employee's default cost center, the behavior is the same as if the cost center is not filled in the import template.

Open Enrollment

Adding Account Contact Relationship Types

WFR-202174: During Open Enrollment, employees can add an Account Contact which contains a Relationship type. Employees adding their own relationship type adds the entry to

the global relationship list, which may not be desired. We are now introducing a way to limit employees from adding their own relationship types.
A new ***Allow New Typed Entries For Relationship In Account Contacts*** setting has been added. If enabled, employees can add their own entries. If disabled, the user will not be able to freely type a Relationship in Account Contacts (whether through the Account Contacts widget itself, through Open Enrollment, or via an HR Action). They will have to select from the drop-down list which contains the visible relationships configured under *Company Settings > Global Setup > Global List Definitions > Relationships*.
NOTE: This setting is enabled by default for backwards compatibility. It can be disabled to restrict users from adding new relationship types.

Performance Management – Peer Feedback

Multiple improvements have been made to the Peer Feedback process to make the process easier for both managers and employees to provide and manage feedback. Some of the updates are new and some are redesigns, and all support the framework and standards of the user interface.

Peer Feedback: Updated Page on Assigned Tab of Peer Feedback

WFR-139850: The Assigned tab view for managers has been updated as follows:

- Records are grouped by Peer Feedback Name - Peer Feedback Name column removed
- Created On column has been added
- Records are sorted by Created On date (descending) within a group
- The value in the Created On column is hyperlinked and selectable, taking user to the Peer Feedback page for the selected record

Peer Feedback: Ability for Managers to Add/Delete Providers

WFR-210317, WFR-198696: Managers viewing feedback details for their team members on the Assigned tab can manually add and delete providers.

Deleting Providers

- Bypasses the approval process and deletes the To Do Item for the provider.
- Multiple providers for the selected employee can be deleted at once on the Delete Providers pop-up.
- If feedback has been submitted by a provider, a message will be generated to warn that the feedback could not be removed because it was submitted.

Adding Providers

- Bypasses the approval process and creates a To Do Item for the provider.
- Multiple providers for the selected employee can be added at once on the Browse and Select Employees popup.
- Feedback provider cannot be the same person as the employee. System will generate a warning message in such cases.

Peer Feedback: Ability for Managers to Add Notes and Documents When Viewing Feedback

WFR-134435: Managers viewing feedback details for their team members can now add notes and documents.

- Managers can add Notes on individual Feedback provider - per feedback note only stored in the feedback section
- Managers can add Documents & Notes on Feedback in general (icons at top of page.)

Users must have security permissions enabled for adding notes and attaching documents (current security setting applies here – no new setting added).

Peer Feedback: Assigned Employee No Longer Displays in Peer Feedback Provider Lookup List

WFR-146060: When a manager (or other user) selects *Add Peer Feedback Providers* from their My To Do Item for peer feedback, their name will no longer display in the employee list (*Browse and Select Employees* pop-up). This was done because it doesn't make sense for a user to assign themselves to their own feedback.

Peer Feedback: Allow Peer Feedback to be Used in Performance Reviews

💡WFR-125625, WFR-204973, WFR-125630: When creating a new Peer Feedback configuration under *Company Settings > HR Setup > Performance Review > Peer Feedback*, a new ***Use In Performance Reviews*** checkbox has been added. When checked, the peer feedback will be used only in performance reviews.

- This is not retroactive – existing peer feedback configurations will not have this option show as active, and instead will be grayed out. This is only valid on new configurations.
- When checking this box, Peer Feedback will be managed within the performance review and will not be available under *Team > Talent > Performance > Peer Feedback* but will be visible on the Assigned tab when used.
- In Performance Review Profiles, a ***Peer Feedback*** checkbox is available in the *Enabled* section of the *Functionality* widget. When checked, the Peer Feedback configurations where the *Use In Performance Reviews* checkbox is checked, will be included for employees assigned to the performance review profile.
- A new ***Peer Feedback*** widget will then be available and should be added. Once added the first time, it will be available for other profiles. The feedback will occur independently of user intervention based on the dates of the performance review and the time period set to collect and end peer feedback.

Peer Feedback: Ability to Modify Visibility to Feedback

WFR-203223: Managers will now have the ability to limit visibility to Peer Feedback. Visibility only exists if feedback has been given (Submitted or Modified status). Admins or managers can review feedback on the *Assigned* tab under *Team > Talent > Performance > Peer Feedback*. Depending which option is selected will determine who can view the comment by feedback providers. The selection will change the view on the page.

- **Visible to All** – anyone with access can view feedback by providers
- **Visible to Company Admin** – only the administrator can view feedback by providers

- **Visible to Select Employees** – only the selected employee(s) & Full Rights Admins can view feedback by providers

NOTE: The Anonymous options can be used in conjunction with the Visibility options.

Peer Feedback: Approve Automatically Step Added to Peer Feedback Workflows

WFR-139487: A new and separate ***Approve Automatically*** step has been added to Peer Feedback workflows. Depending where the step is placed in the workflow, approval of peer feedback providers or feedback will occur automatically without user intervention.

Position Management

Position Attributes Included in Reports

WFR-206158: Position attribute columns have been added to the **Pay Statement History (Detail)** (requires Payroll sub-system) and the **Employee Information** report pages. If employee position assignment attributes are enabled in Company Setup (Position Management widget), any assigned attributes will display in the report pages when adding these columns to the reports.

Recruitment

Applicant Profile Setup: Job Application Summary Tab Added

WFR-205650, WFR-205677: A new **Job Application Summary** tab has been added to Applicant Profile Setup. The information in the ***Job Application Summary*** tab becomes active when the applicant has completed their job application process. The system takes a snapshot in time of the information they provide while applying for a specific job. Prior to submitting/signing, if they make edits to any of their information, the summary tab will update. Once they submit/sign, any further edits will not be reflected in that job application.

- **For Administrators**: The Summary tab allows you to customize a *Consent/Acknowledgement* message for the job application. *Electronic Signature* is now available on this tab. Also allowed is a customized *Screen Message* and a customized title and message for *My Job Application Summary*.
- **Coming in a Future Release**: This information will be available in the downloaded PDF for Job Applications.

Applicant Profile Setup: Cover Letter, Resume & Supporting Documents Tab Moved

WFR-205644: To allow applicants the ability to add cover letters, resumes and any supporting documents prior to finishing and applying, the Cover Letter tab has been renamed and moved. The new name is **Cover Letter, Resume & Supporting Documents**.

- It will now be located above the new ***Job Application Summary*** tab. This tab will have a *Save & Continue* button (previously it had a *Finish & Apply* button) and when clicked will validate information and move the applicant to the next tab.
- As with the other tabs, the names and messages can be customized.

Applicant Profile Setup: Localization of Tabs

WFR-214188: Applicants will be able to view the information in their Applicant Profiles in their designated locale language. All system default text in the tab headers, section headers, and screen messages will be translated accordingly.

Quick Apply: Knockout Waiting Period Added to Quick Apply Applicants

WFR-206055: Previously, when Quick Apply applicants were knocked out through a job-related questionnaire, they were not restricted to wait the specified period before reapplying for the job. Going forward, Quick Apply applicants will now be subject to the configured waiting period set in the knockout questionnaire.

Security: New Permission Added to Limit End User Access to Hiring Stages in Job Requisitions

WFR-187124: Historically, if users have access to View/Edit Job Requisitions in their Security Profiles, they can also View/Edit the Hiring Stages within the Job Requisition (such as enforcing sequence, enabling/disabling specific hiring stages and/or marking certain hiring stages as required or changing the sequence order).

If you do not want your users to have this ability within job requisitions, a new security permission has been added that will control this access. The new ***Job Requisition Hiring Stages*** setting is under the *HR* Tab in the *Recruitment* section where other Job Requisition items are located. Options are Null, View and View Edit.

- For backwards compatibility, *View/Edit* will be selected by default.
  - If *Null* is selected, the user will not be able to View or Edit the Hiring Stages section or any of its contents.
  - If *View* is selected, the user will be able to View the Hiring Stages section but will not be able to edit any of its contents.
  - If *View/Edit* is selected, the user will be able to View the hiring stages section content and make edits.
  - Existing functionality still remains in that once an application is tied to a job requisition, no changes to hiring stages in that job requisition can be made.

This new setting only affects the hiring stages widget within the job requisition and does not control whether the manager can move the applicant to different hiring stages on the job application, as that is already controlled by a separate existing security item for Job Application Hiring Stages.

Workers Compensation

Cost Centers Added to Worker's Claims

WFR-211307: HR Managers can now connect a Workers Claim to a specific Cost Center so that incident reporting is done accurately. A new ***Specify Cost Center*** checkbox has been added to the Workers Claim Incident tab. If checkbox is checked, users can select one specific Cost Center from the values available to the user. This is done from *Team > HR > HR Maintenance > Worker Claims*.

Payroll Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. *****For full details on any of the following enhancements, including screen shots, please see the detailed Payroll release notes for February 2021**.***

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!

Important! Quick Payroll Under Construction

WFR-219834: We are in the process of making some needed and required UI changes to Quick Payroll. As a result, this feature will be unavailable after the April Release (R74) is applied to your server. The unavailability will most likely extend into future releases. When it is set to become available again, we will notify you in the that release's release notes.

Auto Correct for FFCRA Earning Types

WFR-216467: To eliminate some manual work that employers have to do when their employees take leave because of COVID-19, the system now automatically unchecks the Auto Correct check box after an employee is paid using any of the following three FFCRA earnings types: FFCRA Family Leave 10 days, FFCRA Sick Leave 10 days, FFCRA FMLA 10 weeks. After an employee is paid with one of these earnings types, the system ensures that their tax is not Auto Corrected for the rest of 2021. The system also ensures that the Auto Correct check box is returned to the checked state on the first day of 2022.

Account Taxes Report Column Name has Changed

WFR-202698: In the Account Taxes report, the *W4 2020 Form: Claim Dependent* column has been renamed to *Claim Dependent/Amount/Credits*.

ADP File Updates

WFR-199637: Quarterly and Periodic ADP files have been updated to the latest ADP specification.

Employer Tax Settings Updates for Eugene, OR

WFR-218512: Employer tax settings for Eugene, Oregon are updated in the system.

Federal Form W-4 Updates for 2021

WFR-186920: The IRS has updated the 2021 Federal W-4 form. It is now available in the system.

Federal Lock In Letter Updates

WFR-193213: The IRS has updated Lock In Letters 2800C and 2808C for 2020 and forward. The updated letters are now available in the system.

FFCRA Wages Included in 2020 W2

WFR-184263, WFR-214394, WFR-215725: The system is updated to include FFCRA wages in Box 14 of 2020 W2 forms. For earnings codes created with these system types, the description on the W2 will appear as follows:

- For Earning Codes with System Type= FFCRA Family Leave 10 Days:
  Tax Forms = W2, Box Type = 14 - Other Description On W2 = **SKLV$200**
- For Earning Codes with System Type= FFCRA FMLA 10 Weeks:
  Tax Forms = W2, Box Type = 14 - Other Description On W2 = **EMFAMLV**
- For Earning Codes with System Type= FFCRA Sick Leave 10 Days:
  Tax Forms = W2, Box Type = 14 - Other Description On W2 = **SKLV$511**

NOTE: Users must recalculate 2020 W2 forms in Year End Processing in order for the system to populate FFCRA wages into Box 14.

Intuit Exports are Updated for 2020

WFR-191758: The system is updated so that when users perform year end processing and they click *Enable Turbo Tax W2 Import*, the system generates the 2020 Intuit export file and uploads it into Turbo Tax.

MasterTax RTS Files is Updated

WFR-213805: The MasterTax RTS file is now updated to Version 41 in the system.

Special Characters are Converted for MasterTax

WFR-156154, WFR-175853, WFR-175854, WFR-175855: Because MasterTax does not support special characters in EFW2 and 1099 files, the system has been updated to convert these special characters (such as accent symbols) into characters that MasterTax does support. Now when users create RTS, PTS, Setup PTS, and Monthly UI files for MasterTax, any special characters in the fields are converted to characters supported by MasterTax.

State Forms are Updated for 2021

WFR-204763: Updated state-specific forms for 2021 are now available in the system for Arizona, Delaware, Idaho, Indiana, Iowa, Maine, Michigan, Mississippi, Missouri, Nebraska, New York (IT-2104 and IT-2104E), Ohio, Puerto Rico, Rhode Island, South Carolina. Also, the following states are configured to use the 2021 Federal W-4 form: Colorado, New Mexico, North Dakota, Utah.

Cross Product Enhancements

A summary list of the enhancements for the next system release is listed below. An in-depth explanation of these descriptions is available in the regular detailed release notes. ****For full details on any of the following enhancements, including screen shots, please see the detailed Cross Product release notes for February 2021*.****

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ACA

2020 AIR Updates

WFR-193282, WFR-193285: Previous year files have been updated to the current IRS reporting standards, so if you have to file for a previous year or send in corrections, your file will be accepted right away. If Tax Year <=2019, the manifest file generated will be in the Tax Year 2020 format.
Per IRS Publication 5258, once the TY2020 format is in production, the format for TY2019, TY2018, TY2017, and TY2016 files must be updated. These updates only reflect on the AIR XML files when the selected Tax Year =! 2020.
These updates include:

- Within the header xmlns="urn:us:gov:treasury:irs:ext:aca:air:ty19" ends with ty20 rather than ty19
- For 2019 files only the <PriorYearDataInd> has been changed from 0 to 1
- The files for 2016, 2017, and 2018 already have these updates from previous years' updates

2020 AIR Update - Software ID for 2020 Entries

WFR-193281: The 2020 software ID for this year's ACA (AIR) filing (*Tax Year* = 2020) has been updated in the system.

2020 AIR Update - 2020 AIR File Format

WFR-193283: The system now has the most up to date AIR File format to ensure that the submissions are accepted right away. Files created for the 2020 tax year meet the current IRS file specifications, and the updated format is applied when the *Tax Year* selected is 2020.

2020 AIR Update - 2020 TCC Communication Test File Format

WFR-193284: The TCC Communication Test file, which is a character-by-character file containing “dummy” data that employers submit to the IRS as a test, has been updated to meet IRS specifications for tax year 2020. The TCC communication test file is created per the new specifications, and the manifest file is generated upon clicking on *Generate XML*. The TCC code now displays under the *<UniqueTransmissionId>*, and the current date and time display under the *Timestamp* tag.

If an employer has already completed this test with the IRS, they do not need to repeat it.

AIR Validations New for 2020 Filing

WFR-209052: Additional validations have been added to the Generate AIR Files process based on new business rules implemented in 2020. This process generates a .txt file, providing users with advance notice of items that may cause the file to be rejected.

The system warns users if any information on the forms is incorrect so they can proactively make changes before submitting the file to the IRS. The following validations are built into the Generate AIR File generation process for the 2020 tax year.

- If the <StartMonthNumberCd> within the Form 1095-C grouping meets any of the following criteria, it is included in the .txt file:
  - It is not just numbers/numeric.
  - It is not two digits in length.

  The text includes a way to identify which Employee/Form 1095-C is affected and also includes *PlanStart month is in an invalid format and will cause your AIR submission to be rejected*.
- If the <StartMonthNumberCd> is missing from within the Form 1095-C grouping, it is included in the .txt file. The text includes a way to identify which Employee/Form 1095-C is affected and also includes *PlanStart month is missing and will cause your AIR submission to be rejected*.
- If any of the Line 14 codes fall in the listing below and there is no <AnnualICHRAZipCd> or <MonthlyICHRAZipCdGrp> within the same Form 1095-C grouping, it is included in the .txt file:
  - 1L
  - 1M
  - 1N
  - 1O
  - 1P
  - 1Q

  The text includes a way to identify which Employee/Form 1095-C is affected and also includes *A five digit Zip Code is required in Line 17 when using Line 14 codes 1L, 1M, 1N, 1O, 1P, 1Q*.

2020 Form 1095-C Validations

WFR-202902: Up to date validations have been applied to Part I on the 2020 Form 1095-C to ensure the employee and employer information is properly filled out, meets the IRS standards, and does not cause errors in the filing process.

WFR-212532: The system prevents users from entering information that does not meet the IRS standards so that there are not errors on the forms provided to employees or via paper filing to the IRS that will cause a need to issue corrected forms. The following fields that are new for 2020 and the corresponding validations have been applied to Part II on the 2020 Form 1095-C:

Part II Header - Employees Age on January 1

- This should be numeric only.
- The maximum length is 3 characters
- This information auto-populates.

Part II Header - Plan Start Month

- This should be numeric only.
- The maximum length is 2 numbers.
- The values should be between 01 and 12 (i.e. 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, 12).
- This information will **not** auto-populate and must be manually entered or Mass Edited on multiple forms.

Line 17 - ZIP Code (**NOTE**: This differs from the Zip Code in Line 6)

- This should be numeric only.
- The maximum length is 5 digits.
- This information will not auto-populate on the ACA Timeline and must be manually entered. When it is populated on the ACA Timeline, it comes directly from an employee's ACA Timeline.
- Some Zip Codes begin with a leading zero, which does not drop off when exporting to a PDF.

WFR-212533: Up to date validations have been applied to Part III on the 2020 Form 1095-C to ensure the employee and employer information is properly filled out, meets the IRS standards, and does not cause errors in the filing process.

Dependent Form 1095-C Error Plan Start Month not Available

WFR-212570: The Plan Start Month is now enabled and is a required field for the Dependent 1095-C Form for 2020. Users can enter the appropriate month on the Dependent Form 1095-C to ensure that their filing will be accepted as the Plan Start Month is now required by the IRS this year (2020).

Valid values are 01, 02, 03, 04, 05, 06, 07, 08, 09, 10, 11, or 12. When the Dependent Form 1095-C is exported to PDF, the value populated in this field is included in the PDF.

Broadcast Messaging/Twilio

Send Broadcast Messages as of Certain Date/Time

WFR-185793: Admins or managers can now send a Broadcast Message to employees either using an existing template or by creating a new message, allowing them to communicate in a faster way through the system. When sending out a Broadcast Message to employees, the option to specify when to send (*Date* and *Time*) the message is available in the *Schedule* section.

CMS Reporting

CMS Pay Type Code as Required Field

WFR-74847: Previously, the *CMS Pay Type Code* was an optional field on the employee record. If a user forgot to assign a code to an employee, the employee would be left off the CMS reporting.
What's new: *CMS Pay Type Code* can now be set as a required field in the Employee Profile so that employees cannot be hired or have edits made to their record without having a value in this field. To enable this field as a required field, navigate to the *Account Policies* widget under *Company Settings > Global Setup > Company Setup*, then enable *CMS Pay Type Code Is Required*.

Configuration Documents

Pay Calculations Profiles Rules Structure in Configuration Documents

WFR-209226, WFR-209225, WFR-209220, WFR-209222, WFR-209221, WFR-209174: For companies utilizing Pay Calculations 2.0, users can download an easily understandable Configuration Summary document so that non-technical audiences can digest the document. The following Pay Calculation rules now have a customized structure in the PDF configuration document:

- Exception Based On Worked Time
- Scheduled Total Hours To Counter
- Shift Premium Based On Time Of Day
- Adjust In/Out Time Based On Schedule
- Cumulative By Day
- Exception Based On Scheduled Shift Missed

Cost Centers

Tree Filtering for Cost Centers in Employee Profile Widgets

WFR-190600: In the *Browse and Select Cost Centers* lookup pop-up, cost center tree views have been added. These pop-ups display when adding a cost center. You will now see a ***Tree View*** tab where you can navigate to the desired cost center and then select it.

Cost Center Lookup: View Accounts Column in Single Select Lookup

WFR-198059: More Cost Center related columns have been added to each lookup for consistency. The *View Accounts* column in single select lookups is now supported in Cost Center lookups, and when clicked, it returns the specific accounts associated with that Cost Center assignment.

Dashboards

Dashboard Updates – General

The following updates have been made to dashboards.

Ticket Number	Update/Issue
WFR-208872	To reduce scrolling on your Home Dashboard, adjustments have been made to reduce padding (empty space). On Desktop views, the Back button will be hidden on your first view since it is not necessary to go back a page on that view. It will be available on all subsequent views.
WFR-215134, WFR-200942	Users who have edit ability of their Home Dashboard can reset their configuration with a *Reset Configuration* option under the ellipsis (located above the widgets). A confirmation warning message will display; *Cancel* to exit, or click *Yes* to proceed. This option removes any changes the end user has made and sets their layout back to their assigned profile Schedule configuration.
WFR-214834	The Back button and Dashboard Name on Domain Dashboards is now positioned above the Today's Tasks widget. The Back button has been added to the Home Dashboard and is available when a user has previously opened some other page to which the system can return them. By clicking the Back button on the Home Dashboard, the user returns to the page on which they were previously.

Mobile Dashboard Header Styling Changes

WFR-213231: Styling changes have been made to the Mobile Dashboard Header according to the new design for the HR Dashboard and Start Menu.

- The user icon size is now 54 px.
- The font size in the Dashboard menu is now 16 px.
- The height of the Today’s Tasks widget is now 62 px.
- The space between the Dashboard menu and the Dashboard widgets is now 10 px if there is no choosing Dashboard View panel between them.

Dashboard Layout Profiles – Configuration Updates

WFR-187647 & WFR-198952: The Dashboard Layout Profile configuration page has been improved to streamline the flow. Standard patterns have been applied and users must select *Save* before making edits to schedule layouts when creating a new profile or editing an existing profile.

Dashboard Layout Profile Column Added to Announcements Report

WFR-207944: In the Announcements (Maintenance) report page, located under *Company Settings > Our Company > Announcements*, a new default **Visible to Dashboard Layout Profile** column has been added. In this column, if an announcement has a *Dashboard Layout Profile* in the *Visible To* section, that profile will display in this column and will be hyperlinked. When clicked, the Dashboard Layout Profiles page will open.

Remain on the Same Dashboard Tab After Save

WFR-209561: When Company Admins make changes to a specific tab on the Dashboard Layout Profile and click *Save*, they remain on the same tab after the saving is complete to continue their work.

Updates to the Reset Configuration Action on the Landing Page

WFR-218652: If a user is assigned a Dashboard Layout Profile where the *User Can Modify* option is disabled for the active Schedule and which includes some tiles on any Custom tab, when the user opens the Custom Dashboard on the Landing page and clicks on the ellipsis button, the *Reset Configuration* item is disabled in the drop-down on the Landing page. Additionally, if the user tries to perform a reset of the Custom Dashboard at the same time that the *User Can Modify* option is disabled for the user, a warning message with an *OK* button and the following text is displayed: *You don't have permissions to modify landing dashboard. Please, contact your Administrator*. When the user clicks *OK*, the warning pop-up is closed and the page is refreshed in order to disable the possibility of the user making future modifications.

Reset Configuration Button for System Administrators

WFR-216322: Upon clicking the *Reset Configuration* button when logged in as a System Administrator, the Landing page is reset to its default state.

- There is only one Custom tab, *Home*, that is focused and empty by default.
- All Domain tabs are visible.
- The *My Dashboard* tab is the first Domain tab in the row and is placed right after the Home tab.
- All tabs have a Visible state.

Documents Widget – New!

WFR-206361: A new **Documents** widget is now available to be added to Dashboard Layout Profiles. Users with access to view and download documents will be able to download files from the ellipsis. Clicking the *Documents* title will open the *Download Documents* page (which is accessible from *My Info > Help > Download Documents*).

Documents Widget in Available Widgets

WFR-217682: The Documents widget has been added to the *Available Widgets* list in the *Add Widget* pop-up so Admins with access to the Documents widget can add the widget to a tab. The Documents widget should be included in the Dashboard Layout.
The *Download Documents* and/or *Download Service Provider Documents* security items must be enabled in the user's assigned Security Profile (on the *ESS* tab in the *Tools & Documents* section). When both items are not enabled, the *Button: Download Uploaded Document* row-level action/column is not available to the user. The *Integrated Document Storage* in the Marketplace must also be enabled.

Dashboard Layout Profiles Added to Employees XML Import Template

💡WFR-207397: The **Dashboard Layout Profile** column has been added to the *Profiles/Policies* section of the *Employees XML* import template. When importing via the *Employee Setup > Employees* option, XML is also an option in the *Input Type* drop-down.

Start Widget - Remove the Read-Only Color Box For All Themes Except Standard

WFR-215721: When the Look & Feel (New UI) Theme field is set to Teal (*Company Settings > Global Setup > Look & Feel > System Themes*, *Theme* selector in the *Look & Feel (New UI)* widget is set to **Teal**), and an end user can view the Start Widget in a tab within the Dashboard, the *Category Color (New UI Only - Cannot Be Edited)* label no longer displays the **read-only color box**, which contains the hex code of the selected theme's primary color. The same positioning of the label is maintained in each category, and the text is wrapped in multiple lines.
An informational message displays at the top of the Start Widget Configuration page when a theme other than the Standard (New UI) is selected for a company. The message reads: *Your company is using a theme that provides only a single category color*.
NOTE: New UI themes do not affect the Classic Dashboard (premium dashboard) Start Widget.

My Team Widget Settings

WFR-199070: Users can now view the last applied filter, pagination, and/or search query applied within the *My Team* widget. When the Team Members page/*My Team* widget is displayed and a user makes a change to the pagination, filter, or search query, if the user navigates across the application or logs out or in, when the user navigates back to the Team Members page/*My Team* widget, the last applied filter/pagination/search is retrieved. Different tabs preserve different widget states.
If the *My Team* widget is displayed, when a user clicks on the title to open the Team Members page, the last applied filter/pagination/search to the widget is not inherited on the Team Members page. The *My Team* widget and the Team Members page are independent of each other.

Notifications

Notify Users that their Password was Changed

WFR-148958: A new notification, *Password Changed*, is now available and can be configured and sent to employees to notify them when their account password has been changed.

Passwords

Enable Mobile in Security Profiles No Longer Tied to Desktop Access

WFR-203877: In the New UI Preferences widget of security profiles, when checking *Enable Mobile*, this will now only enable the user(s) to log in through the Mobile App. Previously, this setting was also tied to accessing Desktop (.home). Now, users can access Desktop on a browser without the need to check this security setting.

Warning to User When Changing Passwords

WFR-200777: When a user changes their password, the next action they take logs them out of the system. Previously, this occurred without warning. We have now added a warning message, so the user is prepared for the automatic log out.

Platform

HTML Editor Image Scaling

WFR-202850: The HTML Editor now provides the ability for images to be resized inside the editor. Selecting an image allows you to left click and drag any of the four corners of an image to increase or decrease the size of the image.

HTML Editor Percentage and Fit/Small/Medium/Large/Custom For Width/Height

WFR-212091, WFR-214790: When adding an image to the HTML Editor, Admins/Content managers can now set the image size in pixels and by percentage. The percentage type allows the image to behave responsively in the output of the editor, allowing employees to view the image successfully in both Desktop and Mobile devices.

Within *Add/Edit*, the HTML Editor allows users to set an image to use a percentage-based value of 1-100% or >100% to support images on responsive devices. For example, images placed into the description of a Job Requisition under Recruitment will scale up and down automatically on different Desktop-based and Mobile-based screens when one or more images are set to use percentages.

The *Add/Edit Image* pop-up also provides preset options for certain percentage values based on the preferred size of the image to fit inside the area where the output of the editor is shown.

- **Fit**: 100%

- **Small**: 25%
- **Medium**: 50%
- **Large**: 75%
- **Custom**: Type in your desired width and height.

NOTE: Uploaded image capability is not currently supported in the HTML Editor, and is targeted for a future release.

ADDITIONAL NOTES: Currently, when images set to use the Percentage type are resized from within the Editor, the type is switched to Pixels. As a workaround, access the *Add/Edit Image* pop-up for a selected image and manually type in the new percentage-based value (such as 100% x 100% to 50% x 50%).

In addition, images using the Percentage Type do not currently allow for a ratio difference between the width and height, meaning images cannot be stretched to a smaller percentage width and a larger height (for example, 35% W by 65% H). As a workaround, access the *Add/Edit Image* pop-up for a selected image and change the type to Pixels. Click to unlock the ratio, and set the desired dimensions. Please note that the Pixel type does not allow for the image to be responsive based on screen size.

Report Links in the Mobile Application

WFR-213939: The links to Company Settings within the Mobile Application are now displayed as text instead of links.

Classic Options from Settings

WFR-154558: When users navigate to System Themes (in the *.home* environment), the following data is no longer displayed:

- The Logo (Classic) upload field on the Login tab.
- The Mobile tab.
- The Look and Feel (Classic) widget on the System tab.
- The System widget on the System tab.
- The Export Theme and Import Theme buttons.
- The reports widget on the System tab.

Number of Outstanding Items Related to the Element inside the Popover

WFR-192188: Users can now see the number of outstanding items related to the Action inside the popover, giving them full visibility of pending actions. The number of pending items displays in brackets next to the Action icon title.

Page Layout Footer Logic (Mobile Application)

WFR-211798: Within the Mobile Application, the Action icons are hidden behind the ellipsis so that users have proper access to the Split button for punching. Necessary adjustments have been made to some components in order to further achieve this.

Menu Search in Header

WFR-202203: Within the Mobile Application and the *.home* Desktop environment, the Search location has been updated and is now placed back in the header. The Search is duplicated in the menu and placed at the right of the header.

Reports

Row-Level Actions in Report/Chart Tiles

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

Scrolling with Page Up/Page Down Buttons

WFR-204071: Users can utilize the Page Up and Page Down buttons, as well as the Up/Down/Left/Right arrow buttons, from the body of the report to scroll through any report in the system with enough data.

Complex Employee Lookup - Saved List(s)

Edit List Popup with Members

WFR-202668: Users with access to one or more reports with the Employee Filter functionality can now view a list of Members for existing Saved Lists in the Employee Filter. When at least one Saved List is selected, when a user clicks on the *Name* of a Saved List on the *Selected* Tab, the *View/Edit <Saved List Name>* pop-up appears with focus on the *Selected* Tab. The user views a list of employees belonging to the Saved List in the *Employees* table.
Users can remove employees from selection, add Employees/Groups/Profiles/Advanced Filters/Saved Lists to the selection and save the updated selection as a new list upon clicking *Save List As*. When the user Saves the new list, it appears:

- On the *Available* tab, Saved Lists in the Edit/View list pop-up.
- On the *Available* tab, Saved Lists in the Browse/Select Employee pop-up.

Selections made in the View/Edit Saved List remain on the *Selected* tab. When a user closes the Edit/View Saved list pop-up, the user will return to the Browse/Select Employee pop-up on the Selected tab the user triggered the View Saved List action from.

Edit List

WFR-202667: Users can now overwrite Saved Lists in the Employee Filter of one or more reports. When a user has access to one or more reports that provide Employee Filter functionality, the user can edit the Saved List membership from:

- The *Available* tab, Saved Lists: *Add Column*, upon clicking on the Edit row level action.
- The *Selected* tab, Saved Lists table, upon clicking on the *List Name*.

Users can trigger the Edit Saved List action, then open the View/Edit Saved List pop-up on the *Selected* tab and view the list of employees included in the Saved List the user is editing within

the *Employees* table. Users can also remove employees from the selection, add Employees/Groups/Profiles/Advanced Filters/Saved Lists to the selection, and Save the updated selection, which overrides the previous membership of the list upon clicking *Save* in the footer of the pop-up.
If there is a mixed selection (Employee(s)/Profiles/Groups/Advanced Filters/Saved Lists), when the user clicks *Save*, a confirmation message appears to indicate that the selection will be converted to a static Saved List.

Filter Out All Employee Types Except Regular

WFR-213755: A Holiday Profile may be assigned to not only Regular, but also internal employees such as Applicants. When a Saved list was created based on a selection including the Holiday Profile, the Saved List members showed a counter which included not only Regular, but also internal employees.
Now, upon saving the list either through creation or updates via editing, all Employee Types are excluded from the selection except for Regular employees. Internal employees such as Applicants are removed from the list's members to ensure users can view accurate counts on the *Saved List* tab and the actual number of employees selected for viewing data in a report.

Link for Non-Editable Saved List (Deleted & Shared)

WFR-215085: Users cannot edit deleted Saved Lists or Saved Lists s/he does not own.

- If a Saved List used as an Employee Filter is deleted, when a user opens the *Selected Tab* of the Employee Selector, the deleted Saved List does not provide a link to View/Edit the Saved List members.
- If a user shares a Saved Report View to a Saved List of employees, when the users who get access to the Shared View open the *Selected Tab* of the Employee Selector, the Saved List does not provide a link to View/Edit the Saved List members.

NOTE: If a user selects their own Saved List, a link to View/Edit the list is provided.

Delete Saved List & Display Saved List (Deleted) on Selected Tab

WFR-207233: Users can delete a Saved list so they can eliminate obsolete lists using the delete column in the *Available > Saved Lists* tab. When the *Delete* action is clicked for a Saved list that is applied in the Employee Filter, when the Saved list is deleted, an inline informational message on the Selected Tab of the Employee Filter pop-up explains: *<List Name> is deleted, but selection is retained for use in saved view*. If a user shared the view with the list of employees, when the user deletes the view, employees from the list still can access the shared view.

Embedded Reports Hidden in Mobile Application

WFR-213428: Saved Views of embedded reports are visible on the My Saved Reports page in the Desktop environment, but hidden on the Mobile Application. When a user saves a view in the Desktop environment of an embedded Monthly/Weekly/Yearly Birthday Calendar, then:

- **Desktop** - User can view and run the Saved View via My Saved Reports.
- **Mobile Application** - User cannot view the Saved View of the embedded Monthly/Weekly/Yearly Birthday Calendar on My Saved Reports.

Employee Pill Localized

WFR-195771: Users now see the Employee Pill localized according to the logged-in user's Locale. In the Employee Pill, the following items are localized:

- Employees
- Groups
- Profiles
- Advanced Filter
- Saved List

Selectors and Columns

"Badge (Barcode)" Column Did Not Display Barcode

WFR-109131: Previously on Desktop, the *Badge (Barcode)* column in *Employee Information* displayed the URL, not the barcode. Going forward, the barcode will display in the *Badge (Barcode)* column, as expected.

Feature Retirements

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

Retired Features

Product/ Component	Feature	Menu Path	User Experience	Reason	Planned Retirement Date
Platform	Enable Desktop security setting	*Security Profiles - Company Settings > Profiles/Policies > Security*	Platform	With the move to the New UI being complete, this setting is no longer valid.	February 2021
TLM	Time Entry Approval report	*My Reports > Time Reports > Time Allocation > Detailed Hours Overview*	Desktop	This report is no longer supported. A warning message at the top of the report will display in R72, "The *Time Entry Approval* report setting in the *Detailed Hours Overview* will be retired in the February 2021 release. Time Entries can alternatively be approved from the *All Time Entries* report, *Approve Time*	December 2020

				Entries report, or directly within timesheets."	
HR	**HR SBE (Small Business Edition) **Partner Resellers Only****	***Available Functionality***	All	Functionality No Longer Supported	December 2020
Platform	**My To Do Items** **My Mailbox**	***Main Menu*** ***Start Widget*** ***Quick Links***	New UI, Desktop and Mobile	Updated in the New UI. To access My To Do Items and My Mailbox users can click the My Mailbox indicator (bell icon, upper right hand corner)	December 2020
Full Application	Wiki	*Company Settings > Our Company > Wiki* *My Info > My Company > Wiki*	All	Functionality No Longer Supported	December 2020
TLM	VCA Configuration For Report Dialogs In Notifications	*Employee Profile*	Desktop, Mobile Version on Desktop, and Mobile	The VCA Configuration For Report Dialogs In Notifications section of the Employee Profile (which includes the	December 2020

				Enable Virtual Code Authentication checkbox) is no longer supported. In replacement of the verification code, a security token has been built into the link of the report.	

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