



# Version 2.039

# Release Notes

*June 5, 2010*



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## Version 2.039 Checklist

Certain new features in Version 2.039 require set-up steps. Use the checklist below to update your system for each area that you wish to use.

	Completed By	Date Completed
Assign Function Security to new functions to applicable users.		
If you have hired qualified employees for purposes of the HIRE Act, enter them in HIRE Act Eligibility (pg. 6).		
If you wish to display company policies to employees when they log on to Employee Self Service, use Login Acceptance Policies (pg. 8).		
If you wish to change the settings for displaying Social Security Numbers or Dates of Birth in Employee Self Service, use HR System Defaults (pg. 49).		
If you wish to set up severance pay to be automatically tax exempt according to Alabama, Georgia, North Carolina and Washington D.C. rules, see page 57. If you are an Outsource client, contact Pay Support and request that this be done.		
If you have any employees with a deduction for Wisconsin delinquent taxes, set up the Garnishment Payee for electronic funds transfer. If you are an Outsource client, contact Pay Support and request that this be done.		
If you report new hires to the states, run Set State New Hire Report. If Unicorn HRO reports your new hires, no action is necessary on your part.		

## Version 2.039 Overview

iCON Version 2.039 provides many new functions in Manager Services, as well as new features throughout the product. The Release Notes contain a description of each feature in detail.

**HIRE Act Eligibility:** On March 18, 2010, the Hiring Incentives to Restore Employment (HIRE) Act was enacted into law. Two new tax benefits are available to employers hiring workers who were previously unemployed or only working part time.

- Employers who hire unemployed workers this year (after Feb. 3, 2010 and before Jan. 1, 2011) may qualify for a 6.2-percent payroll tax incentive, in effect exempting them from their share of Social Security taxes on wages paid to these workers after March 18, 2010. This reduced tax withholding will have no effect on the employee's future Social Security benefits, and employers still need to withhold the employee's 6.2-percent share of Social Security taxes, as well as income taxes. The employer and employee's shares of Medicare taxes still apply to these wages.
- For each worker retained for at least a year, businesses may claim an additional general business tax credit, up to \$1,000 per worker, when they file their 2011 income tax returns.

Employers claim the payroll tax benefit on the federal employment tax return they file, usually quarterly, with the IRS. Eligible employers will be able to claim the new tax incentive on their revised employment tax form for the second quarter of 2010.

Unicorn HRO is providing the following changes to the system to support the HIRE Act regulations:

- A new function called HIRE Act Eligibility will be provided when Version 2.039 is applied. In this function, enter the dates for which employer FICA credits may be claimed for your qualified new hires.
- On June 19, programs will be provided that will calculate the employer FICA credit for quarters 1 and 2, which may be claimed on your 2nd quarter Form 941. Beginning with Check Dates in 3rd quarter, and continuing for the remainder of the year, the system will process employer FICA credits each pay period.
- On December 11 as part of the Year-End Update, W-2s will be changed to print eligible earnings in Box 12 as code "CC". Also, a report will be provided for you to use to determine the new hires for which the business tax credit (up to \$1,000) can be claimed.

For more information on the HIRE Act, please use this website for the IRS informational bulletin:

<http://www.irs.gov/newsroom/article/0,,id=220326,00.html>

**Login Acceptance Policies:** The ability to display company policies to employees when they log on to Employee Self Service will be added. When an employee acknowledges reading and accepting the policy, history of the "e-acknowledgement" is stored. History records can be viewed or printed in a report. The new functions in Manager Services are:

- Login Acceptance Policies (to set up policies, handbooks, etc.)
- Login Acceptance History (to view employees who have accepted or rejected policies)
- Acceptance Policy Report (to create a PDF report or CSV file of login acceptance history)

**Additional Functions in Manager Services:** Set-up functions and various other functions will be added.

The following functions will be added to the Employment Information menu:

- HIRE Act Eligibility
- Work History

The following functions will be added to the HR Setup menu:

- Entitlement Policies
- Entitlement Absence Code Assignment
- Entitlement Pay Code Assignment

The following functions will be added to the Payroll Setup menu:

- Garnishment Exemptions
- Legal Entity By Year

The following functions will be added to the Payroll Actions menu:

- New Year Employee Copy
- Retroactive Pay Adjustments

The following functions will be added to the Reports menu:

- Acceptance Policy Report
- Client Setup Report
- EEO-1 File Creation

- EEO-1 File Inquiry
- EEO-4 Reporting
- EEO-4 File Creation
- EEO-4 File Inquiry
- Electronic Payment Register
- Employee Wages Exception Report
- Entitlement Liability Report
- Garnishment Check Register
- Payment List
- Payment Register By Check Date
- VETS-100 Data Generation
- VETS-100 File Creation
- VETS-100 File Inquiry

The following functions will be added to the Tools menu:


- HR COD Security
- Payroll COD Security
- Login Acceptance History
- Login Acceptance Policies

## New iCON Manager Services Functions

This section describes each of the features that have been added to iCON Manager Services. Function Security must be assigned to users as needed.


- HIRE Act Eligibility** has been added to the **Employment Information** menu. Use this function to specify the date ranges when newly hired or rehired employees are qualified for purposes of the tax credit allowed by the HIRE Act. The system will use this information to calculate the employer FICA tax credit for employees' non-voided payments whose Check Dates are in the entered date range. Employers who hire qualified unemployed workers between February 3, 2010 and December 31, 2010 may qualify for a 6.2% payroll tax incentive, effective for wages paid after March 18, 2010. Programs to calculate the tax credits will be provided to you soon after Version 2.039 is applied.

**Luis Perez**  
 Employee Number: 6090  
 Job Title: Assistant Manager  
 Division: Florham Pk.  
 Employment Status: Active

**HIRE Act Eligibility** 

To update, click on information in the left column.

Start Date	End Date	Action
No Data Found		





When you add information for an employee, the system will only allow a Start Date equal to or greater than March 19, 2010, and less than or equal to December 31, 2010.

You may begin entering new hire information in this function as soon as Version 2.039 is applied to your system.



<b>Luis Perez</b>	
Employee Number:	6090
Job Title:	Assistant Manager
Division:	Florham Pk.
Employment Status:	Active

**Add HIRE Act Eligibility**













\* = Required

Enter the starting and ending dates for the company to receive an employer FICA tax credit for qualified employees. Dates must be between 3/19/2010 and 12/31/2010. If the End Date is blank, the system will use 12/31/2010.

*Start Date:	05/12/2010
End Date:	12/31/2010

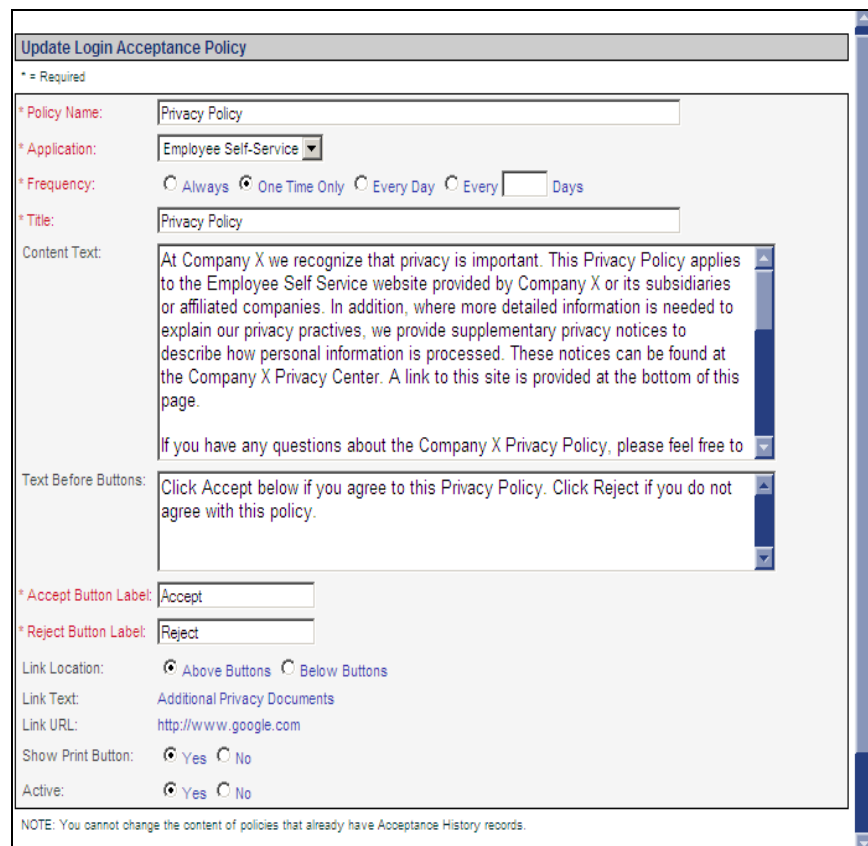
 

- Login Acceptance Policies** has been added to the **Tools** menu. This function allows you to set up policies such as Terms of Agreement and Privacy Policies that your employees must agree to in order to access Employee Self Service. You may set up one or more policy to be shown to employees after they enter their log on credentials. The employee may either accept or reject the policy; history of each transaction is captured and may be viewed in Login Acceptance History. You may print historical data or create a CSV file by using the Acceptance Policy Report.

Login Acceptance Policies <span>+ add</span>				
To update, click on information in the left column. If more than one policy is defined, use the Up or Down arrows to change the sequence in which the policies are displayed to employees.				
Policy Description	Application	Frequency	Active	Action
▼ Privacy Policy	ESS	One Time Only	yes	 view  delete
↕ Consolidated Group 2010 Employee Handbook Revision #3	ESS	Always	yes	 view  delete
↕ Consolidated Group Employee Handbook Revision #2	ESS	One Time Only	no	 view  delete
↕ Vacation Policy Reminder	ESS	One Time Only	yes	 view  delete
↕ Employee Referral Policy	ESS	Every 365 Days	yes	 view  delete
↕ Employment Agreement	ESS	Always	no	 view  delete

If you want to display more than one policy to employees when they log on to ESS, use the sorting arrows to the left of the policies to determine the order in which they will be shown. If a policy is no longer in effect, change it to Inactive. By doing so, it will no longer be shown to employees. History will be accessible. If you wish to remove a policy as well as any employee history, use the delete feature.

To illustrate a sample policy that an employee might see when logging on to Employee Self Service, refer to the set-up page for this Privacy Policy:



**Update Login Acceptance Policy**

\* = Required

\* Policy Name:

\* Application:

\* Frequency: ☐ Always ☒ One Time Only ☐ Every Day ☐ Every  Days

\* Title:

Content Text: 

At Company X we recognize that privacy is important. This Privacy Policy applies to the Employee Self Service website provided by Company X or its subsidiaries or affiliated companies. In addition, where more detailed information is needed to explain our privacy practices, we provide supplementary privacy notices to describe how personal information is processed. These notices can be found at the Company X Privacy Center. A link to this site is provided at the bottom of this page.  
If you have any questions about the Company X Privacy Policy, please feel free to

Text Before Buttons: 

Click Accept below if you agree to this Privacy Policy. Click Reject if you do not agree with this policy.

\* Accept Button Label:

\* Reject Button Label:

Link Location: ☒ Above Buttons ☐ Below Buttons

Link Text:

Link URL:

Show Print Button: ☒ Yes ☐ No

Active: ☒ Yes ☐ No

NOTE: You cannot change the content of policies that already have Acceptance History records.


In many cases, the acceptance of a policy by an employee is akin to a legal contract. To prevent employers from changing the nature of the policy after it is in use, the Content Text, Text Before Buttons, Link Text and the Link URL fields will be disabled when updating a policy that has Login Acceptance History.

Set up your policies by entering the following information:

- Policy Name: this is used for internal identification purposes only; it is not shown to the employee.
- Application: currently, only Employee Self Service policies are supported.
- Frequency: select the frequency with which this policy will be shown to employees.
- Title: enter the title of the policy. This will be shown in Employee Self Service.
- Content Text: you may enter your policy information in this field, up to 30,000 characters. Note that you may also use a link to another website if that is where your policy is located. Refer to the "Link" fields below.
- Text Before Buttons: if you wish to provide instructions to employees explaining what the buttons represent, enter them in this field, up to 1,000 characters.
- Accept Button Label: enter the text that will appear on the button indicating that the employee accepts the policy, such as: I Accept.
- Reject Button Label: enter the text that will appear on the button indicating that the employee rejects the policy.
- Link Location: if you will be providing a link to another website, select whether it should be shown above the Accept and Reject buttons or below the buttons.
- Link Text: if you wish to provide a link to a separate website containing the policy or other information, enter the text that will appear as the link, up to 100 characters.

- **Link URL:** if you entered Link Text, enter the website address, up to 300 characters, such as <http://www.samplecompanypolicy.com>.
- **Show Print Button:** select Yes if you wish to provide a link to a Printer Friendly Page. When the employee clicks on this, a separate window will appear that may be printed.
- **Active:** this field defaults to No. Select Yes when the policy has been fully defined. It will then appear when employees log on to Employee Self Service.

The Privacy Policy in our example will be shown after the employee enters his or her log on credentials:



The screenshot shows a web browser window displaying the 'Privacy Policy' page. The page has a blue header with the 'iCON' logo on the left and the title 'Privacy Policy' on the right. The main content area contains the following text:

At Company X we recognize that privacy is important. This Privacy Policy applies to the Employee Self Service website provided by Company X or its subsidiaries or affiliated companies. In addition, where more detailed information is needed to explain our privacy practices, we provide supplementary privacy notices to describe how personal information is processed. These notices can be found at the Company X Privacy Center. A link to this site is provided at the bottom of this page.

If you have any questions about the Company X Privacy Policy, please feel free to write to us at:

Company X  
Privacy Policy  
123 Any Street  
Anytown, NC 12345

Information we collect and how we use it:

When you access Employee Self Service, you may provide certain personal information, such as your user name and account password. This information will be used for internal business use only and may also be directed to third-party providers for certain business services.

Company X Privacy Center: <http://www.companyxprivacycenter.com>

Below the text, there is a link for 'Additional Privacy Documents'. At the bottom, there is a line of text: 'Click Accept below if you agree to this Privacy Policy. Click Reject if you do not agree with this policy.' Below this text are two buttons: 'Accept' and 'Reject'. At the very bottom, there is a link for 'Printer-Friendly Page'.

- **Login Acceptance History** has been added to the **Tools** menu. This allows you to view who has accepted or rejected the login acceptance policies.

Every time an employee accepts or rejects a policy, his or her response is stored as policy history. This function provides a way to see all history records, or narrow your search by a variety of filters. You may choose to enter a date range, type of response, policy name or employee number. When you make a change to the filters, click on Refresh to display a list of entries matching your selections.

The list will show the Response, Date and Time, Policy Name, Employee Number, Last Name, First Name and Initial and the user's IP Address from where the response was made.

Login Acceptance History							
Date Range:	All Dates	Policy Name:	Privacy Policy	refresh			
Response:	Both	Employee Number:					
Accept Date	Accept Time	Response	Policy Name	Employee#	Last Name	First Name	IP Address
05/12/2010	14:01:30 EST	Accepted	Privacy Policy	305	Clark	Jonna	192.168.100.157
05/12/2010	13:54:27 EST	Accepted	Privacy Policy	400	Anderson-Johnson	Matthew M	192.168.100.171
05/12/2010	13:50:47 EST	Accepted	Privacy Policy	300	Clark	Kristen L	192.168.100.171
05/10/2010	09:34:31 EST	Accepted	Privacy Policy	325	Canfield	Aurora C	192.168.100.157
05/06/2010	08:48:40 EST	Accepted	Privacy Policy	308	Lieberman	Caroline M	192.168.100.157

- **Acceptance Policy Report** has been added to the **Reports** menu. This report allows you to work with information in Login Acceptance History. You may print a report or create a CSV file of employees' responses.

You may select only employees within a certain organization level or choose one or all employees. If you choose the option By Employee Number and leave the Employee Number field blank, it will report on all selected responses for all employees to which you are authorized.

**Acceptance Policy Report**

\* = Required

**Select Employee Population:**

+ Cons. Group

☒ By Organization Structure  
☐ By Employee Number

**Selected Levels:**

Employee Number:

**Select Report Parameters:**

\*Report Type: ☒ Latest Responses ☐ All Responses

\*As Of Date:

\*Report Name:

\*Break By Organization Structure at Level:

\*Employment Status:

Active  
 Active F/T  
 Active Part Time  
 Count  
 Downsizing  
 FMLA Leave  
 In Transit  
 Lay Off (No return)

The bottom portion of the page appears as follows:

**Select Report Parameters:**

\*Report Type: ☒ Latest Responses ☐ All Responses

\*As Of Date:

\*Report Name:

\*Break By Organization Structure at Level:

\*Employment Status:

\*Acceptance Policy:

\*Responses To Include:   
☐ Accepted ☒ Rejected ☒ No Response

\*Group By: ☒ Organization / Employee ☐ Policy / Organization

\*Sort By: ☒ Employee Number ☐ Employee Name

\*Output Options: ☒ PDF Report ☐ CSV File




- Select the Report Type. If you select Latest Responses, the report will contain only the last responses each employee made for the policies and responses specified. If you select All Responses, the report will contain all responses.
- If you selected the Latest Responses option, the As Of Date field will appear. The report will contain the last responses each employee made as of this date.



- If you selected the All Responses option, the From and To Date fields will appear. The report will contain all responses in the date range you specify.
- If you wish to only include employees with selected Employment Statuses, select them from the list. By default, the system preselects all statuses marked as Active in Employment Status Definition. For Latest Responses, the employee status based on the As Of Date is used. For All Responses, the employee's status as of the From Date is used.
- Select one or more policies that are to be included.
- Select the responses to be included. For Latest Responses, select the policies the employee accepted, rejected or did not respond to after the amount of time dictated by the policy frequency. For Always and One-Time Only options, the last response will be used regardless of when it was made. For All Responses, choose to include accepted or rejected responses.
- Select the group method you wish to use. Subtotal policy counts will be provided based on this method.
- Select the sorting method you wish to use.
- Select whether you wish to produce a report, CSV file, or both.

- Work History** has been added to the **Employment Information** menu. This is the same as the Employee Work History function in iCON Tools. When an employee is hired, transferred or terminated, the system automatically writes a Work History record. This includes the organization levels, job title, reason for position, effective date, available hours, workers compensation class, the user who made the change and the date and time the change was made. If the employee left the company, the following information will be shown: reason for termination, termination date, user who made the change and date and time the termination information was entered.

Information in this function is view-only. If you have security to Salary History, you may access this information from Work History.

<b>William C Fulton Jr</b> Employee Number: 615 Job Title: Business Analyst I Division: Charlotte Employment Status: Active <a href="#">Click to send e-mail message to employee</a>				
<b>Work History</b> To view, click on information in the left column. <a href="#">Salary History</a>				
Effective Date	Organization	Job Title	Termination Date	Action
<a href="#">02/09/2008</a>	Value Sol. / Charlotte	Business Analyst I		 delete
<a href="#">01/02/1997</a>	Value Sol. / Pequannock	Business Analyst I	<a href="#">03/12/2009</a>	 delete
<a href="#">01/02/1997</a>	Value Sol. / Charlotte	Business Analyst I	<a href="#">02/11/2008</a>	 delete

- Entitlement Policies** has been added to the **HR Setup** menu. This is the same as the existing iCON Tools function. Use this function to set up entitlement accrual and usage rules. You may set up more than one Entitlement Group if employees in your organization are subject to different policies. For each group, define the policies that apply. Policies may be defined as anniversary-based or calendar-based. Different accrual rules may be defined based on the number of Scheduled Hours for employees. You may also define separate accrual rules for the employee's first year. After policies have been defined, link them to either absences or pay types so that the payroll process automatically updates the number of hours that are accrued and used.

Entitlement Policies			
Entitlement Group: <span>Services Group</span>			
Anniversary Plans			+ add
Entitlement	Plan Date	Action	
Anniversary	01/01/2006	accrual rules	buckets view delete
Birthday	04/15/2010	accrual rules	buckets view delete
Calendar Plans			+ add
Entitlement	Plan Date	Action	
Family/Medical	01/01/2006	accrual rules	buckets view delete
Floater	01/01/2006	accrual rules	buckets view delete
Holiday	01/01/2006	accrual rules	buckets view delete
Personal Time	01/01/2006	accrual rules	buckets view delete
PTO	01/01/2006	accrual rules	buckets view delete
Sabbatical	01/01/2006	accrual rules	buckets view delete
Sick Time	01/01/2006	accrual rules	buckets view delete
Vacation	01/01/2006	accrual rules	buckets view delete

- **Entitlement Absence Code Assignment** has been added to the **HR Setup** menu. This is the same as the existing iCON Tools function. Use this function if you wish to link an absence code to an Entitlement Policy. By doing so, when an absence is recorded in Time and Attendance or Lump Sums, the hours will be deducted from the designated bucket and the employee's hours balance will be adjusted. Units Used will be subtracted from the entitlement plan year in which the Work Date falls. A record will also be written to the Absences function.

Entitlement Absence Code Assignment

+ add

\* = Required

\*Entitlement Group:

Full Time

\*Type Of Absence:

Sick Pay

refresh


To update, click on information in the left column.

Sequence	Entitlement	Entitlement Bucket Code	Action
1	Sick Time	Sick Time Bkt	view delete

+ add

- Entitlement Pay Code Assignment** has been added to the **HR Setup** menu. This is the same as the existing iCON Tools function. Use this function if you wish to link a pay code to an Entitlement Policy. By doing so, when pay is recorded in Time and Attendance or Lump Sums, the hours will be deducted from the designated bucket and the employee's hours balance will be adjusted. If a Work Date is entered in Time and Attendance or Lump Sums, Units Used will be subtracted from the entitlement plan year in which the Work Date falls. If no Work Date is entered, Units Used will be subtracted from the entitlement plan year in which the Pay Period End Date falls.

For each entitlement, set up either an Absence or Pay Code, not both. If both an absence and pay code is linked to an entitlement, the balance will be reduced twice when an employee uses entitlement hours.

Entitlement Pay Code Assignment 


\* = Required

\*Entitlement Group:



Experienced


\*Type Of Pay:

Vacation

 refresh

To update, click on information in the left column.

Sequence	Entitlement	Entitlement Bucket Code	Action
1	Vacation	Vacation Bucket	 view  delete

 add

- Garnishment Exemptions** has been added to the **Payroll Setup** menu. This is the same as the existing iCON Tools function. This function is used to set up the systemwide rules that apply to garnishments of employee pay. These rules establish how the system determines what part of the employee's pay is protected from garnishment. For example, the federal pay exemption for a weekly pay check insures that either 75% of the employee's disposable pay or 30 times the current minimum wage is exempt from garnishment, whichever is higher. However, state governments and court orders can have special requirements. These rules are set up in this function.

In order to use the "Default to Fed Formula" checkbox, you must set up a Rate Definition for the same Garnishment Deduction where the Type of Garnishment is "fed". This is where the system will get the Federal default exemption rules.

Garnishment Exemptions

+ add

\* = Required

\*Garnishment Deduction: Garnishment

refresh

To update, click on information in the left column.

Rate Definition	Percent Exemption	Minimum Wage Multiplier	Annual Fixed Amount	Default To Fed Formula	Court ID	Judge Name	Action
50% Exemption	50.0000	0.0000	0.00	No			rate by tier view delete
90% Exempt	90.0000	0.0000	0.00	No			rate by tier view delete
90% or 30X Fed Min.	90.0000	30.0000	0.00	No			rate by tier view delete
Annual \$12000	0.0000	0.0000	12,000.00	No			rate by tier view delete
Federal Exemption	75.0000	30.0000	0.00	No			rate by tier view delete
Minimum Wage	0.0000	30.0000	0.00	No			rate by tier view delete
No Exemption	0.0000	0.0000	0.00	No			rate by tier view delete

+ add

- **Legal Entity By Year** has been added to the **Payroll Setup** menu. This is the same as the existing iCON Tools function. This function is used to validate a legal entity for a particular year. At least one legal entity must be defined before you can use this function. A legal entity must be associated with a year before you can set up taxation definitions and activate employees in payroll for that year.

Legal Entity By Year

+ add

\* = Required

Tax Year: 2010

Legal Entity	Action
Allen Beverage Company	X delete
Carolina Coffee Company	X delete
Copy Services	X delete
Olympics, Inc.	X delete
Starlight Group	X delete
Value Solutions	X delete

+ add

- **New Year Employee Copy** has been added to the **Payroll Actions** menu. This is the same as the existing iCON Tools function. This function copies information for an active employee from one year to another. Use this function to copy information for an employee who was not active at the time New Year Administration was run.

This function copies information from Misc. Payroll and adds a record in Wage Accumulators for the selected year. Note that the AEIC Category and Reason For AEIC fields are not copied, since employees must submit a new W-5 form each year.

The copy process is also run as part of the Rehire (Payroll) function if the employee does not have a Misc. Payroll record for the year in which he or she is being rehired. If you rehire an employee using the Rehire (Payroll) function, you do not need to run New Year Employee Copy.

**Allison Thayer**  
Employee Number: 6050  
Job Title: Assistant Manager  
Division: Pequannock  
Employment Status: Active

**New Year Employee Copy**  
\* = Required

**Selection:**  
\*Legal Entity: Value Solutions  
\*From Year: no value \*To Year: no value  
☐ Copy Fiscal Amounts

submit cancel



- **Retroactive Pay Adjustments** has been added to the **Payroll Actions** menu. This is the same as the existing iCON Tools function. Use this function to apply a retroactive pay adjustment for one or more employees. This is done after the new salary amounts have been entered. New pay rates must be added in the following functions, as applicable, before the retroactive pay can be calculated: Salary Change, Rate Indexes, Pay Rate Overrides, Shift Overrides and Special Rate Overrides. The system will calculate any difference between what the employee was paid and what should have been paid for the specified time period.

Enter the From and To Pay Period End Dates that you wish to include in the calculation of the pay adjustment.

Retroactive Pay Adjustments			
* = Required			
<b>By Payroll Processing Group:</b>			
Legal Entity:	Value Solutions		
Payroll Processing Group:	Value Semi-Mo.		
<b>Select Report Parameters:</b>			
*From Pay Period End Date:	<input type="text"/>	*To Pay Period End Date:	<input type="text"/>
*Percent of First Pay Period:	<input type="text" value="100.00"/>	*Percent of Last Pay Period:	<input type="text" value="100.00"/>
Process Pay Type (Blank for all):	<input type="text" value="no value"/>		
Lump Sum Pay Type:	<input type="text" value="no value"/>		
From Work Date:	<input type="text"/>	To Work Date:	<input type="text"/>
*Lump Sum Date:	<input type="text"/>	*Report ID:	<input type="text" value="RetroactivePayAdjustmentReport"/>
<input checked="" type="radio"/> Combine With Regular Payment <input type="radio"/> On Demand Payment <input type="radio"/> Separate Payment			
<input type="button" value="→ submit"/> <input type="button" value="cancel ←"/>			

If the employee's salary change does not apply to the entire portion of the first payment in the date range, enter the Percent of First Pay Period. For example, if the employee is paid on a monthly basis and the salary change is effective on the 15th of the month, enter 50 in this field because the adjustment applies to half of the pay period. Likewise, if the salary change does not apply to the entire payment at the end of the date range, enter the percent in Percent of Last Pay Period.

When calculating the adjustment, you can select one pay type to be processed or all pay types. To calculate the retroactive pay adjustment on only one pay type, select it in the Process Pay Type field. Note that flat amounts are not recalculated, such as bonus or commission amounts. Only pay that had associated hours will be processed.

When the adjustment is calculated, a lump sum record will be created for the employee. You may specify one pay type for which the lump sum will be created, or create a separate lump sum record for each pay type that is adjusted. If you wish to pay out the entire amount in one pay type, select it in the Lump Sum Pay Type field.

If the retroactive pay adjustment is to be based on certain days, and Work Dates have been entered in Time and Attendance functions, enter the From and To Work Dates. If Work Dates are entered, only records with matching Work Dates will be processed.

In the Lump Sum Date field, enter the Pay Period End Date on which the lump sums are to be paid. Select the check option for the lump sum, whether it is to be combined with the employee's regular payment, paid as a separate payment as part of the regular pay process, or paid as part of an on demand pay process.

When the Retroactive Pay Adjustment job completes, lump sums will be created for any differences that were found. A report will be produced. It will include the selection criteria that was used:

- organization structure
- pay processing group
- from PE date
- to PE date
- process pay type
- from work date
- to work date
- lump sum date

The report will include the following employee information:

- employee number and name
- pay type
- PE date
- work date
- hours
- amount paid
- amount calculated
- difference
- special rate (if any)
- shift (if any)
- pay rate override (if any)

- **Client Setup Report** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. The report will print detailed information about the legal entities that you select. This report can be run at any time to verify that the setup information for a company is correct. Some of the information that is provided includes:
  - legal entity name, address, phone number, FEIN
  - SIT and SUI account numbers
  - pay code and deduction rules
  - employer federal and state tax rates
  - SUI locations
  - check stock and bank information

Client Setup Report

\* = Required

Selection:

☒ All Legal Entities
 ☐ Select Legal Entity:
 

\*no value

\*As Of Date:

\*Report Name:

ClientSetupReport

→ submit

cancel ←

- EEO-1 File Creation** has been added to the **Reports** menu. This is the same as EEO-1 Diskette Creation in iCON Tools. After you create a file using the EEO-1 Report function, use this function to copy the information to a file for submission to the EEOC. This function displays the names of the files that are available. Click on the checkbox in the Select column next to the file(s) you want to copy. If your company is a single establishment employer, you will only have one file to copy. If you are a multi-establishment employer, you should have the following files: Consolidated Report, Establishment List (for non-headquarters locations with less than 50 employees), Establishment Report (for non-headquarters locations with 50 or more employees), and the Headquarters Report. Click on Process. When the job has completed, the text file(s) may be accessed in Report Master Listing. The file names are FILE1yyyynnnnnnnn.txt (for multi-establishment employers, it includes all data except the Establishment List), and FILE2yyyynnnnnnnn.txt (Establishment List), where yyyy is the year for which the data was generated and nnnnnnnn is the Company Number in Organization Setup.

EEO-1 File Creation						
Select the record(s) to be written to files. To create a file for a single establishment, only select the Single Establishment report. For multi-establishments, select all types that apply: Headquarters Report, Consolidated Report, Establishment Report and Establishment List. For multi-establishment employers, all report types must be written to the same file, with the exception of an Establishment List (locations with less than 50 employees). This will be written to a separate file.						
Select	User Name	Year	Type	Name of EEO-1 Report	Creation Date	Creation Time
<input type="checkbox"/>	carol	2010	8	Establishment List	04/22/2010	08:43:25
<input type="checkbox"/>	carol	2010	1	Single Establishment Employer Report	04/16/2010	09:43:49
<input type="checkbox"/>	carol	2010	2	Consolidated Report	04/16/2010	09:19:15
<input type="checkbox"/>	carol	2010	8	Establishment List	04/16/2010	09:16:16
<input type="checkbox"/>	carol	2010	4	Establishment Report	04/16/2010	09:14:02
<input type="checkbox"/>	carol	2010	3	Headquarters Report	04/16/2010	09:09:12
<input type="checkbox"/>	carol	2009	1	Single Establishment Employer Report	04/16/2010	13:40:18
<input type="checkbox"/>	carol	2009	1	Single Establishment Employer Report	02/09/2010	14:17:02

- **EEO-1 File Inquiry** has been added to the **Reports** menu. This is the same as EEO-1 Diskette Inquiry in iCON Tools. Use this function to see a list of EEO-1 Report files that were created from the EEO-1 File Creation function. It shows the User Name of the person who created the file, as well as the report name, and the date and time it was created. You can see what files were created by other users, and purge files that you created.



EEO-1 File Inquiry						
To delete records, mark the checkbox in the Select column and then click on Delete button.						
Select	User Name	Year	Type	Name of EEO-1 Report	Creation Date	Creation Time
<input type="checkbox"/>	carol	2010	8	Establishment List	04/22/2010	08:43:25
<input type="checkbox"/>	carol	2010	1	Single Establishment Employer Report	04/16/2010	09:43:49
<input type="checkbox"/>	carol	2010	2	Consolidated Report	04/16/2010	09:19:15
<input type="checkbox"/>	carol	2010	8	Establishment List	04/16/2010	09:16:16
<input type="checkbox"/>	carol	2010	4	Establishment Report	04/16/2010	09:14:02
<input type="checkbox"/>	carol	2010	3	Headquarters Report	04/16/2010	09:09:12
<input type="checkbox"/>	carol	2009	1	Single Establishment Employer Report	04/16/2010	13:40:18
<input type="checkbox"/>	carol	2009	1	Single Establishment Employer Report	02/09/2010	14:17:02
<input type="checkbox"/>	carol	2007	2	Consolidated Report	04/04/2007	14:40:46
<input type="checkbox"/>	carol	2007	8	Establishment List	04/04/2007	14:40:25
<input type="checkbox"/>	carol	2007	4	Establishment Report	04/04/2007	14:40:11
<input type="checkbox"/>	carol	2007	3	Headquarters Report	04/04/2007	14:38:11
<input type="checkbox"/>	carol	2007	2	Consolidated Report	03/30/2007	16:07:50
<input type="checkbox"/>	carol	2007	1	Single Establishment Employer Report	03/30/2007	16:03:30
<input type="checkbox"/>	carol	2007	8	Establishment List	03/30/2007	15:46:09
<input type="checkbox"/>	carol	2007	4	Establishment Report	03/30/2007	15:43:35
<input type="checkbox"/>	carol	2007	3	Headquarters Report	03/30/2007	15:40:22
<input type="checkbox"/>	carol	2007	2	Consolidated Report	03/30/2007	14:41:19
<input type="checkbox"/>	carol	2007	8	Establishment List	03/30/2007	14:41:13
<input type="checkbox"/>	carol	2007	4	Establishment Report	03/30/2007	14:40:59

 delete

- **EEO-4 Reporting** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. EEO-4 reporting is required of state and local government agencies. Use this function to calculate the number of employees in your organization and provide totals by race, gender, EEO job categories and annual salary ranges. The data is retrieved from employee demographic information and job title records.

There are a number of set up steps that must be performed before creating EEO-4 data. See the Manager Services help text for a list of these steps.

This function creates two files: E4DATA and E4LIST. E4DATA contains employee counts and E4LIST contains a list of the EEO-4 functions of each department. When the EEO-4 Reporting job completes, you can create files using the EEO-4 File Creation function. You can review or purge the files in EEO-4 File Inquiry.

EEO-4 Reporting	
* = Required	
<b>Employee Population To Be Included:</b>	
Organization:	 organization
<b>Submitted By Jurisdiction:</b>	
*Organization:	 organization
*Effective Date:	<input type="text"/>
*Report Break at Level:	<input type="text" value="2"/>
*Minimum Full-Time Weekly Hours:	<input type="text" value="40"/>
*Title of Certifying Official:	<input type="text"/>
<input type="button" value="→ submit"/> <input type="button" value="cancel ←"/>	

- **EEO-4 File Creation** has been added to the **Reports** menu. This is the same as EEO-4 Diskette Creation in iCON Tools. After you create a file using the EEO-4 Reporting function, use this function to copy the information to a file for submission to the EEOC.


The page displays the names of the files that were created. Click on Create File next to the file you want to copy. Reply to the confirmation message to create the file. A window will then appear to display the files that will be created. It may include E4DATA and E4LIST, as required by the EEOC. Click OK to submit the job to the queue. When the job has completed, the text file(s) may be accessed in Report Master Listing. The file names will be E4DATAyyyy.txt and E4LISTyyyy.txt, where yyyy is the year for which data is being reported.

EEO-4 File Creation				
To create a file in Report Master Listing, click on Create File next to the file you wish to work with.				
User Name	Year of EEO-4	Create Date	Create Time	Action
carol	2010	04/20/2010	13:18:12	Create File
carol	2009	04/20/2010	13:08:37	Create File
carol	2010	04/20/2010	13:08:17	Create File
carol	2010	04/20/2010	12:53:42	Create File
carol	2010	04/20/2010	12:53:35	Create File
carol	2010	04/20/2010	12:53:24	Create File
carol	2010	04/20/2010	12:51:52	Create File
carol	2008	01/05/2008	11:44:40	Create File
carol	2007	04/02/2007	10:04:43	Create File
carol	2007	04/02/2007	09:52:15	Create File
carol	2007	03/30/2007	16:50:48	Create File
carol	2007	03/30/2007	16:20:11	Create File
carol	2007	03/30/2007	16:17:14	Create File
carol	2007	03/22/2007	16:39:48	Create File
carol	2007	02/16/2007	14:51:55	Create File
DEV	2006	05/18/2006	10:22:50	Create File
CAROL	2006	05/17/2006	17:20:16	Create File
CAROL	2006	05/17/2006	17:08:06	Create File
CAROL	2005	05/17/2006	16:55:01	Create File
CAROL	2005	05/17/2006	16:51:59	Create File



- **EEO-4 File Inquiry** has been added to the **Reports** menu. This is the same as EEO-4 Diskette Inquiry in iCON Tools. This function displays a list of the EEO-4 Reporting files that were created from the EEO-4 File Creation function. It shows the User Name of the person who created the file, as well as the report name and the date and time it was created. You can see what files were created by other users, and purge files that you created.


EEO-4 File Inquiry				
To delete record, click on Delete button.				
User Name	Year of EEO-4	Creation Date	Creation Time	Action
carol	2010	04/20/2010	13:18:12	 delete
carol	2009	04/20/2010	13:08:37	 delete
carol	2010	04/20/2010	13:08:17	 delete
carol	2010	04/20/2010	12:53:42	 delete
carol	2010	04/20/2010	12:53:35	 delete
carol	2010	04/20/2010	12:53:24	 delete
carol	2010	04/20/2010	12:51:52	 delete
carol	2008	01/05/2008	11:44:40	 delete
carol	2007	04/02/2007	10:04:43	 delete
carol	2007	04/02/2007	09:52:15	 delete
carol	2007	03/30/2007	16:50:48	 delete
carol	2007	03/30/2007	16:20:11	 delete
carol	2007	03/30/2007	16:17:14	 delete
carol	2007	03/22/2007	16:39:48	 delete
carol	2007	02/16/2007	14:51:55	 delete
DEV	2006	05/18/2006	10:22:50	 delete
CAROL	2006	05/17/2006	17:20:16	 delete
CAROL	2006	05/17/2006	17:08:06	 delete
CAROL	2005	05/17/2006	16:55:01	 delete
CAROL	2005	05/17/2006	16:51:59	 delete

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- **Electronic Payment Register** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. Use this function to generate a detail and summary report based on bank entries that were created by the Electronic Payment Generation process.

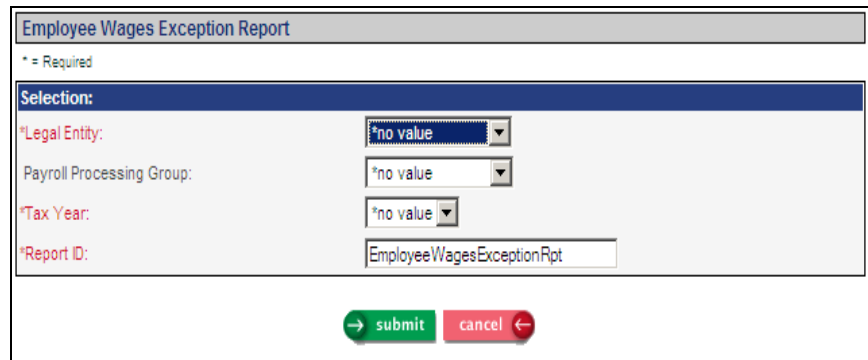
For each payee, the detail report includes the transmission number, creation date, employee number, employee name, amount paid and docket number. The summary report includes the transmission number, payment date, payee name, amount paid to each payee as well as the total amount paid.

Only reports will be generated; no data is updated using this function.



The screenshot shows a web form titled "Electronic Payment Register". Below the title is a legend indicating that an asterisk (\*) denotes a required field. The form is divided into a "Selection:" section and a main input area. The "Selection:" section contains four fields: "\*Legal Entity:" with a dropdown menu showing "\*no value", "Payroll Processing Group:" with a dropdown menu showing "\*no value", "\*Pay Period End Date:" with a text input field and a calendar icon, and "\*Report ID:" with a text input field containing "ElectronicPaymentRegister". At the bottom of the form are two buttons: a green "submit" button with a right-pointing arrow and a red "cancel" button with a left-pointing arrow.

- **Employee Wages Exception Report** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. Use this function to print information for employees who have at least one pending amount that is negative in any of the following areas: Wage Accumulators, Tax Accumulators, Deduction Accumulators or Pay Distribution. The report will print the first negative amount that it finds from these areas. Negative pending amounts do not normally occur, but if any exist, contact the iCON Support Line for instructions on how to correct these amounts.



The screenshot shows a web-based form titled "Employee Wages Exception Report". Below the title is a legend indicating that an asterisk (\*) denotes required fields. The form contains a section labeled "Selection:" with four input fields: "\*Legal Entity:" (a dropdown menu showing "\*no value"), "Payroll Processing Group:" (a dropdown menu showing "\*no value"), "\*Tax Year:" (a dropdown menu showing "\*no value"), and "\*Report ID:" (a text input field containing "EmployeeWagesExceptionRpt"). At the bottom of the form are two buttons: a green "submit" button with a right-pointing arrow and a red "cancel" button with a left-pointing arrow.

- **Entitlement Liability Report** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. Use this function to print employees' current entitlement balances and retrieve G/L amounts that have been created for accrued entitlements as of today's date. G/L amounts accrue each pay period if you have set up entitlement account numbers in Account Manager. Entitlements with account numbers will automatically be highlighted after you select an entitlement group.

If you have not set up entitlement account numbers, you may still print calculated liability amounts. No G/L liability amounts will print.

The report lists employees and their accrued entitlement balances. You can include negative and zero amounts if desired. Subtotals will print at each break level, with grand totals at the end of the report.

Entitlement Liability Report	
* = Required	
<b>Selection By Payroll Processing Group:</b>	
Legal Entity:	Value Solutions
Payroll Processing Group:	Value Semi-Mo.
<b>Select Report Parameters:</b>	
Entitlement Group:	Full Time
*Entitlement:	<div> <div>Hours</div> <div>Personal Time</div> <div>PTO</div> <div>Sabbatical</div> <div>Sick Time</div> <div>Vacation</div> </div>
*Report ID:	EntitlementLiabilityRep
Report Break at Level:	2
Include Negative Balances:	<input checked="" type="checkbox"/>
Display Entitlements with Zero Amounts:	<input type="checkbox"/>
Sort By:	<input checked="" type="radio"/> Employee Number <input type="radio"/> Employee Name
<div> <div>→ submit</div> <div>cancel ←</div> </div>	

- Garnishment Check Register** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. Use this function to report on payments made to the entities defined in Garnishment Payees that are not set up to receive payments electronically. These are payments that were generated using Garnishment Check Print. Select the legal entity and payee you want to work with and the date the checks were issued to them. If you wish to select a specific payroll processing group or pay period end date, use the By Pay Period End Date option. For each payee, the detail report includes the check number, check date, employee number, employee name, amount paid and docket number. The summary report includes the check number, check date, payee name, amount paid to each payee as well as the total amount paid.

Only reports will be generated; no data is updated using this function.

**Garnishment Check Register**

\* = Required

☐ By Pay Period End Date

**Selection:**

\*Legal Entity:
 

☐ All
 

Allen Beverage  
 Carolina Cof Co  
 Copy Cats Inc.  
 Olympics, Inc.  
 Starlight Group  
 Value Solutions

☒ Selected

Payee:

From Check Date:

To Check Date:

\*Report ID:

- **Payment List** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. The report will print a one-line entry for each payment. Subtotals will be printed at the selected break level, along with grand totals at the end of the report.

When you select a specific Payroll Processing Group, the system will print payments if the employee's group at the time of the payment is the same as the selected group.

The report includes employee number, employee name, payment number, pay period end date, check date, payment type, payment status, gross amount, total employee-paid tax amount, total employee-paid deduction amount, net amount and number of hours.

Payment List	
<b>Selection By Payroll Processing Group:</b>	
Legal Entity:	Value Solutions
Payroll Processing Group:	Value Semi-Mo.
From Date:	05/01/2010
To Date:	05/31/2010
<b>Select Report Parameters:</b>	
Report ID:	PaymentList
<input checked="" type="radio"/> Break By Organization Level	At Level: 2
<input type="radio"/> Break By Home Account Number	
Include manual payments from the selected date range:	<input type="checkbox"/>
Include prior period payments voided against the selected date range:	<input type="checkbox"/>
Include payments issued and voided against the selected date range:	<input checked="" type="checkbox"/>
Include payments issued in the selected date range but voided against future pay periods:	<input checked="" type="checkbox"/>
Print voids only:	<input type="checkbox"/>
Sort By Employee Number:	<input checked="" type="radio"/>
Sort By Employee Name:	<input type="radio"/>
Sort By Payment Number:	<input type="radio"/>
<input type="button" value="→ submit"/> <input type="button" value="cancel ←"/>	






- **Payment Register By Check Date** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. The report will print pay, tax and deduction information for each payment. A detailed report will print with payment data, and totals by check type and check status. A summary report will print with totals by the selected break points, and a grand total will print also.

Whereas the selection in the Payment Register is by Pay Period End Date, you can use the Payment Register By Check Date to report on payments within a specific range of check dates.

Payment Register By Check Date	
<b>Selection By Payroll Processing Group:</b>	
Legal Entity:	Value Solutions
Payroll Processing Group:	Value Semi-Mo.
From Date:	05/01/2010
To Date:	05/31/2010
<b>Select Report Parameters:</b>	
Report ID:	PaymentRegister
<input checked="" type="radio"/> Break By Organization Level	At Level: 2
<input type="radio"/> Break By Home Account Number	
Summary Only:	<input type="checkbox"/>
Include manual payments from the selected date range:	<input type="checkbox"/>
Include prior period payments voided against the selected date range:	<input type="checkbox"/>
Include payments issued and voided against the selected date range:	<input checked="" type="checkbox"/>
Include payments issued in the selected date range but voided against future pay periods:	<input checked="" type="checkbox"/>
Sort By Employee Number:	<input checked="" type="radio"/>
Sort By Employee Name:	<input type="radio"/>
Sort By Payment Number:	<input type="radio"/>
Sort By Check Date:	<input type="radio"/>
<input type="button" value="→ submit"/> <input type="button" value="cancel ←"/>	

- **VETS-100 Data Generation** has been added to the **Reports** menu. This is the same as the existing iCON Tools function. You may generate VETS-100 and VETS-100A reports and data from this function. When the VETS-100 Data Generation job has completed, use the VETS-100 File Creation function to copy information to a file. You can review or purge the files in VETS-100 File Inquiry.

Based on your selections, the report will print, for each location, the number of veterans employed by the organization. It shows separate counts for employees hired within the previous 12 months of the Effective Date. These employment figures are separated into EEO job categories. The report also counts all active permanent employees as of the last day of each quarter within the reporting period, and counts the maximum number and minimum number of employees on those dates.


VETS-100 Data Generation			
* = Required			
<b>Parent Company:</b>			
*Organization:	 organization		
<b>Headquarters:</b>			
Organization:	 organization		
<b>Employee Population To Be Included:</b>			
Organization:	 organization		
*Effective Date:	<input type="text"/>	*Report Break at Level:	<input type="text" value="1"/>
<input checked="" type="radio"/> Prime Contractor (P)	<input checked="" type="radio"/> Single Establishment	<input checked="" type="radio"/> VETS-100	<input checked="" type="radio"/> Files
<input type="radio"/> Subcontractor (S)	<input type="radio"/> Multiple Establishment	<input type="radio"/> VETS-100A	<input type="radio"/> Reports
<input type="radio"/> Both (B)			
<div>  submit            cancel         </div>			



















- **VETS-100 File Creation** has been added to the **Reports** menu. This is the same as VETS-100 Diskette Creation in iCON Tools. After you create data in the VETS-100 Data Generation function, use this function to create a file for submission. Both VETS-100 and VETS-100A files are created from this function.

The page displays the names of users who created files, as well as the date and time they were created, and whether the file represents VETS-100 or VETS-100A data. Click on Create File next to the information you want to write to a file. Reply to the confirmation message to send the job to the queue. When the job has completed, the text file may be accessed in Report Master Listing. The file name will be either VETS-100.txt or VETS-100A.txt.

VETS-100 File Creation					
Files created in this function can be viewed in Report Master Listing.					
User Name	Year	Creation Date	Creation Time	File Name	Action
carol	2010	04/22/2010	08:14:35	VETS-100	Create File
carol	2010	03/30/2010	16:57:34	VETS-100A	Create File
carol	2010	03/30/2010	16:38:57	VETS-100A	Create File
carol	2010	03/29/2010	10:27:05	VETS-100	Create File
carol	2010	03/29/2010	10:18:26	VETS-100	Create File
carol	2010	03/29/2010	10:02:20	VETS-100	Create File
carol	2010	03/23/2010	14:16:35	VETS-100A	Create File
carol	2010	03/23/2010	14:15:45	VETS-100A	Create File
carol	2010	03/23/2010	14:11:42	VETS-100A	Create File
carol	2010	03/23/2010	14:07:57	VETS-100A	Create File
carol	2010	03/23/2010	13:45:39	VETS-100	Create File
carol	2010	03/23/2010	13:41:40	VETS-100	Create File
carol	2010	03/23/2010	13:37:42	VETS-100	Create File
carol	2010	03/15/2010	08:57:22	VETS-100	Create File
carol	2010	02/09/2010	14:18:13	VETS-100	Create File
carol	2007	01/09/2008	14:22:01	VETS-100	Create File
carol	2007	05/14/2007	10:22:30	VETS-100	Create File
dev	2010	05/07/2010	05:02:48	VETS-100	Create File
dev	2010	05/07/2010	04:55:28	VETS-100	Create File
dev	2010	05/07/2010	04:54:16	VETS-100	Create File

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- **VETS-100 File Inquiry** has been added to the **Reports** menu. This is the same as VETS-100 Diskette Inquiry in iCON Tools. This function displays a list of VETS-100 and/or VETS-100A files that were created from the VETS-100 File Creation function. It shows the User Name of the person who created the file, as well as the report name, and the date and time it was created. You can see what files were created by other users, and purge files that you created.

VETS-100 File Inquiry				
To delete record, click on Delete button.				
User Name	Year	Creation Date	Creation Time	Action
dev	2010	05/07/2010	05:02:48	 delete
dev	2010	05/07/2010	04:55:28	 delete
dev	2010	05/07/2010	04:54:16	 delete
carol	2010	04/22/2010	08:14:35	 delete
dev	2010	04/21/2010	00:49:29	 delete
carol	2010	03/30/2010	16:57:34	 delete
carol	2010	03/30/2010	16:38:57	 delete
carol	2010	03/29/2010	10:27:05	 delete
carol	2010	03/29/2010	10:18:26	 delete
carol	2010	03/29/2010	10:02:20	 delete
carol	2010	03/23/2010	14:16:35	 delete
carol	2010	03/23/2010	14:15:45	 delete
carol	2010	03/23/2010	14:11:42	 delete
carol	2010	03/23/2010	14:07:57	 delete
carol	2010	03/23/2010	13:45:39	 delete
carol	2010	03/23/2010	13:41:40	 delete
carol	2010	03/23/2010	13:37:42	 delete
carol	2010	03/15/2010	08:57:22	 delete
carol	2010	02/09/2010	14:18:13	 delete
carol	2007	01/09/2008	14:22:01	 delete

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- **HR COD Security** has been added to the **Tools** menu. This is the same as the existing iCON Tools function. This function is used to control access to human resources tables in Common Object Dictionary. There are four levels of access available: Update, Add, Delete, and No Authority.

To secure payroll common objects, use the Payroll COD Security function.

Note that these functions only control a user's ability to modify the information associated with a common object; they do not restrict users from accessing the drop-down listings.

The screenshot shows the 'HR COD Security' window. At the top, there's a title bar 'HR COD Security'. Below it, there are two dropdown menus: 'User Name: Carol Bradbury' and 'Copy To User Name: Carol Bradbury', with a 'copy' button. Below these, a instruction says 'Click on the checkbox or on the Common Object Description to select or unselect.' and there are 'Select All' and 'Unselect All' links. The main area is a table with the following columns: 'Common Object:', 'Update', 'Add', and 'Delete'. Each row represents a common object with a checkbox in the first column and three checkboxes in the subsequent columns.

Common Object:	Update	Add	Delete
<input checked="" type="checkbox"/> Absence Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Address Status Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Address Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Algorithm Sequence	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Algorithm Sequence Options	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Applicant Stage Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benefit Carriers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benefit Category	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benefit Change Reason Code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benefit Cost Methods	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benefit Group	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benefit Options	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benefit Plans	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Benefit Status Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Blood Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Body Part	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Budget Class	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Business Relationships	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- **Payroll COD Security** has been added to the **Tools** menu. This is the same as the existing iCON Tools function. This function is used to control access to payroll tables in Common Object Dictionary. There are four levels of access available: Update, Add, Delete, and No Authority.

Payroll COD Security

User Name: Carol Bradbury

Copy To User Name: Carol Bradbury

copy

Click on the checkbox or on the Common Object Description to select or unselect. [Select All](#) [Unselect All](#)

Common Object:

<input checked="" type="checkbox"/>	AEIC Categories	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	AEIC Reasons	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Algorithm Category	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Bank Account Type	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Bank Names	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Bond Series	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Check Print Options	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Check Run Statuses	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Check Stock	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	City Tax Codes	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Close Cycle Statuses	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	County Tax Code	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Deduction Arrears	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Deduction Change Reasons	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Deduction Groups	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Deduction Percentage Classes	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Deduction References	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>
<input checked="" type="checkbox"/>	Federal Reserve Banks	<a href="#">Update</a>	<a href="#">Add</a>	<a href="#">Delete</a>

## iCON Manager Services Features

The following features have been added to iCON Manager Services.

- In the menu bar, a link to **Help** has been added. When you click on **Help**, the system will open a separate window and display information for the area of the system that you are working with. A menu bar at the top of the Help window also allows you to access the following:
  - **Documents:** this area includes instructions pertaining to various modules within the system, as well as Product Manuals and Release Notes.
  - **How To:** this section includes instructions on how to perform various actions in the system. It is presented in question and answer format according to various subjects. Links to additional information are provided where applicable.
  - **Outsource Forms:** if Unicorn HRO processes your payroll, use this section for fill-in PDF forms that can be saved and e-mailed to Pay Support to request various actions.
  - **COD:** this section lists all of the common objects in the system and explains how they are used and the functions where they can be found.
  - **Index:** this is a list of the functions in iCON, as well as various set-up instructions, such as User Setup.
  - **Refresh:** if you access a different function while the help text window is open, click Refresh to view the help text for the current function.
  - **Back:** click the Back button to go to the previous page that you were on in the Help window.

- In **Demographics**, the Address Effective Date field has been added. This will default to the effective date of the Address that is being displayed. If you change any of the address fields in Demographics, you will also be required to change the Address Effective Date so that a new record can be written to the Address function.
- In **Work Profile**, the following fields have been added: Acquisition Date, Last Paid Date (view-only), Key Employee and Highly Compensated Employee. In **Add Employee** and **New Hire**, the following fields have been added: Clock Number, Key Employee and Highly Compensated Employee.
- In **New Hire** and **Payroll Activation**, a section for Advance Earned Income Credit has been added, with the AEIC Category and Reason for AEIC fields. A section for W-2 Information has been added, with the Retirement Plan and Statutory Employee fields. In the federal income tax section, the Exempt and Exempt Expiration Date fields have been added.
- In **Misc. Payroll**, the Date Last Paid field has been added. This field is view-only.
- A new method of obtaining new hire data for purposes of state new hire reporting will be used. Previously, the system asked for a hire date range. Once Version 2.039 is applied, the system will automatically flag new hires (using the **Add Employee** and **New Hire** functions) and rehires (using the **Rehire (HR)** function and changes to the Adjusted Hire Date in **Work Profile**) that will be reported. In **Work Profile**, two new fields were added: the Pending State New Hire Reporting field will be set to "yes" when an employee is added. When the employee's information is written to a state new hire file, this field will automatically be changed to "no", and the date will be written to the second new field called Date Reported to State as New Hire. When an employee's Adjusted Hire Date is changed, the system will display a

message and ask if the employee is being rehired. If you answer Yes, the system will set the Pending State New Hire Reporting field to Yes, and the employee will once again be reported to the state. Note that this new checkbox may also be updated manually. When an employee's Adjusted Hire Date is changed, the system will not ask whether they are being rehired under the following conditions, per state rules:

- If the hiring location is in Idaho and the rehire date is 364 or fewer days after termination
- If the hiring location is in Iowa and the rehire date is 41 or fewer days after termination
- If the hiring location is in Wisconsin and the rehire date is 90 or fewer days after termination.

To capture the new hires that were entered since your last report to the state, a separate procedure needs to be run. If your new hires are reported by Unicorn HRO, this process will be run for you. If you report new hire data to the state, run the Set State New Hire Report process described in the Version 2.039 Service Bureau Release Notes.

- In the **Dependents** function, the system will only accept one character in the Middle Initial field. Previously, this field accepted longer values.
- In the **Training Information** function, you may now click on a column heading to sort the data by that column. A yellow arrow will appear in the column heading of the column that is being used to sort the data. Also, a column for Completed Date has been added.
- In **Paid Time Off**, a checkbox called Show Historical Data has been added. Select this checkbox if you wish to see employee data for previous years. The system defaults to only displaying the current year's records.

- In **Benefit Enrollment**, an error occurred when trying to deactivate a benefit where Units Purchased was zero. This would typically only occur with data that had been migrated into the system. This error will no longer appear.
- In **Benefit History**, you may now click on a column heading to sort the data by that column. This may be done in the sections for employee, dependent and beneficiary history. A yellow arrow will appear in the column heading of the column that is being used to sort the data.
- In **Salary Change**, records for the Standard compensation method with the same Effective Date will now be sorted in descending sequence by entered date and time. This reflects how the payment process gets the employee's current salary record.
- In **Deductions**, when you change the Active checkbox to "no" or change the End Date, and a corresponding Employer Deduction exists, a message will ask if you want to make the same change to the Employer Deduction. You may click OK to have the system make the same change, or click Cancel to not update the Employer Deduction.
- In **Deductions**, the Fiscal Year Maximum field has been added.
- In **Garnishment Payees**, the ability to electronically remit deductions for Wisconsin delinquent tax payments has been added. If Unicorn HRO processes your payroll, contact Pay Support to set up the Garnishment Payee. If you process your own payroll, refer to the Version 2.039 Service Bureau Release Notes for set-up instructions. As part of this change, the Use ECS field in Garnishment Payees has been renamed Use Electronic Funds Transfer.
- In **Manual Payment**, a checkbox called Display in ESS has been added. This checkbox will only be available if the Manual Adjustment checkbox is selected, since those payments are not normally displayed in the Paycheck Information function in Employee Self Service. This



new checkbox gives you the ability to display the manual adjustment to the employee. Note that all manual adjustments appear in the Paycheck Information function in Manager Services.

- The ability to automatically exempt severance pay from state income taxation has been added as follows:
  - Alabama: the first \$25,000 of severance pay is exempt from income tax
  - Georgia: severance payments to nonresidents for services performed in Georgia are not taxable (pay to employees whose address is not in Georgia will not be taxed)
  - North Carolina: the first \$35,000 of severance pay is exempt from income tax
  - Washington, D.C.: severance payments made to nonresidents for services performed within the District are not taxable (pay to employees whose address is not in DC will not be taxed)

Previously, a separate pay code had to be set up as exempt from these taxes. A field will be added to Pay Code Definition called Severance Pay For State Income Tax Purposes. When this is selected, the system will exempt the pay per the above rules. If your payroll is processed by Unicorn HRO, contact Pay Support to have your pay code(s) for severance pay set up in this manner.

- In **Misc. Payroll**, if you add a record or change the Work State on an existing record, and no SUI Account Number or SUI tax record exists for the Work State, an error message will appear and you will not be allowed to save the data. This edit will not appear for railroads.
- In **Paycheck Information**, the Pay Period Start Date has been added. Also, the existing Payment Date field has been renamed Pay Period

End Date. These changes have also been made to the Paycheck Information function in Employee Self Service.

- In **Clear Time and Attendance Data**, the following fields have been added to the available selections: Work Date, Organization and Pay Type. You can use these optional fields to further define the records that you wish to clear. Also, the following change has been made to this process: previously, the system cleared either the Time and Attendance Exempt records or Time and Attendance Non-Exempt records, depending on the employee's current time card exempt status. This caused "old" records to be ignored, in the case where an employee's time card exempt status had been changed. The program has been changed so that records that exist in both tables will be cleared for the selected employees, regardless of their current time card exempt status.
- In **Time & Attendance SB Entry**, a checkbox called Replacement Hours Default has been added to the selection page. This allows you to change the default value for the Replacement Hours column for each pay type that you use to pay time card exempt employees. Also, the field for the Absence Code checkbox has been changed to Display Absence Data.
- In **Common Object Dictionary**, the Required Value field has been removed from the Add and Update pages. This field was unnecessary for user-defined records. It is only used by Unicorn HRO when records are added that are required by certain programs; in this situation, it is set to "yes" so that required records cannot be removed. Even though this field is no longer displayed, it will be set to "no" when user-defined records are added so that they may be deleted at a later date if necessary.
- When any of the following reports are run and there is no data to report, the selection criteria will print in the heading: **Garnishment**

**Check Register (Summary), Electronic Payment Register (Summary), Close Payment Log, Pending Payments Exception Report, G/L Report By Date and W-2 Register.**

- In **HR System Defaults**, fields relating to ESS have been moved to a section called Employee Self Service Settings. The field called Display Last 4 Digits of SSN in Personal Data (ESS) has been changed to Social Security Number Display Rule. It allows you to select from the following options:
  - Show full SSN
  - Show only last 4 digits
  - Do not show SSN

When Version 2.039 is applied, this field will be set to your current selection, which is either Show Full SSN or Show Only Last 4 Digits.

A field called Hide Date of Birth has been added. This will be set to "off" when Version 2.039, which replicates the current programming.

You may change these settings if needed. Your selections in these two fields will affect the following areas in Employee Self Service:

- Personal Data (main page and Update page)
- Dependents (main page)
- First Time Enrollment (Step 1, list of dependents in Step 2 and Step 3)
- Open Enrollment (Step 1, list of dependents in Step 2 and Step 3)
- Life Events (list of dependents in Step 2 and Step 3)

Note that employees will still be able to enter Social Security Numbers and Dates of Birth for Dependents on the Add and Update pages.

## iCON Employee Self Service Features

This section describes the features that have been added to Employee Self Service.

- If **Login Acceptance Policies** have been set up, employees will see a page for each active policy when they log on. They will be given the opportunity to accept or reject each policy.
- Employee and dependent Social Security Numbers and Dates of Birth will be displayed or hidden based on the settings in **HR System Defaults**, as described in the previous section.
- In **Personal Data**, the links in the Veteran Status section have been updated to <http://www.opm.gov/staffingportal/vgmedal2.asp>. This website, provided by the U.S. Office of Personnel Management, provides information about veteran classifications.
- In **Paycheck Information**, the Pay Period Start Date has been added. The Payment Date field has been renamed Pay Period End Date. These are the same changes that were made in Paycheck Information in Manager Services.

## New iCON Tools Function

This section describes the function that has been added to iCON Tools. Function Security must be assigned to users as needed.

- Use the **State New Hires Report For Administrator** function to produce a list of newly hired or rehired employees. Use this report if you do not send a file to the state to report these employees. By running this report, the system will change the Pending State New Hire Reporting checkbox from "yes" to "no" and will populate today's date in the Date Reported as State New Hire field. Note that the existing State New Hires Report will not update the Pending State New Hire Reporting or Date Reported as State New Hire fields.

State New Hires Report For Administrator

File Selection Help

Legal Entity:

State/Province: \*no value

'Contact Person: Outback Contact Person

'Phone Number: (973) 360-0688 Extension: 5930

'Break at Organization Level: 2 'Report ID: StateNewHiresRpt

☒ Job Server ☒ Sort By Employee Name

☐ Local ☐ Sort By Social Security Number

Generate Exit Help

## iCON Tools Features

This section explains the features that have been added to iCON Tools. Where noted, it represents the same change made in Manager Services.

### Benefits

Benefit History  (iCON Tools and Manager Services)	You may click on a column heading to sort the data by that column. This may be done in the sections for employee, dependent and beneficiary history.
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### Human Resources

Employee Dependents	The Social Security Number will no longer be a required field. Use of this field will be optional.
Entitlement Policies	When multiple accrual rules existed for a policy, and you clicked on a rule to either update or delete it, in certain circumstances the system accessed a different record than the one selected. This has been corrected.

<p>Employee Direct</p> <p>State New Hires Report</p> <p>State New Hires Report For Administrator</p> <p>(iCON Tools and Manager Services)</p>	<p>A new method of obtaining new hire data for purposes of state new hire reporting will be used. Previously, the system asked for a hire date range. Once Version 2.039 is applied, the system will automatically flag new hires that are entered in Employee Direct. In this function, two new fields were added: the Pending State New Hire Reporting field will be set to "yes" when an employee is added. For rehired employees, when you change the employee's Adjusted Hire Date, the system will display a message and ask if the employee is being rehired. If you answer Yes, the system will set the Pending State New Hire Reporting field to Yes so that the employee will be reported to the state. Note that this new checkbox may also be updated manually. When an employee's Adjusted Hire Date is changed, the system will not ask whether they are being rehired under the following conditions, per state rules:</p> <ul style="list-style-type: none"> <li>• If the hiring location is in Idaho and the rehire date is 364 or fewer days after termination (the system uses the employee's last inactive status from Employment Status Assignment to determine this date)</li> <li>• If the hiring location is in Iowa and the rehire date is 41 or fewer days after termination</li> <li>• If the hiring location is in Wisconsin and the rehire date is 90 or fewer days after termination</li> </ul> <p>When the employee's information is written to a state new hire file, or the State New Hires Report For Administrator is run, the system will include all employees whose Pending State New Hire Reporting field is "yes". It will then change this value to "no", and write the date to the Date Reported to State as New Hire field. When the State New Hires Report is run, the system will include all employees whose Pending State New Hire Reporting field is "yes"; however, it will not update the Pending State</p>
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<p>Employee Direct</p> <p>State New Hires Report</p> <p>State New Hires Report For Administrator</p> <p>(iCON Tools and Manager Services)</p>	<p>A new method of obtaining new hire data for purposes of state new hire reporting will be used. Previously, the system asked for a hire date range. Once Version 2.039 is applied, the system will automatically flag new hires that are entered in Employee Direct. In this function, two new fields were added: the Pending State New Hire Reporting field will be set to "yes" when an employee is added. For rehired employees, when you change the employee's Adjusted Hire Date, the system will display a message and ask if the employee is being rehired. If you answer Yes, the system will set the Pending State New Hire Reporting field to Yes so that the employee will be reported to the state. Note that this new checkbox may also be updated manually. When an employee's Adjusted Hire Date is changed, the system will not ask whether they are being rehired under the following conditions, per state rules:</p> <ul style="list-style-type: none"> <li>• If the hiring location is in Idaho and the rehire date is 364 or fewer days after termination (the system uses the employee's last inactive status from Employment Status Assignment to determine this date)</li> <li>• If the hiring location is in Iowa and the rehire date is 41 or fewer days after termination</li> <li>• If the hiring location is in Wisconsin and the rehire date is 90 or fewer days after termination</li> </ul> <p>When the employee's information is written to a state new hire file, or the State New Hires Report For Administrator is run, the system will include all employees whose Pending State New Hire Reporting field is "yes". It will then change this value to "no", and write the date to the Date Reported to State as New Hire field. When the State New Hires Report is run, the system will include all employees whose Pending State New Hire Reporting field is "yes"; however, it will not update the Pending State</p>
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<i>(continued)</i>	New Hire Reporting or Date Reported to State as New Hire fields. Note that the New Hires Report logic has not been changed; this report is for internal use, and not intended for use with state reporting.
<p>HR System Defaults</p> <p>(iCON Tools and Manager Services)</p>	<p>The field called Display Last 4 Digits of SSN in Personal Data (ESS) has been changed to Social Security Number Display Rule. It allows you to select from the following options:</p> <ul style="list-style-type: none"> <li>• Show full SSN</li> <li>• Show only last 4 digits</li> <li>• Do not show SSN</li> </ul> <p>When Version 2.039 is applied, this field will be set to your current selection, which is either Show Full SSN or Show Only Last 4 Digits.</p> <p>A field called Hide Date of Birth has been added. This will be set to "off" when Version 2.039 is applied; this replicates the current programming.</p> <p>You may change these settings if needed. Your selections in these two fields will affect the following areas of Employee Self Service:</p> <ul style="list-style-type: none"> <li>• Personal Data (main page and Update page)</li> <li>• Dependents (main page)</li> <li>• First Time Enrollment (Step 1, list of dependents in Step 2 and Step 3)</li> <li>• Open Enrolment (Step 1, list of dependents in Step 2 and Step 3)</li> <li>• Life Events (list of dependents in Step 2 and Step 3)</li> </ul> <p>Note that employees will still be able to enter Social Security Numbers and Dates of Birth for Dependents on the Add and Update pages.</p>

## Payroll

<p>Clear Time and Attendance Data</p> <p>(iCON Tools and Manager Services)</p>	<p>The following fields have been added to the available selections:</p> <ul style="list-style-type: none"> <li>• Work Date</li> <li>• Organization</li> <li>• Pay Type</li> </ul> <p>You may use these optional fields to further define the records that you wish to clear.</p> <p>Also, the following change has been made to this process: previously, the system cleared either the Time and Attendance Exempt records or Time and Attendance Non-Exempt records, depending on the employee's current time card exempt status. This caused "old" records to not be cleared, in the case where an employee's time card exempt status had been changed. The program has been changed so that records that exist in both tables will be cleared for the selected employees, regardless of their current time card exempt status.</p>
<p>Employee Deduction Formulas</p> <p>(iCON Tools and Manager Services)</p>	<p>When you change the Active checkbox to "no" or change the End Date, and a corresponding Employer Deduction Formula exists, a message will ask if you want to make the same change to the Employer Deduction Formula. You may click Yes to have the system make the same change, or click No to not update the Employer Deduction Formula.</p>
<p>Employee Payroll</p> <p>(iCON Tools and Manager Services)</p>	<p>If you add a record or change the Work State on an existing record, and no SUI Account Number or SUI tax record exists for the Work State, an error message will appear and you will not be allowed to save the information. Note that this edit will not appear for railroads.</p>

<p>Garnishment Payees</p> <p>(iCON Tools and Manager Services)</p>	<p>The ability to electronically remit deductions for Wisconsin delinquent tax payments has been added. If Unicorn HRO processes your payroll, contact Pay Support to set up the Garnishment Payee. If you process your own payroll, refer to the Version 2.039 Service Bureau Release Notes for set-up instructions. As part of this change, the Use ECS field in Garnishment Payees has been renamed Use Electronic Funds Transfer.</p>
<p>Manual Payments</p> <p>Manual Adjustment</p> <p>(iCON Tools and Manager Services)</p>	<p>A checkbox called Display in ESS has been added. In Manual Payments, this checkbox will only be available if the Manual Adjustment checkbox is on, since those payments are not normally displayed in the Paycheck Information function in Employee Self Service. This new checkbox gives you the ability to display the manual adjustment to the employee. (Note that all adjustments appear in the Paycheck Information function in Manager Services.)</p>
<p>Pay Code Definition</p> <p>(iCON Tools and Manager Services)</p>	<p>The ability to automatically exempt severance pay from state income taxation has been added. Currently, the following states have special rules:</p> <ul style="list-style-type: none"> <li>Alabama: the first \$25,000 of severance pay is exempt from income tax</li> <li>Georgia: severance payments to nonresidents for services performed in Georgia are not taxable (the system will not tax employees whose mailing address state is not Georgia)</li> <li>North Carolina: the first \$35,000 of severance pay is exempt from income tax</li> <li>Washington, D.C.: severance payments made to nonresidents for services performed within the District are not taxable</li> </ul> <p>Previously, a separate pay code had to be set up as exempt from these taxes. A field will be added to Pay Code Definition called Severance Pay For State Income Tax Purposes. When this is selected, the system will exempt the pay per the above rules.</p>

<p>Retroactive Pay Adjustments</p> <p>(iCON Tools and Manager Services)</p>	<p>The ability to process retroactive pay adjustments for employees paid by the Job Based and Position Based method has been added. Since additional data must be stored with the payments in order to do this, retroactive pay adjustments for these employees will only be available for payments created after Version 2.039 has been applied.</p> <p>When you choose the Local option when calculating a Retroactive Pay Adjustment, the checkbox called "Don't show this window again" has been removed. This is in response to client requests, since the details of the adjustment could no longer be viewed if this checkbox was inadvertently selected.</p> <p>The report that is produced for retroactive pay adjustments has been enhanced. Additional information will print which will allow you to review how the system calculated the adjustment amounts. The report will now print the following selection criteria in the heading section:</p> <ul style="list-style-type: none"><li>• organization structure</li><li>• pay processing group</li><li>• from and to pay period end dates</li><li>• process pay type</li><li>• from and to work dates</li><li>• lump sum date</li></ul> <p>In the detail section, the following information will be printed:</p> <ul style="list-style-type: none"><li>• employee number</li><li>• employee name</li><li>• pay type</li><li>• pay period end date</li><li>• work date</li></ul>
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<i>(continued)</i>	<ul style="list-style-type: none"><li>• hours</li><li>• amount paid</li><li>• amount calculated</li><li>• difference</li><li>• special rate (if any)</li><li>• shift (if any)</li><li>• pay rate override (if any)</li></ul>
Reports  (iCON Tools and Manager Services)	<p>When any of the following reports are run and there is no data to report, the selection criteria will print in the heading:</p> <ul style="list-style-type: none"><li>• Close Payment Log</li><li>• Electronic Payment Register (Summary)</li><li>• G/L Report By Date</li><li>• Garnishment Check Register (Summary)</li><li>• Pending Payments Exception Report</li><li>• W-2 Register</li></ul>