



Version 2.049

Release Notes

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25B Hanover Road * Florham Park, NJ 07932
Phone: 800-343-6844 * Fax: 073-360-0699
www.unicornhro.com

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Version 2.049 Checklist

Certain new features in Version 2.049 require set-up steps. Use the checklist below to update your system for each applicable area.

	Completed By	Date Completed
<p>Assign Function Security to the following new functions in Manager Services to applicable users.</p> <ul style="list-style-type: none"> • Global Forms Assignment • Benefit Cost Import • Physical Demand Categories • Physical Demand Definition • Work Environment Categories • Work Environment Definition • Work Relationships • G/L Interface Purge • Direct Deposit Accounts Report • Employee SSN Change Report • Workspace Administration 		
<p>In Benefit Enrollment Defaults, a checkbox called “Allow Employee to Select Limited-Use FSA Without Selecting HDHP in Enrollment Functions” will be added. Select this checkbox if employees should be allowed to select a limited-use FSA if they have no High Deductible Health Plan.</p>		
<p>In Benefit Enrollment Defaults, a checkbox called “Display Declined Benefits on Confirmation Statement in Enrollment Functions” will be added. Select this checkbox if you wish to display declined benefits in Step 6 of on-line enrollment functions, in addition to displaying them in Step 5. Currently, declined benefits are only shown on Step 5.</p>		
<p>In Common Object Dictionary, a checkbox called “Sort By Description Only” will be added to Benefit Category. Select this checkbox for each Benefit Category where benefit plans short be sorted only by the Long Description, rather than by Cost and then by Long Description of the benefit options.</p>		
<p>In Employer Deduction Contributions, a checkbox called “Apply employer match to combined deductions with the same Algorithm Category” will be added. This field only appears for deductions with a Deduction Type defined in the Payroll Deductions common object. Select this checkbox if you want to limit the employer deduction based on the combined deductions.</p>		
<p>In Messaging Setup, a data field called “Org/Level” will be added to messages containing employee data.</p>		

	Completed By	Date Completed
In Messaging Setup , you will have the ability to send a message to a Work Relationship for the selected Organization Levels. To do this, enter records in the Business Relationships common object, and then set up information in the new Work Relationships function. Then add a Notification entry in Messaging Setup so that a message is sent to the employee's Work Relationship when the even occurs.		
In Misc. Payroll , if any Puerto Rico employees earned wages through an arranged part-time schedule, select the new checkbox called "Partial Wages Indicator (Puerto Rico)".		

Overview

Version 2.049 contains several new functions as well as additional functionality throughout the product. The Release Notes contain a description of each feature in detail.

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

- Global Forms Assignment

The following function will be added to the Benefit Setup menu:

- Benefit Cost Import

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

- Physical Demand Categories
- Physical Demand Definition
- Work Environment Categories
- Work Environment Definition
- Work Relationships

The following function will be added to the Payroll Processing menu:

- G/L Interface Purge

The following functions will be added to the Reports menu:

- Direct Deposit Accounts Report
- Employee SSN Change Report

The following function will be added to the Tools menu:

- Workspace Administration

Manager Services New Functions

This section describes the new functions that will be added to Manager Services.

Global Forms Assignment will be added to the Employment Information menu. This function is used to create entries in the Forms function for a group of employees. This may be done, for example, if benefit documentation is given to your employees and you wish to track this information. Select the Organization Levels of the employees who received the form; employees in this level and lower levels will be included. Select one or more Employment Statuses; active statuses are automatically highlighted, but these may be changed. Employees whose current Employment Status is selected will be processed. Select the Form Type and Date Distributed. You may enter an employee number in the Verified By field; this is optional. When the job completes, a report will be created. If any employees already have the selected record, the record will not be affected, but this will be noted on the report. Records for all other employees will be created. If no duplicate records were found, the report will print No Error Found. Records may be viewed or updated in the Forms function.

The screenshot displays the 'Global Forms Assignment' web application. At the top, a navigation bar includes links for 'Reports', 'WebReportHR', 'My Employees', 'My Account', 'Home', 'About', 'Help', and 'Log Off'. The user is identified as 'User: carol' and the customer as 'Customer: 2000 Live (2000)'. The main content area is titled 'Global Forms Assignment' and includes a note '* = Required'. It features a 'Select Employee Population:' section with a tree view showing 'Cons. Group' and 'Zion'. To the right, an 'Employment Status:' dropdown menu is open, listing options: Active, Active F/T, Active Part Time, Contingent Workers, FMLA Leave, In Transit, Lay Off (No return), and Leave of Absence. Below this, the 'Form Distribution:' section contains fields for '*Form Type:' (set to 'no value'), '*Date Distributed:', 'Verified By:' (with a user icon), and '*Report Name:' (set to 'GlobalFormsAssignment'). A left-hand menu lists various system functions, including 'Employee Search', 'Menu Search', 'Personal Information', 'Employment Info.', 'Certifications', 'Compensation Methods', 'Education', 'Employee Biography', 'Employee Files', 'Employee Notes', 'Expired Certification Search', 'Expired I-9 Search', 'FMLA Certifications', 'FMLA Details', 'Forms', 'Global Forms Assignment', 'Grievances', and 'HIRE Act Eligibility'. At the bottom, there are 'submit' and 'cancel' buttons.

Benefit Cost Import will be added to the Benefit Setup menu. This function allows you to import cost records for Benefit Plans that are costed by the standard method. Costs for plans costed by age, salary range and/or smoker status cannot be imported using this function. To import data, you only need to enter the fields you wish to populate, but at least the mandatory fields must exist on the file. The mandatory fields are: Benefit Group, Benefit Plan, Benefit Option, Effective Date, and at least one combination of “cost” and “per”. The “per” values are codes from the Unit of Time Codes common object, such as 01 for annual cost, 12 for monthly cost, etc. Optional fields can be entered as needed. The fields on the file do not need to be in any special order, but the field names in the header record must be exactly as shown below.

- Benefit Group
- Benefit Plan
- Benefit Option
- Effective Date
- ER cost per EE
- EREE Per
- EREE Coverage Amount
- ER cost per Dep
- ERDP Per
- ERDP Coverage Amount
- EE cost per EE
- EEEE Per
- EEEE Coverage Amount
- EE cost per Dep
- EEDP Per
- EEDP Coverage Amount

When the job completes, a report will be created in Report Master Listing. If any errors exist, they will be included on the log and no data will be imported. Data in the file must be corrected and then imported again.

Physical Demand Categories will be added to the HR Setup menu. Use this function to define the categories of physical demands that are required by certain jobs in your organization. These categories are used to group factors that have something in common. For example, if some of your organization's job titles require employees to lift boxes or machinery, you can create a Heavy Lifting Category.

In iCON, a physical demand definition is made up of two elements: an index and a category. Follow these steps to define a physical demand, which can then be linked to a job title.

1. In **Physical Demand Categories**, add a record for each type of demand, such as Heavy Lifting, Climbing and Walking.
2. In the **Physical Demand Definition** table in **Common Object Dictionary**, add a record for each description that will be applicable to the Physical Demand Categories. When adding entries in this common object, leave the Category field blank. This will be automatically populated by the system when this entry is selected in **Physical Demand Definition**.
3. In **Physical Demand Definition**, define a record by selecting a Physical Demand Category and Physical Demand.
4. In **Job Titles**, go to the Update page and associate one or more Physical Demand Definitions with each job title.

Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

Physical Demand Categories + add

To update, click on information in the left column.

Index	Category	Action
01	Walking	view delete
car	Carrying	view delete
Cib	Climbing Stairs	view delete
cll	Climbing Ladders	view delete
cr	Crawling	view delete
dr	Driving	view delete
E	This is Index E	view delete
hear	Hearing	view delete
knee	Kneeling	view delete
lift	Lifting	view delete
op	Operating Heavy Machinery	view delete
push	Pushing	view delete
RCH	Reaching	view delete
sit	Sitting	view delete
st	Standing	view delete
vis	Vision	view delete
wh	Working at Heights	view delete

+ add

Employee Search
Employee Number GO

Menu Search

Personal Information
 Employment Info.
 Benefit Setup
 Benefit Actions
 HR Setup
 Agency Information
 Certification Definition
 Date Rounding Formula
 Employment Status Definition
 Entitlement Absence Code Assignment
 Entitlement Pay Code Assignment
 Entitlement Policies
 FMLA Setup

Below is an example of a job title that includes Environmental Job Requirements and Physical Job Requirements.

Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

Employee Search
Employee Number:
Menu Search:

Personal Information
Employment Info.
Benefit Setup
Benefit Actions
HR Setup
Agency Information
Certification Definition
Date Rounding Formula
Employment Status Definition
Entitlement Absence Code Assignment
Entitlement Pay Code Assignment
Entitlement Policies
FMLA Setup
FTE Position Number Import
Job Title:

To update courses, click on information in the left column.

Skill	Skill Group	Skill Level	Action
Certification			<input type="button" value="add"/>
Certification and Licenses			<input type="button" value="Action"/>
Degrees			<input type="button" value="add"/>
Education Degrees			<input type="button" value="Action"/>

To update courses, click on information in the left column.

Category	Work Environment	Action
Location	Office	<input type="button" value="delete"/>
Noise Level	Low	<input type="button" value="delete"/>
Stress Level	Moderate Stress	<input type="button" value="delete"/>

Environmental Job Requirements

Category	Physical Requirement	Action
Carrying	Up to 10 pounds	<input type="button" value="delete"/>
Lifting	Up to 10 pounds	<input type="button" value="delete"/>
Sitting	Most of day	<input type="button" value="delete"/>
Walking	Up to 10%	<input type="button" value="delete"/>

Physical Job Requirements

Physical Demand Definition will be added to the HR Setup menu. Use this function to define the physical demands that are required by certain jobs in your organization. Each definition includes both a category and physical demand.

Before adding records in this function, the following must be done.

1. In **Physical Demand Categories**, add a record for each type of demand, such as Heavy Lifting, Climbing, Walking, etc.
2. In the **Physical Demand Definition** table in **Common Object Dictionary**, add a record for each description that will be applicable to the Physical Demand Categories. Examples would be: Lifting up to 50 pounds, Climbing up to 100 feet, or Walking up to 8 hours. When adding entries in this common object, leave the Category field blank. This will be automatically populated by the system when this entry is selected in **Physical Demand Definition**.

Once the physical demands have been defined, go to the **Job Titles** function. Go to the Update page of the job title. Associate one or more Physical Demand Definitions with the job title.

Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

Physical Demand Definition + add

To update, click on information in the left column.

Category	Job Physical Demand	Action
Carrying	Carry up to 20	view delete
Carrying	Up to 10 lbs.	view delete
Carrying	Up to 100 lbs.	view delete
Carrying	Up to 50 lbs.	view delete
Climbing Ladders	Up to 10%	view delete
Climbing Ladders	Up to 25%	view delete
Climbing Stairs	Up to 10%	view delete
Climbing Stairs	Up to 25%	view delete
Lifting	Up to 10 lbs.	view delete
Lifting	Up to 20 lbs.	view delete
Lifting	Up to 35 lbs.	view delete
Lifting	Up to 45 lbs.	view delete
Lifting	Up to 65 lbs.	view delete
Lifting	Up to 75 lbs.	view delete
Lifting	Up to 95 lb.	view delete
Pushing	Up to 10 lbs.	view delete
Pushing	Up to 100 lbs.	view delete
Pushing	Up to 25 lbs.	view delete
Pushing	Up to 50 lbs.	view delete
Sitting	Most of day	view delete
Sitting	Up to 50%	view delete

Employee Search
Employee Number GO

Menu Search
Physical Demand Definition

Personal Information
Employment Info.
Benefit Setup
Benefit Actions
HR Setup
Agency Information
Certification Definition
Date Rounding Formula
Employment Status Definition
Entitlement Absence Code Assignment
Entitlement Pay Code Assignment
Entitlement Policies
FMLA Setup
FTE Position Number Import
Job Titles

Work Environment Categories will be added to the HR Setup menu. Use this function to create classifications for the environmental conditions that employees in certain job titles are exposed to. These categories are used to group factors that have something in common. For example, if employees in some of your organization's job titles are exposed to temperatures of 75° F to 125° F, you can create a Heat Exposure category.

In iCON, work environment categories are made up of two elements: an index and a category. Follow these steps to define a work environment, which can then be linked to a job title.

1. In **Work Environment Categories**, add a record for each type of environment, such as Noise Exposure, Cold Exposure and Heat Exposure.
2. In the **Work Environment Definition** table in **Common Object Dictionary**, add a record for each description that will be applicable to the Work Environment Categories. When adding entries in this common object, leave the Category field blank. This will be automatically populated by the system when this entry is selected in **Work Environment Definition**.
3. In **Work Environment Definition**, define a record by selecting a Work Environment Category and Work Environment.
4. In **Job Titles**, go to the Update page and associate one or more Environmental Job Requirements with each job title.

Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

Work Environment Categories + add

To update, click on information in the left column.

Index	Category	Action
123	Humidity	view delete
a	Location	view delete
dust	Exposure to Dust, Fumes, Gases	view delete
es	Risk of Electrical Shock	view delete
exp	Work with Explosives	view delete
fum	Fumes or Airborne Particles	view delete
hig	Work In High Places	view delete
MEDI	Medical or Health Environment	view delete
mmp	Near Moving Mechanical Parts	view delete
ohm	Operate Heavy Machinery	view delete
q	Air Quality	view delete
rr	Risk of Radiation	view delete
rv	Vibration	view delete
strs	Stress Level	view delete
temp	Temperature	view delete
tmch	Exp. to changes in Temperature	view delete
zz	Noise Level	view delete






+ add

Work Environment Definition will be added to the HR Setup menu. Use this function to enter information about the environmental conditions that employees in certain jobs are exposed to. Each definition includes both a category and work environment.

Before entering information in this function, perform the following set-up steps:

1. In **Work Environment Categories**, add a record for each type of environment, such as Extreme Cold, Extreme Heat, etc.
2. In the **Work Environment Definition** table in **Common Object Dictionary**, add a record for each description that will be applicable to the Work Environment Categories. Examples would be: 0 degrees to 32 degrees, 75 degrees to 100 degrees, etc. When adding entries in this common object, leave the Category field blank. This will be automatically populated by the system when this entry is selected in **Work Environment Definition**.

Once the work environments have been defined, go to the **Job Titles** function. Go to the Update page of the job title. Associate one or more Work Environment Definitions with the job title.

Customer: 2000 Live (2000) User: carol Reports WebReportHR My Employees My Account Home About Help Log Off		
<div>  </div>		
<div> <div>Employee Search</div> <div>Employee Number <input type="text"/></div> <div>GO</div> </div>		
<div>Menu Search</div>		
<div> <div>Salary Type Definition</div> <div>Skill Definition</div> <div>Training Course Administration</div> <div>Training Definition</div> <div>Training Facilities</div> <div>Training Schedule</div> <div>Work Environment Categories</div> <div>Work Environment Definition</div> <div>Work Relationships</div> <div>HR Actions</div> <div>Payroll Setup</div> <div>Payroll Actions</div> <div>Payroll Information</div> <div>Payroll Processing</div> <div>Reports</div> <div>myWorkSpace</div> <div>Tools</div> </div>		
<div> <div>Work Environment Definition</div> <div>+ add</div> </div>		
To update, click on information in the left column.		
Category	Work Environment	Action
Air Quality	Dust	 
Air Quality	Fumes	 
Air Quality	Mists	 
Air Quality	Odors	 
Air Quality	Smog	 
Air Quality	Smoke	 
Humidity	High Humidity	 
Humidity	Low Humidity	 
Location	Healthcare	 
Location	Laboratory	 
Location	Machine Shop	 
Location	Office	 
Location	Traffic Nearby	 
Medical or Health Environment	Medical: Hazard	 
Medical or Health Environment	Medical: Waste	 
Noise Level	High	 
Noise Level	Low	 
Noise Level	Low to Moderate	 
Noise Level	Moderate	 
Stress Level	1-Low Stress	 
Stress Level	2-Moderate	 

Work Relationships will be added to the HR Setup menu. This function is used to define relationships in your organization. Messages can then be added in **Messaging Setup** to be sent to the employee's Work Relationship, such as Benefits Manager or HR Manager, when the selected event occurs. For example, if there is a Message set up to be sent to an employee's Benefits Manager when an address is added, the system will get the employee's home organization levels from **Work Profile**, get the Benefits Manager for the matching organization levels from the **Work Relationships** function (or if no Benefits Manager exists for those exact organization levels, the system will go up a level until it finds a match), get that employee's e-mail address from **E-Mail Addresses**, and send the message to that e-mail address. You may define Work Relationships at any organization level. Before using this function, enter values in the Business Relationships common object; they will then be displayed in the Work Relationship drop-down list.

The example below shows Benefits Managers that have been defined.

Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

Work Relationships + add

To update, click on information in the left column. To sort, click on the column heading.

*Work Relationship: Benefits Mgr. Rows Per Page: 20

Employee Number	Employee Name	Organization Levels	Action
170me4	Smith, Jonathan	Cons. Group / Outback / Maine	delete
170MT3	Thompson, Joy	Cons. Group / Outback / Montana	delete
170vwy20	Anderson, James	Cons. Group / Outback	delete

+ add

Employee Search: Employee Number [] GO

Menu Search: []

Personal Information

Employment Info.

Benefit Setup

Benefit Actions

HR Setup

The organization wants Benefits Managers to be notified when an employee adds a new address in Employee Self Service. For this message, go to the Notification List in Messaging Setup and select Benefits Manager from the drop-down list:

Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

Add Messaging Setup Notification

Process: ES Address Event: After Add

Message ID: esaddaddress User: *All Users

Subject: Employee Number "Emp#" added address in Employee Services

* = Required

Send e-mail message to employee's supervisor (Reports To) + add

Send e-mail message to payroll administrator + add

Send e-mail message to employee's Benefits Mgr. + add

* Mail Name: []

* Mail Address: []

submit cancel

Employee Search: Employee Number [] GO

Menu Search: []

Personal Information

Employment Info.

Benefit Setup

Benefit Actions

HR Setup

HR Actions

Payroll Setup

Payroll Actions

Payroll Information

Payroll Processing

Reports

The following entries exist in Work Relationships:

Employee	Work Relationship	Level 1	Level 2	Level 3
170me4	Benefits Manager	Cons. Group	Outback	Maine
170MT3	Benefits Manager	Cons. Group	Outback	Montana
170wy20	Benefits Manager	Cons. Group	Outback	(blank)

Messages will be sent as follows:

- When an employee in Maine (level 3) adds an address, a message will be sent to employee 170me4, since there is a Benefits Manager Work Relationship set up for this organization level.
- When an employee in Montana adds an address, a message will be sent to employee 170MT3.
- When an employee in Florida (or any organization level other than Maine or Montana) adds an address, a message will be sent to employee 170wy20; since there is no Work Relationship set up for Florida, it will next look for a matching record with level 1 = Cons. Group, and level 2 = Outback.

G/L Interface Purge will be added to the Payroll Processing menu. Use this function to clear the general ledger entries that are created by payroll processing functions (**Pending Payments, Manual Payments, Net To Gross Calculator, Void Process, G/L Interface Estimate Generation** and **G/L Interface Reversal Generation**). Records from the GL_JE_EE and GL_JE tables are deleted. When you access this function, the system defaults to displaying entries from the previous 31 days. You may change these dates as needed.

The screenshot shows the iCON web application interface. At the top, the header includes 'Customer: 2000 Live (2000) | User: carol' and navigation links: Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off. The main content area is titled 'G/L Interface Purge'. Below the title, there is a section for filters: 'Legal Entity' (Value Solutions), 'Payroll Processing Group' (Value Semi-Mo.), 'From Date' (08/06/2013), and 'To Date' (09/06/2013), with a 'refresh' button. A table displays the results with columns: Select, Pay Period End Date, and G/L Type. The table contains one entry: a radio button, 08/15/2013, and Actual. At the bottom of the table area are 'submit' and 'cancel' buttons. On the left side, there is a sidebar with the iCON logo and a menu: Employee Search (with a 'Go' button), Menu Search, and a list of options: Personal Information, Employment Info., Benefit Setup, Benefit Actions, and HR Setup.

Direct Deposit Accounts Report will be added to the Reports menu. Based on the Selection Criteria, the report will print current and future direct deposit accounts for employees, as stored in the **Direct Deposit Accounts** function. It will include employees with an active payroll status, as stored in **Payroll Status**. The system will use your User Security setting to determine which employees to include on the report.

The report includes the following information:

- organization structure
- legal entity
- employee number
- employee name
- effective date
- priority
- ABA number
- Account number
- Account type
- Deposit (amount, percent or Balance)

Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

Direct Deposit Accounts Report

* = Required

Select Employee Population:

Select an organization level below:

- ☒ Cons. Group
- ☒ Zion

☒ By Organization Structure
☐ By Legal Entity

*Legal Entity:
 Payroll Processing Group:
 *Effective Date: 09/06/2013

Select Report Parameters:

*Report Name: DirectDepositAccountsReport

Break By Organization Structure at Level: 2

Sort by Employee Number: ☒

Sort by Employee Name: ☐

submit cancel

Employee SSN Change Report will be added to the Reports menu. The report will print all employees whose Social Security Numbers have been changed in the selected quarter. It will include each quarter and year in which the employee had SUI taxable wages. Use this to determine if amended returns need to be filed.

The report includes the following information:


- Employee number
- Employee name
- Old SSN number
- New SSN number
- Date of change
- State (where SUI wages were earned)
- Quarter and year in which wages were earned


The screenshot shows the iCON web application interface. At the top, a navigation bar includes links for Reports, WebReportHR, My Employees, My Account, Home, About, Help, and Log Off. The user is logged in as 'carol' for 'Customer: 2000 Live (2000)'. On the left, a sidebar menu lists various setup options: Employee Search, Menu Search, Personal Information, Employment Info., Benefit Setup, Benefit Actions, HR Setup, HR Actions, and Payroll Setup. The main content area is titled 'Employee SSN Change Report'. It contains several fields: '*Legal Entity:' with radio buttons for 'All' and 'Selected' (the latter is selected), a dropdown menu showing a list of entities (Cheesecake Fac., Discovery, Fort Hays Inc., Harris Golf, Kohrs Ice Cream, Marco I. Marina), '*Year:' with a dropdown set to '2013', '*Quarter:' with radio buttons for Quarter 1, Quarter 2, Quarter 3 (selected), and Quarter 4, and '*Report Name:' with a text box containing 'EmployeeSSNChangeReport'. At the bottom of the form are 'submit' and 'cancel' buttons.

WorkSpace Administration will be added to the Tools menu. This function is similar to WorkSpace Setup, and allows you to add, update or delete your WorkSpace entries. This function also allows you to add, update or delete WorkSpace entries for other users, including the ability to copy entries from one user to another.

































Users may still work with their own WorkSpace entries using the WorkSpace Setup function (previously called WorkSpace Admin), which does not require Function Security. However, access to the WorkSpace Administration function should only be given to people who can make changes to other users' WorkSpaces.


Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

WorkSpace Administration 

User Name: Copy To User Name: 

To update, click on information in the myWorkSpace column. Select All Unselect All

Copy	myWorkSpace	Action
<input type="checkbox"/>	Address and Withholding Changes	 
<input type="checkbox"/>	Benefit Enrollments	 
<input type="checkbox"/>	Benefit Plan Set Up	 
<input type="checkbox"/>	Benefit Reports	 
<input type="checkbox"/>	Common Object Functions	 
<input type="checkbox"/>	Company Set Up	 
<input type="checkbox"/>	Deduction Functions	 
<input type="checkbox"/>	EEO 1 and EEO 4 Functions	 
<input type="checkbox"/>	Employee Salary Functions	 
<input type="checkbox"/>	Future Dated Job Transfers	 
<input type="checkbox"/>	Hiring New Employee	 
<input type="checkbox"/>	Override Functions	 
<input type="checkbox"/>	Payroll Limits Functions	 
<input type="checkbox"/>	Payroll Process	 
<input type="checkbox"/>	Rehire For HR Department	 
<input type="checkbox"/>	Rehire for Payroll Department	 

Employee Search
Employee Number 

Menu Search

Tools
 Auto PIN Assignment
 Common Object Dictionary
 Employee Security
 ESS Login Groups
 ESS News Upload
 File Type Security
 Function Security
 HCA Planned Headcount Import
 HCA Revenue Import
 HR COD Security
WorkSpace Administration
 myWorkSpace
 Reports
 Payroll Processing
 Payroll Information
 Payroll Actions
 Payroll Setup

Manager Services New Features

This section describes the new features that will be added to Manager Services.

Benefits

On the **Census Report**, a new checkbox will be added on the FSA tab called “Flag Limited-Use FSA without HDHP Enrollment”. If you allow this scenario, you may report on those employees by selecting this checkbox. On the report, an extra column will be created after the Flexible Spending Account columns. “No HDHP Enrollment” will be written to this column.

In **Open Enrollment, First Time Enrollment** and **Life Events**, you may display declined benefits in Step 6. To do this, select the new checkbox “Display Declined Benefits on Confirmation Statement in Enrollment Functions” in Benefit Enrollment Defaults. Leave this field blank to continue to display declined benefits only on Step 5 of the on-line enrollment functions.

In **Open Enrollment, First Time Enrollment** and **Life Events**, you may allow an employee to select a Limited-Use Flexible Spending Account without enrolling in a high deductible health plan, as in the case where the employee’s spouse is enrolled in a HDHP. To allow this, select the new checkbox called “Allow Employee to Select Limited-Use FSA Without Selecting HDHP in Enrollment Functions” in Benefit Enrollment Defaults. If you do not select this checkbox, the system will continue to require the employee to select a HDHP when selecting a Limited-Use FSA. This change has also been made to the **Flexible Spending Accounts** function.

In **Open Enrollment, First Time Enrollment** and **Life Events**, benefit plans within each benefit category are sorted first by the Long Description of the benefit plan, then by cost, and then by the Long Description of the benefit option. If you wish to sort by Long Descriptions only, go to the Benefit Category common object and select the new checkbox “Sort By Description Only”. You may wish to use this option for benefits that are costed according to a coverage amount, which would be re-sorted after the employee selects an amount. If you leave this checkbox blank, benefit plans will continue to sort by cost and Long Description.

In **Open Enrollment, First Time Enrollment** and **Life Events**, benefit plans with an Eligible Dependent List that contained a “*no value” entry were grayed out and not available for selection. This will be changed so that the benefit may be selected by the employee in this scenario.

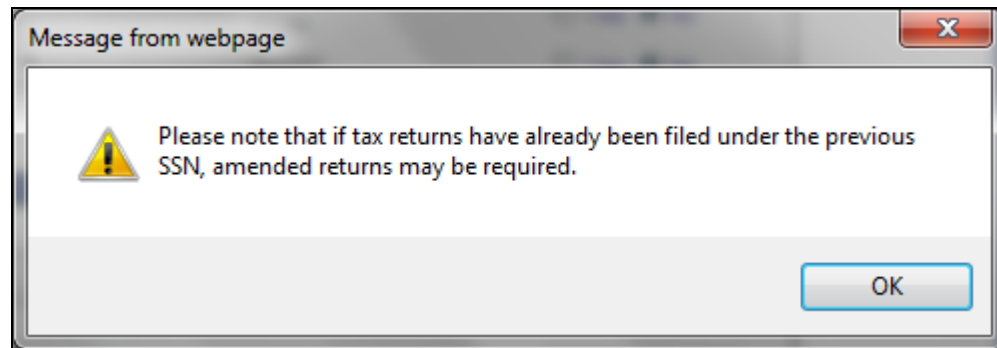
On the **Benefit Comparison Report**, if an employee completed Open Enrollment but made no changes other than selecting an FSA or HSA, he/she did not appear on the report when the option to include only employees who completed Open Enrollment was chosen. These employees will now print on the report when this selection is made.

When running the **Benefit Comparison Report** and more than 2600 employees were processed, an error occurred. This will be corrected.

On the **Benefit Cost Report**, the Policy Number will be added.

Human Resources

In **Demographics**, if you change an employee's Social Security Number, the following warning message will appear.



In **Education**, a date field called Degree Awarded will be added.

In **Job Review**, a column for Actual Date will be added to the main page so that you may see this information without having to access each record.

In **Messaging Setup**, you will have the ability to include an employee's home organization levels on each message that includes employee data. Previously, organization levels were only available on a few employee-related messages. The new data element is called "Org/Level". If you include this in a message, the e-mail message will include the Short Description of each Organization Level in Work Profile.

In **Messaging Setup**, a new option on the Notification page will be available that allows you to send a message to an employee's Work Relationship. You may set up a notification to be sent to various Work Relationships. Please refer to Work Relationships in the Manager Services New Functions section of this document for information on setting up this information in your system.

In **Previous Names**, if you made more than one change to an employee's name on the same day, the names were sorted alphabetically, rather than in descending date order by day and time changed. Previous names will now be sorted in descending order by the date and time in which they were entered.

In **Work Profile**, if an employee's organization level is in Montana, and you change the Adjusted Hire Date, the system will only ask if the employee is a rehire if the Adjusted Hire Date is 60 or more days past the termination date. Montana will be following the Federal rules for reporting new hires. In addition, if you enter a hire date in **Rehire (HR)** that is 60 or more days after the termination date for a Montana employee, the system will automatically set the Pending State New Hire Reporting to "yes"; if it is less than 60 days, this flag will not be set.

Payroll

In **Account Manager**, in the Legal Entities section, the ability to enter a Credit account number without a corresponding Debit account number will be added for Estimated and Reversal accounts. Previously, both fields had to be entered or blank.

In **Deductions**, when a record is added and Populate Amount/Percent when Manually Adding Deduction is selected in Deduction Definition, the system will automatically populate the Frequency value.

In **Employer Deduction Contributions**, a field called "Apply employer match to combined deductions with the same Algorithm Category" will be added. This field only appears for deductions with a Deduction Type defined in the Payroll Deductions common object, such as 401(k) or 403(b). This option can be used with employer deductions that are a Percent of Employee Contribution or a Tiered formula. If you select this checkbox for a 401(k) and Roth 401(k) deduction, for example, the combined employer match will not go above the maximum that is set up on the deduction. As an example, if your company matches 50% up to the first 6%, and an employee contributes 4% to 401(k) and 4% to Roth 401(k), and this checkbox for both deductions is off, the employer deduction will be 50% for each deduction, since 4% is less than 6%. However, if the checkbox for both deductions is on, the employer match will be capped at 6%. The first deduction that is processed will have the 4% match applied; the second deduction will have the remaining 2% applied.

In **Misc. Payroll**, a checkbox called "Partial Wages Indicator (Puerto Rico)" will be added. This is used to report quarterly wage data to Puerto Rico. Select this checkbox for Puerto Rico employees who earned the wages through an arranged part-time schedule.

On the main page of **Time and Attendance**, columns for Rate and Rate Type will be added. To make room for these columns, the following column headings will be changed: Hours Worked will be changed to Hours, Type of Absence will be changed to Absence and Replacement Hours will be changed to Replacement.

The calculation of an employee's healthcare coverage will be slightly changed. This is used in **W-2 Data Generation** and **W-2 Healthcare Cost Report**. For employees whose coverage is calculated using the system calculation, it will continue to use Benefit History to see what coverage the employee had for each day of the year, and will continue to use the costs from Benefit Plans to see what the cost was for each day of the year. The only difference is that costs from Benefit Plans that are dated on or after the Pay Period End Date of the first Check Date of the following year will be ignored. So, for example, the first Check Date is 1/4/2014, and it has a Pay Period End Date of 12/28/2013. If any cost records exist in Benefit Plans starting on 12/28/2013, they will be ignored. The previous cost record will be used up until 12/31/2013 for purposes of calculating the employee's healthcare coverage amount. Unicorn HRO recommends that costs for the new year are entered with a January 1 date, and that the checkbox in Benefit Update be used to start the new deductions on the first Pay Period End Date with a Check Date in the new year, if desired. However, if special circumstances warrant that you enter new benefit costs with a start date near the end of December, the W-2 healthcare calculation will no longer be affected.

In the **W-2 Healthcare Cost Report**, the ability to create a csv file will be added. If you select this option, the csv report can be accessed in Report Master Listing when the job completes. The csv file will be in the format of the W-2 Healthcare Import, with the exception of the employee's name also being included. You may use this file if needed to change coverage amounts and then bring them into the system as an override, using the W-2 Healthcare Import function. Please note that you must open the file in a certain manner if any of your legal entity codes or employee numbers begin with zero; please refer to the Manager Services help text for instructions. Columns in the csv file will be:

- Employee Number
- Legal Entity
- Tax Year
- Health Coverage Amount
- First Name
- MI
- Last Name

The **W-2 Health Coverage Import** will be changed to allow you to import the following values in the HealthCoverageAmount field, in addition to a dollar amount:

- 0 or C: this will set the Override Amount to zero and the option to Use System Calculation
- D: this will set the Override Amount to zero and set the option to Do Not Report

Below is an example of a file in which these values are being used.

	A	B	C	D	E	F	G
1	Employee#	LegalEntit	TaxYear	HealthCoverageAmount			
2	10010	OUT	2013	5678.9			
3	10035	OUT	2013	6789.12			
4	10047	OUT	2013	12222.33			
5	10022	OUT	2013	0			
6	10082	OUT	2013	0			
7	10099	OUT	2013	0			
8	10092	OUT	2013	C			
9	10182	OUT	2013	C			
10	10285	OUT	2013	D			
11	10175	OUT	2013	D			
12	10043	OUT	2013	D			
13							
14							
15							

Reports

When running the **Employee Audit Report**, if you selected Organization and Group, the system included employees in all Payroll Processing Groups in the organization. The report will be changed to include only employees who are currently in the selected Payroll Processing Group, as stored in Misc. Payroll.

When running the **Entitlement Report** and the employee's latest Paid Time Off record was created during the selected Pay Period End Date, the system will add together the Pending Hours Used from the current record as well as the last record. Previously, only the Pending Hours Used from the current record were shown on the report.

In **WebReportHR**, additional data will be available. These tables will be added:

- Account Distribution
- Education
- Exit Interview
- Lump Sums (current and prior year)
- Paid Time Off (current and prior year)
- Salary History
- Work History

The following fields will be added to existing tables:

- Disciplinary Action file:
 - Follow_Up_Date
- Deduction file:
 - Lifetime_Limit
- Employee file:
 - Job_Title_Abbrev
 - Job_Review_Comments
 - Review_Matrix
 - Review_Matrix_Desc
 - Vets_100A
 - Vets_100a_Desc
 - Weeks_Worked
- Payroll file:
 - Accum_Retirement_Earnings
 - Exempt_Workers_Comp
 - Resident_Locality
 - Resident_Locality_Desc
 - Health_Coverage_Option
 - Health_Coverage_Option_Desc
 - Health_Coverage_Override_Amount

myWorkspace

In the Workspace area, Workspace Admin will be renamed Workspace Setup. Users will no longer be allowed to copy Workspace entries to other users. Rather, the new function Workspace Administration must be used for copying information to other users. Users still have the ability to add, update and delete their own WorkSpaces, as shown in the following example.

Customer: 2000 Live (2000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

Workspace Setup [add](#)

To update, click on information in the myWorkspace column.

myWorkspace	Action
Address and Withholding Changes	view delete
Benefit Enrollments	view delete
Benefit Plan Set Up	view delete
Benefit Reports	view delete
Common Object Functions	view delete
Company Set Up	view delete
Deduction Functions	view delete
EEO 1 and EEO 4 Functions	view delete
Employee Salary Functions	view delete
Future Dated Job Transfers	view delete
Hiring New Employee	view delete
Override Functions	view delete
Payroll Limits Functions	view delete
Payroll Process	view delete
Rehire For HR Department	view delete
Rehire for Payroll Department	view delete
Report Samples	view delete
Safety Functions	view delete

myWorkspace

- Address and Withholding Changes
- Benefit Enrollments
- Benefit Plan Set Up
- Benefit Reports
- Common Object Functions
- Company Set Up
- Deduction Functions
- EEO 1 and EEO 4 Functions
- Employee Salary Functions
- Future Dated Job Transfers
- Hiring New Employee
- Override Functions
- Payroll Limits Functions
- Payroll Process
- Rehire For HR Department
- Rehire for Payroll Department
- Report Samples
- Safety Functions

Employee Self Service New Features

The following changes will be made to the Employee Self Service module.

In **Direct Deposit Accounts**, a field called Re-enter Account Number will be added. When adding or updating a direct deposit account, the employee must enter it a second time to verify that it has been entered correctly. If the two account numbers do not match, an error message will appear.

Welcome, William C Fulton Jr Home | Print | Log Off

Personal

- Personal Data
- Address Information
- E-Mail Address
- Dependents
- Education
- Emergency Contacts
- Change Password
- Job Reviews
- Salary History
- Skills Information
- Certifications
- Employee Files
- Training Classes
- Training Enrollment
- Notification Elections

Payroll

- W-4
- Paid Time Off
- Time Off Request
- Paycheck Information
- Paycheck Calculator
- Direct Deposit Accounts

Direct Deposit Accounts William C Fulton Jr

* Required.

Add Direct Deposit Account

Effective Date: 09/23/2013 Company: Value Solutions

*ABA Number: *Account Type: *no value

*Account Number: *Priority:

*Re-enter Account Number: Deposit Amount:

Deposit Percent:

Deposit Balance: ☐ Yes ☒ No

Pre-Notification: Yes

When you add or change a bank account, a pre-note will be sent to your bank on your next pay date to verify the information. On this pay date you will receive a check instead of a direct deposit voucher. If the pre-note is successful, you will receive a direct deposit voucher on the pay date following the pre-note.

Priority: 1 is the highest; 98 is the lowest. 99 is reserved for Deposit Balance Accounts.

In **Education**, a date field for Degree Awarded will be added.

Welcome, William C Fulton Jr Home | Print | Log Off

Personal

- Personal Data
- Address Information
- E-Mail Address
- Dependents
- Education
- Emergency Contacts
- Change Password
- Job Reviews
- Salary History
- Skills Information
- Certifications
- Employee Files
- Training Classes
- Training Enrollment
- Notification Elections

Payroll

- W-4
- Paid Time Off
- Time Off Request
- Paycheck Information

Add Education

* = Required

*Education Level: *No Value *Type of Education: *No Value

*School Attended: *No Value License Number:

*Major/Course: *No Value Name of License:

From Date: Expiration Date:

To Date: Tuition Amount: 0.000

Education Degree: *No Value Credits Earned: 0

Minor: *No Value Final Grade:

Graduation Year: 0 Degree Awarded:

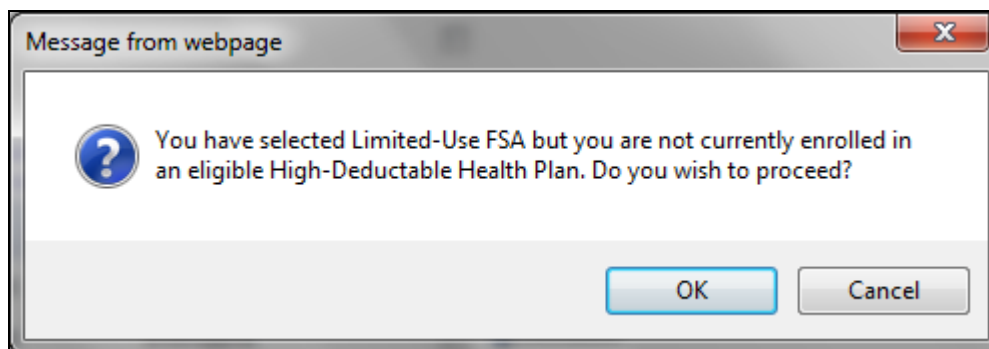
Comments:

In **First Time Enrollment**, **Life Events** and **Open Enrollment**, the following changes will be made if the system has been configured to use these new features:

- Declined benefits will be displayed on Step 6, in addition to being displayed on Step 5, if the “Display Declined Benefits on Confirmation Statement in Enrollment Functions” checkbox has been selected in Benefit Enrollment Defaults.

		Employee	Employer
Medical	You have selected Medical / EE + Family coverage. Family members covered: Alexandra Fulton, Melissa Fulton, Michelle Fulton, Nicolas Fulton, Sarah Fulton and Steven Fulton.	\$141.67	\$404.17
Dental	You have selected Dental / Family Plan coverage. Family members covered: Michelle Fulton, Sarah Fulton and Steven Fulton.	\$18.34	\$36.67
Vision Care	You have selected Vision Plan / Main Plan coverage. Family members covered: Michelle Fulton, Sarah Fulton and Steven Fulton.	\$5.00	\$20.84
Life Insurance	You have selected Life Insurance / Main Plan coverage. Coverage amount is \$105,000. Primary beneficiaries are: Sarah Fulton (100.0000%).	\$0	\$15.75
Life Ins. 2	You have selected 1X Salary / Age Costed coverage. Coverage amount is \$35,000.	\$0	\$2.16
Optional Life	You have selected Life Insurance / Optional Life coverage. Coverage amount is \$100,000 with an override coverage amount of \$100,000. Primary beneficiaries are: Sarah Fulton (100.0000%).	\$15.00	\$0
Spouse/Dep	You have selected to decline Spousal Life Insurance coverage.	N/A	N/A

- The employee will be allowed to select a Limited-Use Flexible Spending Account without enrolling in a high deductible health plan if the new checkbox called “Allow Employee to Select Limited-Use FSA Without Selecting HDHP in Enrollment Functions” has been selected in Benefit Enrollment Defaults. If this checkbox is selected and the employee selects a Limited-Use FSA without a HDHP, a warning message will appear, similar to the one shown here. The employee may click OK to continue, or click Cancel to return to Step 4 of the enrollment process.



- Benefit plans within each benefit category will be sorted by Long Description of the benefit plan and then Long Description of the benefit option, rather than by Cost and then Long Description, if you select the new checkbox “Sort By Description Only” for the Benefit Category common object entry. If you leave the new checkbox blank, the benefits will continue to be sorted by Cost and then Long Description of the Benefit Option. Below is an example.

If you leave the new checkbox blank, and plans have zero cost until a coverage amount is shown, the benefits would first be displayed as:

Plan	Coverage	Cost/Pay Period
Life Insurance	Plan A	0.00
Life Insurance	Plan B	0.00
Life Insurance	Plan C	0.00
Life Insurance	Plan D	0.00

If the employee chooses a coverage amount for Plan C, which causes the cost to be recalculated as \$10.00, the benefits would be displayed in Cost order if the Sort By Description Only checkbox is blank:

Plan	Coverage	Cost/Pay Period
Life Insurance	Plan A	0.00
Life Insurance	Plan B	0.00
Life Insurance	Plan D	0.00
Life Insurance	Plan C	10.00

If you select the Sort By Description Only checkbox, the entries would be displayed by the Long Description:

Plan	Coverage	Cost/Pay Period
Life Insurance	Plan A	0.00
Life Insurance	Plan B	0.00
Life Insurance	Plan C	10.00
Life Insurance	Plan D	0.00

iCON Tools New Features

This section describes the new features that will be added to the iCON Tools module.

Benefits

On the **Benefit Cost Report**, the Policy Number will be added.

On the **Census Report**, a new checkbox will be added on the FSA tab called “Flag Limited-Use FSA without HDHP Enrollment”. If you allow this scenario, you may report on those employees by selecting this checkbox. On the report, an extra column will be created after the Flexible Spending Account columns. “No HDHP Enrollment” will be written to this column.

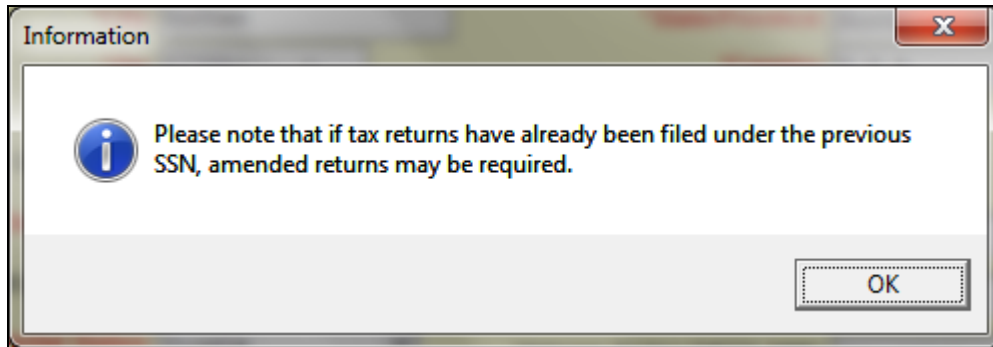
In **Flexible Spending Accounts**, you may allow an employee to select a Limited-Use Flexible Spending Account without enrolling in a high deductible health plan, as in the case where the employee’s spouse is enrolled in a HDHP. To allow this, select the new checkbox called “Allow Employee to Select Limited-Use FSA Without Selecting HDHP in Enrollment Functions” in Benefit Enrollment Defaults in Manager Services. If you do not select this checkbox, the system will continue to require you to enroll the employee in a HDHP before selecting a Limited-Use FSA.

Human Resources

In **Employee Absences**, the system did not default the employee’s job title when adding a record. As a result, an error appeared when you tried to save a record with a blank job title. The program will be changed to automatically populate the employee’s job title from Demographics when a record is added. This can be changed if needed.

In **Employee Direct**, if an employee's organization level is in Montana, and you change the Adjusted Hire Date, the system will only ask if the employee is a rehired if the Adjusted Hire Date is 60 or more days past the termination date. Montana will be following the Federal rules for reporting new hires.

In **Employee Direct**, if you change an employee's Social Security Number, the following warning message will appear:



In **Employee Education**, a date field called Degree Awarded will be added.

When running the **Employee Entitlement Report** and the employee's latest Paid Time Off record was created during the selected Pay Period End Date, the system will add together the Pending Hours Used from the current record as well as the last record. Previously, only the Pending Hours Used from the current record were shown on the report.

In **Employee Previous Names**, if you made more than one change to an employee's name on the same day, the names were sorted alphabetically, rather than in descending date order by day and time changed. Previous names will now be sorted in descending order by the date and time in which they were entered.

In **Messaging Setup**, you will have the ability to include an employee's home organization levels on each message that includes employee data. Previously, organization levels were only available on a few employee-related messages. The new data element is called "Org/Level". If you include this in a message, the e-mail message will include the Short Description of each Organization Level in Work Profile.

In **Messaging Setup**, a new option on the Notification page will be available, that allows you to send a message to an employee's Work Relationship. You may set up a notification to be sent to various Work Relationships. Please refer to the Work Relationships section of this document for information on setting up this information in your system.

Payroll

In **Account Manager**, in the Legal Entities section, the ability to enter a Credit account number without a corresponding Debit account number will be added for Estimated and Reversal accounts. Previously, both fields had to be entered or blank.

In **Employee Deduction Formulas**, when a record is added and Populate Amount/Percent when Manually Adding Deduction is selected in Deduction Definition, the system will automatically populate the Frequency value.

In **Employee Payroll**, a checkbox called “Partial Wages Indicator (Puerto Rico)” will be added. This is used to report quarterly wage data to Puerto Rico. Select this checkbox for Puerto Rico employees who earned the wages through an arranged part-time schedule.

In **Employer Deduction Contributions**, a field called “Apply employer match to combined deductions with the same Algorithm Category” will be added. This field only appears for deductions with a Deduction Type defined in the Payroll Deductions common object, such as 401(k) or 403(b). This option can be used with employer deductions that are a Percent of Employee Contribution or a Tiered formula. If you select this checkbox for a 401(k) and Roth 401(k) deduction, for example, the combined employer match will not go above the maximum that is set up on the deduction. As an example, if your company matches 50% up to the first 6%, and an employee contributes 4% to 401(k) and 4% to Roth 401(k), and this checkbox for both deductions is off, the employer deduction will be 50% for each deduction, since 4% is less than 6%. However, if the checkbox for both deductions is on, the employer match will be capped at 6%. The first deduction that is processed will have the 4% match applied; the second deduction will have the remaining 2% applied.

In **G/L Interface Purge**, the system will default to showing entries from the previous 31 days when you first access this function. This will increase the speed in which entries are displayed. Previously, all entries were displayed. You may change the From and To Dates as needed to display the desired entries.

The calculation of an employee’s healthcare coverage will be slightly changed. This is used in **W-2 Data Generation** and **W-2 Healthcare Cost Report**. For employees whose coverage is calculated using the system calculation, it will continue to use Benefit History to see what coverage the employee had for each day of the year, and will continue to use the costs from Benefit Plans to see what the cost was for each day of the year. The only difference is that costs from Benefit Plans that are dated on or after the Pay Period End Date of the first Check Date of the following year will be ignored. So, for example, the first Check Date is 1/4/2014, and it has a Pay Period End Date of 12/28/2013. If any cost records exist in Benefit Plans starting on 12/28/2013, they will be ignored. The previous cost record will be used up until 12/31/2013 for purposes of calculating the employee’s healthcare coverage amount. Unicorn HRO recommends that costs for the new year are entered with a January 1 date, and that the checkbox in Benefit Update be used to start the new deductions on the first Pay Period End Date with a Check Date in the new year, if desired. However, if special circumstances

warrant that you enter new benefit costs with a start date near the end of December, the W-2 healthcare calculation will no longer be affected.

In the **W-2 Healthcare Cost Report**, the ability to create a csv file will be added. If you select this option, the csv report can be accessed in Report Master Listing when the job completes. The csv file will be in the format of the W-2 Healthcare Import, with the exception of the employee's name also being included. You may use this file if needed to change coverage amounts and then bring them into the system as an override, using the W-2 Healthcare Import function. Please note that you must open the file in a certain manner if any of your legal entity codes or employee numbers begin with zero; please refer to the Manager Services help text for instructions.

The **W-2 Health Coverage Import** will be changed to allow you to import the following values in the HealthCoverageAmount column, in addition to a dollar amount:

- 0 or C: this will set the Override Amount to zero and the option to Use System Calculation
- D: this will set the Override Amount to zero and set the option to Do Not Report