Version 2.050 Release Notes

December 14, 2013

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Getting the Latest iCON Information

Certain new features in Version 2.050 require set-up steps. Use the checklist on the following page to update your system for each applicable area.

The Unicorn HRO website (http://www.UnicornHRO.com) contains the most up-to-date information about **i**CON.

On our web site, there are three documents that are of particular interest at year-end: *Taxes, SUI Reporting Set Up by State* and *W2 Reporting By State*. The *Taxes* document explains how each state tax is calculated for 2014. The *SUI Reporting Set Up by State* document explains how to set up your system to create SUI wage files. The *W2 Reporting By State* document gives information about the state W-2 file formats, state websites and any special set-up instructions that may be required.

These documents are available from the Documents section of the Help window in Manager Services, on our website through the **i**CON Documentation section of the Downloads area, or you can access them from the main page of **i**CON Tools:

1. From the main window, click on **Help**.
2. Click on **HelpLink**.
3. Click on **iCON Documentation**.
4. Select the document you wish to view.

Version 2.050 Checklist

Certain new features in Version 2.050 require set-up steps. Use the checklist below to update your system for each applicable area.

	Completed By	Date Completed
Review Release Notes		
Assign **Function Security** to the following new functions in Manager Services to applicable users. • Onboard Setup • Onboard Status • Organization Security Import		
If you wish to display an onboarding menu to your newly hired employees, follow the steps in the Manager Services New Functions section of this document.		
If any of your employees are nonresident aliens and are subject to federal income tax withholding, add a **Tax Election** (Manager Services) or **Employee Tax Option** (iCON Tools) record effective 1/1/2014 and enter -2250.00 in the Additional Allowance field (make sure this is entered as a negative number). The values in all other fields, such as Filing Status and Number of Exemptions, should be the same as the employee's current record.		
If any of your employees are nonresident aliens and are subject to Maine income tax withholding, add a **Tax Election** (Manager Services) or **Employee Tax Option** (iCON Tools) record effective 1/1/2014 and enter -6200.00 in the Additional Allowance field (make sure this is entered as a negative number). The values in all other fields, such as Filing Status and Number of Exemptions, should be the same as the employee's current record.		
If any of your employees have deductions for delinquent tax payments in Minnesota, these payments must be remitted electronically beginning January 1, 2014. Contact iCON Support to have the agency set up as an electronic payment agency. Once this has been completed, set up the record in **Garnishment Payees** for Minnesota with FIPS Code 015.		
As part of the changes for North Carolina income tax withholding, all employers are required to obtain Form NC-4EZ or Form NC-4 from their employees. Please see the following for more details: http://www.dor.state.nc.us/press/2013/nc4requirement.html		

	Completed By	Date Completed
If you have employees in Puerto Rico and produce Forms 499R-2/W-2PR, the forms must include the Electronic Filing Confirmation Number. This is provided when you submit your W-2 file to Puerto Rico. After filing, enter the number in **Legal Entity Definition** on the Additional W-2 page in the Puerto Rico Electronic Filing Confirmation Number field for 2013. Also, a field called Cease of Operations Date has been added to the main page of **Legal Entity Definition**. Enter this date if applicable.		
If any of your legal entities pay Rhode Island employees, and must use the $22,100 wage limit rather than $20,600, make sure that the wage ceiling is updated properly for these legal entities in **Tax Manager**. If Unicorn HRO files your taxes, contact Tax Support if any of your legal entities must use the $22,100 wage limit.		
If any of your employees are subject to Washington State Industrial Insurance Fund (SIIF), State Medical Aid Fund (SMAF) and State Supplemental Pension Fund (SSPF), you should have received your rates for 2014 from the state. Enter these in Tax Manager.		

Employee Tax Changes

This section describes the tax changes that have been announced. The rates for employee-paid taxes are included with the product update. No action is required on your part to update employee-paid tax rates.

> **Note:** The rates for employer-paid taxes are stored by legal entity. If your payroll is processed by Unicorn HRO, these changes will be made for you.

Federal Tax Changes

Federal Income Tax Tables Early Release Copies Are Published

Early release copies of the percentage method tables for federal income tax for 2014 have been published. Also, $2,250.00 must be added to annual wages for nonresident aliens who are subject to federal income tax withholding. For all affected employees, add a record in Tax Elections (Manager Services) or Employee Tax Options (iCON Tools) with an Effective Date of 1/1/2014. Enter -2250.00 in the Additional Allowance field. By so doing, this amount will effectively be added to the employee's annualized wages when calculating the tax. The values in all other fields, such as Filing Status and Number of Exemptions, should be the same as the employee's current record.

FICA Wage Limit Is Announced

The annual taxable wage limit for the Social Security portion (OASDI) of the FICA tax will change from $113,700 for 2013 to $117,000 for 2014.

FUTA Ceiling Remains the Same

The FUTA wage ceiling remains $7,000.

Railroad Retirement Board Announces Changes

The U.S. Railroad Retirement Board has announced that the taxable earnings base for Tier I will change from $113,700 in 2013 to $117,000 in 2014. Tier II will change from $84,300 in 2013 to $87,000 in 2014. The maximum monthly taxable earnings for Railroad Unemployment Insurance purposes will change from $1,405 to $1,440.

Pension Plan Amounts Announced

The following 2014 dollar limitations for qualified retirement plans have been published by the IRS. Changes are shown in bold.

If your payroll is processed by Unicorn HRO, and you are using the annual compensation limit, it will be updated to $260,000 for you.

Plan Type	2013	2014
Elective deferrals, section 402(g)(1); affects 401(k) and 403(b) plans, among others.	17,500	17,500
Catch-up contributions for individuals age 50 or over (i.e., 401(k), 403(b) and 457 plans)	5,500	5,500
Defined contribution plan, section 415(c)(1)(A)	51,000	**52,000**
Annual compensation limit, sections 401(a)(17), 404(l), 408(k)(3)(C) and 408(k)(6)(D)(ii)	255,000	**260,000**
Defined benefit plan, section 415(b)(1)(A)	205,000	**210,000**
Simple retirement accounts, section 408(p)(2)(E)	12,000	12,000
Highly compensated employee, sec. 414(q)(1)(B)	115,000	115,000

State and Local Taxes

Alaska Changes Unemployment Wage Base and Tax Rate

The state unemployment insurance withholding rate paid by employees will change from .68% to .62%. The taxable wage base changes from $36,900 to $37,400.

California Changes 2014 Withholding Calculations

For 2014 income tax withholding, the state has changed the low income exemption, standard deduction and personal allowance amounts as well as the tax tables.

California Increases Disability Wage Base

The state disability insurance withholding rate paid by employees will remain 1.0%. The taxable wage base changes from $100,880 to $101,636.

Connecticut Publishes Withholding Calculation Rules

For 2014 income tax withholding, the amounts in Table A (Exemption) and Table E (Personal Tax Credits have been changed for withholding code “F” (filing status “S” in iCON).

Delaware Lowers Highest Tax Percentage

Effective 1/1/2014, the withholding percentage on amounts of $60,000 and over will decrease from 6.75% to 5.95%.

Hawaii Updates Maximum Weekly Disability Tax

For the employee-paid disability tax, the maximum amount has been changed from $4.61 to $4.70.

Kansas Announces New Withholding Rates

Kansas published new percentage method tables for 2014.

Kentucky Changes Standard Deduction and Tax Credit Amounts

Kentucky announced that the value of the annual standard deduction will change from $2,360 to $2,400. Also, the tax credit amount will change from $20 to $10.

Kentucky Wage Ceiling Changes for Local Taxes

The wage ceiling will change to the FICA wage ceiling of $117,000 for the following localities: Cold Spring City, Covington, Crestview Hills, Florence, Fort Wright, Franklin, Kenton County and Newport.

Maine Publishes Annualized Percentage Method

Maine published new percentage method instructions and rate schedules for 2014. Also, $6,200.00 must be added to annual wages for nonresident aliens who are subject to Maine income tax withholding. For all affected employees, add a record in Tax Elections (Manager Services) or Employee Tax Options (iCON Tools) with an Effective Date of 1/1/2014. Enter -6200.00 in the Additional Allowance field. By so doing, this amount will effectively be added to the employee's annualized wages when calculating the tax.

Maryland Rates Change for Caroline and Charles Counties

For 2014, Caroline County will change from the 2.65% withholding tables to 2.8%. Charles County will change from the 2.9% tables to 3.05%.

Minnesota Publishes 2014 Withholding Computer Formula

Minnesota published new tax tables for 2014.

New Jersey Disability Rate and Ceilings Change

The employee rate for Disability Insurance in New Jersey is changing from .36% to .38%. The wage ceiling for FLI, SDI, SUI and SWD is changing from $30,900 to $31,500.

New Mexico Publishes 2014 Withholding Computer Formula

New Mexico published new tax tables for 2014.

New York State and Yonkers Publish Tax Tables

For income tax withholding, the standard deduction for New York State and Yonkers city tax have been changed. New tax tables have also been provided. The supplemental withholding rate remains the same.

North Carolina Publishes 2014 Withholding Calculation

For 2014 income tax withholding, the standard deduction amounts have been changed, and the withholding allowance will be $2,500 regardless of the employee's annualized wage amount. The tax tables have been reduced to one rate. As part of these changes, employers are required to obtain Form NC-4EZ or Form NC-4 from all employees.

Ohio Local Taxes to Change

Various cities and school districts announced tax rate changes to take effect January 1, 2014.

Oregon Announces Changes to Local Taxes

The employer-paid transit rate for TriMet will change to .7237%. The employer-paid transit rate for Lane will change to .7%.

Rhode Island Updates Disability Wage Ceiling

For purposes of the temporary disability tax, the taxable wage base changes from $61,400 to $62,700 in 2014. The employee tax rate remains 1.2%.

Rhode Island Publishes 2014 Percentage Method

Rhode Island published new tax tables for 2014. This also includes a change to the annual wage amount where withholding exemptions are no longer subtracted from annual wages. The amount has been changed from $207,950 to $211,300.

Washington Announces Insurance Rates for 2014

Washington insurance rates were announced. If you have employees subject to the SIIF, SMAF and SSPF taxes, update the rates in Tax Manager according to the notice that you received.

Unemployment and Disability Wage Bases are Adjusted

Several states have adjusted their unemployment wages bases and other tax ceilings for 2014. A table is provided in the next section showing the states whose ceilings need to be changed on your system.

State Unemployment and Other Wage Bases Adjusted

Several states have adjusted their unemployment wage bases and other tax ceilings for 2014, shown in the following table.

State	Tax Type	Employer Wage Ceiling
Alaska (AK)	Unemployment	37,400
Colorado (CO)	Unemployment	11,700
Delaware (DE)	Unemployment	18,500
Hawaii (HI)	Unemployment	40,400
Idaho (ID)	Unemployment	35,200
Illinois (IL)	Unemployment	12,960
Iowa (IA)	Unemployment	26,800
Kansas (KS)	Unemployment	12,000
Kentucky (KY)	Unemployment	9,600
Montana (MT)	Unemployment	29,000
Nevada (NV)	Unemployment	27,400
New Jersey (NJ)	Disability Family Leave Insurance Unemployment Workforce Development	31,500
New Mexico (NM)	Unemployment	23,400
New York (NY)	Unemployment	10,300
North Carolina (NC)	Unemployment	21,400
North Dakota (ND)	Unemployment	33,600
Oklahoma (OK)	Unemployment	18,700
Oregon (OR)	Unemployment	35,000
Pennsylvania (PA)	Unemployment	8,750
Rhode Island (RI)	Unemployment	20,600 *
South Dakota (SD)	Unemployment	14,000
Utah (UT)	Unemployment	30,800
Washington (WA)	Unemployment	41,300
Wyoming (WY)	Unemployment	24,500

* **Note:** For Rhode Island, the standard unemployment wage base will be $20,600. For employers that pay at the highest UI tax rate, the wage base will be $22,100.

Manager Services New Functions

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

The following function will be added to the HR Actions menu:

- Onboard Status

The following functions will be added to the Tools menu:

- Onboard Setup
- Organization Security Import

If you wish to display a separate Onboarding menu to newly-hired employees when they log on to Employee Self Service, grant access to the new **Onboard Setup** function in Manager Services. After the onboarding steps have been defined, mark the employee as Enrolled in Onboarding; this field appears in **Add Employee, New Hire** and **Work Profile**. The Onboard menu will be displayed in Employee Self Service until the employee marks all functions as Complete. Once that occurs, the regular home page and menu will be displayed to the employee.

In **Onboard Setup**, you may define different steps per Login Group, or all Login Groups may have the same steps. Refer to the help text in **ESS Login Groups** for an explanation of how these groups are used and how an employee's group is determined.

If an employee does not fall into the definition of any ESS Login Groups, or if no ESS Login Groups are set up, the *Default setting will be used when the employee logs in to Employee Self Service. Note that if the employee has no Employment Status of today's date, the system will use the first future Employment Status record it finds for the employee.

When an employee who is enrolled in onboarding first logs on to Employee Self Service, the system saves the onboarding menu items associated with that employee. If a change is later made for his or her Login Group in **Onboard Setup**, the original onboarding functions will still appear if the employee logs back on prior to completing all onboarding steps.

If you wish to see the steps that have been completed by newly hired employees, use the **Onboard Status** function. It will display information for employees who are marked as Enrolled In Onboarding, or who have completed Onboarding. You may select employees by hire date, organization and onboarding status (Not Started, In Process or Completed). The system will display the date the employee started each step and the date that it was completed.

Onboard Setup: Field Descriptions

Select the Login Group that you wish to work with. Enter the necessary information as described below. For each Step, enter Step Text, a URL, or an ESS Function. Only one option may be set up for each Step. The only exception to this is when you select the ESS Function First Time Enrollment, you must also enter Step Text, which will be shown instead of First Time Enrollment if the eligibility period has expired.

Field	Description
*Sequence	This field is display-only. The system will assign a sequence number.
*Step Name	Enter the description that you wish to display to the employee in the left-hand menu of Employee Self Service during the onboard process.
Step Text	If you wish to display text to the employee in this step, enter it in this field. You may use html commands to format the text.
URL	If you wish to display a website to the employee in this step, enter the http address, such as http://www.unicornhro.com.
ESS Function	If you wish to display an Employee Self Service function in this step, select the ESS Function from the drop down list. Only the functions that are allowed for the selected Login Group (as defined in **Employee Security**) will be displayed. If you select First Time Enrollment, enter Step Text to be displayed to the employee, instead of the First Time Enrollment function, if the available number of days has passed when the employee logs in to the Onboarding process. (The Maximum Number of Days After Adjusted Hire Date that First Time Enrollment is Available to New Hire is maintained in **Benefit Enrollment Defaults**.) For example, if your system is set up to display First Time Enrollment for 30 days after the new hire's Adjusted Hire Date, and the employee logs on to Employee Self Service 35 days after hire, and has not yet completed all of the Onboarding steps, the system will display the Step Text instead of the First Time Enrollment function. You may wish to include instructions on when the employee is next eligible to select benefits, etc. Note that **Open Enrollment** and **Total Compensation Statement** are not available to be shown in the Onboarding menu. Since they are date-dependent, they should only be shown in the main Employee Self Service menu, which appears as soon as the employee has completed all Onboarding steps.

**indicates field is mandatory*

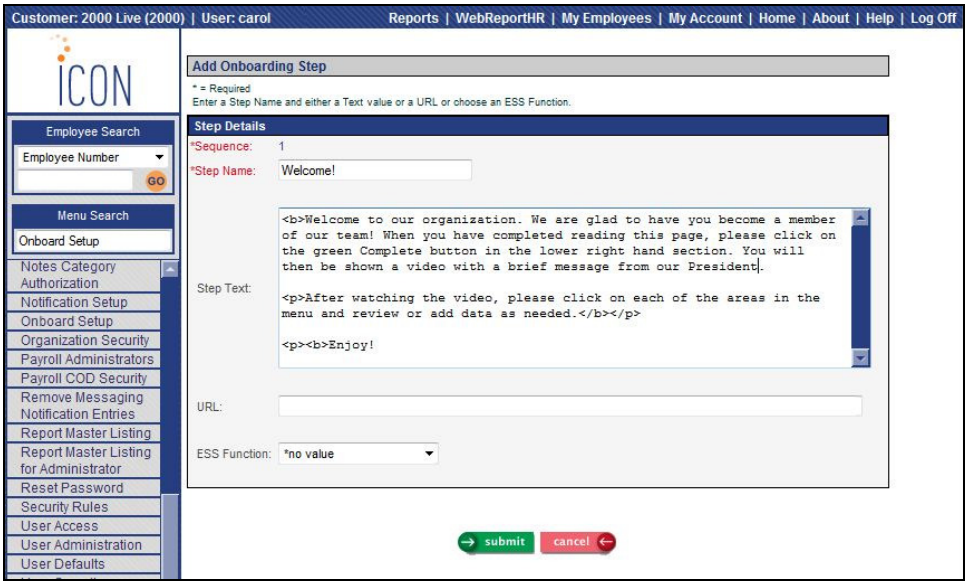
Below is an example of Onboard Setup and the Employee Self Service pages that will appear.

For the Default ESS Login Group, the company wishes to show newly hired employees the following menu in Employee Self Service:

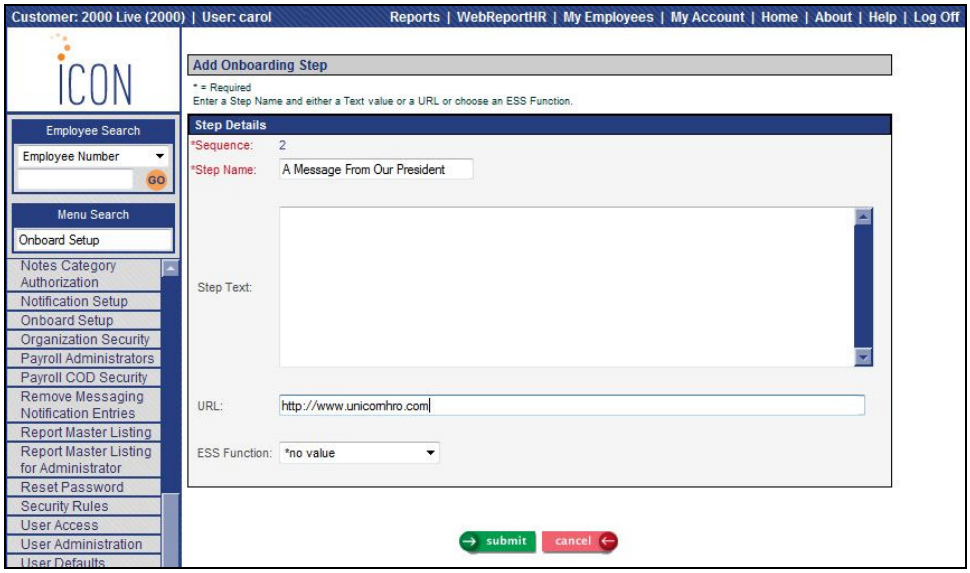
- A Welcome message
- A video from the president, which is accessed from a page on their website
- The Personal Data ESS function
- The Address Information ESS function
- The Dependents ESS function
- The Emergency Contacts ESS function
- The Education ESS function
- The Skills ESS function
- The Certifications ESS function
- The First Time Enrollment ESS function
- The Training Enrollment ESS function
- The Direct Deposit Accounts ESS function
- The W-4 ESS function

Here are the steps to set up the Onboarding functions for our example.

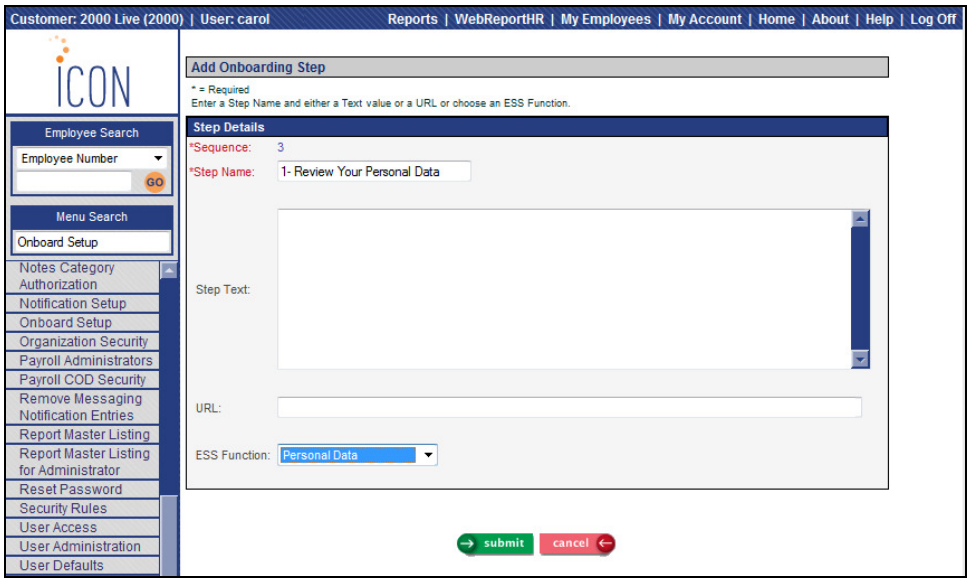
a) In **Onboard Setup** in the Tools menu, select the *Default Login Group; click Add. Since the first step in the ESS menu item will show only text, enter the Step Name that you wish to display as the menu "function", and then enter the Welcome message that the employee will see. Click Submit to save the record.



b) From the main page, click Add to set up the next step. Enter the Step Name and website that will be displayed; click Submit to save.

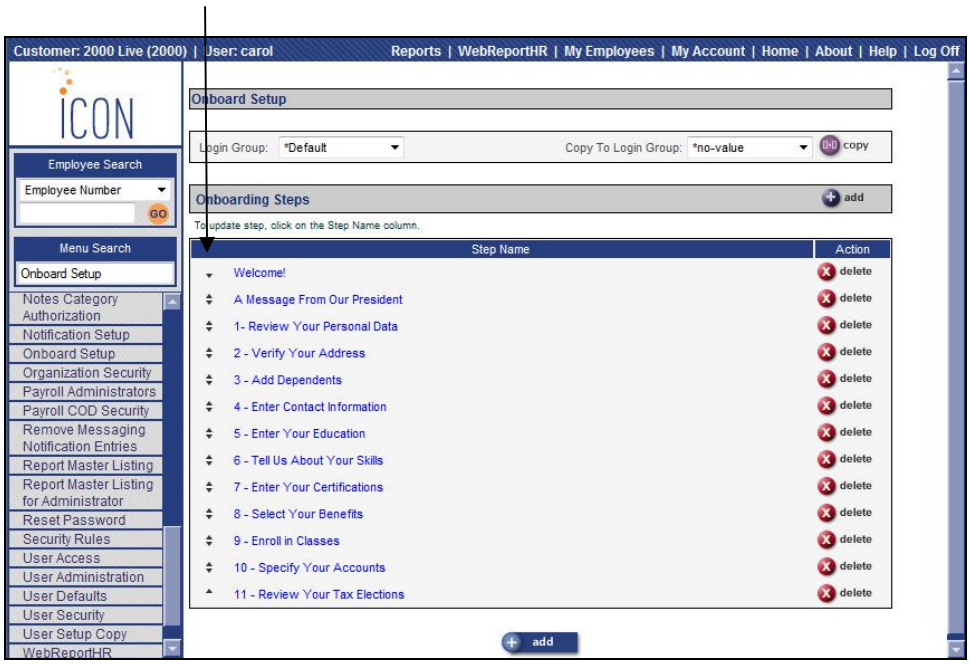


c) For the third step, Personal Data will appear, where the employee can review the information and make any necessary changes. Click Add from the main page and enter the Step Name that you wish to display in the menu. Select the ESS Function Personal Data. Click Submit to save this step.

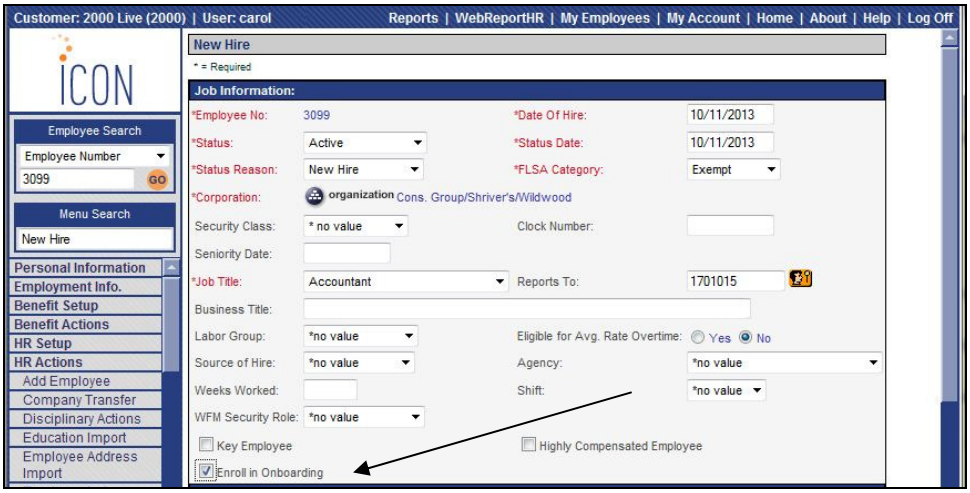


d) Continue adding steps for all of the ESS Functions that you wish to display in ESS when the employee logs on during the Onboarding process. Note that if you include First Time Enrollment, you must also specify text that will be shown to the employee if they try to access First Time Enrollment after the eligibility period has expired.

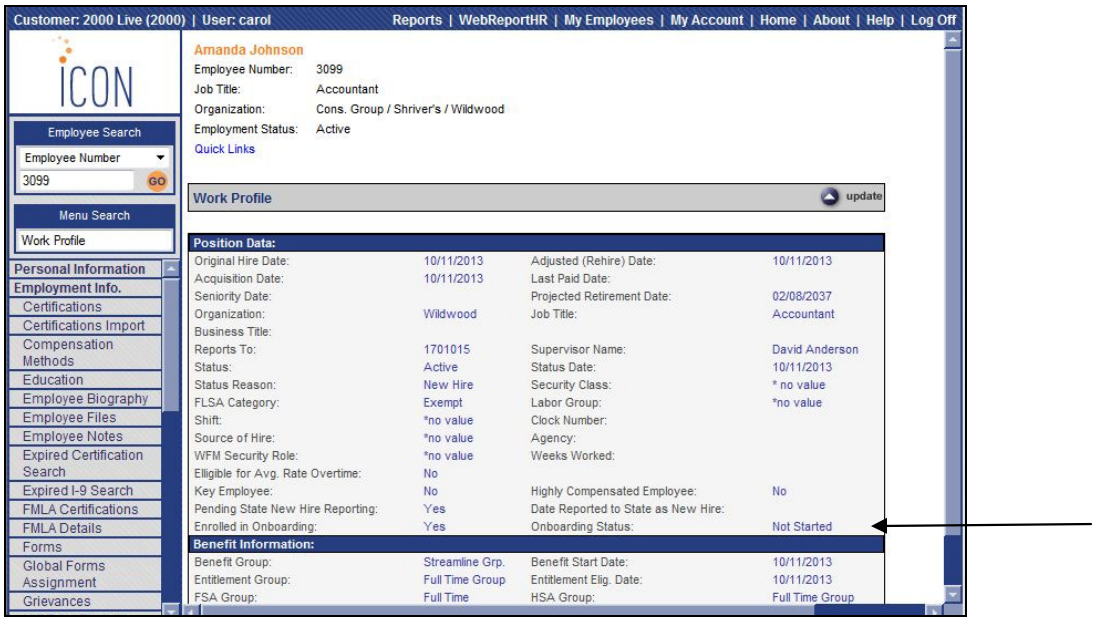
e) Once all of the steps have been added, you may move them up or down in the list if needed by clicking on either the up arrow or down arrow next to the step. Note that if you choose to include a step "number" in the Step Name, you would need to update the step with the correct number once the functions have been re-ordered.



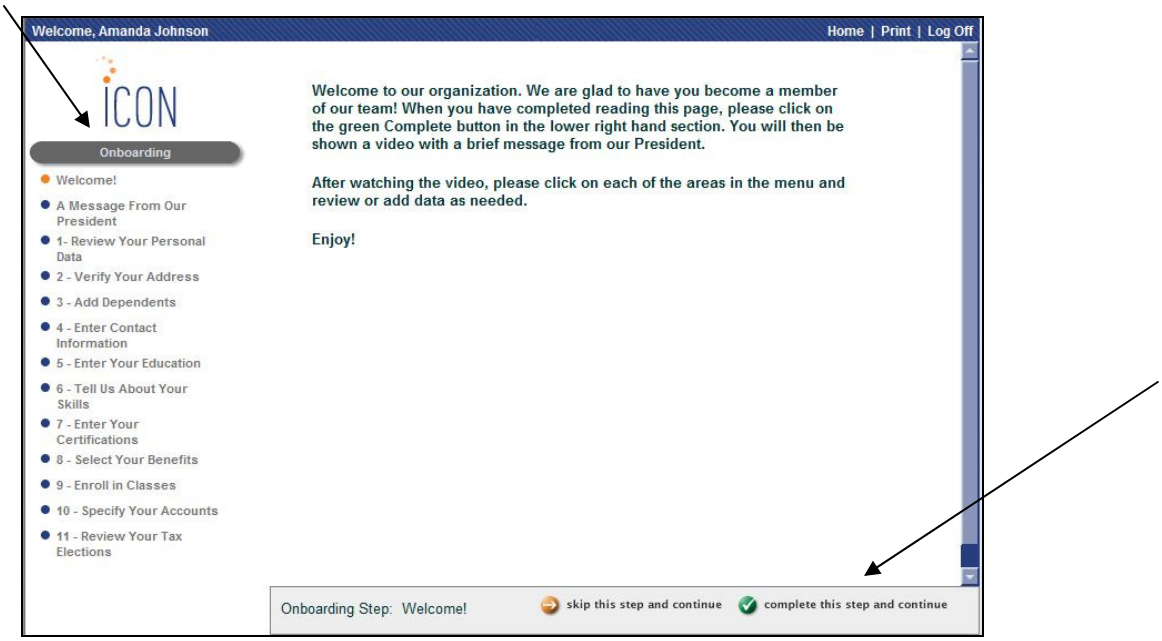
f) When you add an employee to the system, select the Enroll in Onboarding checkbox. This checkbox defaults to the value of the Default for Enrolled in Onboarding checkbox in HR System Defaults. This field appears in Add Employee, New Hire and Work Profile in Manager Services, and Employee Direct in iCON Tools. If you wish to enroll a rehired employee in onboarding, use the Work Profile or Employee Direct function.



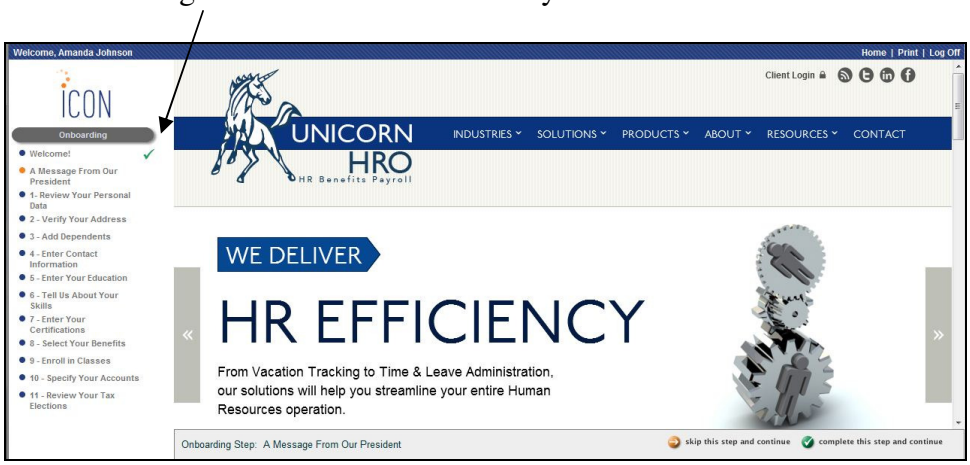
g) When you select the Enroll in Onboarding checkbox in Work Profile, the Onboarding Status will display “Not Started”. When the employee logs on to Employee Self Service, the Onboarding Status in Work Profile will display “In Process”. When he or she has marked all steps as Completed, the Onboarding Status will display “Completed” and Enrolled in Onboarding will be changed from “Yes” to “No”.



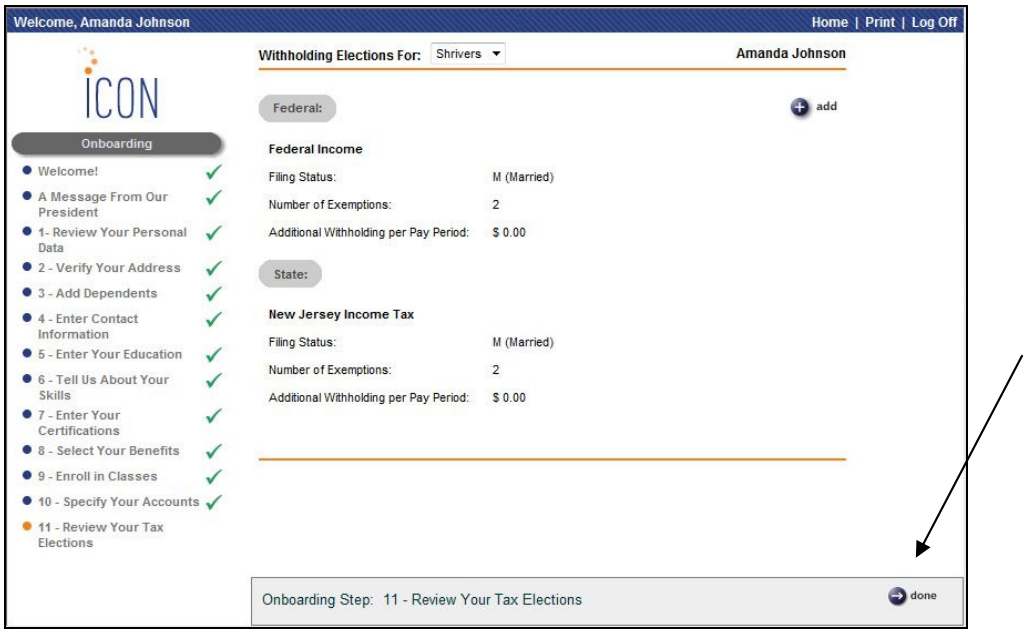
h) When the employee logs on to Employee Self Service, the onboarding menu will appear with the first step that has been defined. A gray bar will appear at the bottom of each page while in the onboarding menu. The employee may either click the green "complete this step and continue" button or the yellow "skip this step and continue" button.



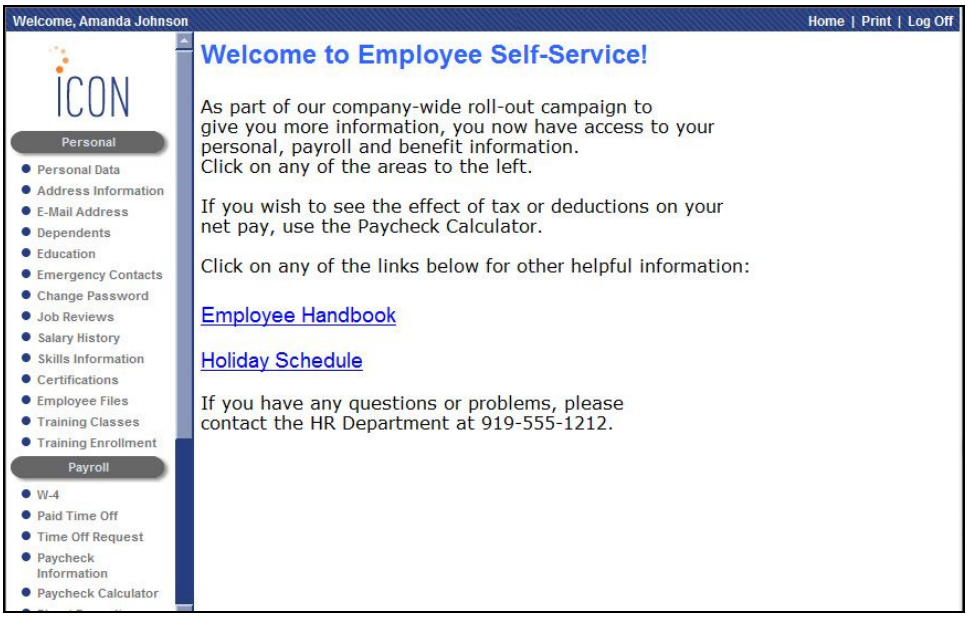
i) This screen shows the menu after the employee clicked the green "complete" button on the first step. A green checkmark now appears next to the first step in the menu. For the second step, the website that we specified is displayed to the employee. Note that since a webpage is calling another webpage, the employee may see a message "display all content". This is standard Windows behavior. The employee would click on this message and then click either Retry or Cancel.



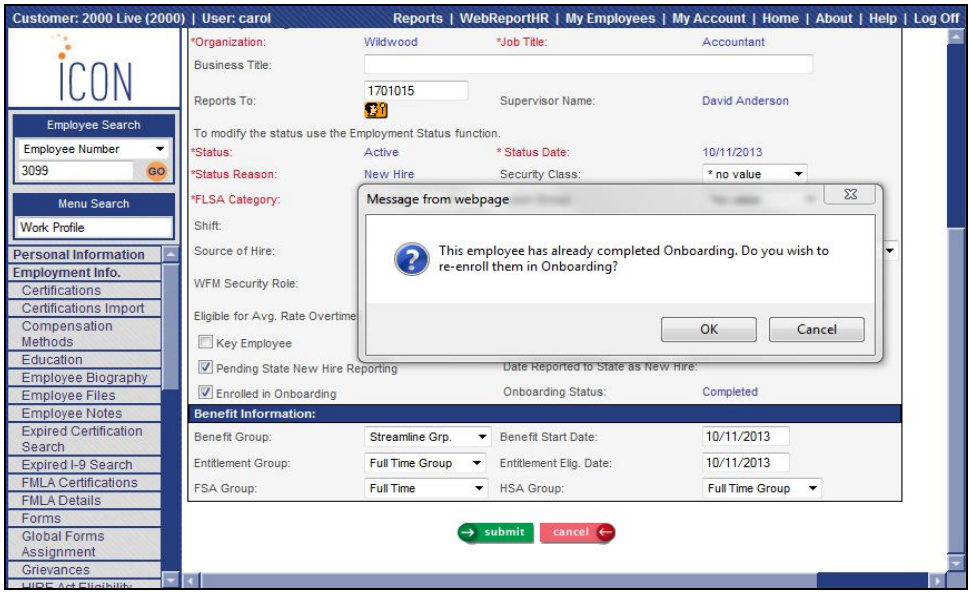
j) The employee may follow the steps in order, or may click on any function in the left hand menu. If the employee logs off without completing all functions, the system will position to the first uncompleted function when he or she logs back on. When the employee is on the last step and all previous steps have been marked as completed, the "done" button will appear.



k) When the employee clicks "done", the system will display the regular menu and home page, as shown in this example.



l) If for any reason you need to re-enroll an employee in Onboarding after he or she has already completed the steps, go to **Work Profile** and select the Enrolled in Onboarding checkbox. A message will let you know that onboarding was already completed. Click Cancel to return to the Work Profile page, or click OK to re-enroll the employee in onboarding.



Onboard Status

To see employees who are currently in the onboarding process, or who have recently completed the onboarding process, use the **Onboard Status** function. You may select employees by hire date range, organization level and/or onboard status. If an employee has started the onboard process, click on "+" next to the Hire Date to see the status of each step.

Organization Security Import will be added to the Tools menu. Use this function if you wish to import records into the **Organization Security** function. The file must contain one header row. Enter the field names in the header row, separated by a comma. You only need to enter the fields you wish to populate, but at least the mandatory fields must exist on the file: User, Authority and Lower Levels (yes/no). Optional fields can be entered as need. Use the following field names:

- User
- Corp Code
- Company Code
- Level 3
- Level 4
- Level 5
- Level 6
- Level 7
- Security Class
- Authority
- Lower Levels

Manager Services New Features

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

Human Resources

In the EEO Job Category table in **Common Object Dictionary**, the description for Value 05 will be changed from Office/Clerical to Administrative Support, to conform to the current EEO-1 terminology.

In **HR System Defaults,** a field will be added called Default for Enrolled in Onboarding. If you wish the Enroll in Onboarding checkbox to default to "on" in **Add Employee** and **New Hire**, select this checkbox in HR System Defaults. It can be overridden **in Add Employee** and **New Hire** if needed.

In **Medical Visits, Payroll Status** and **Property,** if you tried to add a duplicate record, no error message appeared. The system will be changed to display an error message in this scenario.

Payroll

In **Deductions**, fields for benefits, FSAs and HSAs will be shown as display-only on the Update and View pages. This will allow you to see whether the deduction was created by enrolling in a benefit, flexible spending account or health savings account.

The ability to electronically remit delinquent tax payment deductions to Minnesota will be added. Electronic payments for this type of deduction are required effective January 1, 2014. If you have employees with this type of deduction, contact iCON Support to have Receiving Agency "MNT" added to your system. Then add a record in **Garnishment Payees**, or update your existing record; enter FIPS Code 015.

In **Retroactive Pay Adjustments**, if you selected the Organization and Group option, no data was processed. This will be corrected to process employees in the selected organization and payroll processing group.

In the **Time & Attendance Import** function, if you imported more than one record with the same data for a time card exempt employee, where only the number of hours was different, the second record was not added to the system. This will be changed so that each record on the file is imported.

If you have values entered in **User Defaults**, they will now be automatically populated when you access the **Submit Payroll For Processing** function (available to Outsource clients) and the **Time and Attendance List** function.

State Unemployment Insurance Reporting

When you create the Pennsylvania SUI files, the .TAB file will be changed. Tabs will be inserted in between each data element, per the state's specifications.

Taxes

The 2014 tax programs for federal, state and local taxes will be provided with Version 2.050.

For California income tax withholding in 2014, the amounts for the low income exemption, standard deductions and tax credits will be updated. New tax tables will also be provided.

For Connecticut income tax withholding in 2014, amounts for Table A (Exemptions) and Table E (Personal Tax Credits) will be updated for withholding code "F" (this is filing status "S" in iCON).

For Kentucky income tax withholding in 2014, the standard deduction will change to $2,400, and the tax credit will change to $10.

For North Carolina income tax withholding in 2014, the standard deduction amounts will change, and the withholding allowance will be $2,500 regardless of the annualized wage amount. New tax tables will also be provided.

W-2 Reporting

The on-line version of the federal W-2 form and the Puerto Rico 499R-2/W-2PR form for 2013 will be provided. This is used in the **W-2 History** function in Employee Self Service and Manager Services after you create the final W-2 forms.

On the Puerto Rico 499R-2/W-2PR form, a new box called Electronic Filing Confirmation Number was added. After your Puerto Rico information is filed electronically, you will receive a confirmation number. This must be entered in the Additional W-2 section of **Legal Entity Definition**. It will then be printed on the employees' forms. Also, a field called Cease of Operations Date was added to **Legal Entity Definition**. Enter this date if applicable. It will print on the employees' forms.

When you create files using any of the **W-2 Data Generation** functions, contact information will be written to the RE record of the federal W-2 file, as well as any state and local W-2 files that follow the federal EFW2 format. This contact information is taken from the W-2 Information section of **Legal Entity Definition**.

If you have employees subject to income tax withholding in Idaho, effective January 1, 2014, existing split-monthly filers will change to a semi-monthly filing frequency, paying income tax withholding twice a month. Existing split-monthly filers (filing cycle "B") are no longer required to include payments made from 1/1/2014 to 1/15/2014 within the RV record of the W-2 file. Instead, payments made from 1/1/2013 to 1/15/2013 will be reported in RV positions 65 to 75 (this amount was included in the 2012 submission). In iCON, the name for filing status B will be changed from Split Monthly to Semi Monthly (B) in the Employer Withholding Reconciliation Return section of **SUI and W-2 Manager**. Please make sure that you enter the appropriate amounts on this screen prior to creating your 2013 W-2 file for Idaho. You may download the 2013 W-2 Electronic Reporting Manual at: http://tax.idaho.gov/pubs/EPB00668_10-04-2013.pdf.

On the Maryland W-2 file in the RE record, positions 222-318 will be changed to write the fields from the federal W-2 specifications: Contact Name, Contact Phone Number, Phone Extension, Contact Fax Number and Contact E-Mail Address. This information is taken from the W-2 Information section of **Legal Entity Definition.**

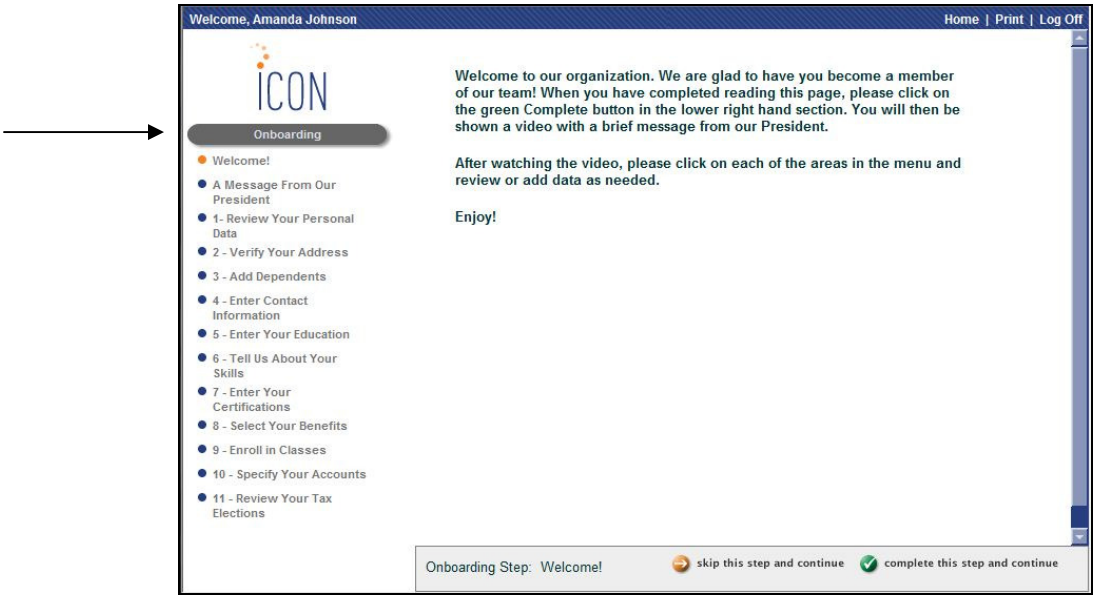
On the New Jersey W-2 file, "P" for Production will be written to position 5 on the RS record.

When W-2 forms are produced with a Pennsylvania locality subject to Act 32 (this excludes Philadelphia), Box 20 will print the 6-digit PSD code, instead of the first 2 digits.

Employee Self Service New Features

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

If **Onboard Setup** entries exist and the employee is marked as Enrolled in Onboarding, the onboarding menu will appear when the employee logs on, as shown in this example.



When the employee has marked all onboarding functions as complete, the regular menu will appear, as shown in this example.

In **Paycheck Information**, the system previously defaulted to showing payments for January 1 of the current year through today's date. If your system was set up to display payments one day before the Check Date, for example, the employee had to change to "To" date to tomorrow's date in order to see the payment dated for tomorrow. The "To" date will be changed so that it defaults to today's date + the "Days prior to Check Date to display payments in Paycheck Information" from **HR System Defaults**. This way, the employee will not have to change the "To" date in order to see payments that you have allowed him or her to see prior to the Check Date.

In **Direct Deposit Accounts, Retirement Deductions** and **Tax Elections**, if an employee only had future-dated records, the system did not display them. These functions will be changed to display future records, regardless of whether there are current records.

iCON Tools New Features

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

Benefits

In **Employer Benefit Plans**, the View page of Plan Eligibility always showed the dependent-related checkboxes as empty, even when they were selected. The checkboxes will now be shown with the correct value.

Human Resources

In the EEO Job Category table in **HR Common Object Dictionary**, the description for Value 05 will be changed from Office/Clerical to Administrative Support, to conform to the current EEO-1 terminology.

In **HR System Defaults,** a field will be added called Default for Enrolled in Onboarding. If you wish the Enroll in Onboarding checkbox to default to "on" in **Add Employee** and **New Hire** in Manager Services and **Employee Direct** in iCON Tools, select this checkbox in **HR System Defaults**. It can be overridden in **Add Employee, New Hire** and **Employee Direct** if needed.

Payroll

The ability to electronically remit delinquent tax payment deductions to Minnesota will be added. Electronic payments for this type of deduction are required effective January 1, 2014. If you have employees with this type of deduction, contact iCON Support to have Receiving Agency "MNT" added to your system. Then add a record in **Garnishment Payees**, or update your existing record; enter FIPS Code 015.

In the **Time & Attendance Import** function, if you imported more than one record with the same data for a time card exempt employee, where only the number of hours was different, the second record was not added to the system. This will be changed so that each record on the file is imported.

Railroad retirement taxes (Tier I, Tier II and Railroad Medicare) will be written to the files created by the **Payroll Tax Summary Interface** and **Reconciliation Tax Summary** functions for Check Dates beginning with 1/1/2014.

State Unemployment Insurance Reporting

When you create the Pennsylvania SUI files, the .TAB file will be changed. Tabs will be inserted in between each data element, per the state's specifications.

Taxes

The 2014 tax programs for federal, state and local taxes will be provided with Version 2.050.

For California income tax withholding in 2014, the amounts for the low income exemption, standard deductions and tax credits will be updated. New tax tables will also be provided.

For Connecticut income tax withholding in 2014, amounts for Table A (Exemptions) and Table E (Personal Tax Credits) will be updated for withholding code "F" (this is filing status "S" in iCON).

For Kentucky income tax withholding in 2014, the standard deduction will change to $2,400, and the tax credit will change to $10.

For North Carolina income tax withholding in 2014, the standard deduction amounts will change, and the withholding allowance will be $2,500 regardless of the annualized wage amount. New tax tables will also be provided.

W-2 Reporting

The on-line version of the federal W-2 form and the Puerto Rico 499R-2/W-2PR form for 2013 will be provided. This is used in the **W-2 History** function in Employee Self Service and Manager Services after you create the final W-2 forms.

On the Puerto Rico 499R-2/W-2PR form, a new box called Electronic Filing Confirmation Number was added. After your Puerto Rico information is filed electronically, you will receive a confirmation number. This must be entered in the Additional W-2 section of **Legal Entity Definition**. It will then be printed on the employees' forms. Also, a field called Cease of Operations Date was added to **Legal Entity Definition**. Enter this date if applicable. It will print on the employees' forms.

When you create files using any of the **W-2 Data Generation** functions, contact information will be written to the RE record of the federal W-2 file, as well as any state and local W-2 files that follow the federal EFW2 format. This contact information is from the W-2 Information section of **Legal Entity Definition**.

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On the Maryland W-2 file in the RE record, positions 222-318 will be changed to write the fields from the federal W-2 specifications: Contact Name, Contact Phone Number, Phone Extension, Contact Fax Number and Contact E-Mail Address. This information is taken from the W-2 Information section of **Legal Entity Definition.**

On the New Jersey W-2 file, "P" for Production will be written to position 5 on the RS record.

When W-2 forms are produced with a Pennsylvania locality subject to Act 32 (this excludes Philadelphia), Box 20 will print the 6-digit PSD code, instead of the first 2 digits.

A field called Split By Legal Entity will be added to the following functions: **W-2 Data Generation, W-2 Data Generation For Administrators,** and **W-2 Data Generation – Official Forms.** When you select either the Forms or Summary option, this new checkbox will appear. If you select multiple legal entities and leave this checkbox blank, all legal entities will be processed in the same job, which is the way it currently works. If you wish to run a separate print job for each of the legal entities you selected, as if you had submitted one legal entity at a time, select the Split By Legal Entity checkbox.

In **W-2 Data Generation For Administrators**, the system currently displays all legal entities. This will be changed so that only legal entities that have a Legal Entity By Year record for the selected Tax Year will be displayed in the list.

In **W-2 Data Generation For Administrators**, when you create an export file for one employee, the system populates the file name as: w2_<customer number>_<legal entity code>_<employee number>_<tax year>.dat. If you originally selected one legal entity, and then selected a different legal entity, the system did not update the legal entity code in the file name. The program has been changed to update the file name when a different legal entity is chosen.