



# Version 2.051

# Release Notes

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## Table of Contents

Version 2.051 Checklist.....	1
Overview.....	3
Manager Services New Function.....	4
Manager Services New Features.....	10
Benefits .....	10
Human Resources .....	15
Payroll.....	16
Reports .....	18
Employee Self Service New Function .....	19
Employee Self Service New Features.....	25
iCON Tools New Features.....	30
Benefits .....	30
Human Resources .....	31
Payroll.....	31
Reports .....	33

## Version 2.051 Checklist

Certain new features in Version 2.051 require set-up steps. Use the checklist below to update your system for each applicable area.

	Completed By	Date Completed
<p>Assign <b>Function Security</b> to the following new function in the HR Setup menu of Manager Services for applicable users.</p> <ul style="list-style-type: none"> <li>User Defined Field Setup</li> </ul> <p>In the User Defined Field Setup function, define up to 10 fields. If any of the fields are to be displayed as pulldown lists, define the valid entries that are to appear in the lists. These fields will appear in Add Employee, New Hire and Work Profile.</p>		
<p>In <b>Common Object Dictionary</b>, a field called Employee Directory Type will be added to Phone Number Types. For each phone number that you want to display in the ESS Employee Directory function, select either Primary or Secondary. In <b>Employee Security</b>, grant access to the Employee Directory function for each applicable ESS Login Group.</p>		
<p>In <b>HR System Defaults</b>, a checkbox called Require Dependent Gender will be added. If you wish to require the Gender whenever a dependent is added or updated, select this checkbox. This affects all functions in Employee Self Service, Manager Services and iCON Tools where dependents are entered.</p>		
<p>In <b>HR System Defaults</b>, a checkbox called Display/Update Employee's Marital Status will be added. If you wish to allow employees to update their Marital Status (as stored in Demographics) in Employee Self Service in the Personal Data, First Time Enrollment and Open Enrollment functions, select this checkbox. Note that this field does not affect tax filing status (as stored in Tax Elections).</p>		
<p>In <b>HR System Defaults</b>, two checkboxes will be added that affect how dependents' Social Security Numbers are entered in Employee Self Service. The first field is called Display Only Last 4 Digits of Dependent's SSN, and the second field is called Include Field to Confirm Dependent's SSN. Select either or both of these checkboxes. Note that if you wish to only display the last 4 digits of a dependent's SSN, select both checkboxes. This will mask the first 5 digits of the SSN in the following functions: Dependents, First Time Enrollment, Life Events and Open Enrollment.</p>		

	Completed By	Date Completed
In <b>HR System Defaults</b> , two checkboxes will be added that allow additional beneficiary information to be displayed in Employee Self Service. The first field is called Display/Update Beneficiary's Date of Birth. The second field is called Display/Update Beneficiary's SSN. These checkboxes affect the information that is displayed in Benefit Beneficiaries, First Time Enrollment, Life Events and Open Enrollment.		
In <b>Common Object Dictionary</b> , a field called HSA Employer Contribution AL SIT/SUI Taxable will be added to Payroll Deductions. If your Health Savings Account (HSA) plans meet the criteria so that the employer deductions are must be added to taxable wages paid in Alabama, select this checkbox. You must also make adjustments to affected employees' year-to-date tax bases.		
If you have <b>Health Savings Account Plans</b> with employer contributions and you have employees with HSAs in California or New Jersey where all HSAs are taxable, amounts for the year-to-date HSA employer deductions must be made to the applicable tax bases. If your system is hosted by Unicorn HRO, we will be contacting clients who have already had employer HSA amounts entered in 2014 for California or New Jersey, with regards on how to correct the data for this year. If your system is not hosted by Unicorn HRO, determine whether you have employees whose wages must be adjusted for employer HSA contributions in Alabama, California or New Jersey.		

## Overview

Version 2.051 contains 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 HR Setup menu in Manager Services:

- User Defined Field Setup: you may define up to ten employee-related fields that will be available in the Add Employee, New Hire and Work Profile functions

The following function will be available in Employee Self Service:

- Employee Directory: this allows you to display active employees' phone numbers and email addresses

Several options will be added that affect what your employees see in the on-line enrollment functions in Employee Self Service. You will have the ability to specify the following:

- Whether employees can change their Marital Status (as stored in Demographics)
- Whether Gender should be required when adding and updating Dependents
- Whether to mask the first five digits of Dependents' Social Security Numbers, and whether to display a confirmation field to ensure that Dependent Social Security Numbers are entered correctly
- Whether to display Beneficiary Social Security Numbers and Dates of Birth

## Manager Services New Function

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

**User Defined Field Setup** will be added to the HR Setup menu. This function allows you to define up to 10 fields that can be used to store employee data. These fields will appear in a section called User Defined Fields in the following functions:

- Add Employee
- New Hire
- Work Profile

You can report on the employee data using the following:

- Employee Audit Report (User Defined Employee Data)
- WebReportHR

You can report on the set-up of the fields using the Audit Report (User Defined Codes and User Defined Fields).

When you access User Defined Field Setup, you will see a page similar to the following. The available 10 fields are shown. Click on the first field in the UDF Field column.

Customer: 1000 Live (1000) | User: carol      Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**ICON**

Employee Search  
Employee Number

Menu Search

Training Schedule

User Defined Field Setup

WFM Field Setup

Work Environment Categories

Work Environment Definition

Work Relationships

HR Actions

---

**User Defined Field Setup**

\* = Required

UDF Table:  ▼

To update, click on information in the left column.

UDF Field	UDF Label	UDF Type	Action
UDF_EE_01			
UDF_EE_02			
UDF_EE_03			
UDF_EE_04			
UDF_EE_05			
UDF_EE_06			
UDF_EE_07			
UDF_EE_08			
UDF_EE_09			
UDF_EE_10			

Enter the name of the field in the UDF Label field. This will appear in Add Employee, New Hire and Work Profile. This field accepts up to 25 characters. Next, select whether you want the field to appear as a Pulldown list, or a Character entry field (free form field that allows up to 25 characters).

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**Add User Defined Field**

\* = Required

UDF Field: UDF\_EE\_01

\*UDF Label:

\*UDF Type: Pulldown

submit cancel

Below is an example of a field where the client wants to display a Pulldown list. The UDF Label is entered as “Softball Team”.

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**Add User Defined Field**

\* = Required

UDF Field: UDF\_EE\_01

\*UDF Label: Softball Team

\*UDF Type: Pulldown

submit cancel

When you click submit, the field definition is saved and the main page shows the new field. Since the field was defined as a Pulldown, a button called “setup cod” appears in the Action column.

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**User Defined Field Setup**

\* = Required

\*UDF Table: Employee

To update, click on information in the left column.

UDF Field	UDF Label	UDF Type	Action
UDF_EE_01	Softball Team	COD	setup cod delete
UDF_EE_02			
UDF_EE_03			
UDF_EE_04			
UDF_EE_05			
UDF_EE_06			
UDF_EE_07			
UDF_EE_08			
UDF_EE_09			
UDF_EE_10			

When you click on the “setup cod” button, the following page appears:

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**User Defined Field COD Setup** + add

To update, click on information in the left column.

UDF Table:	Employee
UDF Field:	UDF_EE_01
UDF Label:	Softball Team

UDF Code	UDF Description	Action
No Data Found.		

+ add back

Click on the “add” button to add the valid entries that will appear in the pulldown list, as shown in this example:

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**Add User Defined Field COD Setup**

\* = Required

UDF Table:	Employee
UDF Field:	UDF_EE_01
UDF Label:	Softball Team

\*UDF Code: A

\*UDF Description: Team A

submit cancel

You may enter as many pulldown records as needed. The UDF Code accepts up to 15 characters. The UDF Description accepts up to 20 characters. Once a record is added, you may later change the UDF Description, but you may not change the UDF Code, since it is the key to the record. Below is an example of records that have been defined for the Softball Team user defined field.

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**User Defined Field COD Setup** + add

To update, click on information in the left column.

UDF Table: Employee  
 UDF Field: UDF\_EE\_01  
 UDF Label: Softball Team

UDF Code	UDF Description	Action
A	Team A	delete
B	Team B	delete
C	Team C	delete
D	Team D	delete

+ add    back ←

To define a free-form field, select Character in the UDF Type field as shown in this example:

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**Add User Defined Field**

\* = Required

UDF Field: UDF\_EE\_02  
 \*UDF Label: Name of Pet  
 \*UDF Type: Character

→ submit    cancel ←

Since the UDF Type for this field was defined as Character, the “setup cod” button will not appear next to it in the Action column:

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

**User Defined Field Setup**  
\* = Required

\*UDF Table: Employee

To update, click on information in the left column.

UDF Field	UDF Label	UDF Type	Action
UDF_EE_01	Softball Team	COD	setup cod delete
UDF_EE_02	Name of Pet	Char	delete
UDF_EE_03			
UDF_EE_04			
UDF_EE_05			
UDF_EE_06			
UDF_EE_07			
UDF_EE_08			
UDF_EE_09			
UDF_EE_10			

When at least one User Defined Field exists, a section called User Defined Fields will appear in Add Employee, New Hire and Work Profile. Below is an example.

Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off

To modify the status use the Employment Status function.

\*Status: Active \* Status Date: 01/01/2002  
 \*Status Reason: New Hire Security Class: \*no value  
 \*FLSA Category: Exempt Labor Group: \*no-value  
 Shift: \*no value Clock Number:  
 Source of Hire: \*no value Agency: \*no value  
 WFM Security Role: \*no value Weeks Worked: 94  
 Eligible for Avg. Rate Overtime: Yes No  
 Key Employee  Highly Compensated Employee  
 Pending State New Hire Reporting Date Reported to State as New Hire:

**Benefit Information:**  
 Benefit Group: \*No Benefit Benefit Start Date: 01/01/2002  
 Entitlement Group: Payday Solution Entitlement Elig. Date: 01/01/2000  
 FSA Group: \*No Value HSA Group: \*No Value

**User Defined Fields:**  
 Softball Team: no value Name of Pet:

**Workforce Management:**  
 Time Clock Location:

submit cancel

The pulldown records that you entered will be shown in the list, sorted by description, as shown in this example:

The screenshot shows the 'Employee Information' form in the ICON system. The 'Workforce Management' dropdown menu is open, displaying a list of teams: Team A, Team B, Team C, and Team D. The form includes various fields for employee data, such as Status (Active), Status Reason (New Hire), FLSA Category (Exempt), Shift, Source of Hire, WFM Security Role, Eligible for Avg. Rate Overtime (No), Key Employee, Highly Compensated Employee, Date Reported to State as New Hire, Benefit Group (No Benefit), Entitlement Group (Payday Solution), FSA Group (No Value), HSA Group (No Value), Softball Team, Name of Pet, and Time Clock Location. The 'submit' and 'cancel' buttons are visible at the bottom.

You may use the Employee Audit Report to see the changes that have been made to employee data in the User Defined Fields. Use Table Filter “User Defined Employee Data”.

The screenshot shows the 'Employee Audit Report' form in the ICON system. The 'Table Filter' dropdown menu is set to 'User Defined Employee Data'. The form includes various fields for report parameters, such as Organization (Dole Company), Legal Entity (ABC Corp.), From Date (05/05/2014), To Date (05/05/2014), Report ID (EmployeeAuditReport), User Filter (\*All Users), Table Filter (User Defined Employee Data), Break By Organization Level (selected), Break By Home Account Number, Break By User, Separate Reports By User, Sort by Employee Number, Sort by Employee Name, Sort by Type of Change Then Employee Number, and Sort by Type of Change Then Employee Name. The 'submit' and 'cancel' buttons are visible at the bottom.

## Manager Services New Features

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

### Benefits

When running the **Benefit Update** for a benefit whose employee/employer percentages are defined based on annual salary range, the program used the employee's salary as of the Benefit Enrollment Date, rather than using the Effective Date that was entered when submitting the Benefit Update process. The program will be changed to use the Effective Date.

On the **Census Report**, a new field will be provided called Decimal Places, as shown in the example below. This field will be available when the Pay Rate and Type checkbox is selected. You may have the pay rate written to the census file with 2, 3 or 4 decimal places.

The screenshot shows the iCON web application interface for generating a Census Report. The top navigation bar includes 'Customer: 2000 Live (2000)', 'User: carol', and various menu options like 'Reports', 'WebReportHR', 'My Employees', 'My Account', 'Home', 'About', 'Help', and 'Log Off'. The main content area is titled 'Census Report' and contains several sections:

- Report Configuration:** Fields for '\*Report Name:' (CensusRpt), 'Sort By:' (Employee Number selected), '\*From Date:', and '\*To Date:'.
- Navigation Tabs:** Basic Census Data (selected), Benefits, Flexible Spending Accounts, Health Savings Accounts, Retirement Accounts.
- Select Basic Census Data:** Two columns of dropdown menus for demographic and employment information.
- Include in Report:** A list of checkboxes for data to include in the report. 'Pay Rate and Type' is checked, and the 'Decimal Places' dropdown is set to 2. An arrow points to this dropdown.

When the **Census Report** ran, if you selected FSAs, HSAs and/or Retirement Deductions, and the employee was transferred to a different legal entity during the selected date range, and you selected “Accumulated Deductions within the Date Range” and/or “YTD Deductions as of To Date”, and there were no amounts for the selected deductions in the employee's current legal entity, the program did not include the FSA, HSA or Retirement deductions from the employee's previous legal entity. The program will be changed to include deduction amounts for all legal entities in this scenario.

A section has been added to the bottom of the **HR System Defaults** function called **Employee Self Service On-Line Enrollment Settings**. Each field is described on the following pages.

The screenshot displays the iCON web application interface. At the top, the header includes 'Customer: 2000 Live (2000)', 'User: carol', and navigation links for 'Reports', 'WebReportHR', 'My Employees', 'My Account', 'Home', 'About', 'Help', and 'Log Off'. The left sidebar contains a menu with categories like 'Personal Information', 'Employment Info.', 'Benefit Setup', 'Benefit Actions', 'HR Setup', 'HR Actions', 'Payroll Setup', 'Payroll Actions', 'Payroll Information', 'Payroll Processing', 'Reports', 'myWorkSpace', 'Tools', 'Auto PIN Assignment', 'Common Object Dictionary', 'Employee Security', and 'ESS Login Groups'. The main content area is titled 'Print SSN and Direct Deposit on Payments:' and contains three sections: 1. 'Print SSN and Direct Deposit on Payments:' with checkboxes for 'Last 4 Digits of SSN', 'Don't Print SSN', and 'Last 4 Digits of Direct Deposit Account Number'. 2. 'Employee Self Service Settings:' with a 'Social Security Number Display Rule' dropdown set to 'Show only Last 4 digits', checkboxes for 'Hide Date of Birth', 'Display VETS-100 Veteran Status', 'Display VETS-100A Veteran Status', and 'Display Only Last 4 Digits of Direct Deposit Account Number in Paycheck Information', and a text field for 'Days prior to Check Date to display payments in Paycheck Information' with the value '48'. 3. 'Employee Self Service On-Line Enrollment Settings:' with checkboxes for 'Display/Update Beneficiary Date of Birth', 'Display/Update Beneficiary SSN', 'Display Only Last 4 Digits of Dependent's SSN', 'Include Field to Confirm Dependent's SSN', 'Require Dependent's Gender', and 'Display/Update Employee's Marital Status'. At the bottom, there are 'submit' and 'cancel' buttons. An arrow points from the text in the paragraph above to the 'Employee Self Service On-Line Enrollment Settings' section.

A field for beneficiary date of birth will be added to the system. This field will always appear in the **Benefit Enrollment** and **Open Enrollment** functions in Manager Services, and **Benefit Enrollment** in iCON Tools. In **HR System Defaults**, two checkboxes will be added that affect beneficiary information in Employee Self Service. The first field is called Display/Update Beneficiary's Date of Birth. The second field is called Display/Update Beneficiary's SSN. These checkboxes affect the information that is displayed in **Benefit Beneficiaries, First Time Enrollment, Life Events** and **Open Enrollment**. Below is an example of the Add Beneficiary page in Open Enrollment when both checkboxes are on.

The screenshot shows the 'Add Beneficiary' page in the iCON system. The page title is 'Add Beneficiary' and the user is identified as 'William C Fulton Jr'. A message states: 'Name, Relationship and Percent of Funds are required fields.' The form contains the following fields and controls:

- Name:
- National ID/SSN:  (indicated by an arrow)
- Date of Birth:  (indicated by an arrow)
- Address:
- City:
- State:
- Zip:
- Relationship:
- Percent of Funds:
- Primary Beneficiary:
- Secondary Beneficiary:

At the bottom right, there are two buttons: 'cancel' (with a red left-pointing arrow) and 'submit' (with a green right-pointing arrow).

In **HR System Defaults**, a checkbox called Require Dependent Gender will be added. If you wish to require the Gender whenever a dependent is added or updated, select this checkbox. This affects **Dependents**, **First Time Enrollment**, **Life Events** and **Open Enrollment** in Employee Self Service, **Dependents** and **Open Enrollment** in Manager Services, and **Employee Dependents** in iCON Tools.

In **HR System Defaults**, a checkbox called Display/Update Employee’s Marital Status will be added. If you wish to allow employees to update their Marital Status (as stored in the **Demographics** function) in Employee Self Service in the **Personal Data**, **First Time Enrollment** and **Open Enrollment** functions as shown in the example below, select this checkbox. Note that this field does not affect tax filing status in the **Tax Elections** function.

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

**1 Verify Personal Information** William C Fulton Jr

Please verify that the following information is correct. Feel free to make any necessary address changes or marital status and click the Next button to continue.  
If you need to change your name, social security number or date of birth, contact the Human Resources Department.

First Name: William  
 Initial: C  
 Last Name: Fulton Jr  
 Address: 1017 Raceway Dr.  
                   Unit 1025  
 City: Charlotte  
 State: North Carolina  
 Zip: 28832  
 Social Security Number: XXX-XX-5555  
 Date of Birth: 10/21/1950  
 Date of Hire: 07/09/2013  
 Marital Status: Married

← back    → next

In **HR System Defaults**, two checkboxes will be added that affect how dependents' Social Security Numbers are entered in Employee Self Service. The first field is called Display Only Last 4 Digits of Dependent's SSN, and the second field is called Include Field to Confirm Dependent's SSN. If you wish to only display the last 4 digits of a dependent's SSN, select both checkboxes. This will mask the first 5 digits of the SSN in the following functions: **Dependents**, **First Time Enrollment**, **Life Events** and **Open Enrollment**. Below is an example of these two fields when both checkboxes in HR System Defaults are selected:

The screenshot shows the 'Add Dependent' form for William C Fulton Jr. The form includes the following fields and values:

- First Name: Melissa
- Middle Initial:
- Last Name: Fulton
- Second Last Name:
- Social Security Number: \*\*\* - \*\* - 6789
- Social Security Number Confirmation: \*\*\* - \*\* - 6789
- Relationship: Daughter
- Date of Birth: 01/02/2005 (eg. mm/dd/yyyy)
- Gender: Female
- Full-Time Student:  Yes  No
- Disability: \*no value

At the bottom right, there are 'cancel' and 'submit' buttons. Two arrows point to the Social Security Number and Confirmation fields.

The list of dependents will only show the last four digits, as shown here:

The screenshot shows the 'Verify Dependent Information' screen for William C Fulton Jr. The screen displays a list of current, active dependents. The list includes the following information:

- Dependent 1:** Sarah Fulton, Social Security Number: XXX-XX-4444, Relation To Employee: Spouse, Date Of Birth: 08/18/1965, Gender: Female, Full Time Student: No, Disability: \*no value.
- Dependent 2:** Steven Fulton, Social Security Number: XXX-XX-7777, Relation To Employee: Son, Date Of Birth: 09/02/1989, Gender: Male.

Each dependent entry has 'update' and 'delete' buttons. A number '2' is in a circle at the top left of the main content area. An arrow points from the text above to the 'update' button for Sarah Fulton.

## Human Resources

In **Entitlement Policies**, the ability to specify up to 3 decimal places in the Maximum Accrual field will be added, for both first year rules and standard rules. Previously, these fields did not permit decimal places to be entered.

In **Organization Restructure**, the ability to ignore historical tables will be added. A new checkbox will appear called Update Historical Data. It will default to on. If you leave this checkbox selected, the Organization Restructure will update the same tables as before.

The screenshot displays the 'Organization Restructure' web application. The top navigation bar includes 'Customer: 1000 Live (1000) | User: carol | Reports | WebReportHR | My Employees | My Account | Home | About | Help | Log Off'. The left sidebar contains a menu with categories like 'Employee Search', 'Menu Search', and 'Personal Information'. The main content area features a warning: '\*\*\* WARNING \*\*\*: Since this process cannot be reversed, it is recommended that you first run it in the Test environment to ensure that your selections produce the desired result.' Below this is a 'Select Organization' section with a grid of dropdown menus. At the bottom of this section, there are radio button options: 'Remove Levels' (selected), 'Retain Levels', 'Selected and Lower' (selected), 'Lower Only', and 'Selected Only'. A checkbox labeled 'Update Historical Data' is checked and pointed to by a black arrow. At the bottom of the form are buttons for 'Set From Level', 'Set To Level', 'process', and 'cancel'.

However, if you do not want to update historical data in the following tables, unselect the Update Historical Data checkbox. When this box is unchecked, data in these tables will not be updated, except where noted:

- Absences
- Injuries
- Lump Sums
- Payment History
- Reviews
- Time & Attendance
- Work History: only the current Work History record will be changed. The system will write data to the Termination fields. A field called Reason For Change will appear. Select the reason for this change; it will be written to the employee's current Work History record in the Reason For Termination field. A new Work History record will be written, with today's date and time, for the employee's new organization structure.

The Reason For Change field is shown in this example. It will only appear when the Update Historical Data checkbox is not selected.

The screenshot displays the 'Organization Restructure' page in the iCON system. At the top, it shows the user 'carol' and various navigation links. A warning message states: '\*\*\* WARNING \*\*\*: Since this process cannot be reversed, it is recommended that you first run it in the Test environment to ensure that your selections produce the desired result.' Below this, there are fields for 'Select Organization', 'From Level', and 'To Level', each with a dropdown menu currently set to '\*no value'. There is an 'add' button next to the first dropdown. Below these fields are several radio button options: 'Remove Levels' (selected), 'Retain Levels', 'Selected and Lower', 'Lower Only', and 'Selected Only'. At the bottom of the main area, there is a 'Reason for Change' dropdown menu set to '\*no value'. A checkbox labeled 'Update Historical Data' is present and is not checked. A red arrow points to this checkbox. At the bottom right, there are 'Set From Level' and 'Set To Level' buttons. At the very bottom, there are 'process' and 'cancel' buttons.

In **Organization Setup**, the program will be changed to no longer allow a record to be deleted if there is a corresponding record in **FTE Position Number Maintenance**.

In **Paid Time Off**, the system was sometimes slow when going to the Update or View page, depending on the number of the employee's records in **Payment History**. This process has been streamlined to display the information in less time.

The organization selection field will be changed for better browser compatibility and performance in the following functions: **Reports To** and **Reports To By Organization**. Along with this change, the main list of employees in the **Reports To** function will no longer display employees who have no Reports To supervisor number and who have no employees reporting to them. It will only display employees who have a Reports To, or employees who have other employees report to them. In order to see employees who have a blank Reports To, click on the Exceptions button.

## Payroll

In **Manual Payments**, the system checks to see if the payroll is closed when you enter the Pay Period End Date. If it is closed, an error appears. This validation will remain in effect. This program will be changed to also check if the payroll is closed when you click on the Process button; if so, the error will be displayed.

In **Manual Payments**, the system allowed a Check Date to be entered for a quarter other than the original Check Date in a certain scenario. The program will be changed to no longer allow this.

In **Payroll Feeder**, when calculating a payment where a 401(k) deduction was inactive, and it contained an Auto Switch To Deduction for the 401(k) Catch-Up, and the 401(k) Catch-Up deduction was Active, the system calculated a 401(k) Catch-Up deduction. The program has been changed to not calculate the 401(k) Catch-Up deduction in this scenario, since the 401(k) ceiling had not yet been reached.

In **Payroll Feeder**, if an employee has an employer deduction for a Health Savings Account (HSA), where the W-2 Box 12 Employer in Payroll Deductions is “W”, and the employee is subject to California or New Jersey taxes, the employer HSA deduction will be added to these taxable wages, per state rules. If you have employees in Alabama and your HSA employer contributions are subject to taxation, go to the Payroll Deductions common object and select the checkbox for HSA Employer Contribution AL SIT/SUI Taxable. By so doing, the employer HSA deduction will be added to the Alabama taxable wages. All payments created after this time will have the employer HSA deductions added to taxable wages. For 2014 deductions prior to this time, an adjustment must be made to each affected employee. If your system is hosted by Unicorn HRO, you will be contacted on how to correct the data for this year. If you host your own system, determine whether you have employees in this scenario.

In **SUI and W-2 Manager**, if you have a record for Pennsylvania in the SUI Reporting by State section, the Minimum Wage Amount Per Week will be changed to \$116.00. This takes effect for wages reported for the second quarter of 2014. It is used to calculate the number of weeks each employee has worked during the quarter when creating the quarterly wage reports and files.

In **Tax Collection Agency Data Generation** and **W-2 Local Data Generation**, the ability to create files for the Keystone Collections Group in Pennsylvania will be added. If it doesn't already exist in the W-2 Local Tax Agencies common object, add Code KCG for the Keystone Collections Group (leave the Output file name and Avail char field blank). If you want all Pennsylvania localities to be reported to this agency, select it in the Tax Collection Agency field in **Legal Entity Definition**. You must also define your localities in the **W-2 Local File Manager** function.

In **W-2 Data Generation**, the system previously ignored Pay Distribution and Deduction Accumulator amounts that were negative. This has been changed to first accumulate all Pay Distribution and Deduction Accumulator amounts for each W-2 box, and then ignore any box's amount that is negative, since the IRS

does not accept negative amounts on W-2 forms. The same change has been made to the **W-2 Validation Report** when checking for negative amounts.

## **Reports**

A column for Taxable Wages will be added to the following reports: **Manual Payment Register, Payment Register, Payment Register By Check Date** and **Payment Register Voids**.

When running the **Total Population Report**, the system got each employee's Employment Status as of the Effective Date that was selected. However, if the employee had more than one Employment Status record for that date, the system didn't use the latest record on the Summary report. The Summary report will be changed to use the employee's latest Employment Status record by date and time entered. The Detail report was already using the correct Employment Status record and did not need to be changed.

In **WebReportHR**, additional data will be available. The following fields will be added to existing tables:

- Education file:
  - Degree Awarded
- Employee file:
  - Smoker
- Entitlement file:
  - Omitted Hours Due To Carry Over
- Payroll file:
  - Default Type of Pay
  - Default Type of Pay Desc
  - SUI Location
  - SUI Location Desc

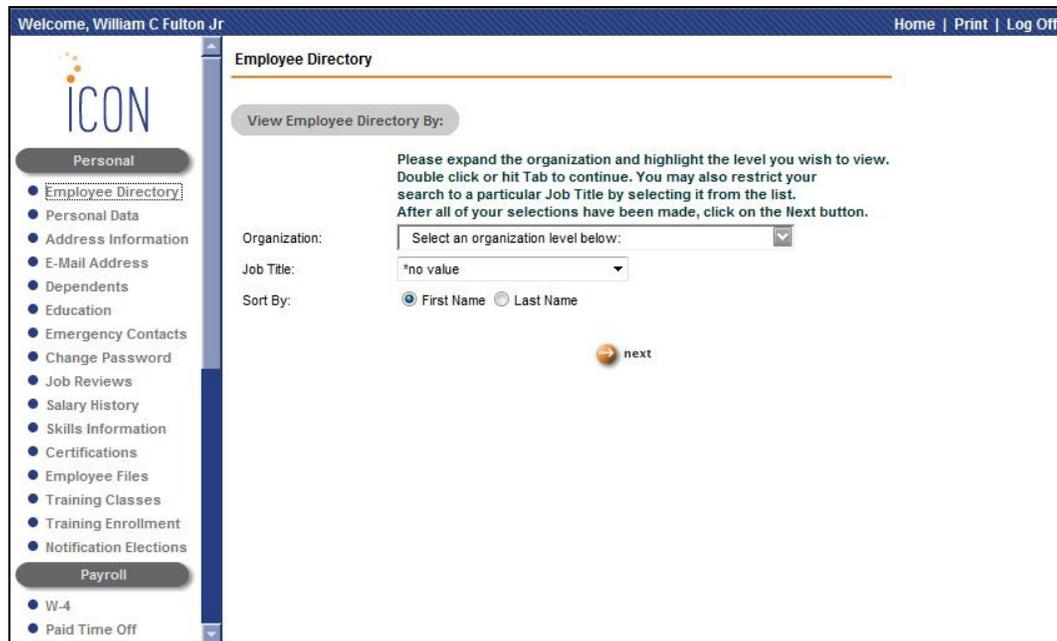
## Employee Self Service New Function

The following function will be made available for the Employee Self Service module.

You may provide a function called **Employee Directory**. This function allows employees to select an organization and/or job title, to search for employee phone numbers and email addresses. The function will display a list of active employees (per the current status in Employment Status) that meet the selection criteria. If you allow employees access to this function, it will appear at the top of the Personal menu, as shown in this example:

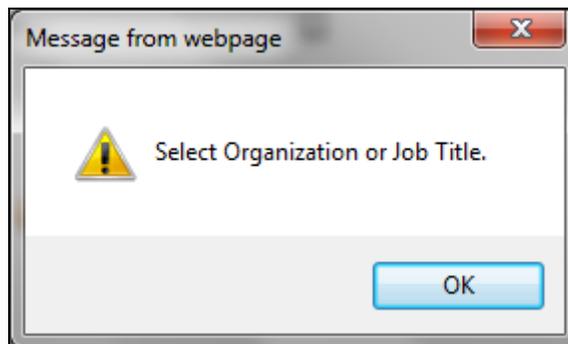


When the employee selects this function, the following page will display. The employee can select an Organization and/or a Job Title to search. The search results can be sorted by First Name or Last Name.

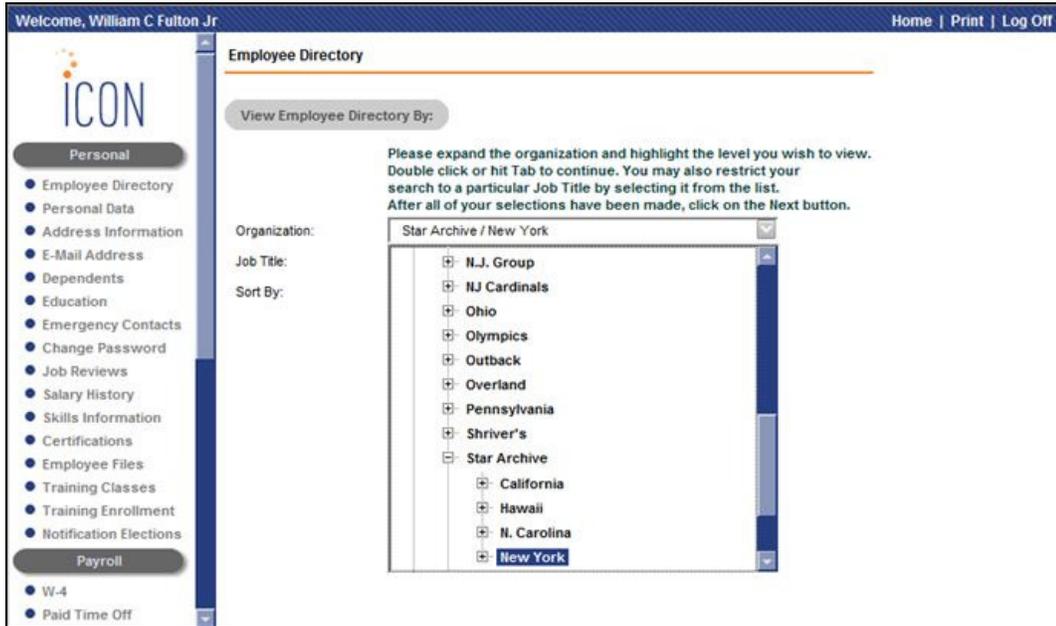


The screenshot shows the iCON Employee Directory search interface. At the top, it says "Welcome, William C Fulton Jr" and "Home | Print | Log Off". The main heading is "Employee Directory". Below this, there is a section titled "View Employee Directory By:". A message instructs the user: "Please expand the organization and highlight the level you wish to view. Double click or hit Tab to continue. You may also restrict your search to a particular Job Title by selecting it from the list. After all of your selections have been made, click on the Next button." The form includes three fields: "Organization:" with a dropdown menu showing "Select an organization level below:", "Job Title:" with a dropdown menu showing "\*no value", and "Sort By:" with radio buttons for "First Name" (selected) and "Last Name". A "next" button with a right-pointing arrow is located below the "Sort By" options. On the left side, there is a navigation menu with categories "Personal" and "Payroll". Under "Personal", "Employee Directory" is highlighted. Other items include 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, and Notification Elections. Under "Payroll", there are items for W-4 and Paid Time Off.

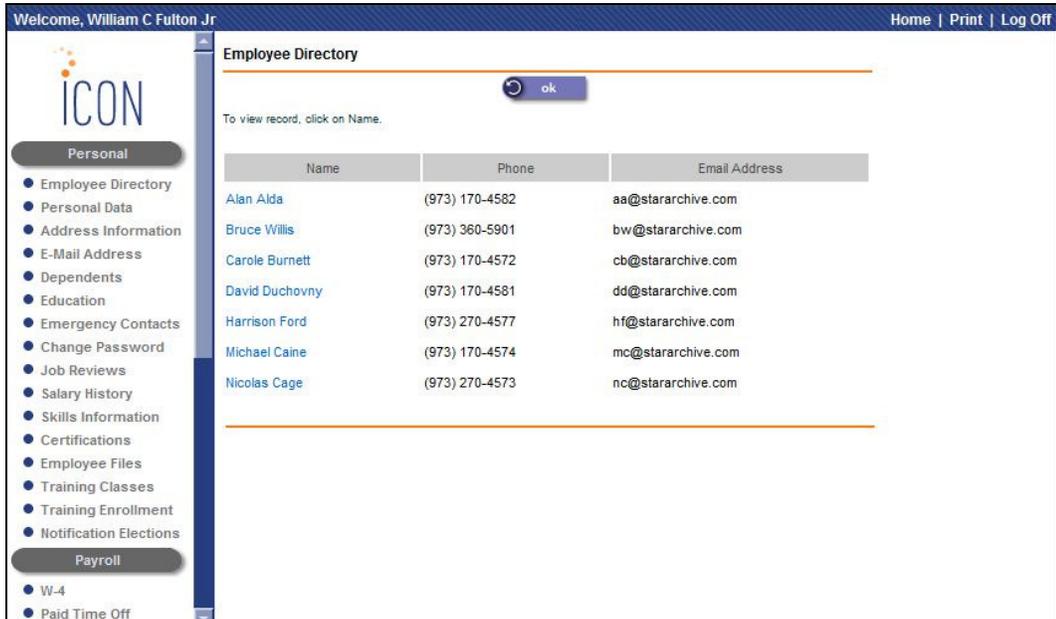
The employee must select either the Organization, Job Title, or both. If neither is selected, a message will appear:



The employee may drill down through the organization levels and select the level to be used in the search, as shown in this example:



When the employee clicks on the “next” button, the search results are displayed.



The following information will be displayed:

- Employee name
- Phone (the first Primary phone number that is found in an Alternate Phone field from the employee's current active Mailing address in the **Address** function, based on the Primary/Secondary setting in the Phone Number Type common object; if no Primary phone number is found, the first Secondary phone number will be displayed)
- Email address (email address type "1" will be shown from the **E-Mail Addresses** function; if no "1" email address exists, the system will display the "W" email address).

The employee name column is a hyperlink. If the employee clicks on a name, a page will appear with additional data. It will display:

- Employee's current photo from **Employee Files** (File Type EPF), if any
- Employee's Primary phone number(s) from the current active Mailing record in the **Address** function. If more than one exists, they will be sorted by the Short Description of the Phone Number Type.
- Employee's Secondary phone number(s). If more than one exists, they will be sorted by the Short Description of the Phone Number Type.
- Job Title from **Work Profile**
- Email Address from **E-Mail Addresses**

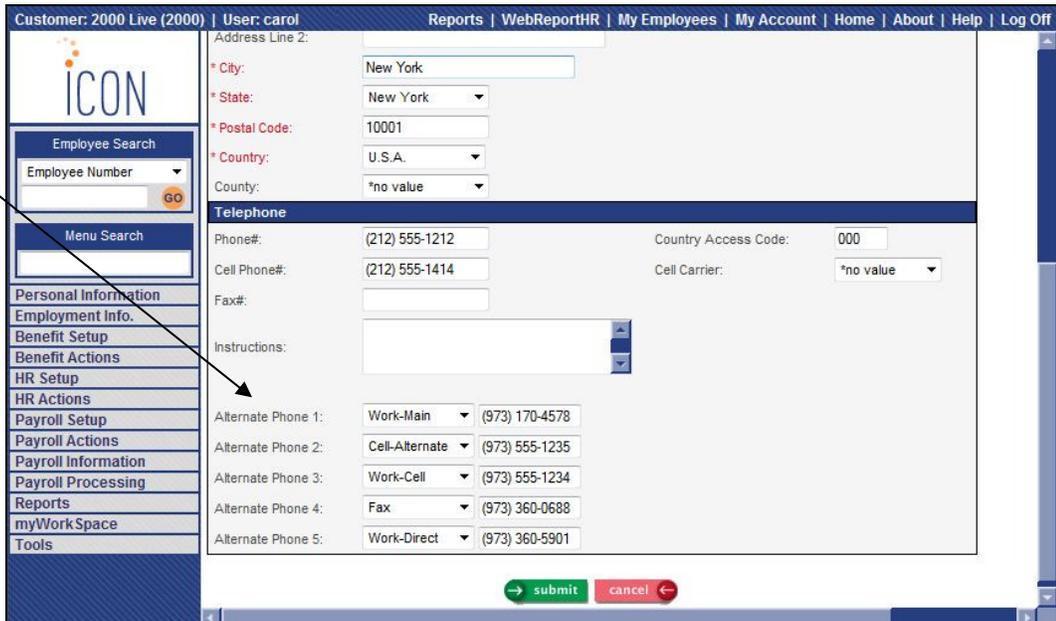
If the employee has only one Alternate Phone Number that is classified as Primary or Secondary, the description will be "Phone", as shown in this example:

The screenshot shows the iCON Employee Directory interface. At the top, it says "Welcome, William C Fulton Jr" and "Home | Print | Log Off". The main heading is "Employee Directory" with the name "Michael Caine" to the right. On the left is a navigation menu with "Personal" and "Payroll" sections. The "Personal" section includes: Employee Directory, 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, and Notification Elections. The "Payroll" section includes: W-4 and Paid Time Off. The main content area features a photo of Michael Caine and the following details: Phone: (973) 170-4574, Job Title: Actor, and Email Address: mc@stararchive.com. A "back" button is located at the bottom right of the main content area.

In the example below, the Work-Direct phone type is set up as the only Primary phone type; the remaining four phone types are set up as Secondary phone types.



Here is the employee’s current active Mailing address showing the Alternate Phone Numbers that are displayed above. Note that only the Alternate Phone Numbers appear in the Employee Directory. The “Phone#” and “Cell Phone#” fields do not appear, since they are most likely to be the employee’s home phone numbers.



To give your employees access to the **Employee Directory** function, these steps are required:

1. In **Common Object Dictionary**, access Phone Number Type. For each Alternate Phone Number from the Address function that you wish to display in the directory, select either Primary or Secondary in the Employee Directory Type field. The employee's first Primary phone number will be shown on the main list of employees; all Primary and Secondary phone numbers will be shown on the detail page. Leave the Employee Directory Type field blank if you do not wish to display this phone type in the Employee Directory.

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

Update Common Object Dictionary for Phone Number Type

\* Phone# Type: W

\* Short Description: Work-Direct

Long Description: Work Direct Line

Employee Directory Type: Primary

no value

Primary

Secondary

2. In **Employee Security**, grant access to the Employee Directory function for each ESS Login Group that should have access.

## Employee Self Service New Features

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

In the **Change Password** function, the ability to set up a security question and answer will be added. If the employee has set up a question and answer, and has an email address in the **E-Mail Addresses** function, he or she will be able to reset the password.

The employee may select a security question from the three questions shown, or enter a different question.

The screenshot displays the 'Change Password' interface for William C. Fulton Jr. The page includes a sidebar with a 'Personal' menu containing options like 'Employee Directory', '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', and 'Notification Elections'. The main content area features the 'Change Password' title and the user's name. It contains the following fields and sections:

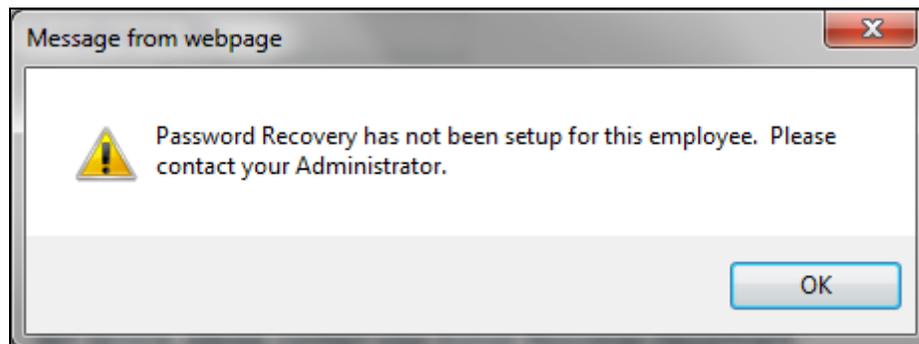
- User ID:** 615
- Password:** Three input fields for 'Current Password', 'New Password', and 'Confirm Password'.
- Recovery:** A section for setting a security question and answer.
  - Current Recovery Question:** A dropdown menu with the text '[Select a question or enter your own below]'.
  - Change Recovery Question:** An input field with a blue help icon.
  - Change Recovery Answer:** An input field.

At the bottom right of the form, there are two buttons: a green 'submit' button and a red 'cancel' button.

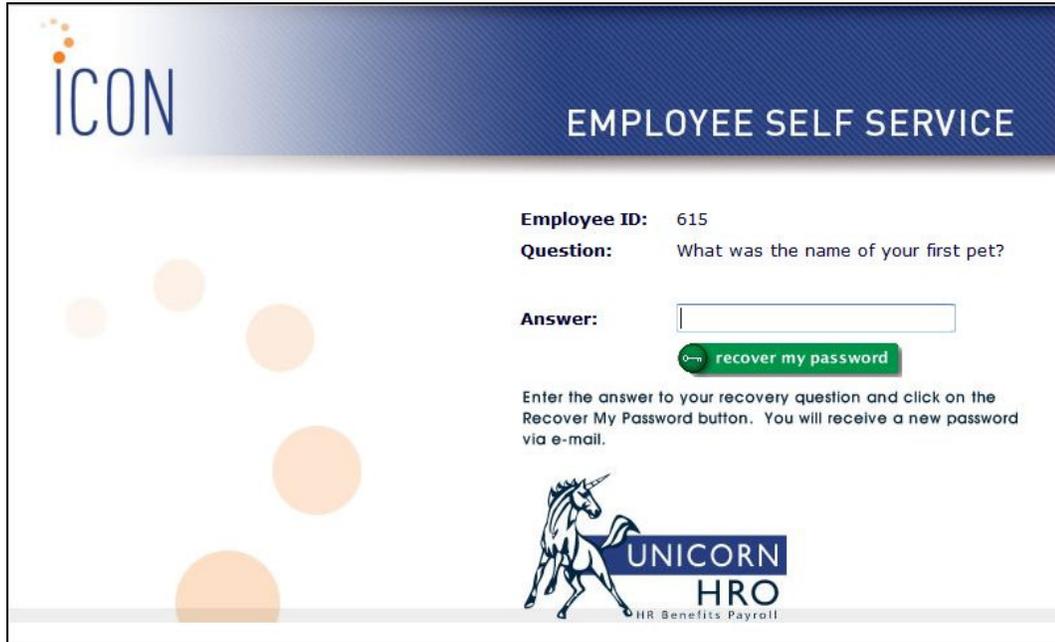
If the employee forgets the password, he or she can click on “recover my password” on the Employee Self Service login page after entering the Customer Number and Employee ID.



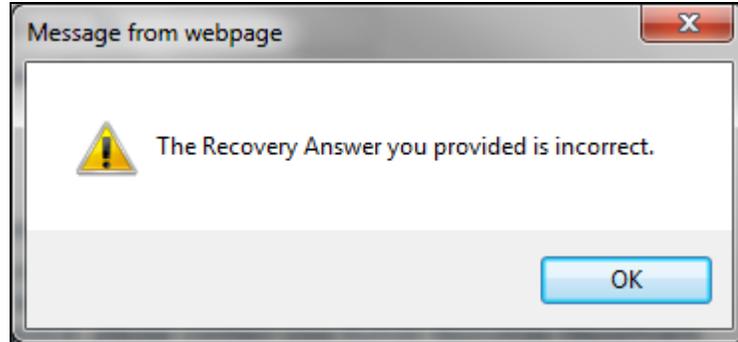
If the employee does not have both a security question and email address, this message will appear:



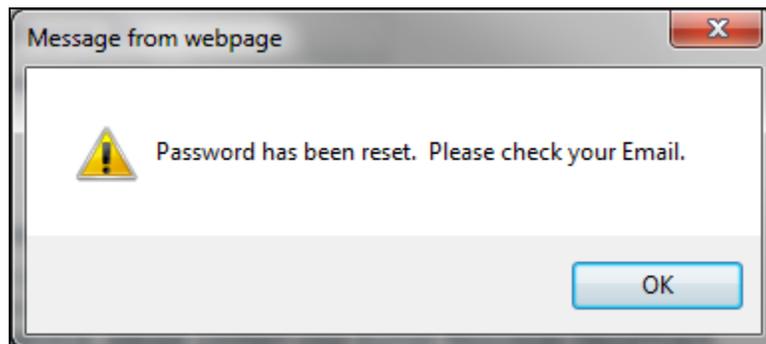
If both a security question and email address exist, the system will display the employee's security question, as shown in this example.



If an incorrect answer is provided, the following message will appear:



If a correct answer is provided, this message will appear:

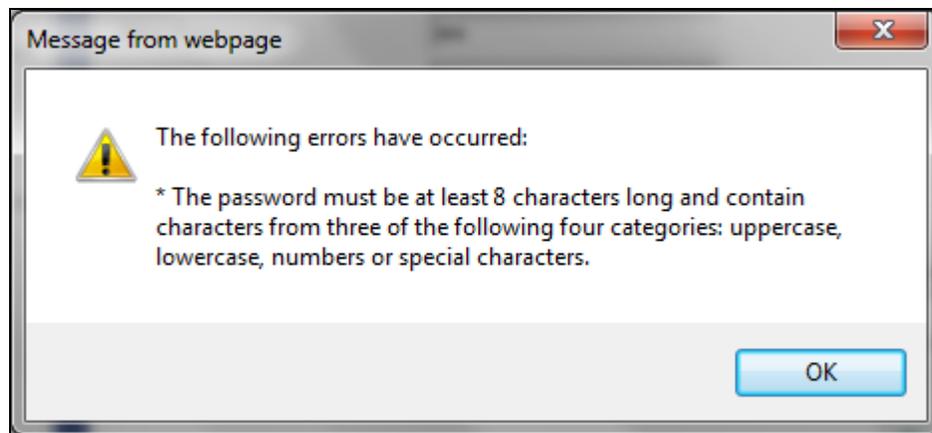


A randomly generated password will be emailed to the employee's email address type "1". If no email address type "1" exists, it will be emailed to the employee's next email address type.

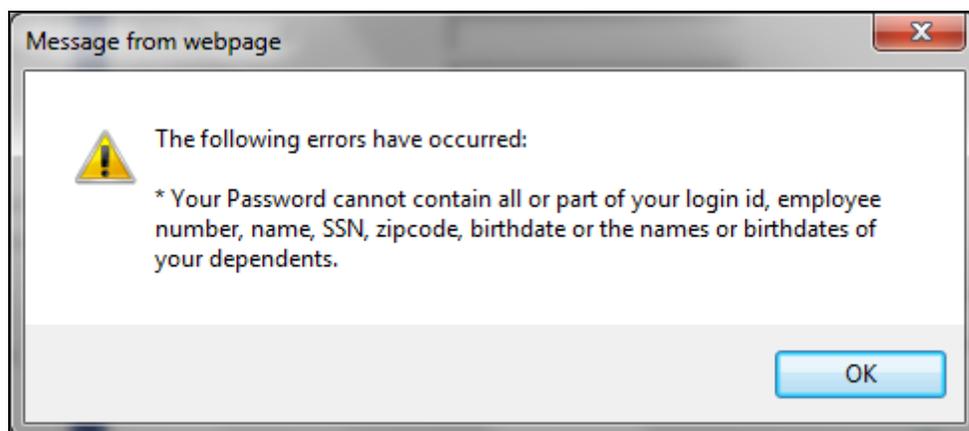
In addition to the password recovery option, the system will require that any new password be at least 8 characters long and contain at least 3 of the following:

- Upper case letter
- Lower case letter
- Number
- Special character

If it does not, the following message will appear:



The password cannot contain certain employee data. If it does, the following message will appear:



Note that these requirements will be in effect when an employee changes a password in Employee Self Service. They will not be in effect when changing an employee's PIN in Manager Services or iCON Tools, or in the nightly automated PIN assignment process.

In **Benefit Beneficiaries, First Time Enrollment, Life Events** and **Open Enrollment**, a beneficiary's Social Security Number and/or Date of Birth can be entered, depending on the settings in **HR System Defaults**.

In **Dependents, First Time Enrollment, Life Events** and **Open Enrollment**, the Gender of a dependent will be mandatory if **HR System Defaults** is set up to require this field.

In **Dependents, First Time Enrollment, Life Events** and **Open Enrollment**, the employee will only see the last four digits of each dependent's Social Security Number, depending on the setting in **HR System Defaults**. A Confirmation Social Security Number will appear when adding and updating dependents if this option has been selected in **HR System Defaults**.

In **Personal Data, First Time Enrollment** and **Open Enrollment**, the employee will see his or her Marital Status and will be able to change it, if allowed in **HR System Defaults**.

## iCON Tools New Features

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

### ***Benefits***

When running the **Benefit Update** for a benefit whose employee/employer percentages are defined based on annual salary range, the program used the employee's salary as of the Benefit Enrollment Date, rather than using the Effective Date that was entered when submitting the Benefit Update process. The program will be changed to use the Effective Date.

On the **Census Report**, a new field will be provided called Decimal Places. This field will be available when the Pay Rate and Type checkbox is selected. You may have the pay rate written to the census file with 2, 3 or 4 decimal places.

When the **Census Report** ran, if you selected FSAs, HSAs and/or Retirement Deductions, and the employee was transferred to a different legal entity during the selected date range, and you selected "Accumulated Deductions within the Date Range" and/or "YTD Deductions as of To Date", and there were no amounts for the selected deductions in the employee's current legal entity, the program did not include the FSA, HSA or Retirement deductions from the employee's previous legal entity. The program will be changed to include deduction amounts for all legal entities in this scenario.

In **HR System Defaults**, a checkbox called Require Dependent Gender will be added. If you wish to require the Gender whenever a dependent is added or updated, select this checkbox. This affects **Dependents**, **First Time Enrollment**, **Life Events** and **Open Enrollment** in Employee Self Service, **Dependents** and **Open Enrollment** in Manager Services, and **Employee Dependents** in iCON Tools.

In **HR System Defaults**, a checkbox called Display/Update Employee's Marital Status will be added. If you wish to allow employees to update their Marital Status (as stored in the **Demographics** function) in Employee Self Service in the **Personal Data**, **First Time Enrollment** and **Open Enrollment** functions, select this checkbox. Note that this field does not affect tax filing status in the **Tax Elections** function.

In **HR System Defaults**, two checkboxes will be added that affect how dependents' Social Security Numbers are entered in Employee Self Service. The first field is called Display Only Last 4 Digits of Dependent's SSN, and the second field is called Include Field to Confirm Dependent's SSN. If you wish to only display the last 4 digits of a dependent's SSN, select both checkboxes. This will mask the first 5 digits of the SSN in the following functions: **Dependents, First Time Enrollment, Life Events** and **Open Enrollment**.

A field for beneficiary date of birth will be added to the system. This field will always appear in the **Benefit Enrollment** and **Open Enrollment** functions in Manager Services, and **Benefit Enrollment** in iCON Tools. In **HR System Defaults**, two checkboxes will be added that affect beneficiary information in Employee Self Service. The first field is called Display/Update Beneficiary's Date of Birth. The second field is called Display/Update Beneficiary's SSN. These checkboxes affect the information that is displayed in **Benefit Beneficiaries, First Time Enrollment, Life Events** and **Open Enrollment**.

## ***Human Resources***

In **Entitlement Policies**, the ability to specify up to 3 decimal places in the Maximum Accrual field will be added, for both first year rules and standard rules. Previously, these fields did not permit decimal places to be entered.

In **Organization Restructure**, the ability to ignore historical tables will be added. A new checkbox will appear called Update Historical Data. It will default to on. If you leave this checkbox selected, the Organization Restructure will update the same tables as before. See the Manager Services section of this document for a list of affected tables.

In **Organization Setup**, the program will be changed to no longer allow a record to be deleted if there is a corresponding record in **FTE Position Number Maintenance**.

## ***Payroll***

In **Check Print For Administrator** and **Voucher Print For Administrator**, after you have selected payments and submitted the job, the payments will no longer be displayed while you are in that function. This will prevent users from submitting the same job more than once.

In **Direct Deposit File Creation** and **HSA Deposit Creation**, the system previously did not include an employee's Second Last Name. The programs will be changed to include both the Last Name and Second Last Name, if any, separated by a space.

**In Legal Entity Authorization**, if you selected a different user name, the system changed your User ID and therefore caused a problem when trying to access an Impromptu report. The program will be corrected so that your user name is not changed in this scenario.

**In Manual Payments**, the system checks to see if the payroll is closed when you enter the Pay Period End Date. If it is closed, an error appears. This validation will remain in effect. This program will be changed to also check if the payroll is closed when you click on the Process button; if so, the error will be displayed.

**In Payroll Feeder**, when calculating a payment where a 401(k) deduction was inactive, and it contained an Auto Switch To Deduction for the 401(k) Catch-Up, and the 401(k) Catch-Up deduction was Active, the system calculated a 401(k) Catch-Up deduction. The program has been changed to not calculate the 401(k) Catch-Up deduction in this scenario, since the 401(k) ceiling had not yet been reached.

**In Payroll Feeder**, if an employee has an employer deduction for a Health Savings Account (HSA), where the W-2 Box 12 Employer in Payroll Deductions is "W", and the employee is subject to California or New Jersey taxes, the employer HSA deduction will be added to these taxable wages, per state rules. If you have employees in Alabama and your HSA employer contributions are subject to taxation, go to the Payroll Deductions common object and select the checkbox for HSA Employer Contribution AL SIT/SUI Taxable. By so doing, the employer HSA deduction will be added to the Alabama taxable wages. All payments created after this time will have the employer HSA deductions added to taxable wages. For 2014 deductions prior to this time, an adjustment must be made to each affected employee. If your system is hosted by Unicorn HRO, you will be contacted on how to correct the data for this year. If you host your own system, determine whether you have employees in this scenario.

**In SUI and W-2 Manager**, if you have a record for Pennsylvania in the SUI Reporting by State section, the Minimum Wage Amount Per Week will be changed to \$116.00. This takes effect for wages reported for the second quarter of 2014. It is used to calculate the number of weeks each employee has worked during the quarter when creating the quarterly wage reports and files.

**In Tax Collection Agency Data Generation and W-2 Local Data Generation**, the ability to create files for the Keystone Collections Group in Pennsylvania will be added. If it doesn't already exist in the W-2 Local Tax Agencies common object, add Code KCG for the Keystone Collections Group (leave the Output file name and Avail char field blank). If you want all Pennsylvania localities to be reported to this agency, select it in the Tax Collection Agency field in **Legal Entity Definition**. You must also define your localities in the **W-2 Local File Manager** function.

In **W-2 Data Generation**, the system previously ignored Pay Distribution and Deduction Accumulator amounts that were negative. This has been changed to first accumulate all Pay Distribution and Deduction Accumulator amounts for each W-2 box, and then ignore any box's amount that is negative, since the IRS does not accept negative amounts on W-2 forms. The same change has been made to the **W-2 Validation Report** when checking for negative amounts.

## ***Reports***

A column for Taxable Wages will be added to the following reports: **Manual Payment Register, Payment Register, Payment Register By Check Date** and **Payment Register Voids**.

When running the **Total Population Report**, the system got each employee's Employment Status as of the Effective Date that was selected. However, if the employee had more than one Employment Status record for that date, the system didn't use the latest record on the Summary report. The Summary report will be changed to use the employee's latest Employment Status record by date and time entered. The Detail report was already using the correct Employment Status record and did not need to be changed.