Version 2.060 Release Notes

7/29/2017

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Table of Contents

Version 2.060 Checklist

Certain new features in Version 2.060 require set-up steps prior to using them. Use the checklist below to update your system for each applicable area.

	Completed By	Date Completed
New Manager Services Functions:		
Assign **Function Security** to the following new functions in Manager Services for applicable users. • Areas of Interest • Employment Status Reasons • Job Evaluation Point Definition • Job Evaluation Point Copy • OSHA Export • Establishment Gross Receipts • Employee Gross Receipts • Tip Inquiry • Tip Allocation Report		
Online Benefit Enrollment:		
In Benefit Enrollment Defaults, the following fields have been added in the ESS Online Enrollment Defaults section. Please select these checkboxes if you wish to use these new features. • Display and update Email Address(es) in the Personal Information Page • Allow Change of Dependent Status in the Dependents Page • Require user to upload Dependent Verification documents		
Life Events:		
New codes for the following life events will be added: Employee Ages Out, Dependent Ages Out, Dependent Eligibility and Court Mandated Dependent. If you wish to offer these options to your employees in the Life Events function in Employee Self Service, set up information in these functions as needed: • Life Event Preferences • Links • Messaging Setup • Employee Security		
Health Savings Account Employer Contributions:		
Previously, employees could select an HSA amount up to the Maximum Amount in Health Savings Employer Contributions. If you wish to limit the amount your employees can select to contribute to their HSA plan by the amount that the company contributes, enter the Maximum Per Year amount in the Employer Deduction Contributions function for each HSA deduction. This affects Open Enrollment, First Time Enrollment and Life Events.		

Overview

Version 2.060 contains new functions as well as additional functionality throughout the product, especially in the area of on-line enrollment, in preparation for this year's Open Enrollment season. The Release Notes contain a description of each feature in detail.

The following function will be added in the Employment Information menu in Manager Services:

- Areas of Interest

The following functions will be added in the HR Setup menu in Manager Services:

- Employment Status Reasons
- Job Evaluation Point Definition
- Job Evaluation Point Copy

The following functions will be added in the Payroll Processing menu in Manager Services:

- Establishment Gross Receipts
- Employee Gross Receipts

The following function will be added in the Payroll Information menu in Manager Services:

- Tip Inquiry

The following functions will be added in the Reports menu in Manager Services:

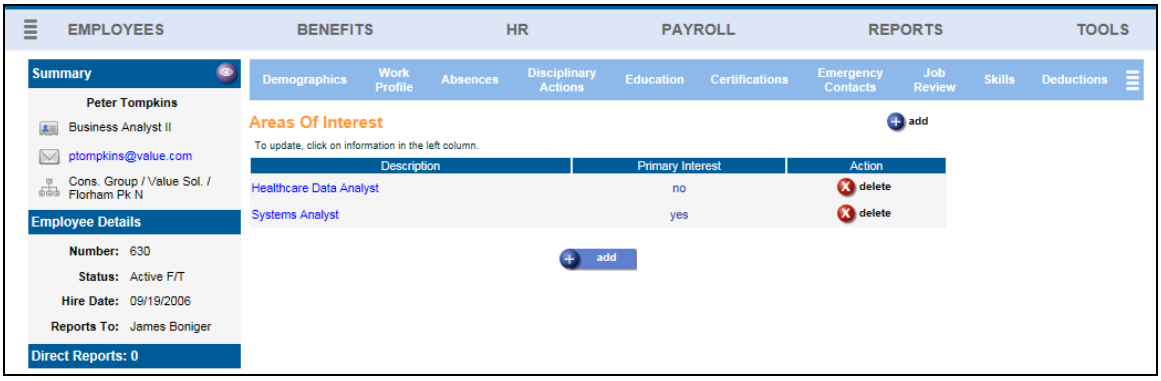
- OSHA Export
- Tip Allocation Report

New Manager Services Functions

This section describes the new functions in Manager Services. You must grant Function Security to these functions to the applicable users.

Areas of Interest

In the Employment Information menu, the Areas of Interest function allows you to store job titles that employees are interested in. One job title may be marked as the employee's primary area of interest.

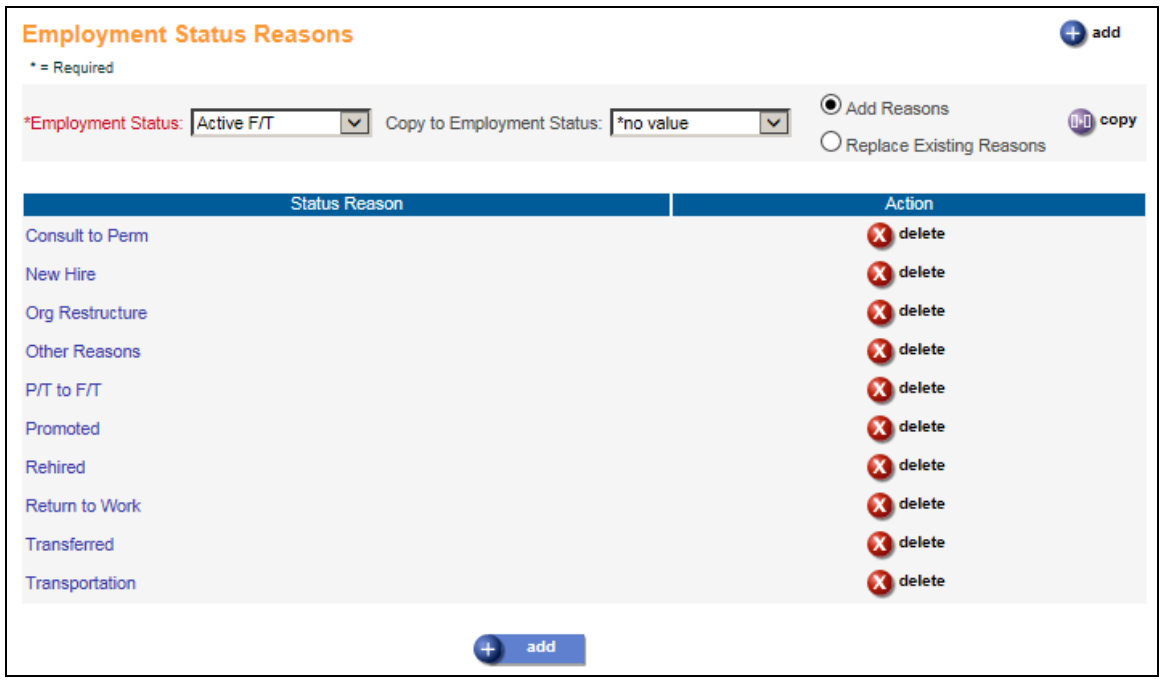


Employment Status Reasons

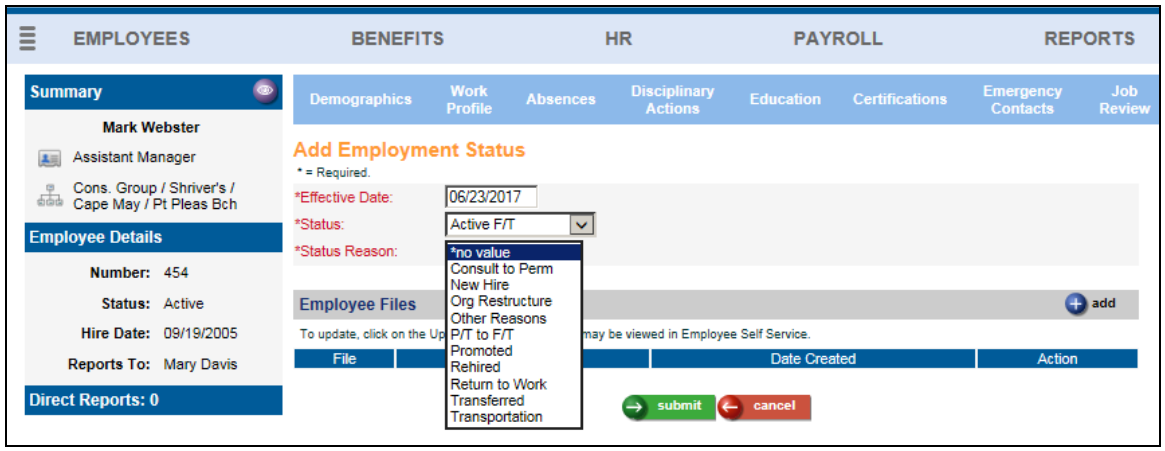
In the HR Setup menu, use this function to create a list of status reasons that can be used for each employment status whenever an employee's status is changed. In functions where an employee's status can be changed, there is a corresponding field for the reason. If entries are defined in the **Employment Status Reasons** function for the employment status that you choose, the Reason drop down list will only display the allowable reasons. This helps to ensure that the correct Reason is entered when there is a change to an employee's Employment Status. The following functions are affected:

- Add Employee
- Company Transfer
- Employment Status
- New Hire
- Rehire (HR)
- Terminate Employee

You may add individual Status Reasons to an Employment Status, or you may copy Status Reasons from one Employment Status to another.



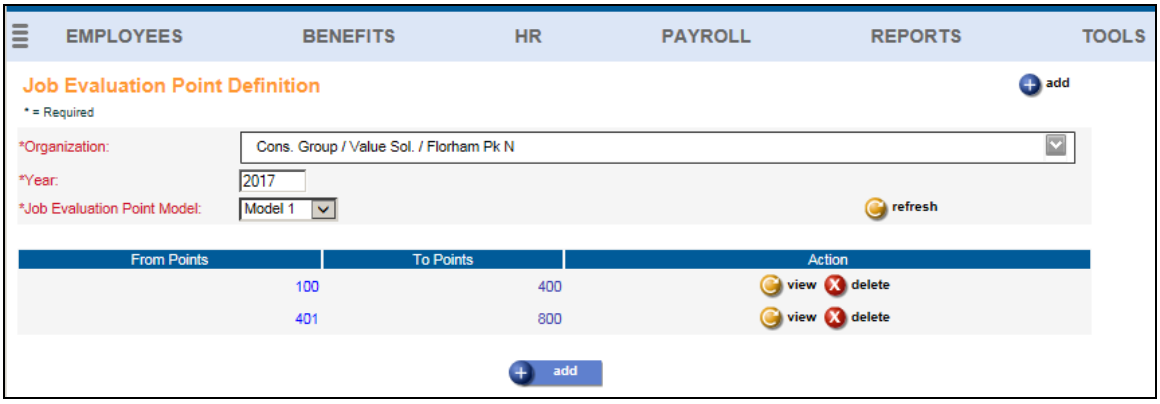
When the above Employment Status is chosen in one of the employee-related functions, the Status Reason drop down box will only include the Status Reasons that have been defined, as shown in this example from the Employment Status function:



You may define valid reasons for one or more employment statuses, or you may choose not to use this feature. If you do not define valid reasons in the Employment Status Reasons function for a particular employment status, then all reasons within the Status Change Reason common object will be shown in the Status Reason drop down list.

Job Evaluation Point Definition

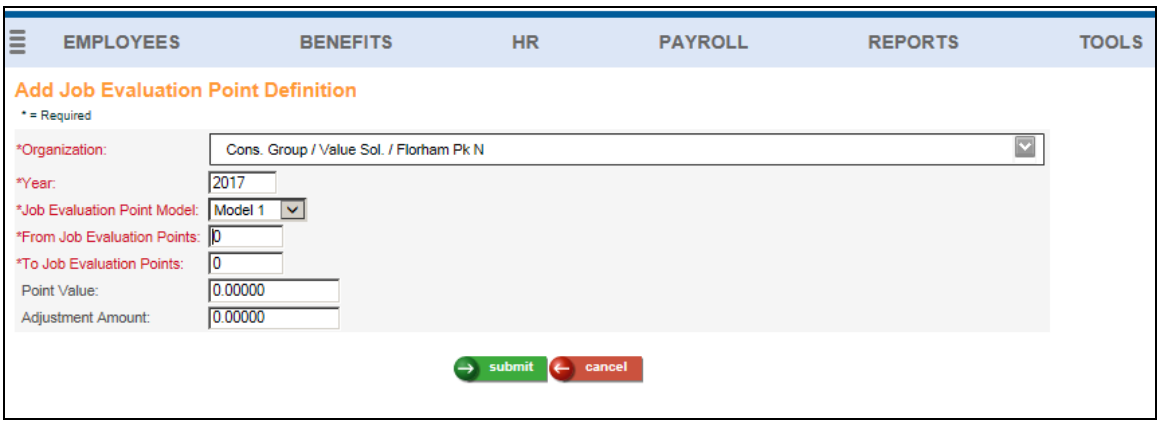
In the HR Setup menu, enter information to calculate salary ranges using the point factor system. You can define a range of points and the dollar amount and adjustment amount associated with the point range. This information is then used to calculate the salary midpoint as well as the high and low ends of the range.



To define and assign job evaluation points:

1. Add any additional models to the Job Evaluation Point Models common object. The product includes the Model 1 value that's used to calculate salaries in the **Position Control** function. You can add other models for creating budgets and salary forecasts.
2. Create job evaluation point definitions. This establishes the point range, the adjustment amount, and the value of each point. This is done in the **Job Evaluation Point Definition** function.

   Below is an example of the Add page in this function:



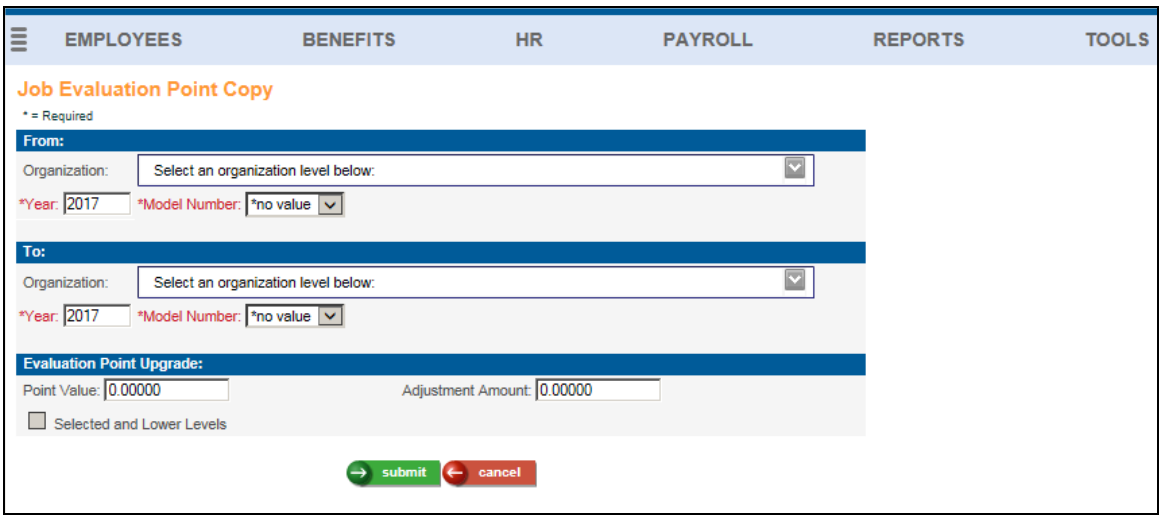
3. Enter salary range percentages. These values are used to determine the midpoint, minimum, and maximum salary amounts for each point range. The percentages are entered in each level 2 value of the **Organization Setup** function.
4. Assign points to the jobs that use them. Usually points are assigned based on factors important to the job, such as complexity, knowledge, etc. Points are assigned in the Job Evaluation Points by Position section of **Position Control**.
5. View the salary range. This displays the salary range for the point range based on the adjustment amount, point value, salary range percentages, and point factors. Use the Salary Range for Position section of **Position Control**.

Job Evaluation Point Copy

This function is in the HR Setup menu. When you have set up data in the **Job Evaluation Point Definition** function, you may copy information from one organization/model/year to another. You may keep the Point Values and Adjustment Amounts as is, or you may increase or decrease those amounts for the new records that are created.

If the From Organization Levels are the same as the To Organization Levels, the checkbox called Selected and Lower Levels will be active. Select this checkbox if you wish to copy the job evaluation points in the selected organization levels as well as lower levels.

As with Salary Ranges, Job Evaluation Points must be stored per year. You may use the copy feature to the copy records to the upcoming year.

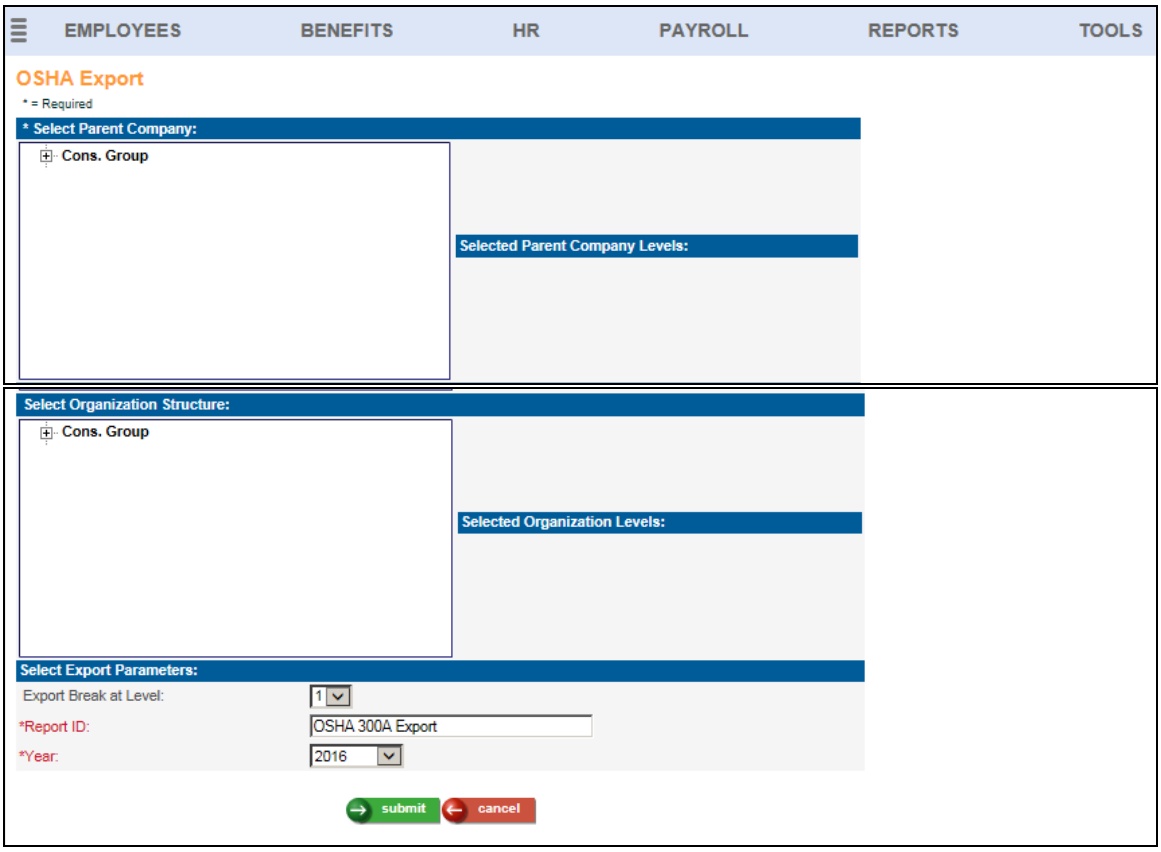


OSHA Export

The **OSHA Export** function in the Reports menu allows you to create a CSV file containing the OSHA 300A information. This contains the data that can be created using the **OSHA Report** function.

The file will write entries recorded in the **Injuries** function. Only OSHA-reportable entries will be included. To include injuries on the OSHA file, use Type of Occurrence "IJ" as found in the Illness/Injury Occurrence common object, and a Type of Illness/Injury that begins with “IJ” in the Illnesses and Injuries common object. For illnesses to be included on the OSHA file, use Type of Occurrence "IL" and one of the following Types of Illness/Injury: IL01, IL03, IL04, IL07 or IL26.

The OSHA 300A Summary file groups all incidents together and provides the following information: establishment name and address, NAICS code, year, industry description, annual average number of employees, total hours worked by all employees, number of deaths, number of cases with days away from work, number of cases with job transfer or restriction, number of other recordable cases, number of days of job transfer or restriction, number of days away from work, number of injuries, number of skin disorders, number of respiratory conditions, number of poisonings, number of hearing loss and number of all other illnesses.

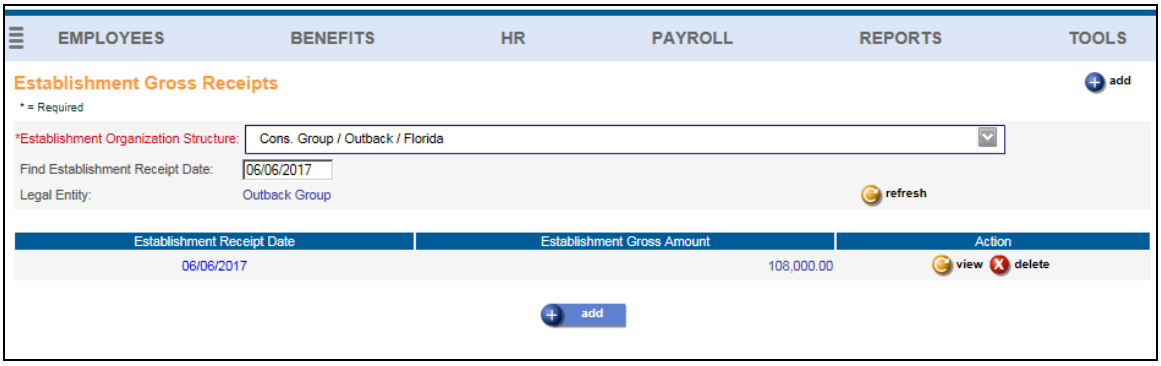


Establishment Gross Receipts

Four functions are being added for processing allocated tips for tipped employees. After a payroll has been closed, follow these steps to calculate allocated tips:

- In **Establishment Gross Receipts** in the Payroll Processing menu, enter the amount of gross receipts for each establishment. Establishments must all be defined at the same organization level.
- In **Employee Gross Receipts** in the Payroll Processing menu, enter the total amount of food and beverage sales for each establishment where the employee worked. This is only done for directly tipped employees. The total of all employees' gross receipts must equal the establishment gross receipts for the same Pay Period End Date. When they do, click on the Process button.
- You may access the **Tip Inquiry** function in the Payroll Information menu to view any allocated tips that have been calculated, either by establishment or employee.
- You may run the **Tip Allocation Report** in the Reports menu to see the amounts used for allocating tips.

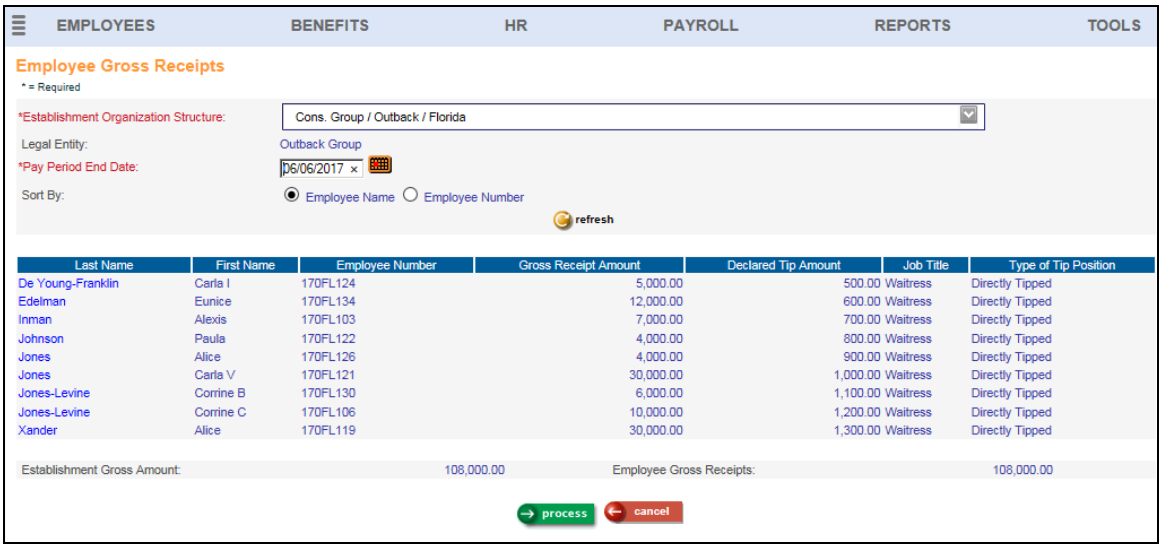
Below is an example of the Establishment Gross Receipts function.



After selecting the organization structure, enter the receipt date and the gross amount:

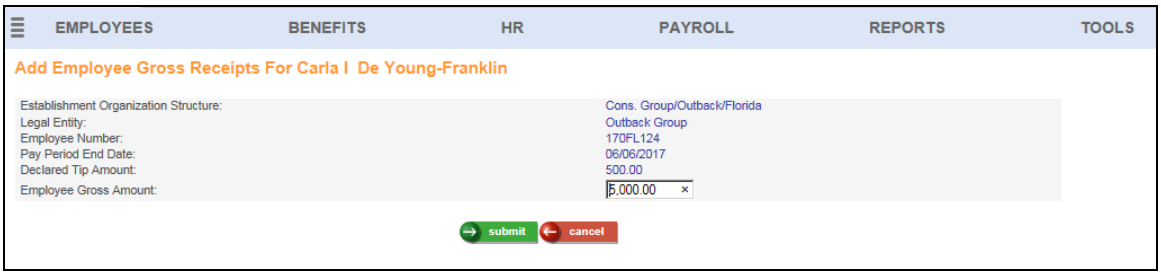
Employee Gross Receipts

After the payroll has been closed, enter the total amount of food and beverage sales for each directly tipped employee. When the total of all employees' gross receipts equals the amount for the matching establishment in **Establishment Gross Receipts**, the Process button will appear. Click on this button to calculate any allocated tips.



Last Name	First Name	Employee Number	Gross Receipt Amount	Declared Tip Amount	Job Title	Type of Tip Position
De Young-Franklin	Carla I	170FL124	5,000.00	500.00	Waitress	Directly Tipped
Edelman	Eunice	170FL134	12,000.00	600.00	Waitress	Directly Tipped
Inman	Alexis	170FL103	7,000.00	700.00	Waitress	Directly Tipped
Johnson	Paula	170FL122	4,000.00	800.00	Waitress	Directly Tipped
Jones	Alice	170FL126	4,000.00	900.00	Waitress	Directly Tipped
Jones	Carla V	170FL121	30,000.00	1,000.00	Waitress	Directly Tipped
Jones-Levine	Corrine B	170FL130	6,000.00	1,100.00	Waitress	Directly Tipped
Jones-Levine	Corrine C	170FL106	10,000.00	1,200.00	Waitress	Directly Tipped
Xander	Alice	170FL119	30,000.00	1,300.00	Waitress	Directly Tipped

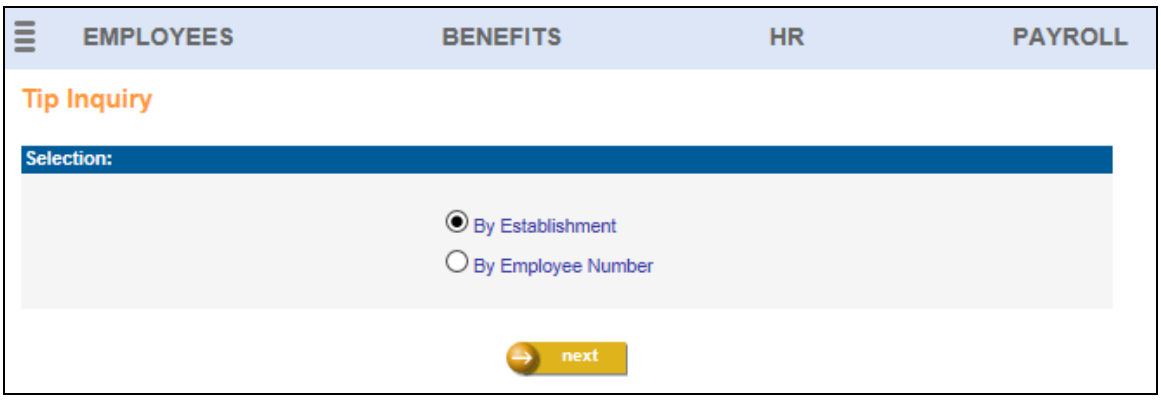
When you first access this function after the payroll has been closed and select an establishment, the directly tipped employees will appear. Click on information in the left column to access the entry page as shown in this example, where you will enter the Employee Gross Amount:



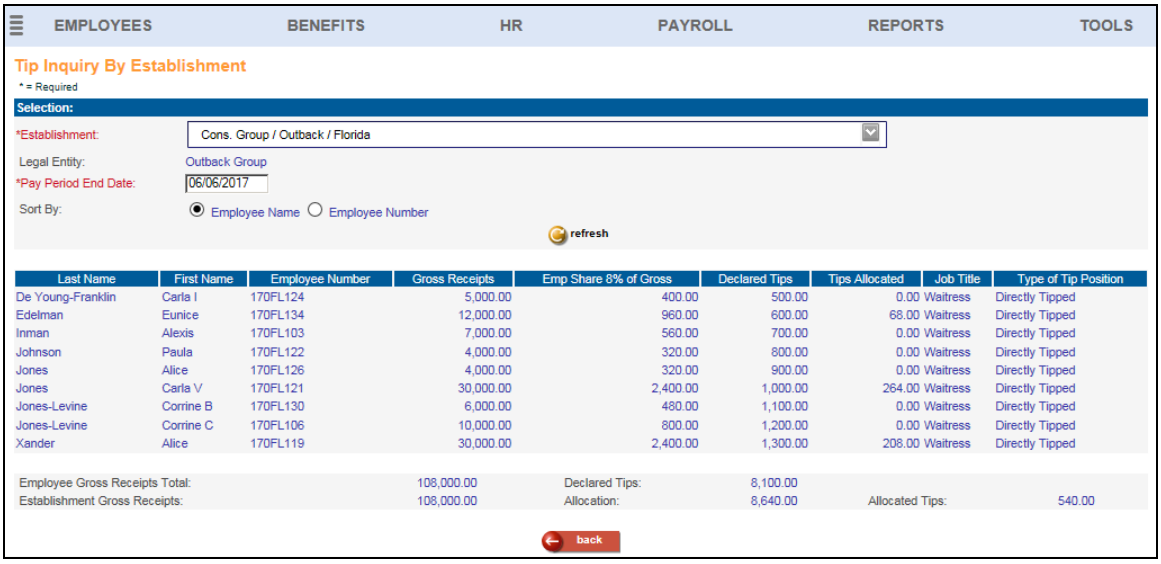
After all amounts have been entered and you click on the Process button, you may use the **Tip Inquiry** function or **Tip Allocation Report** to see if any tips were allocated for this pay period.

Tip Inquiry

After processing allocated tips in the **Employee Gross Receipts** function, you may use **Tip Inquiry** to see if any amounts have been calculated for the employees.

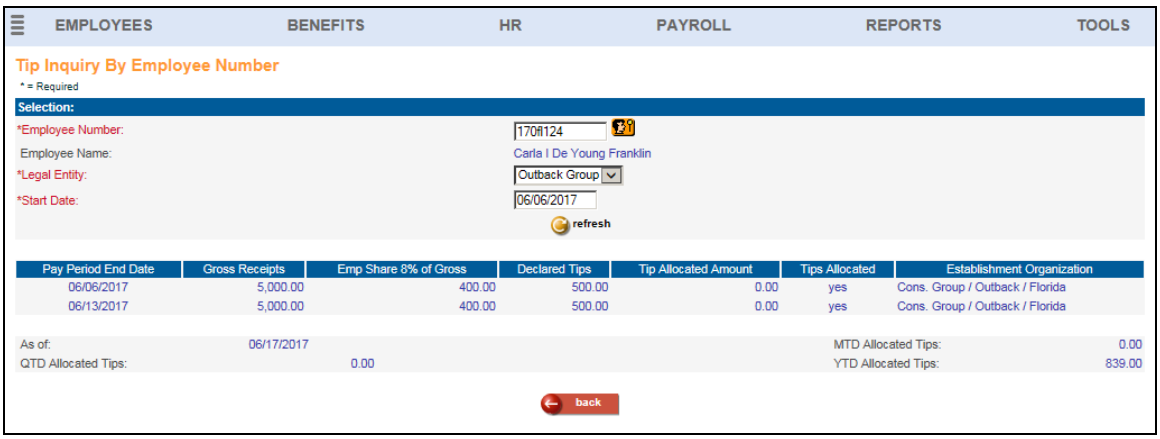


If you select by establishment, you will see the allocated tips for each employee by pay period. The system will display all directly tipped employees, the amounts used in the calculation, and any allocated tips.



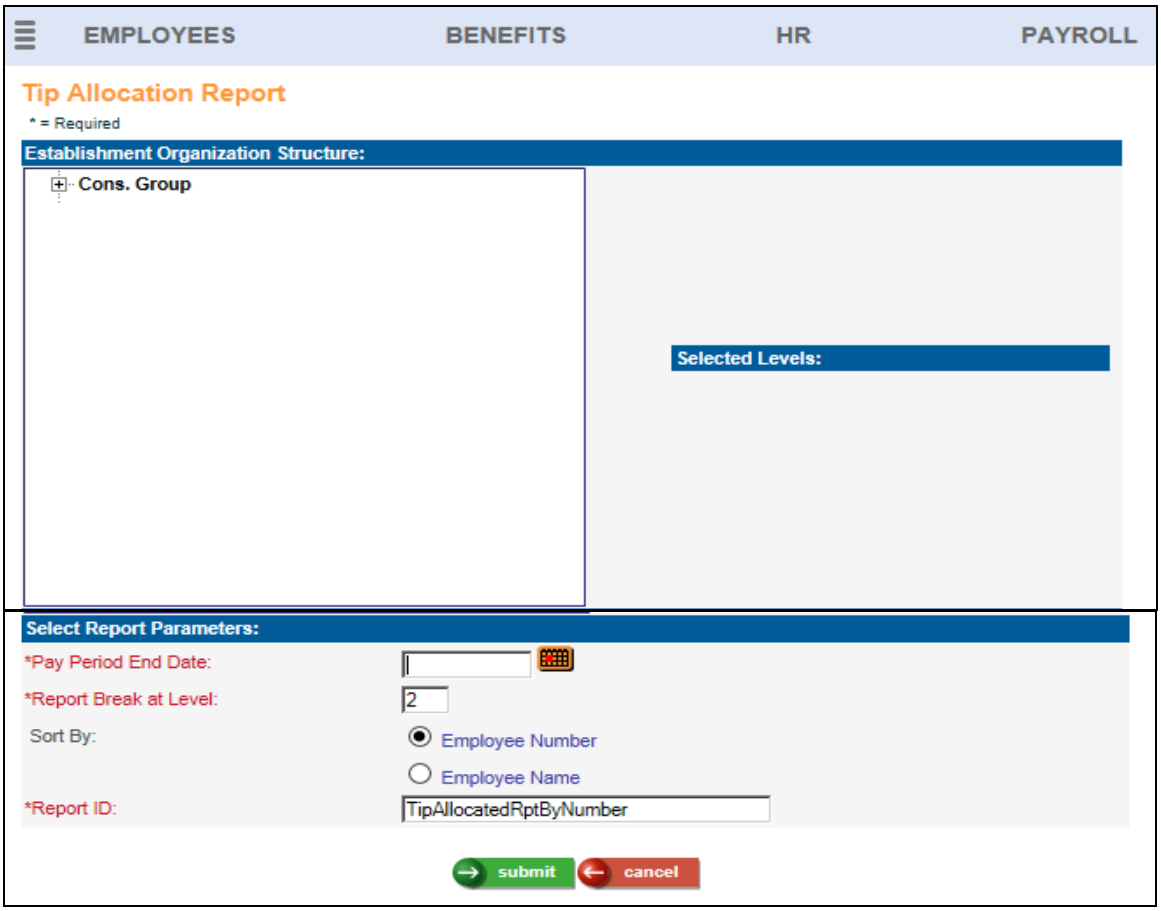
Last Name	First Name	Employee Number	Gross Receipts	Emp Share 8% of Gross	Declared Tips	Tips Allocated	Job Title	Type of Tip Position
De Young-Franklin	Carla I	170FL124	5,000.00	400.00	500.00	0.00	Waitress	Directly Tipped
Edelman	Eunice	170FL134	12,000.00	960.00	600.00	68.00	Waitress	Directly Tipped
Inman	Alexis	170FL103	7,000.00	560.00	700.00	0.00	Waitress	Directly Tipped
Johnson	Paula	170FL122	4,000.00	320.00	800.00	0.00	Waitress	Directly Tipped
Jones	Alice	170FL126	4,000.00	320.00	900.00	0.00	Waitress	Directly Tipped
Jones	Carla V	170FL121	30,000.00	2,400.00	1,000.00	264.00	Waitress	Directly Tipped
Jones-Levine	Corrine B	170FL130	6,000.00	480.00	1,100.00	0.00	Waitress	Directly Tipped
Jones-Levine	Corrine C	170FL106	10,000.00	800.00	1,200.00	0.00	Waitress	Directly Tipped
Xander	Alice	170FL119	30,000.00	2,400.00	1,300.00	208.00	Waitress	Directly Tipped

If you select by employee, you will see the month-to-date, quarter-to-date and year-to-date allocated tips.



Tip Allocation Report

In addition to using the **Tip Inquiry** function to view allocated tips, you may use the **Tip Allocation Report**.



Below is an example of the report.

Date: 6/17/17
Time: 09:38AM

Tip Allocation Report

Page: 1
User: CAROL

Legal Entity: Outback Group

Pay Period End Date: 06/06/2017

Employee Name	Employee#	Employee Gross Receipts	Declared Tips	Emp Share 8% of Gross	Shortfall	Allocated Tips
Establishment Organization: YANKS OUT FL						
Gross Receipts Method of 8%: 8,640.00						
De Young Franklin, Carla I	170FL124	5,000.00	500.00	400.00	0.00	0.00
Edelman, Eunice	170FL134	12,000.00	600.00	960.00	360.00	68.00
Inman, Alexis	170FL103	7,000.00	700.00	560.00	0.00	0.00
Johnson, Paula	170FL122	4,000.00	800.00	320.00	0.00	0.00
Jones, Alice	170FL126	4,000.00	900.00	320.00	0.00	0.00
Jones, Carla V	170FL121	30,000.00	1,000.00	2,400.00	1,400.00	264.00
Jones Levine, Corrine B	170FL130	6,000.00	1,100.00	480.00	0.00	0.00
Jones Levine, Corrine C	170FL106	10,000.00	1,200.00	800.00	0.00	0.00
Xander, Alice	170FL119	30,000.00	1,300.00	2,400.00	1,100.00	208.00
Total of Establishment Receipts Amount:		108,000.00	8,100.00	8,640.00	2,860.00	540.00
Establishment Organization: YANKS OUT FL						
Grand Total Amount:		108,000.00	8,100.00	8,640.00	2,860.00	540.00

Updated Manager Services Functions

This section describes the changes made to functions in Manager Services.

Add Employee, Company Transfer, Employment Status, New Hire, Rehire (HR), Terminate Employee

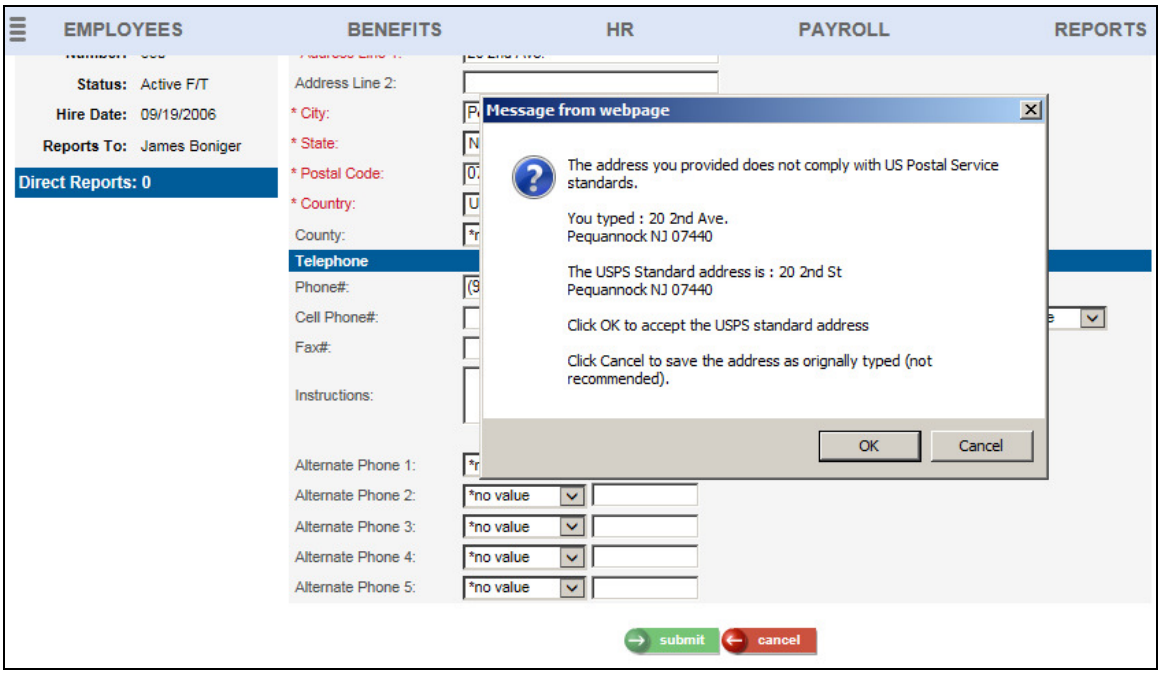
If you set up valid Status Reasons for an Employment Status in the new **Employment Status Definition** function, the Status Reason field in these functions will only display the allowable reasons for the Status that you select. You may set up valid Status Reasons for one or more Employment Statuses. For each Employment Status that does not have valid Status Reasons defined, the system will display all values from the Status Change Reason common object.

Add Employee, New Hire, Salary Change

If you select the Rate Index method in the Compensation section, the system will now only display the valid Job Classes in the drop down list for the rate index that you selected, based on current data from the **Rate Indexes** function. Once you select a Job Class, the system will only display the valid Job Grades. Previously, all entries from the Job Class and Job Grade common objects were displayed in these fields.

Address, Add Employee, Demographics, New Hire, Work Address

When adding or updating an address in the United States (Country Code USA), the United States Postal Services (USPS) validation routine will be called to ensure that the address has been entered correctly. The validation will take place for Address Types that have the Standard Information checkbox selected in the Address Types common object. For example, if you have an Address Type such as Email Address where Standard Information is off, signifying that the standard address fields are not required, the USPS validation routine will not run. Below is an example of the message that will appear if the entered address does not match what is in the USPS system:



You may click OK to accept the address in the USPS system, or click Cancel to save the information that you entered. In some cases, the validation will not have a suggested address. In this scenario, the message will say Address Not Found.

This validation will also be done in the **Address Information, First Time Enrollment, Life Events** (Change of Address) and **Open Enrollment** functions in Employee Self Service.

Benefit Comparison

If the Open Enrollment Effective Date was the start of the new year (such as January 1, 2017) and the **Benefit Comparison** report was created after the start of the new year, the benefit plans that ended on 12/31 (such as December 31, 2016) were not appearing on the report. This has been changed so that the benefits ending in the prior year are shown in the Current Plan Year section of the report (in this example, when running the report for 2016 to 2017 after January 1, 2017, 2016 is the Current Plan Year and 2017 is the Next Plan Year).

Benefit Enrollment, Benefit History, Open Enrollment

If you enroll a spouse (where the Spouse field is set to Yes in the Relationship Types common object) in a medical plan (where the plan has either the Medical Coverage For State New Hire Reporting Purposes checkbox or the ACA Compliant Plan checkbox selected in **Benefit Plans**) in **Benefit Enrollment** or **Open Enrollment**, the system will present you with the following field on the Update page:

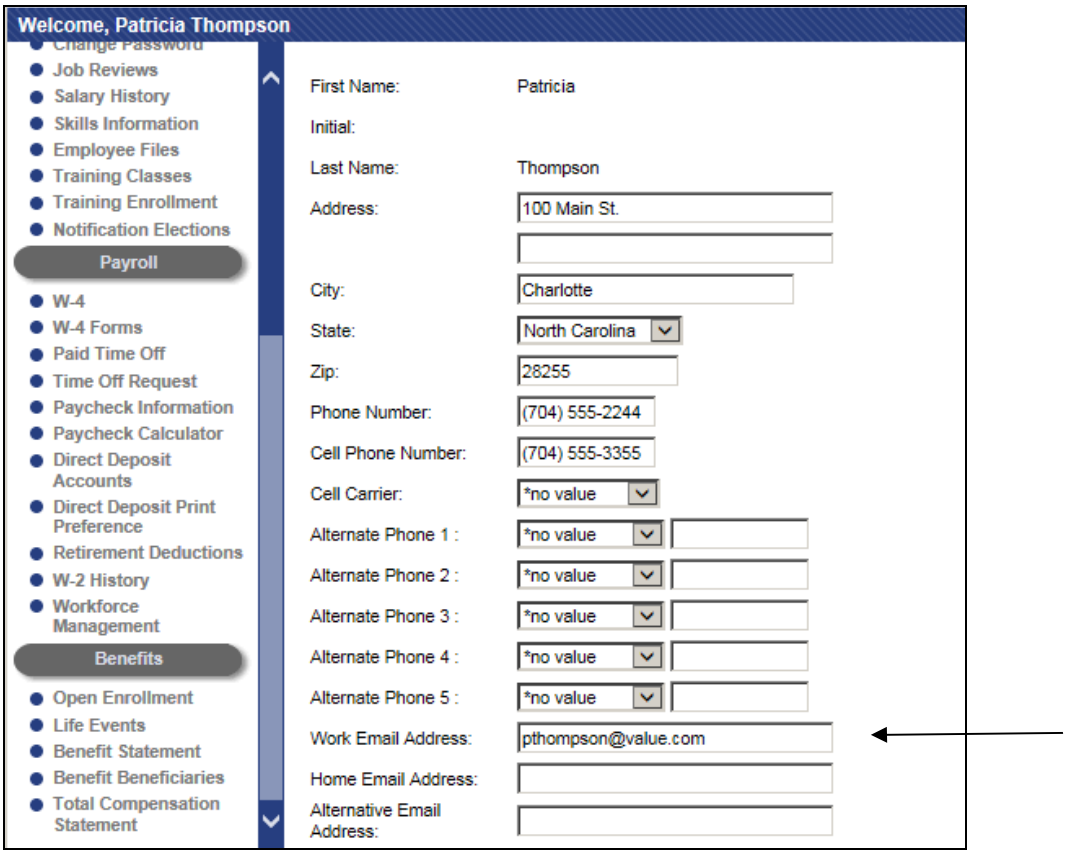
Secondary Spouse Plan (select the appropriate Spouse Coordination of Benefit option):

- (●) No, Spouse is not eligible for Medicare and is either not employed or their employer does not offer medical
- ( ) Yes, Spouse is either eligible for Medicare or their employer offers employee-only medical coverage
- ( ) Yes, Spouse's employer offers medical coverage to both employee and dependents

Select the applicable response. Your response may be viewed in the **Benefit History** function. This information will also be shown in the following Employee Self Service functions: **First Time Enrollment, Life Events** and **Open Enrollment**. This information is needed for the ACA AIR file.

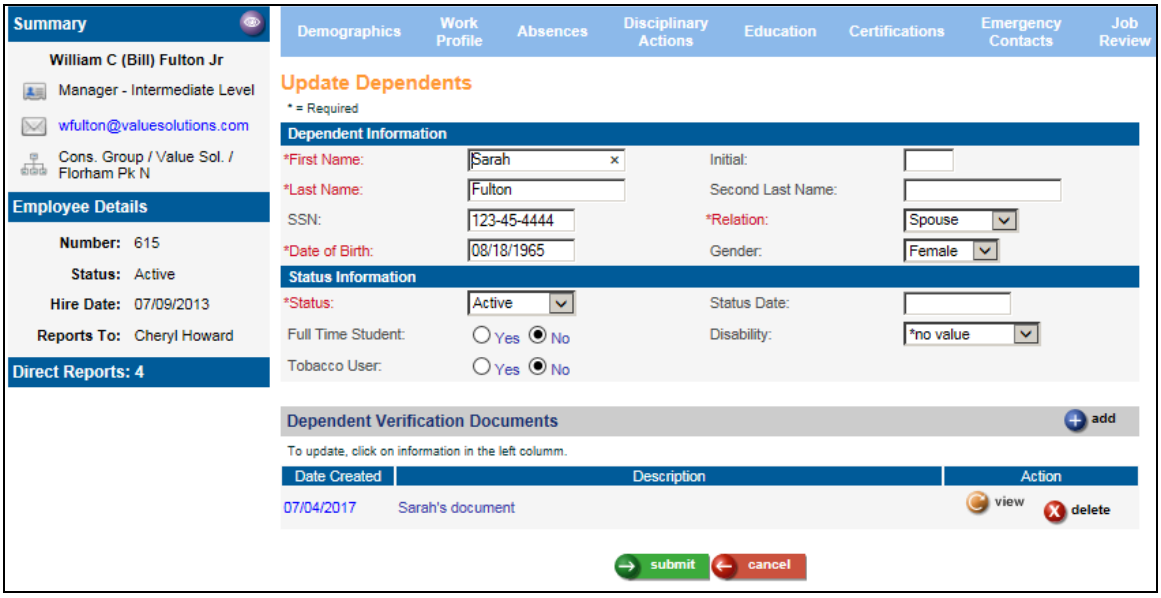
Benefit Enrollment Defaults

In the ESS Online Enrollment Defaults section of Benefit Enrollment **Defaults**, a field has been added called "Display and update Email Address(es) in the Personal Information Page." This field will default to off when Version 2.060 is applied. If you want employees to be able to view and update their email address(es) in **First Time Enrollment** and **Open Enrollment** in Employee Self Service, select the checkbox for this new field. When the checkbox is selected, the Work Email Address, Home Email Address and Alternate Email Address fields will appear with any data that is stored in the system, as shown in the following example. Employees will be able to update this information.



In the ESS Online Enrollment Defaults section of **Benefit Enrollment Defaults**, a field has been added called "Allow Change of Dependent Status in the Dependents Page". This field will default to off when Version 2.060 is applied. Select this checkbox if you want employees to be able to change a dependent's Status in the **First Time Enrollment, Open Enrollment** and **Life Events** functions in Employee Self Service. This could be used, for example, to change an ex-spouse's Status to Suspended or Terminated. This will cause that dependent to no longer appear in the list of dependents that are being enrolled for a particular benefit. This also affects the Dependents page of **Open Enrollment** in Manager Services.

In the ESS Online Enrollment Defaults section of **Benefit Enrollment Defaults**, a field has been added called "Require user to upload Dependent Verification documents". This field will default to off when Version 2.060 is applied. If you select this checkbox, the following functions will require the employee to upload a verification document in Employee Self Service for each dependent that is to be enrolled in a benefit: **First Time Enrollment, Open Enrollment** and **Life Events**. It will also require that a document be uploaded for a dependent who is added or updated in the **Dependents** function. Users in Manager Services can view these documents in the **Dependents** function in the new Dependent Verification Documents section of the Update page. In Manager Services, a document will be required when adding a dependent in the **Dependents** function. Two columns called Verification File (showing the Description associated with the file) and File Load Date will be added to the **Census Report** when you select Dependent Benefits on the Benefits tab; these will only be shown if the new checkbox is selected.



Census Report

If you select the "Require user to upload Dependent Verification documents" checkbox in **Benefit Enrollment Defaults**, two columns called Verification File (showing the Description associated with the file) and File Load Date will be added to the **Census Report** when you select Dependent Benefits on the Benefits tab; these will only be shown if the new checkbox is selected.

Employee Biography

The default view will be changed from Summary View to Event View. Also, if Employee Biography is shown in the Employee Overview, the Event View button will no longer appear, since it was not active from the main page of this function.

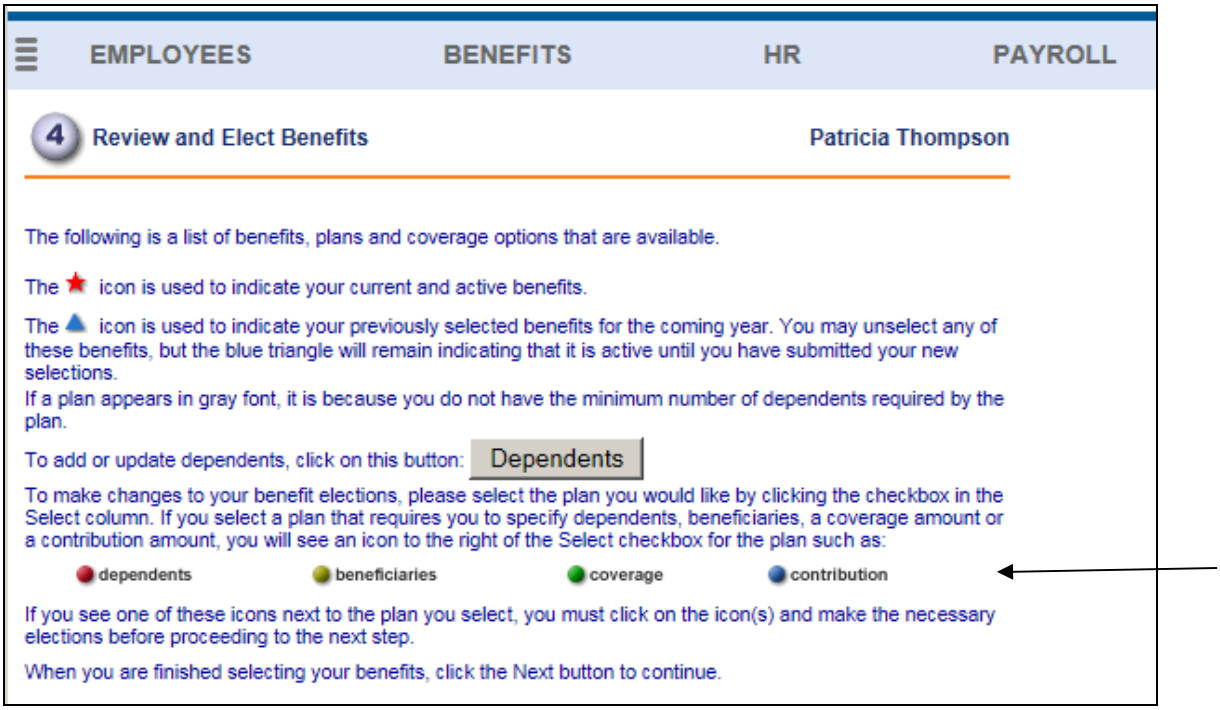
Life Event Preferences

Four codes will be added to the Life Events common object. If you wish to offer these to your employees in the **Life Events** function in Employee Self Service, set them up in **Life Event Preferences, Links, Messaging Setup** and **Employee Security**. Instructions for setting up new life events can be found in the help text for the **Life Event Preferences** function. The new codes are:

Code	Description
11	Employee Ages Out
12	Dependent Ages Out
13	Dependent Eligibility
14	Court Mandated Dependent

Open Enrollment

In **Open Enrollment**, the buttons that appear in the top portion of Step 4 will be shown horizontally instead of vertically, in order to reduce the length of this page. Shown below is an example from Manager Services. This change has also been made in Employee Self Service in **First Time Enrollment, Open Enrollment** and **Life Events**.



In **Open Enrollment**, the system previously highlighted ineligible plans in gray, making them more prominent than plans that an employee was eligible for. As an example, a plan that requires dependents to be enrolled would be highlighted in gray for an employee who had no dependents. This has been changed so that all plans will be shown with a white background; plans that the employee is ineligible to enroll in will be shown in a lighter font. This change has also been made in **Open Enrollment, First Time Enrollment** and **Life Events** in Employee Self Service.

In **Open Enrollment**, the system created a new benefit enrollment record for benefit plans that have a Coverage Amount even if there was no change in the coverage amount or cost. This should not occur; a new benefit enrollment record should only be created if the Coverage Amount has changed or the Cost of the benefit is changing. The program has been changed to no longer create new benefit enrollment records in this scenario. This change has also been made in **Open Enrollment** and **Life Events** in Employee Self Service.

In **Open Enrollment**, when calculating the Remaining Pay Periods for an FSA or HSA plan in which the first Pay Period End Date of the year is in the prior year (for example, 12/31), the system was calculating 25 pay periods instead of 26 for employees with a bi-weekly pay frequency. The program has been changed to count the number of Check Dates in the upcoming year, rather than the number of Pay Period End Dates. This change has also been made in **Open Enrollment** in Employee Self Service.

In **Open Enrollment**, if the pay frequency of an FSA or HSA deduction is defined as two times per month, but the employee's pay frequency is bi-weekly, the calculation of the deduction amount was incorrectly based on 26 pay periods instead of 24. The program that generates the FSA/HSA deduction was not checking to see if the deduction had been defined with a twice a month pay frequency and was using the employee's pay frequency instead. The program has been changed to use the FSA/HSA deduction pay frequency within the employee's deduction record. This change has also been made in **Open Enrollment** in Employee Self Service.

In **Open Enrollment,** if an HSA is selected and Display Employer Costs is selected in **Benefit Enrollment Defaults**, the employer amount will be shown in the Health Savings Accounts section of Steps 5 and 6. If the employer contribution is set up as a one-time employer deduction, a note to this effect will be shown to the employee, and the one-time amount will not be included in the employer column total. This change has also been made to the **Open Enrollment, First Time Enrollment** and **Life Events** functions in Employee Self Service.

In the Health Savings Account section on Step 4 of **Open Enrollment**, the maximum amount from the **Health Savings Account Plans** function appears. Previously, when the employee selected an HSA and entered the amount to be contributed for the year, the system allowed amounts up to this maximum amount. The system has been changed so that the amount that the employee selects will be the maximum amount from the Health Savings Account Plan, minus the Maximum Per Year from **Employer Deduction Contributions** if that amount is not 999,999,999.99. So, for example, if the HSA maximum is $3,650 and the Employer Maximum Per Year is $1,000, the employee must enter an amount $2,650 or less. Instructions will be shown to the employee when he or she enters an amount. This change has also been made to the **Open Enrollment, First Time Enrollment** and **Life Events** functions in Employee Self Service.

Paycheck Calculator

When calculating a paycheck near the end of the year, and the Check Date for the next Pay Period End Date was in the new year, and New Year Administration was not yet run, an error appeared. This has been changed so that the program will get the last Pay Period End Date with a Check Date in the current year, so that the calculations may be performed. This change has also been made in the **Paycheck Calculator** function in Employee Self Service.

Paycheck Information

When viewing the details for a payment in this function, a column for Taxable Wages has been added for each tax type. This shows the amount of wages subject to the tax jurisdiction. This column has also been added to the **Paycheck Information** function in Employee Self Service.

EMPLOYEES | BENEFITS | HR | PAYROLL | REPORTS

Summary

Alexis (Lexi) Inman

Waitress

Cons. Group / Outback / Florida

Employee Details

Number: 170FL103

Status: Active

Hire Date: 06/11/2014

Reports To: Jack B Franklin

Direct Reports: 0

Demographics | Work Profile | Absences | Disciplinary Actions | Education | Certifications | Emergency Contacts | Job Review

Paycheck Information

ok next

Pay Period Start Date	Pay Period End Date	Check Date	Check No	Gross Amount	Net Amount
05/31/2017	06/06/2017	06/13/2017	514598	1,020.00	74.09

Pay Type	Hours	Rate	Amount	Year To Date
Dec. Tips-Cash	0.000	700.0000	700.00	2,080.00
Regular Wages	40.000	8.0000	320.00	1,042.00
Commission				500.00
Vacation Pay				128.00
Gross Pay:			**1,020.00**	**3,750.00**

Tax Type	State	Locality	Taxable Wages	Tax Amount	Year To Date
Federal Income			999.60	137.42	579.76
FICA/Medicare			1,020.00	14.79	54.38
FICA/OASDI			1,020.00	63.24	232.50
Tax Totals:				**215.45**	**866.64**

Deduction	Amount	Year To Date
401(k) Plan	20.40	48.00
Dec. Tip-Cash	700.00	2,080.00
Life Insurance	0.06	0.45
United Way	10.00	17.50
Deduction Totals:	**730.46**	**2,145.95**

Payment Register

In the **Payment Register** function, when the XLS format is chosen, the following changes have been made to the file:

- On the Payment_Master tab, a column for Split Amount has been added, where the gross pay for a split check will be shown.
- On the Payment_Master tab, for “prior period payments voided against the selected date range” and “payments issued and voided against the selected date range”, records with a Void status will display amounts as negatives.
- On the Payment_Detail tab, columns for Payment Type and Payment Status have been added.
- On the Payment_Detail tab, for “prior period payments voided against the selected date range” and “payments issued and voided against the selected date range”, Void payments will have positive amounts shown as negative, and negative amounts shown as positive.

Payment Register, Payment Register By Check Date

In the **Payment Register** and **Payment Register By Check Date** functions, date range limits have been added when you select the detail report. The date range that you enter will be restricted to a maximum of number of days, depending on your employee population selection:

- Consolidated Group selection is limited to 8 days (inclusive)
- Organization and Payroll Processing Group selection is limited to 94 days (inclusive)
- Legal Entity selection is limited to 32 days (inclusive)
- Organization and Date selection is limited to 32 days (inclusive)
- Legal Entity and Payroll Processing Group selection is limited to 94 days (inclusive)
- Employee Number selection is limited to 367 days (inclusive)

If you wish to use a larger date range, you may use the Summary option.

Rate Index

If you changed the Termination Date for a rate index, the system incorrectly changed the “By Hours” setting to “By Length of Service”. As a result, the job class and job grade records were not displayed, since the system was looking for records by Length of Service rather than by Hours. This has been corrected.

Security Reports

The Report ID field allowed 41 characters to be entered. However, when using Internet Explorer 11, an error occurred for a Report ID that was longer than 30 characters. The Report ID field has been changed to only accept up to 30 characters; default Report ID values that were longer than 30 characters have been shortened.

W-2 File Creation

When federal, state or local W-2 files were created in Manager Services and processed in Linux, the command to convert the file to Windows format did not execute. Files are generally accepted in this format also, but Iowa requires that the file be in Windows format. The programs have been changed to convert the files to Windows format.

Work Profile

If you changed the Work Address field from a particular Work Address to *no value and saved the record, and then selected a Work Address and clicked Submit, the system did not save the Work Address that you selected. This has been changed so that the selected Work Address will be saved.

System Processing

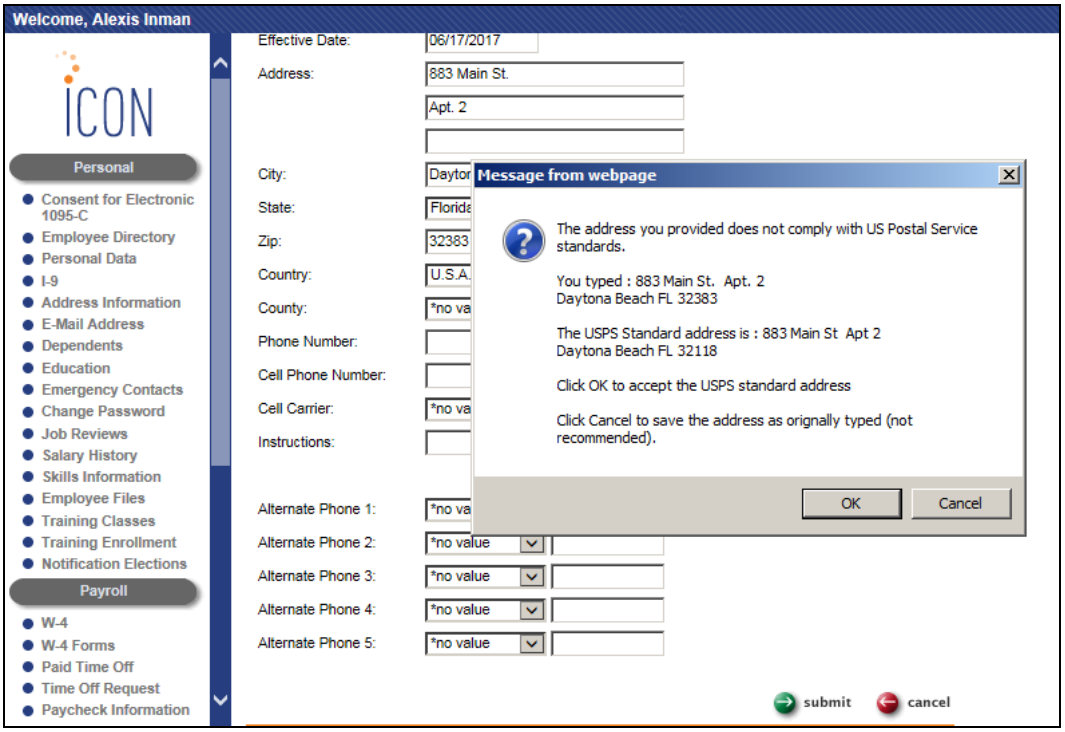
Occasionally, applications would lock up. This has been traced to a locking of the Mail Queue. This issue has been corrected.

Updated Employee Self Service Functions

This section describes the changed functions in Employee Self Service.

Address Information, First Time Enrollment, Life Events, Open Enrollment, Voluntary Benefit Enrollment

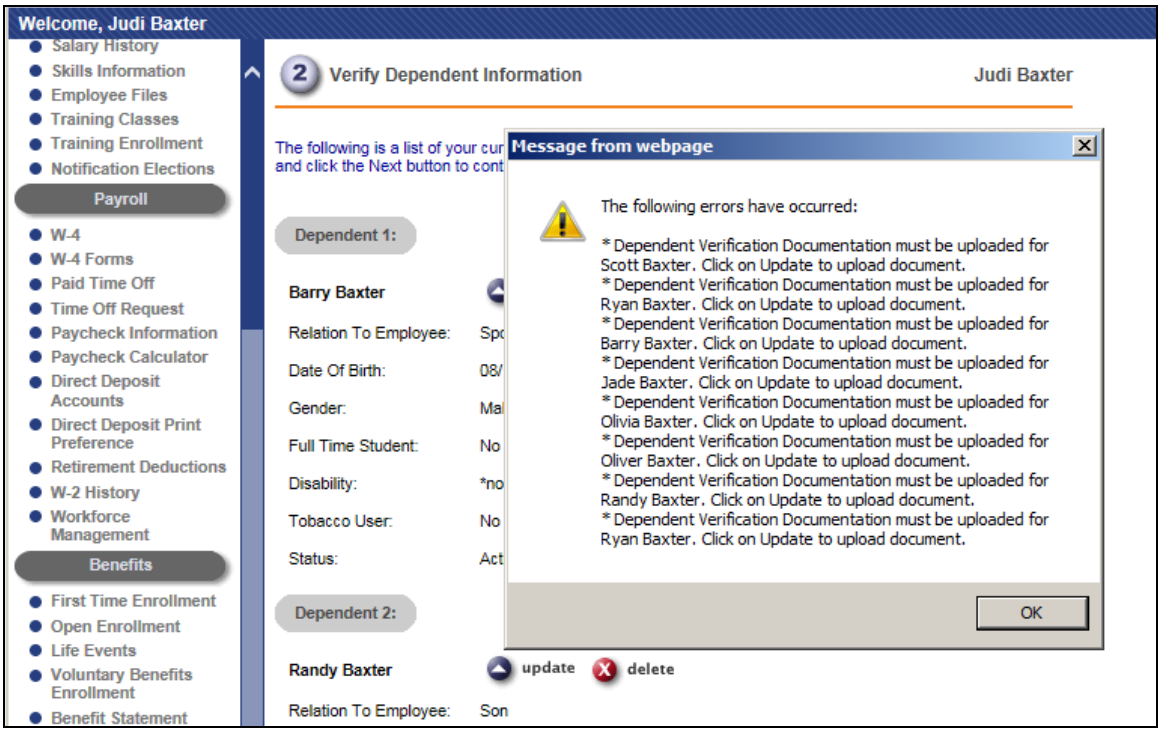
When adding or updating an address in the United States (Country Code USA), the United States Postal Services (USPS) validation routine will be called to ensure that the address is entered correctly. The validation will take place for Address Types that have the Standard Information checkbox selected in the Address Types common object. For example, in the **Address Information** function, if you have an Address Type such as Email Address where Standard Information is off, signifying that the standard address fields are not required, the USPS validation routine will not run. Below is an example of the message that will appear if the entered address does not match what is in the USPS system:



The employee may click OK to accept the address in the USPS system, or click Cancel to save the information that was entered. In some cases, the validation will not have a suggested address. In this scenario, the message will say Address Not Found. It will allow the employee to accept the address as it was entered, or make changes. This validation will also be done in the **Add Employee, Address, Demographics, New Hire** and **Work Address** functions in Manager Services.

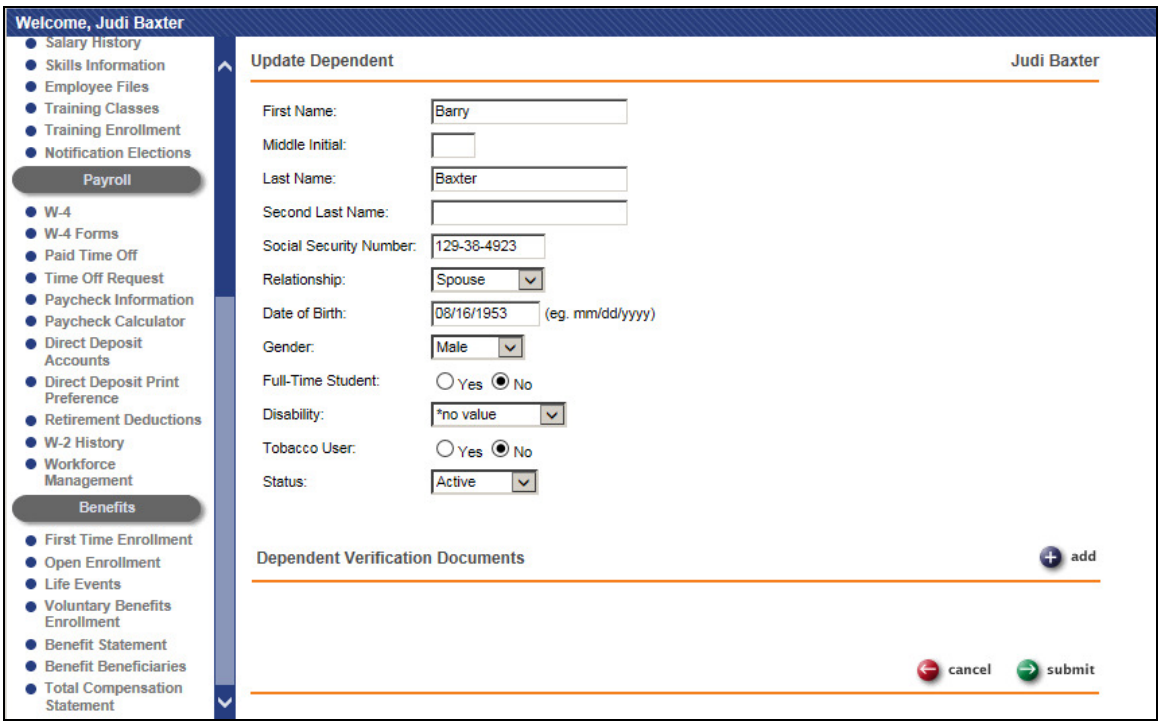
Dependents, First Time Enrollment, Life Events, Open Enrollment

In the ESS Online Enrollment Defaults section of **Benefit Enrollment Defaults**, a field has been added called "Require user to upload Dependent Verification documents". If this checkbox is selected, the following functions will require the employee to upload a verification document for each dependent that is to be enrolled in a benefit: **First Time Enrollment, Open Enrollment** and **Life Events**. It will also require that a document be uploaded for a dependent who is added or updated in the **Dependents** function. If an employee goes into Open Enrollment and dependents are already enrolled, but no document exists for dependents, a message will appear for each dependent who does not have an uploaded document:



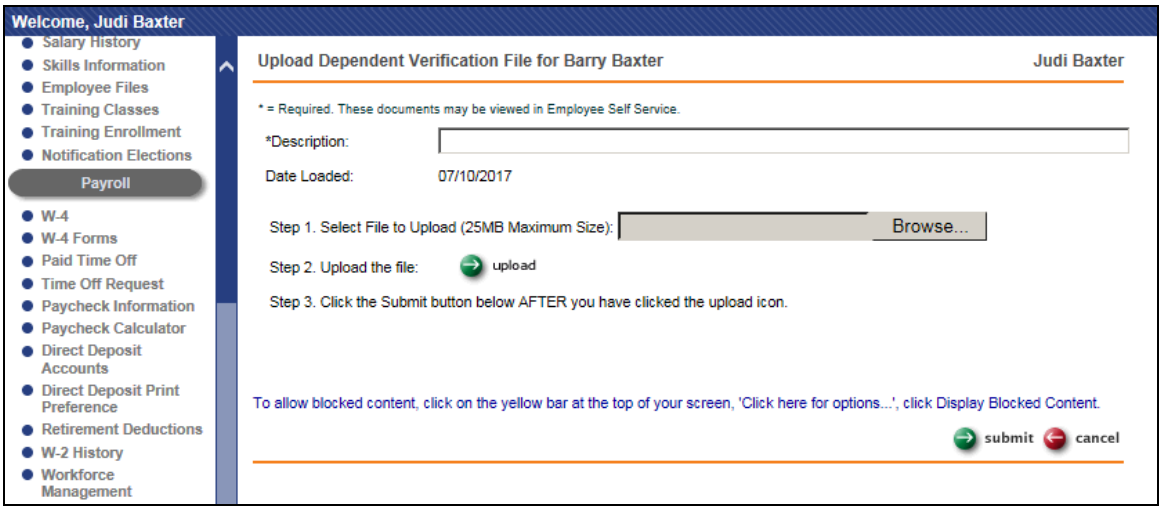
In order to enroll a dependent in a benefit, a document must be uploaded. The system will allow the employee to continue to Step 4 without uploading documents, but the dependent enrollment page will only display dependents who have uploaded documents. From the dependent enrollment page, the employee may click on the Dependents button to upload documents.

When the employee clicks on Update, a section called Dependent Verification Documents will appear at the bottom of the page:



When the employee clicks Add, a page similar to the following appears. A Description of the document is required. Then three steps must be completed:

Step 1: Select the file to upload (by clicking on the Browse button)
Step 2: Click on the Upload button
Step 3: Click on the Submit button

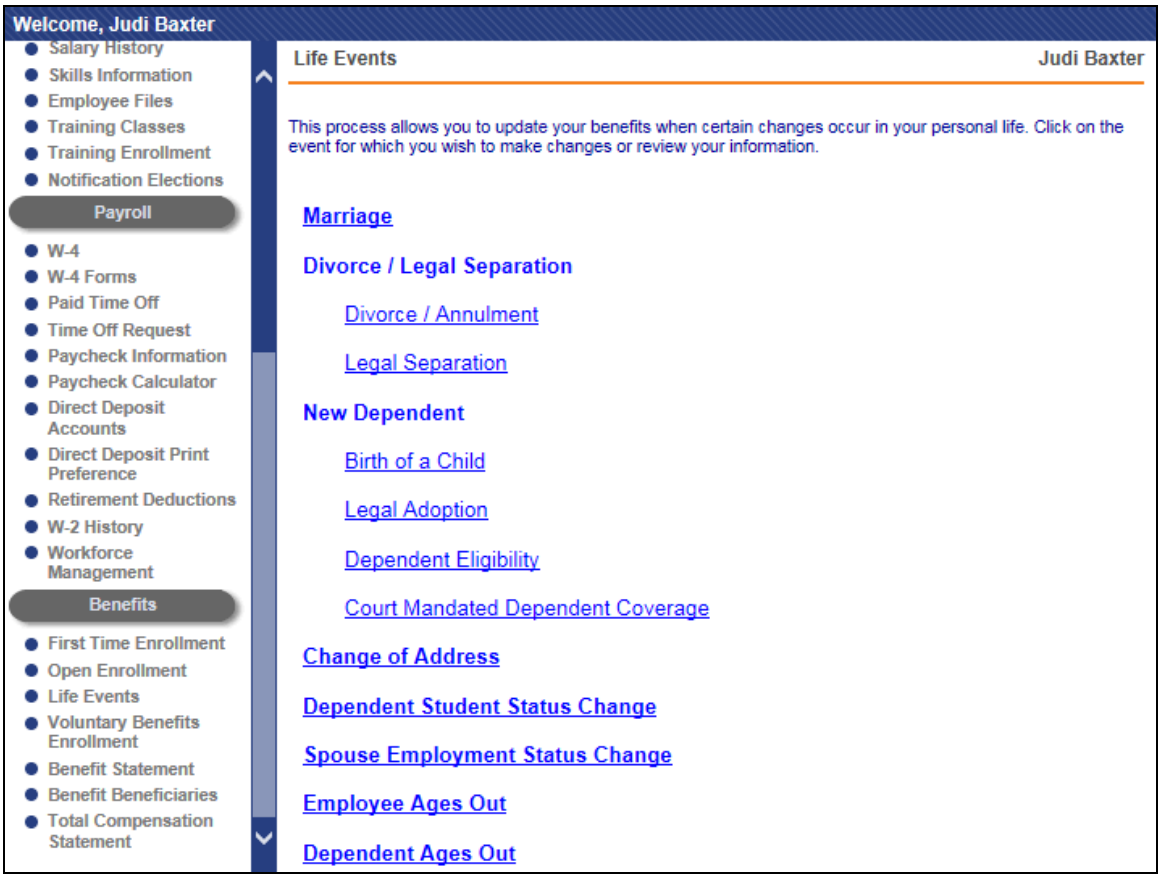


Life Events

Four codes will be added to the Life Events common object. If you wish to offer these to your employees in the **Life Events** function in Employee Self Service, set them up in **Life Event Preferences, Links, Messaging Setup** and **Employee Security**. The new codes are:

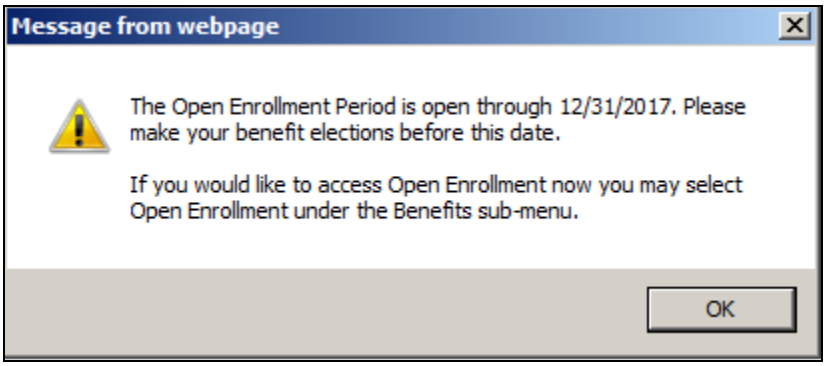
Code	Description
11	Employee Ages Out
12	Dependent Ages Out
13	Dependent Eligibility
14	Court Mandated Dependent

If you give employees the ability to make any of these types of life event changes, they will appear in the **Life Events** function as shown in this example:



Online Enrollment Functions

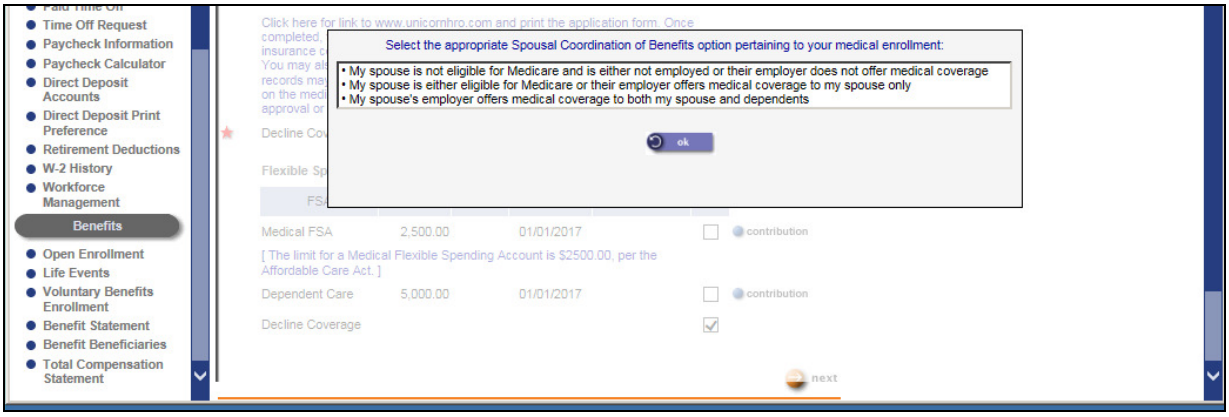
The following change has been made for **Open Enrollment**: When an employee is in the open enrollment period for their Benefit Group, and they have not yet completed Open Enrollment, a message similar to the following will appear when they log on to Employee Self Service. It will show the last date that Open Enrollment is available (as stored in **Benefit Enrollment Defaults** in Manager Services).



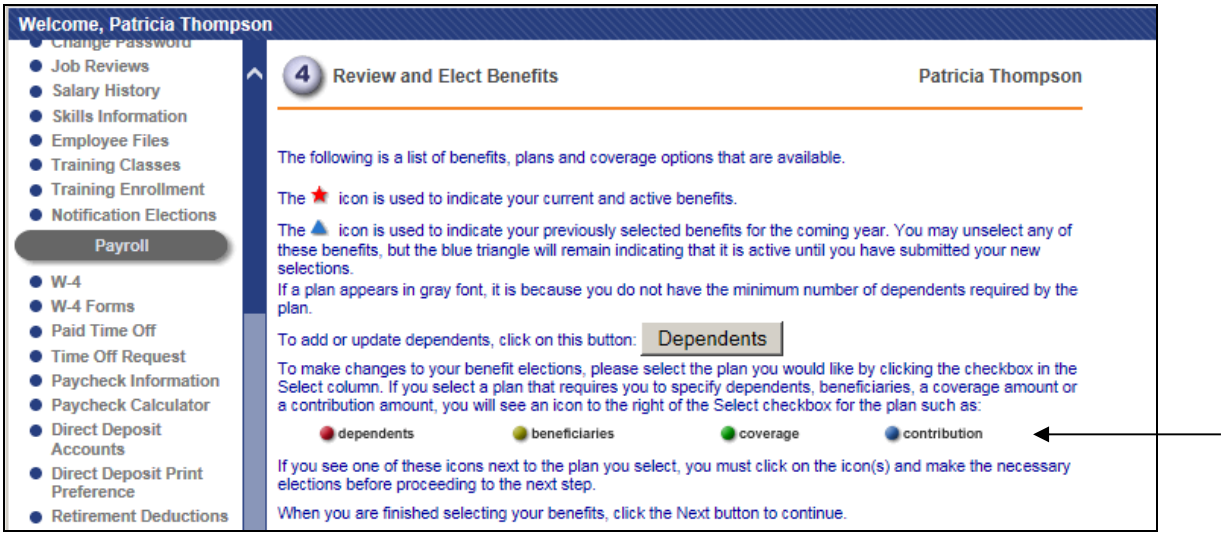
In **First Time Enrollment**, the system will now check the eligibility rules in Flexible Spending Account Plans and Health Savings Account Plans to calculate the start date for any FSA or HSA that the employee selects. If these functions have no eligibility rules, the system will follow the eligibility rules set up for the High Deductible Health Plan; if no rules exist for the HDHP, then the start date will be the Hire Date or today's date, whichever is greater.

In **First Time Enrollment, Open Enrollment** and the Change of Address option in **Life Events**, if an employee only changed their phone number and no other changes were made in Step 1, an email message was generated if set up to send an address change email message in **Messaging Setup**. An email message will no longer be generated in this situation; it will only be generated if the employee makes a change to the address fields.

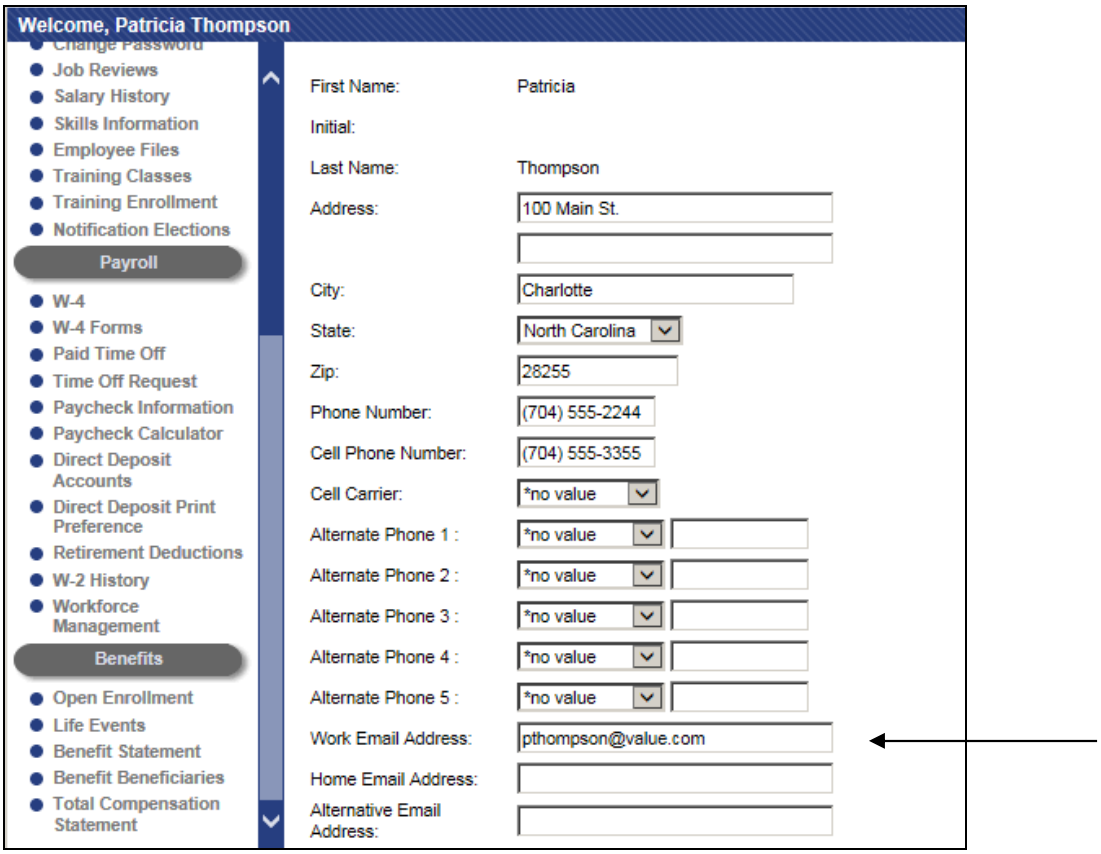
In **First Time Enrollment, Open Enrollment** and **Life Events**, if the employee enrolls a spouse in a medical plan (where the plan has either the Medical Coverage For State New Hire Reporting Purposes checkbox or the ACA Compliant Plan checkbox selected), the system will display the message shown below when the employee clicks Next from Step 4. The employee's response may be viewed in the **Benefit History** function in Manager Services. This information will also be shown in the following Manager Services functions: **Benefit Enrollment** and **Open Enrollment**.



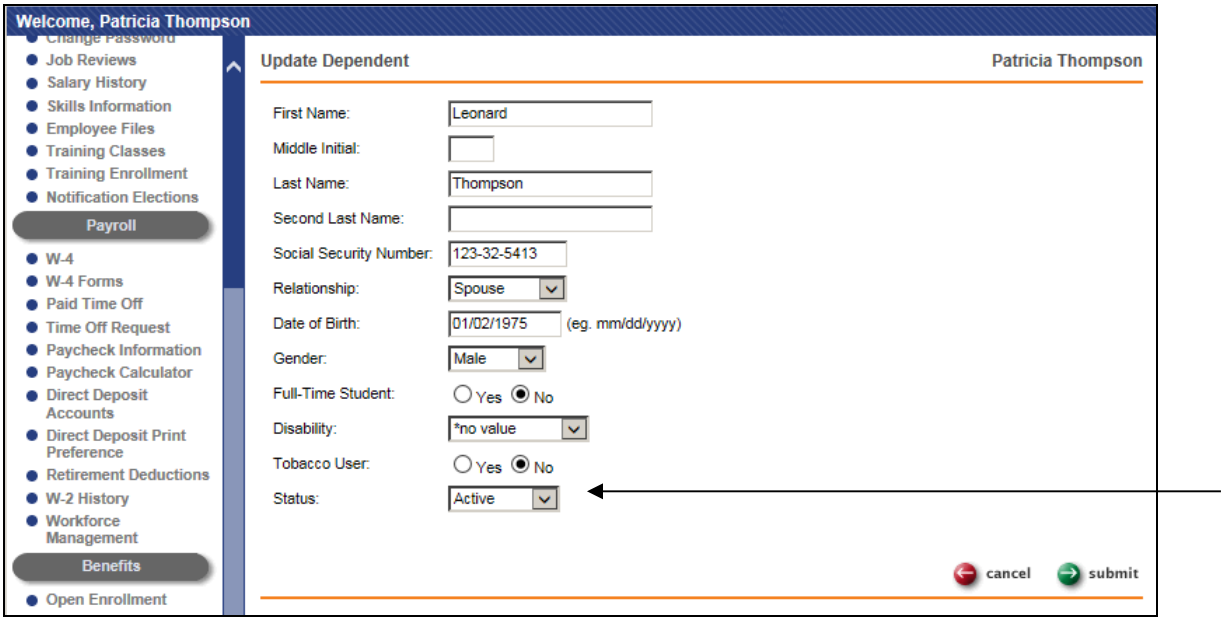
In **Open Enrollment, First Time Enrollment** and **Life Events**, the buttons that appear in the top portion of Step 4 will be shown horizontally instead of vertically, in order to reduce the length of this page. This change has also been made in **Open Enrollment** in Manager Services. Shown below is an example.



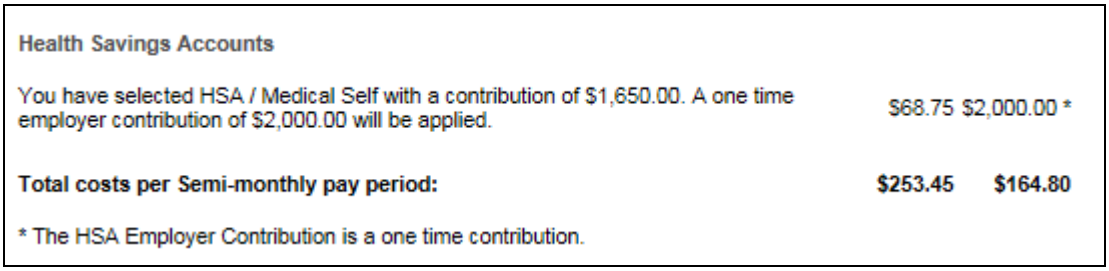
In **First Time Enrollment** and **Open Enrollment**: if you selected the checkbox for "Display and update Email Address(es) in the Personal Information Page" in **Benefit Enrollment Defaults** in Manager Services, the Work Email Address, Home Email Address and Alternate Email Address fields will appear on the Personal Information page of the enrollment process, as shown in this example. The employee may make changes as needed.



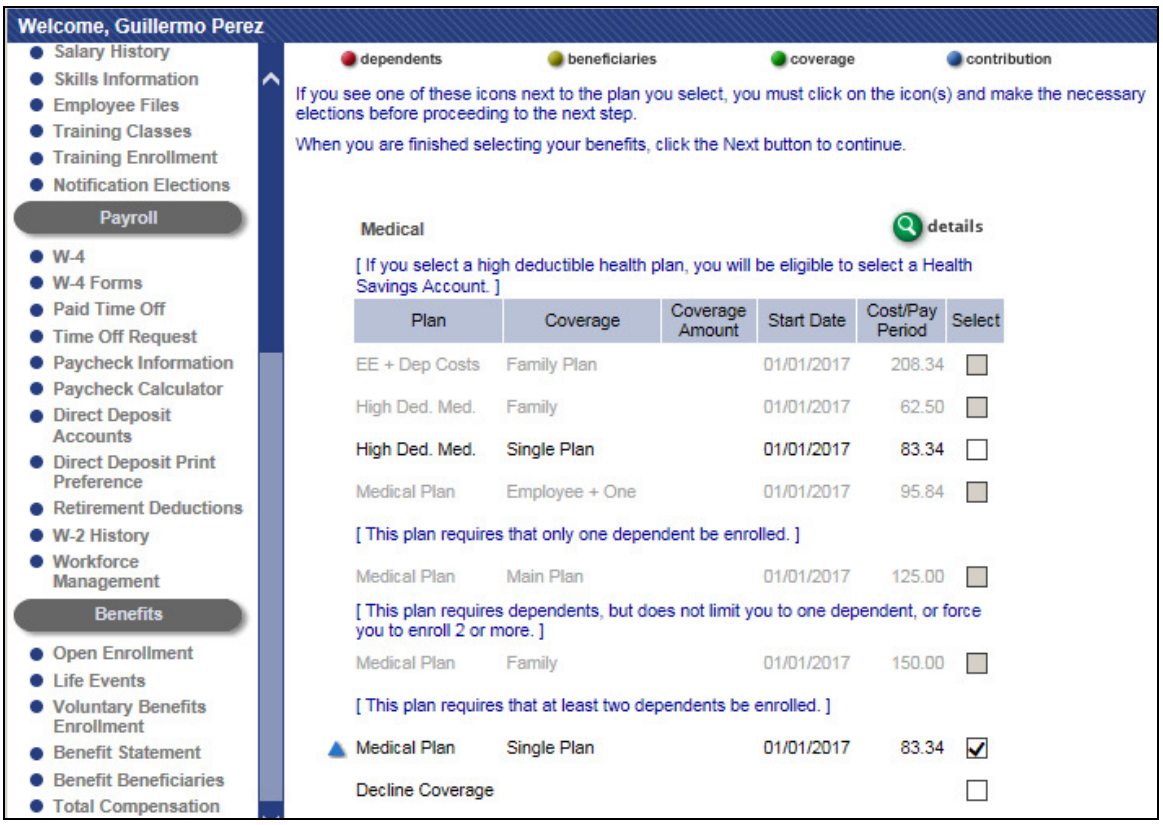
In **First Time Enrollment, Open Enrollment** and **Life Events**, if the field called "Allow Change of Dependent Status in the Dependents Page" is selected in **Benefit Enrollment Defaults** in Manager Services, the employee will be able to change a dependent's status. This could be used, for example, to change an ex-spouse's Status to Suspended or Terminated. This will cause that dependent to no longer appear in the list of dependents that are being enrolled for a particular benefit. Below is an example of when the Dependent Status may be changed by employees:



In **Open Enrollment, First Time Enrollment** and **Life Events**, if an employee selects an HSA and Display Employer Costs is selected in Benefit Enrollment Defaults, the employer amount will be shown in the Health Savings Accounts section of Steps 5 and 6. If the employer deduction is set up as a one time contribution, an explanation will be displayed, as shown in the example below. A one time amount will not be included in the employer column total. This change has also been made to the **Open Enrollment** function in Manager Services.

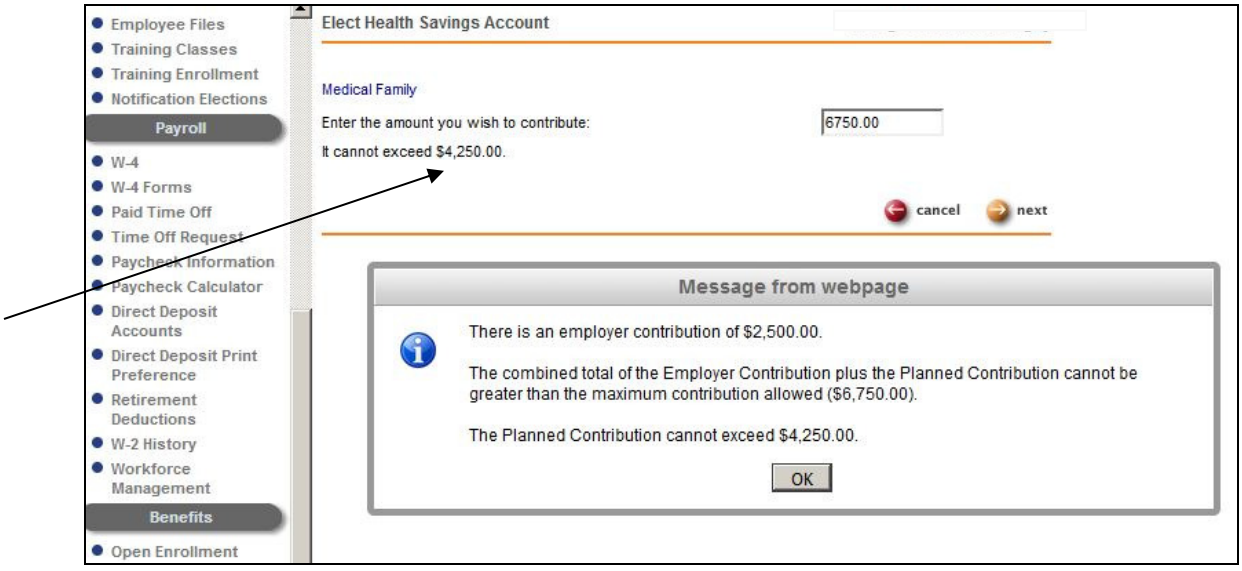


In **Open Enrollment, First Time Enrollment** and **Life Events**, the system previously highlighted ineligible plans in gray, making them more prominent than plans that an employee was eligible for. As an example, a plan that requires dependents to be enrolled would be highlighted in gray for an employee who had no dependents. This has been changed so that all plans will be shown with a white background; plans that the employee is ineligible to enroll in will be shown in a lighter font. This change has also been made in **Open Enrollment** in Manager Services.

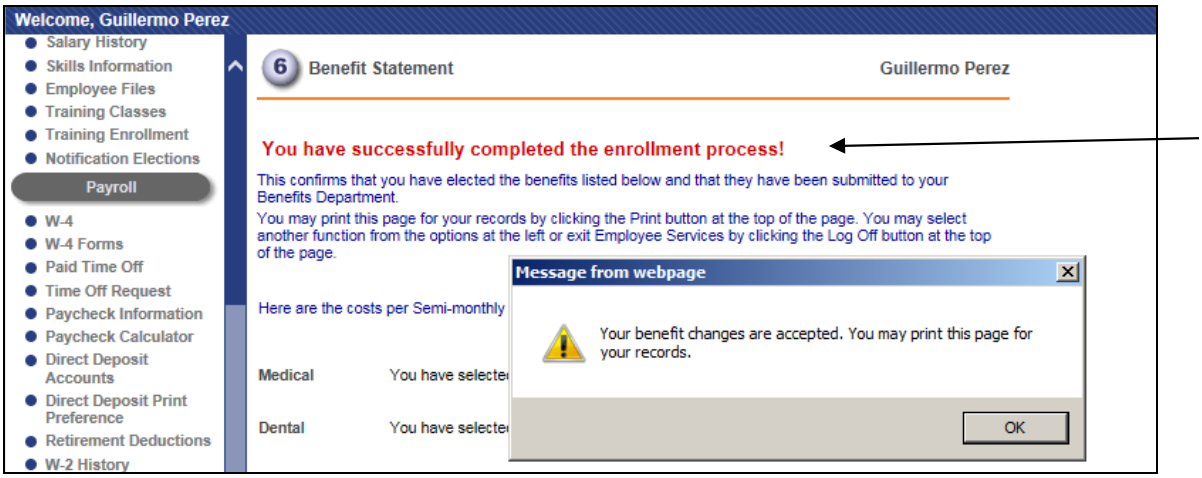


In the Health Savings Account section on Step 4 of **Open Enrollment**, **First Time Enrollment** and **Life Events**, the maximum amount from the Health Savings Account Plans function appears. Previously, when the employee selected an HSA and entered the amount to be contributed for the year, the system allowed amounts up to this maximum amount. The system has been changed so that the amount that the employee selects will be the maximum amount from the Health Savings Account Plan, minus the Maximum Per Year from Employer Deduction Contributions if that amount is not 999,999,999.99. So, for example, if the HSA maximum is $3,650 and the Employer Maximum Per Year is $1,000, the employee must enter an amount $2,650 or less. Instructions will be shown to the employee when he or she enters an amount. This change has also been made to the **Open Enrollment** function in Manager Services. Step 4 of Open Enrollment shows the maximum from **Health Savings Account Plans**:

When the employee enters an amount, the employer deduction Maximum Per Year will be subtracted from the Maximum amount. If the employee tries to enter an amount greater than this, a message will appear:



In **Open Enrollment, First Time Enrollment** and **Life Events**, the system previously displayed a message on the last page: "You have successfully completed the enrollment process." This will be shown in a larger font so that it is more noticeable to the employee and they know that their changes have been recorded.



In **Open Enrollment**, the system created a new benefit enrollment record for benefit plans that have a Coverage Amount even if there was no change in the coverage amount or cost. This should not occur; a new benefit enrollment record should only be created if the Coverage Amount has changed or the Cost of the benefit is changing. The program has been changed to no longer create new benefit enrollment records in this scenario. This change has also been made in **Open Enrollment** in Manager Services.

In **Open Enrollment**, when calculating the Remaining Pay Periods for an FSA or HSA plan in which the first Pay Period End Date of the year is in the prior year (for example, 12/31), the system was calculating 25 pay periods instead of 26 for employees with a bi-weekly pay frequency. The program has been changed to count the number of Check Dates in the upcoming year, rather than the number of Pay Period End Dates. This change has also been made in **Open Enrollment** in Manager Services.

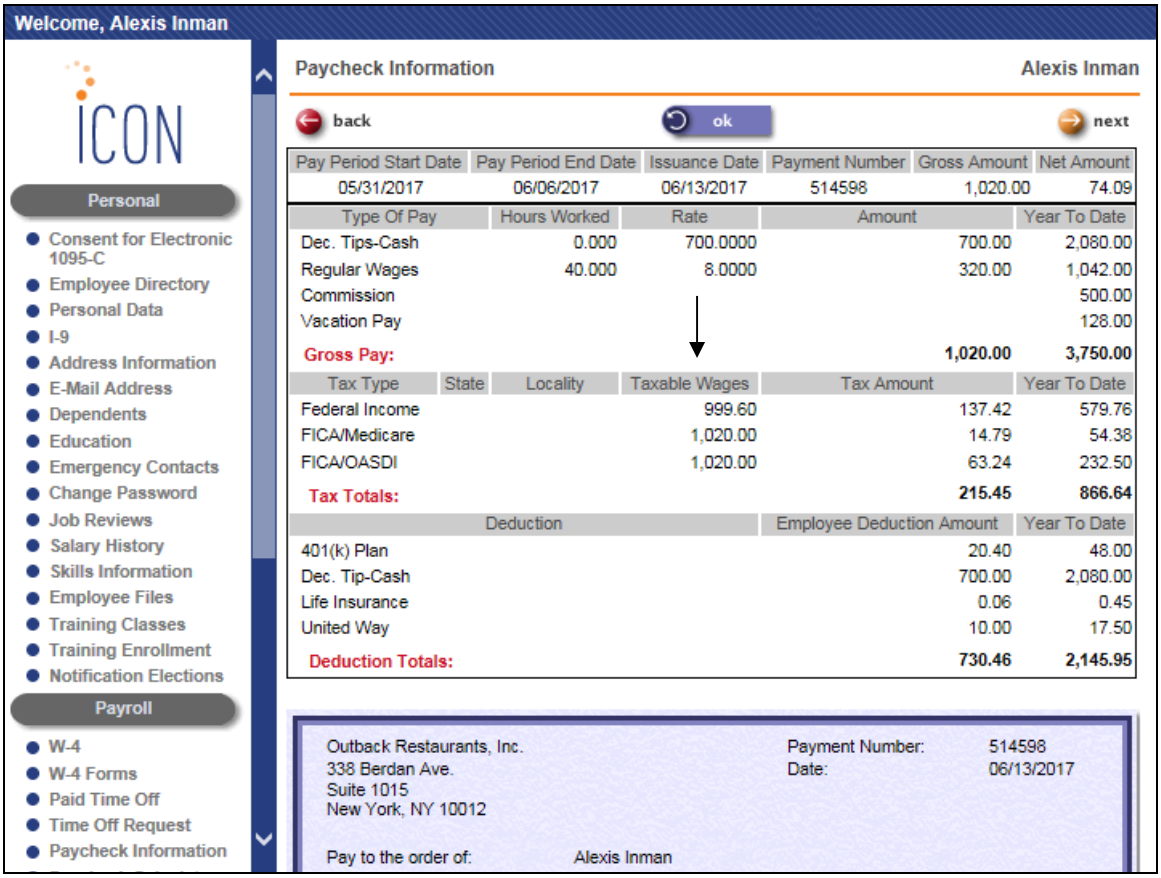
In **Open Enrollment**, if the pay frequency of an FSA or HSA deduction is defined as two times per month, but the employee's pay frequency is bi-weekly, the calculation of the deduction amount was incorrectly based on 26 pay periods instead of 24. The program that generates the FSA/HSA deduction was not checking to see if the deduction had been defined with a twice a month pay frequency and was using the employee's pay frequency instead. The program has been changed to use the FSA/HSA deduction pay frequency within the employee's deduction record. This change has also been made in **Open Enrollment** in Manager Services.

Paycheck Calculator

When calculating a paycheck near the end of the year, and the Check Date for the next Pay Period End Date is in the new year, and New Year Administration has not yet been run, an error appeared. This has been changed so that the program will get the last Pay Period End Date with a Check Date in the current year, so that the calculations may be performed. This change has also been made in the Paycheck Calculator function in Manager Services.

Paycheck Information

On the page that displays the details of the payment, a column for Taxable Wages has been added. This column has also been added to the Paycheck Information function in Manager Services.



Updated iCON Tools Functions

This section describes the changed functions in the iCON Tools module.

Activate New Hire, Employee Direct, Employee Compensation

If you select the Rate Index method in the Salary section, the system will now only display the valid Job Classes in the drop-down list for the rate index that you selected, based on current data from the **Rate Indexes** function. Once you select a Job Class, the system will only display the valid Job Grades. Previously, all entries from the Job Class and Job Grade common objects were displayed in these fields.

Activate New Hire, Employee Direct, Employment Status Assignment, Separation Process

If you set up valid Status Reasons for each Employment Status in **Employment Status Definition** in Manager Services**,** the Status Reason field in these functions will only display the allowable reasons for the Status that you select. If valid Status Reasons have not been set up for the Employment Status you select, the system will display all values from the Status Change Reasons common object in the Status Reason field.

Payment Register, Payment Register By Check Date

In the **Payment Register** and **Payment Register By Check Date** functions, date range limits have been added when you select the detail report. The date range that you enter will be restricted to a maximum of number of days, depending on your employee population selection:

- Consolidated Group selection is limited to 8 days (inclusive)
- Organization and Payroll Processing Group selection is limited to 94 days (inclusive)
- Legal Entity selection is limited to 32 days (inclusive)
- Organization and Date selection is limited to 32 days (inclusive)
- Legal Entity and Payroll Processing Group selection is limited to 32 days (inclusive)
- Employee Number selection is limited to 367 days (inclusive)

If you wish to use a larger date range, you may use the Summary option. This change has also been made in the Manager Services module.