



Version 2.062 Release Notes

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Version 2.062 Checklist

Certain new features in Version 2.062 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. <ul style="list-style-type: none"> • Benefit Eligibility Report • Employee Deletion • Employee Deletion Reset • Organization Level Description • Pay Calendar Copy (Hosted/On Premise clients only) • Pay Cycle Maintenance (Hosted/On Premise clients only) • Positive Pay Extract Interface • Report Security Setup • Set Current Dates (Hosted/On Premise clients only) • SIT File Creation (Hosted/On Premise clients only) • User Exits (Includes Deduction User Exits, Pay Code User Exits, and Tax User Exits) • Voluntary Self-Identification of Disability • Voluntary Self-Identification of Disability Report 		
New Employee Self-Service Function:		
Assign Employee Security to the following new function in Manager Services for applicable ESS Login Groups <ul style="list-style-type: none"> • Voluntary Self-Identification of Disability 		

Overview

Version 2.062 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 in the Employment menu in Manager Services:

- Voluntary Self-Identification of Disability

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

- Organization Level Description

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

- Employee Deletion
- Employee Deletion Reset

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

- Pay Calendar Copy (Hosted/On Premise clients only)
- Pay Cycle Maintenance (Hosted/On Premise clients only)
- User Exits

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

- Positive Pay Extract Interface

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

- Benefit Eligibility Report
- SIT File Creation (Hosted/On Premise clients only)
- Voluntary Self-Identification of Disability Report

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

- Report Security Setup
- Set Current Dates (Hosted/On Premise clients only)

The following function will be added in the Personal menu in Employee Self Service:

- Voluntary Self-Identification of Disability

State Taxes

Oregon Statewide Transit Tax

Beginning July 1, 2018, all Oregon Employers are required to withhold one-tenth of 1 percent (or .001) from:

- Wages of Oregon residents (regardless of where the work is performed).
- Wages of nonresidents who perform services in Oregon.

With this release, a record will be created in Manager Services Tax Elections (iCON Tools Employee Tax Options) for this new Transit Tax Effective 07/01/2018 for all Employees that have been assigned Oregon State Income Tax.

iCON Clients must review Pay Taxation Exemptions and Deduction Taxation Exemptions functions for correct setup for this new State Tax.

Summary	Demographics	Work Profile	Absences	Disciplinary Actions	Education	Certifications
Jefferson Clark Manager - Intermediate Level Cons. Group / Outback / Oregon Employee Details Number: 170OR2 Status: Active Hire Date: 06/18/2008 Reports To: Margaret P. Smith, Jr. Direct Reports: 0	Tax Elections To update, click on information in the left column. Click to access the address lookup site for: New York City/Yonkers, Ohio cities, Ohio school districts, Pennsylvania localities					
Federal: + add						
Eff. Check Date	Tax Type	Filing Status	Exempt.	Active	Action	
06/18/2008	Fed. Unempl.	*no value	000	yes	view	delete
06/18/2008	Federal Income	Single	001	yes	view	delete
06/18/2008	FICA/Medicare	*no value	000	yes	view	delete
06/18/2008	FICA/OASDI	*no value	000	yes	view	delete
State: + add						
Eff. Check Date	State	Tax Type	Filing Status	Exempt.	Active	Action
07/01/2018	Oregon	Transit Tax	*no-value	000	yes	view delete
06/18/2008	Oregon	Income Tax	Single	001	yes	view delete
06/18/2008	Oregon	Unemployment	*no-value	000	yes	view delete
06/18/2008	Oregon	Workers Comp.	*no-value	000	yes	view delete

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.

Benefit Eligibility Report

In the Reports menu, the Benefit Eligibility Report is a report that identifies employees who are assigned to a specific benefit group. When there is a change in the cost of a benefit, you can use this report to determine which employees have to be notified.

You have the option to report information for all employees in the Benefit Group, or select a group of employees by length of service, age, or annual hours worked, that have an Employment Status of Active as of the Effective Date entered in the selection criteria.

Benefit Eligibility Report

* = Required

Selection:

Benefit Group:

Age

From:

To:

Length of Service

From:

To:

Annual Hours

From:

To:

Print SSN: ☒

Print Employee Number: ☐

*Effective Date:

*Report ID:

The report displays the name of the benefit group, effective date of the information, and the eligibility criteria you specified, if any.

Here is an example of the report:

Date: 04/06/2018
Time: 04:27PM

Benefits Eligibility

Page: 1

User: MRUBERTC

Eligibility Criteria: Age From 0 to 55 LOS From 0 Years To 25 Years Annual Hours From 2081 To 9999

Benefit Group: Full Time Employees

As Of: 04/06/2018

Last Name	First Name	Init	Employee SSN	Original Hire Date	Employee Status	Length of Service			Annual Hours Scheduled
						Years	Months	Age	
Adams-Jones	Kristin		299239892	01/07/2008	Active	10	3	54	4,160
Ago	Chic		147558858	07/01/2017	Active		9	29	4,524
Allen	Rodney		888556666	01/01/2017	Active	1	3	51	4,160
Chavez	Luis		239983289	08/22/2013	Active	4	7	50	4,056
Crowley	Alberta		228822882	02/09/2010	Active	8	1	47	4,420
Cushing	Matt	D	239849348	04/09/2004	FMLA Leave	13	12	40	4,160
Douma	Allison		234823948	10/26/2010	Active	7	5	38	3,016
Duck	Daisy		223345654	01/05/2015	Active P/T	3	3	52	3,744
Falconeri	Olivia		448555245	01/17/2018	Active		2	53	4,160
Germain	Donna		239489823	03/23/2009	Active	9		37	5,200
Gibson	Heather		328294823	11/16/2010	Active	7	4	25	4,160
Jackson	Marianne		292384932	07/09/2013	Active	4	9	16	5,200
Jean	Barbra		222556655	01/05/2018	Active		3	53	4,524

Employee Deletion

In the HR Actions menu, this function is used to delete an employee number from the system. An employee with payroll dollars cannot be deleted from the system. In order to delete an employee, you must have Organization Security of either Full Authority, Salary Inquiry or No Salary Authority. When the Employee Deletion process is run, information for the selected employee will be deleted from all tables.

Summary Bobby Brady Administrative Assistant Cons. Group / BRITE STAR / DIV 01 / CUST SVC	Demographics Work Profile Absences Disciplinary Actions Education Certifications Emergency Contacts
Employee Deletion Click on the Submit button to run Employee Deletion Process.	
<input type="button" value="submit"/>	
Employee Details Number: 900055 Status: Active Hire Date: 01/01/2018 Reports To:	

Employee Deletion Reset

In the HR Actions menu, the Employee Deletion Reset function has been added. If, for some reason, the Employee Deletion process does not complete normally, use the Employee Deletion Reset function to reset the flag that is set while the deletion process is running. This will allow you to submit another Employee Deletion process. The flag should only be reset when you are sure that the deletion process is no longer running.

Employee Deletion Reset Click on the Submit button if a Employee Deletion process was submitted but did not complete normally. This will reset the flag that allows another Employee Deletion process to be run.
<input type="button" value="submit"/>

Organization Level Description

In the HR Setup menu, the Organization Level Description function allows you to define each level in the organization structure. For reporting or grouping purposes, you may define up to 7 levels within your structure. The legal entity (FEIN) must correspond to level 2.

Organization Level Description

To update, click on information in the left column.

Level Number	Level Description	Window Value	Action
1	Corporation	Corp.	
2	Company	Comp.	
3	Division	Division	
4	Dept	Dept	
5	Team	Team	
6	State	State	
7	Region	Region	 delete



Update Organization Level Description

* = Required

Level Number: 1

*Level Description:

*Window Value:

Enter the necessary information as follows:

Field	Description
*Level Number	This value is assigned by the system based on the previous level number. It is shown as display-only and cannot be changed.
*Level Description	Enter the description for this organization level. This field accepts up to 11 alphanumeric characters.
*Window Value	Enter the description that will appear on iCON windows and reports for this organization level. This field accepts up to 8 alphanumeric characters.

**indicates field is mandatory*

Pay Calendar Copy

In the Payroll Setup menu, the Pay Calendar Copy function allows you to copy pay calendar dates and information. You can choose to copy pay dates from one legal entity to another, from one payroll processing group to another, from one year to another, or any combination of these factors.

This function has three sections: the From section, the To section, and the Options section.

In the From section, make selections that identify the calendar you want to copy, then specify where you want the calendar copied in the To section.


In the Options section, indicate how you want to handle dates that will fall on Saturday and Sunday in the new pay year. If a date falls on a Saturday, you can change the date to Friday. If a date falls on a Sunday, you can change the date to Friday or Monday.

Pay Calendar Copy

* = Required

From:	
*Legal Entity:	Brite Star ▼
*Year:	2017 ▼
*Payroll Processing Group:	Bi weekly ▼
To:	
*Legal Entity:	Brite Star ▼
*Year:	2000 ▼
*Payroll Processing Group:	Bi weekly ▼

☒ Move to Friday if pay period end date falls on Saturday
 ☐ Move to Monday if pay period end date falls on Sunday
 ☐ Move to Friday if pay period end date falls on Sunday

 copy

In certain cases, the system will be unable to copy dates. For example, you choose to change Saturday dates to Friday, and a Friday falls in the previous month. If the End of the Month pay date has already been designated for the previous month, the system won't add another date with the same designation. When situations like this occur, you can edit the Pay Dates using the Pay Calendars function.

Pay Cycle Maintenance

In the Payroll Setup Menu, the Pay Cycle Maintenance function allows you to change the Pay Cycle Closed or Tax Data Created field for a particular Pay Period End Date from Yes to No. Changing the Pay Cycle Closed field from Yes to No allows you to be able to process a manual payment or void a payment against this Pay Period End Date, if needed. Changing the Tax Data Created field from Yes to No allows you to re-run the Payroll Tax Summary Interface function for the Pay Period End Date, if needed.

This function displays the same information as Pay Calendars. However, only the Pay Cycle Closed and Tax Data Created fields can be updated.


Pay Cycle Maintenance

* = Required

Selection Parameters:

*Legal Entity:

*Payroll Processing Group:

 next

Pay Cycle Maintenance

Click on a Pay Period End Date (shown in bold) and click Next.


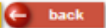
Selection:

Legal Entity:

Payroll Processing Group:

2018

January							February							March							April						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
	1	2	3	4	5	6					1	2	3					1	2	3	1	2	3	4	5	6	7
7	8	9	10	11	12	13	4	5	6	7	8	9	10	4	5	6	7	8	9	10	8	9	10	11	12	13	14
14	15	16	17	18	19	20	11	12	13	14	15	16	17	11	12	13	14	15	16	17	15	16	17	18	19	20	21
21	22	23	24	25	26	27	18	19	20	21	22	23	24	18	19	20	21	22	23	24	22	23	24	25	26	27	28
28	29	30	31				25	26	27	28				25	26	27	28	29	30	31	29	30					
May							June							July							August						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
		1	2	3	4	5					1	2	1	2	3	4	5	6	7				1	2	3	4	
6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14	5	6	7	8	9	10	11
13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21	12	13	14	15	16	17	18
20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28	19	20	21	22	23	24	25
27	28	29	30	31			24	25	26	27	28	29	30	29	30	31					26	27	28	29	30	31	
September							October							November							December						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
						1		1	2	3	4	5	6					1	2	3							1
2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10	2	3	4	5	6	7	8
9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17	9	10	11	12	13	14	15
16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24	16	17	18	19	20	21	22
23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30	23	24	25	26	27	28	29	
30																					30	31					

 next  back

First, enter the Legal Entity and Payroll Processing Group you want to work with and click Next. This brings up the Pay Calendar for that Payroll Processing Group. Select a Pay Period End Date (these dates are highlighted in bold text), and click Next. You can also scroll back and forth to earlier and later years using the arrow buttons above the calendar.

Update Pay Cycle Maintenance

* = Required

Selection:	
Legal Entity:	Outback Group
Payroll Processing Group:	Outback-PR OR
Pay Period End Date:	03/12/2018
*Pay Cycle Closed:	<input type="text" value="no"/>
*Tax Data Created:	<input type="text" value="no"/>
Check Date:	03/12/2018
Number of Weeks Worked:	1

<input type="checkbox"/> End of Month	<input type="checkbox"/> 1st Pay Period of Month
<input type="checkbox"/> End of Quarter	<input checked="" type="checkbox"/> 2nd Pay Period of Month
<input type="checkbox"/> Semi-Annual	<input type="checkbox"/> 3rd Pay Period of Month
<input type="checkbox"/> End of Year	<input type="checkbox"/> 4th Pay Period of Month
	<input type="checkbox"/> 5th Pay Period of Month

On the Update Pay Cycle Maintenance screen, you can change either the Pay Cycle Closed field or that Tax Data Created field, and click Submit to process the change, or click Cancel to return to the previous screen.

Positive Pay Extract Interface

In the Payroll Processing menu, the Positive Pay Extract Interface function allows a file to be created which contains information that can then be sent to your bank. The bank uses this information when a check is cashed or deposited to verify that your company has in fact issued this check, in order to prevent check fraud. Checks must be produced using the Check Print function before the Positive Pay Extract Interface file can be created.


Only Check information is written to this file, Voucher information is not written and Voided checks are written to the file with a special code.


When the job finishes, you may view the file in Report Master Listing.

The name of the file is "<job number>-POS_<legal entity code><mmdyy of Pay Period End Date>.txt". This resulting text file generally contains a header record, detail records, and a trailer record. The general format of the file is detailed in the Manager Services Help Text on this function, however before using this function, check with your bank to determine the format of the file that they will accept. The format described in the help text may need to be modified according to your bank's specifications.



Positive Pay Extract Interface

* = Required

*Legal Entity: 

*Pay Period End Date: 

Company Code:

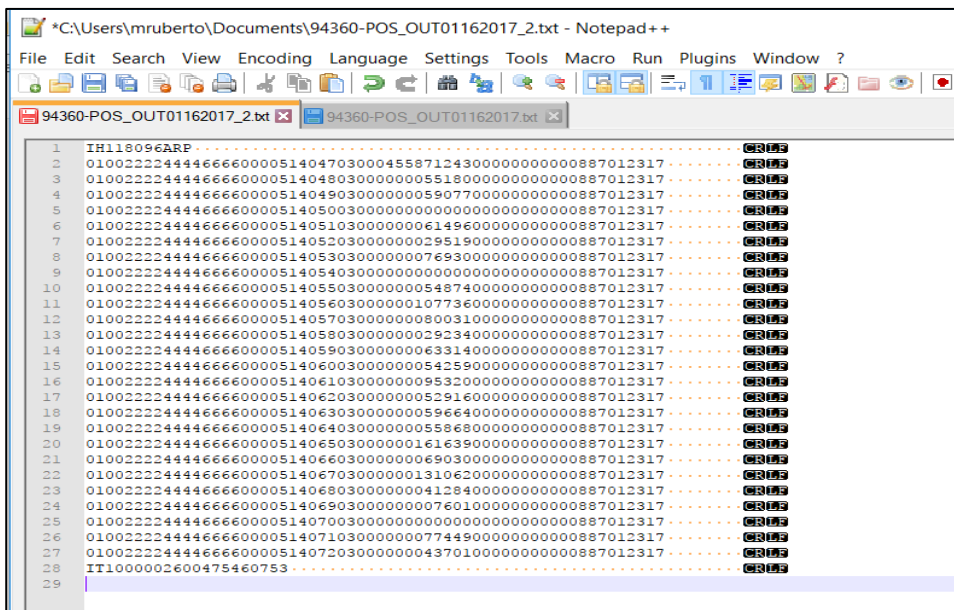
 

Enter the necessary information as follows:

Field	Description
*Legal Entity	Click on the down-arrow and select the legal entity you want to work with.
*Pay Period End Date	Enter the Pay Period End Date of the checks for which the file will be created.
Company Code	Enter the company code that the bank requires on the file, if applicable.

**indicates field is mandatory*

Here is an example of the file as formatted per the help text, opened in Notepad++:



```

1 IH118096ARP.....03103
2 010022224444666600005140470300045587124300000000000887012317.....03103
3 0100222244446666000051404803000000005518000000000000887012317.....03103
4 0100222244446666000051404903000000005907700000000000887012317.....03103
5 010022224444666600005140500300000000000000000000000887012317.....03103
6 0100222244446666000051405103000000006149600000000000887012317.....03103
7 0100222244446666000051405203000000002951900000000000887012317.....03103
8 010022224444666600005140530300000000769300000000000887012317.....03103
9 0100222244446666000051405403000000000000000000000887012317.....03103
10 010022224444666600005140550300000000548740000000000887012317.....03103
11 010022224444666600005140560300000001077360000000000887012317.....03103
12 010022224444666600005140570300000000800310000000000887012317.....03103
13 010022224444666600005140580300000000292340000000000887012317.....03103
14 010022224444666600005140590300000000633140000000000887012317.....03103
15 01002222444466660000514060030000000054259000000000887012317.....03103
16 01002222444466660000514061030000000095320000000000887012317.....03103
17 01002222444466660000514062030000000052916000000000887012317.....03103
18 0100222244446666000051406303000000005966400000000887012317.....03103
19 01002222444466660000514064030000000055868000000000887012317.....03103
20 01002222444466660000514065030000000161639000000000887012317.....03103
21 0100222244446666000051406603000000006903000000000887012317.....03103
22 01002222444466660000514067030000000131062000000000887012317.....03103
23 01002222444466660000514068030000000041284000000000887012317.....03103
24 0100222244446666000051406903000000007601000000000887012317.....03103
25 010022224444666600005140700300000000000000000000887012317.....03103
26 0100222244446666000051407103000000077449000000000887012317.....03103
27 01002222444466660000514072030000000043701000000000887012317.....03103
28 IT1000002600475460753.....03103
29

```

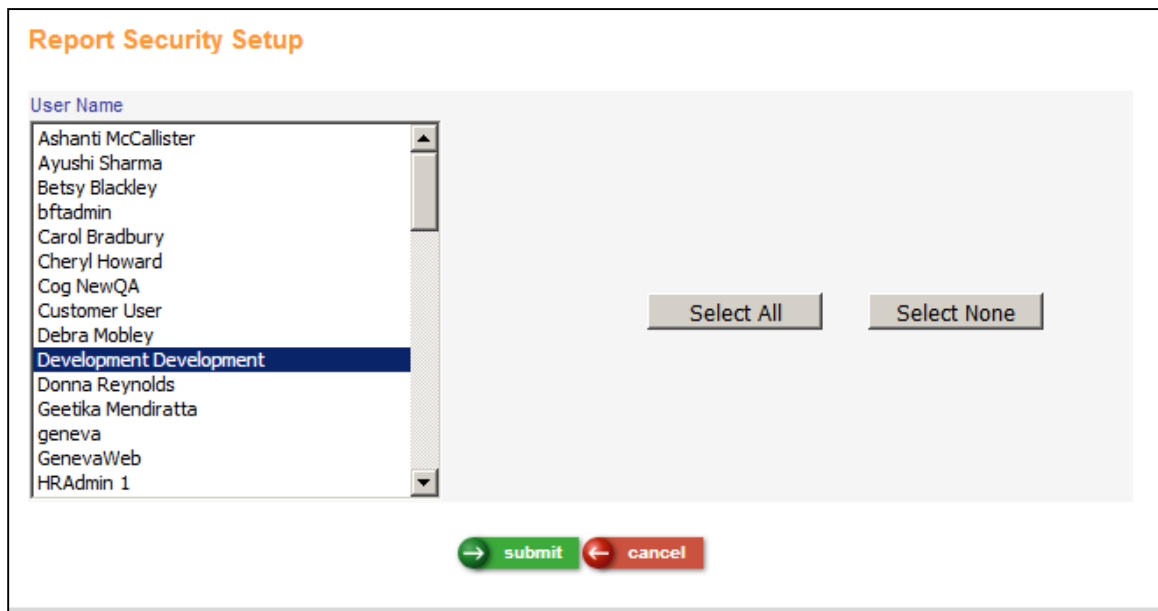
Report Security Setup

In the Tools menu, the Report Security Setup function has been added. When you run this function, Organization Security settings will carry over to the ad hoc, or custom, reporting catalog for each iCON user you specify.

This function creates a table of all employees whose information each user has authority to. This table is used when each user creates an ad hoc report. The user will only be able to print information about the employees they have authority to.

We recommend that you run this function frequently to keep the security settings up to date.

Note: You don't need to run this function for users who only use the standard iCON reports. Organization Security is automatically applied to those reports.



The screenshot shows a window titled "Report Security Setup" with a light gray background. On the left, there is a list box labeled "User Name" containing the following users: Ashanti McCallister, Ayushi Sharma, Betsy Blackley, bftadmin, Carol Bradbury, Cheryl Howard, Cog NewQA, Customer User, Debra Mobley, Development Development (highlighted in blue), Donna Reynolds, Geetika Mendiratta, geneva, GenevaWeb, and HRAdmin 1. To the right of the list box are two buttons: "Select All" and "Select None". At the bottom center of the window are two buttons: a green "submit" button with a right-pointing arrow and a red "cancel" button with a left-pointing arrow.

In the User Name list box, click on the names of the users you want to work with. To select all of the users, click on Select All. To cancel all of your selections, click on Select None.

Click on Submit to start the process or click on Cancel to reset your selections.

Set Current Dates

In the Tools menu, the Set Current Dates function has been added. This function is used to tag effective-dated information in the database tables as current, so that reporting tools can know which information is active and should be included in your report.

Set Current Dates

* = Required

*Target Date: 04/07/2018

Database Table

- Employment Status
- Federal Tax Rates by Legal Entity
- FSA Employee Declined Option Records
- FSA Enrollment Records
- HSA Employee Declined Option Records
- HSA Enrollment Records
- Legal Entity Pay Rate Overrides By Pay Type
- Legal Entity Shift Overrides
- Legal Entity Special Rate Overrides
- Local Tax Rates by Legal Entity
- PERA Employment Status
- Rate Indexes
- State Employee Tax Rate Override
- State Tax Rates by Legal Entity
- WFM EE Work Schedule Profiles

Select All Select None

submit cancel

In this function, you specify the date you want to use, and on which tables. The program goes through the database tables you selected and flags records that are valid up to and including that date. To use this data in your report, enter your selection criteria into your report tool and require that the report tool only select data where the "curr" field is equal to * (asterisk). This will ensure that the report tool pulls the right data.

SIT File Creation

In the Reports menu, the SIT File Creation function has been added, to allow users to create an ICESA format file which provides the State of Maine with employee level and Legal Entity level detail regarding Quarterly State Income Tax withheld.

To create this file, select the Transmitter, Legal Entity, State, Tax Year, and Quarter. Maine also requires business taxpayers to report on this file the weekly or semi-weekly payments made for State Income Tax between quarterly filings. To accomplish this, this new function allows users to upload a simple comma separated file (*.csv), which includes only three elements per payment: Legal Entity Code, date, and payment amount, see below for an example of the data which should be included in the Voucher Payment file:

```
BRITE,01/06/2018,20.00
BRITE,01/13/2018,40.00
BRITE,01/20/2018,20.00
OUT,01/06/2018,20.00
OUT,01/13/2018,20.00
OUT,01/20/2018,20.00
```

There should be no header line, only the data. The file will be checked for the following errors and if there are any, an error file will be produced instead of the SIT file:

- The entity code must exist in the Entity COD table
- The date must be a valid date
- The amount must be a valid amount

The Voucher Payment file must include the iCON Customer ID in the file name. For example, if the Customer ID you use to login to iCON is 2000, you can name the file **2000Maine2018 SITPayments.csv**. It is recommended that users do not open this file in Excel, so that the date and money formats are not altered.

User Exits

In the Payroll Setup menu, the User Exits function has been added, to associate a custom calculation program with a deduction, pay code or tax. For all User Exit custom calculation programs, the program should be stored in \geneva\mods\prapps and should be accessible by all users who run a pay cycle. If the iCON runtime code has been installed on multiple machines, such as client PCs, the custom program must also be installed on those machines if the users are going to run a pay cycle.

User Exits

Selection:

☒ Deduction User Exits
☐ Pay Code User Exits
☐ Tax User Exits

Select a type of User Exit from the main page and click Next. Click on the Add button to add a record.

Deduction User Exits

To update, click on information in the left column.

Payroll Deduction	Employee Program Name	Employer Program Name	Action
No record found.			

Add Deduction User Exits

* = Required

*Payroll Deduction:

Employee Program Name:

Employer Program Name:

Pay Code User Exits

To update, click on information in the left column.

Type Of Pay	Program Name	Action
No Data Found		

Add Pay Code User Exits

* = Required

*Type Of Pay: no value ▼

*Program Name:

→ submit
← cancel

Tax User Exits + add

Select Tax

☒ Federal
 ☐ State
 ☐ Local

To update, click on information in the left column.

Tax Type	State/Province	Locality	Program Name	Action
No record found.				

+ add
← back

Add State Tax User Exits

* = Required

*State Tax: Income Tax ▼

*State/Province: Alaska ▼

*Program Name: alaskasit.p x

→ submit
← cancel

Enter the necessary information as follows.

Deduction User Exits

Field	Description
*Payroll Deduction	Click on the down-arrow and select the deduction you wish to work with. This field cannot be edited in Update mode.
Employee Program Name	If the program affects an employee-paid deduction, enter it in this field. This field accepts up to 15 alphanumeric characters.
Employer Program Name	If the program affects an employer-paid deduction, enter it in this field. This field accepts up to 15 alphanumeric characters.

Pay Code User Exits

Field	Description
*Type Of Pay	Click on the down-arrow and select the type of pay you wish to work with. This field cannot be edited in Update mode.
*Program Name	Enter the program name in this field. This field accepts up to 15 alphanumeric characters.

Tax User Exits - Federal

Field	Description
*Federal Tax	Click on the down-arrow and select the type of federal tax you wish to work with. This field cannot be edited in Update mode.
*Program Name	Enter the program name in this field. This field accepts up to 15 alphanumeric characters.

Tax User Exits - State

Field	Description
*State Tax	Click on the down-arrow and select the type of state tax you wish to work with. This field cannot be edited in Update mode.
*State/Province	Click on the down-arrow and select the state you wish to work with. This field cannot be edited in Update mode.
*Program Name	Enter the program name in this field. This field accepts up to 15 alphanumeric characters.

Tax User Exits - Local

Field	Description
*Local Tax	Click on the down-arrow and select the type of local tax you wish to work with. This field cannot be edited in Update mode.
*State/Province	Click on the down-arrow and select the state you wish to work with. This field cannot be edited in Update mode.
*Locality	Click on the down-arrow and select the locality you wish to work with. This field cannot be edited in Update mode.
*Program Name	Enter the program name in this field. This field accepts up to 15 alphanumeric characters.

**indicates field is mandatory*

Voluntary Self-Identification of Disability

In the Employment menu, the Voluntary Self-Identification of Disability function has been added. This function allows managers to add, update, and delete information about individuals with disabilities (IWDs). Section 503 of the Rehabilitation Act requires Federal Contractors to:

- have their employees voluntarily self-identify with a disability, during the pre-offer and post-offer phases of the application process
- invite their employees to self-identify as IWDs every five years
- document and update annually several quantitative comparisons for the number of IWDs who apply for jobs and the number of IWDs they hire.

This data assists contractors in measuring the effectiveness of their outreach and recruitment efforts. The data must be maintained for three years to be used to spot trends.

This function in Manager Services is used in conjunction with the new function in Employee Self-Service which is explained in that section of these release notes. Once an employee has identified themselves through the function in Employee Self-

Service, a record will appear on the main list page of this function in Manager Services.

Voluntary Self-Identification of Disability + add			
To update, click on information in the left column.			
Date Entered	Next Self-Identification Date	Self-Identification Status	Action
08/01/2017	08/01/2022	No, does not have a disability	view delete
08/29/2012	08/29/2017	No, does not have a disability	view delete
+ add			

Add Voluntary Self-Identification of Disability

* = Required

Legal Entity: Olympics, Inc.

*Date Entered: *Next Self-Identification Date: Adjusted Date of Hire: 08/29/2012

☐ Yes, has a disability (or previously had a disability)
☐ No, does not have a disability
☒ Does not wish to answer

→ submit ← cancel

Update Voluntary Self-Identification of Disability

Legal Entity: Olympics, Inc.

Date Entered: 08/01/2017 Next Self-Identification Date: 08/01/2022 Adjusted Date of Hire: 08/29/2012

☐ Yes, has a disability (or previously had a disability)
☒ No, does not have a disability
☐ Does not wish to answer

→ submit ← cancel

The function in Manager Services has been designed with the flexibility so that users can Update, View, Add, or Delete records regarding an employee's Voluntary Self-Identifications of Disability. Please assign Function Security to this function as needed for your organization.

When Adding a Voluntary Self-Identification of Disability record, the user has the ability to change the Date Entered (from the default of today's date) and the Next Self-Identification Date (from the default of 5 years from today's date), and can select the employee's self-identification status from three options:

- Yes, has a disability (or previously had a disability)

- No, does not have a disability
- Does not wish to answer

When Updating a Voluntary Self-Identification of Disability record, the user only has the ability to change the selection of the employee's self-identification status. All other fields are read-only.

The Legal Entity and Adjusted Hire Date display on both Add and Update, are read-only, and match both the Adjusted Hire Date and the Level 2 of the employee's Organization assignment on the Work Profile function.

Enter the necessary information as follows:

Field	Description
*Date Entered	Enter the date as of which the employee is self-identifying regarding a disability. This field is required when adding a record and can be edited.
*Next Self-Identification Date	Enter the date when the employee will next be required to self-identify regarding a disability. This field is required when adding a record and can be edited.
Yes, has a disability (or previously had a disability)	Select this option if the employee self-identifies as having a disability, or self-identifies as previously having a disability.
No, does not have a disability	Select this option if the employee self-identifies as not having a disability.
Does not wish to answer	Select this option if the employee does not wish to self-identify regarding a disability.

**indicates field is mandatory*

Voluntary Self-Identification of Disability Report

In the Reports menu, the Voluntary Self-Identification of Disability Report function has been added, to allow users to create reports regarding Voluntary Self-Identification of Disability data.

Voluntary Self-Identification of Disability Report

* = Required

Organization Tree:

- BRITE STAR
 - DIV 01
 - Carol Design
 - Carolina Cof
 - CH Dance Co
 - Cheesecake
 - Copy Cats
 - Development
 - Discovery
 - Dynatrend
 - Fort Hays
 - Illinois
 - JB Legal
 - Karen K9
 - KLP Inc

Selected Levels:
Cons. Group / BRITE STAR

Select Report Parameters:

*From Adjusted Hire Date: 01/01/2018 Include Terminated: ☒

*To Adjusted Hire Date: 12/31/2018

*Report Name: VolSelfIdDisReport

*Report Formats: ☒ PDF ☐ XLS ☐ XLSX ☐ XML ☐ CSV ☐ TXT ☐ Criteria File

Sort By: ☒ Employee Number ☐ Employee Name ☐ Self-Identification Status

Users can select the following selection criteria for the report:

- Company Org Structure
- From/To Adjusted Hire Date
- Include Terminated
- Report Name
- Report Format

Users can select one of the following sort orders for the report:

- Employee Number
- Employee Name
- Self-Identification status

The report includes the following information about the employee:

- Organization (in Header of PDF and also in Criteria File*)
- Employee Number
- Employee Name
- Adjusted Hire Date

- Term Date (if selected)
- Self-Identification Status
- Date Entered
- Next Self-Identification Date

Here is an example a PDF formatted report:

Date: 04/09/2018 Time: 11:44:49		Voluntary Self-Identification of Disability Report				Page: 1
Organization: Cons. Group / BRITE STAR						User: MRUBERTO
Sort By: Employee Number		Include Terminated: Yes				
Employee#	Employee Name	Adjusted Hire Date	Term Date	Self-Identification Status	Date Entered	Next Self-Identification Date
900040	Rogers, Casey	01/17/2018	03/18/2018	Yes, has a disability	03/16/2018	03/16/2023
900041	Drake, Emma	01/17/2018		Does not wish to answer	03/21/2018	03/21/2023
900043	Williams, Mitch	01/17/2018		Does not wish to answer	03/18/2018	03/18/2023

***Note about the Criteria selection for Report Format:**

This report has been programmed with multi-format capability. This allows users to create their report in up to 6 formats: PDF, XML, XLS, CSV, XLSX and TXT.

If the user selects Criteria in the Report Format field, the system will create a text file named **<report name>-<job number>-criteria.txt** that displays the options the user selected when running the report, and that may have previously been in the header on a PDF report. This allows the row and column aspects of any of these reports to maintain their row and column characteristics, and show one record per row.

Here is an example of the Criteria file as opened in Notepad:

```

VolSelfIdDisReport-94370-criteria.txt - Notepad
File Edit Format View Help
Report: Vol. Self-Id. Disability
Organization: Cons. Group / BRITE STAR
From Adjusted Hire Date: 01/01/2012
To Adjusted Hire Date: 12/31/2018
Sort By: Employee Number
Include Terminated: Yes

```

Here is an example of an XLS formatted report:


VolSelfIdDisReport-94370.xls (Protected View) - Excel							
PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing							
A	B	C	D	E	F	G	H
1	Employee Number	Employee Last Name	Employee First Name	Adjusted Hire Date	Term Date	Self-Identification Status	Date Entered
2	900040	Rogers	Casey	01/17/2018	03/18/2018	Yes, has a disability	03/16/2018
3	900041	Drake	Emma	01/17/2018		Does not wish to answer	03/21/2018
4	900043	Williams	Mitch	01/17/2018		Does not wish to answer	03/18/2018
5							
6							

New Employee Self Service Functions

This section describes the changed functions in Employee Self Service.

Voluntary Self-Identification of Disability

In the Personal menu, Employees will use this function to Voluntarily Self-Identify their Disability status. Clicking Update on the main list screen brings the user to a scan of the official form with fillable fields.

Voluntary Self-Identification of Disability	Allison Ten Hoeve
 update	
There is no record on file.	

Voluntary Self-Identification of Disability	Form CC-305 OMB Control Number 1250-0005 Expires 1/31/2020 Page 1 of 2																				
Why are you being asked to complete this form?																					
<p>Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualified people with disabilities.¹ To help us measure how well we are doing, we are asking you to tell us if you have a disability or if you ever had a disability. Completing this form is voluntary, but we hope that you will choose to fill it out. If you are applying for a job, any answer you give will be kept private and will not be used against you in any way.</p> <p>If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our employees to update their information every five years. You may voluntarily self-identify as having a disability on this form without fear of any punishment because you did not identify as having a disability earlier.</p>																					
How do I know if I have a disability?																					
<p>You are considered to have a disability if you have a physical or mental impairment or medical condition that substantially limits a major life activity, or if you have a history or record of such an impairment or medical condition.</p> <p>Disabilities include, but are not limited to:</p> <table border="0"> <tr> <td>• Blindness</td> <td>• Autism</td> <td>• Bipolar disorder</td> <td>• Post-traumatic stress disorder (PTSD)</td> </tr> <tr> <td>• Deafness</td> <td>• Cerebral palsy</td> <td>• Major depression</td> <td>• Obsessive compulsive disorder</td> </tr> <tr> <td>• Cancer</td> <td>• HIV/AIDS</td> <td>• Multiple sclerosis (MS)</td> <td>• Impairments requiring the use of a wheelchair</td> </tr> <tr> <td>• Diabetes</td> <td>• Schizophrenia</td> <td>• Missing limbs or partially missing limbs</td> <td>• Intellectual disability (previously called mental retardation)</td> </tr> <tr> <td>• Epilepsy</td> <td>• Muscular dystrophy</td> <td></td> <td></td> </tr> </table>		• Blindness	• Autism	• Bipolar disorder	• Post-traumatic stress disorder (PTSD)	• Deafness	• Cerebral palsy	• Major depression	• Obsessive compulsive disorder	• Cancer	• HIV/AIDS	• Multiple sclerosis (MS)	• Impairments requiring the use of a wheelchair	• Diabetes	• Schizophrenia	• Missing limbs or partially missing limbs	• Intellectual disability (previously called mental retardation)	• Epilepsy	• Muscular dystrophy		
• Blindness	• Autism	• Bipolar disorder	• Post-traumatic stress disorder (PTSD)																		
• Deafness	• Cerebral palsy	• Major depression	• Obsessive compulsive disorder																		
• Cancer	• HIV/AIDS	• Multiple sclerosis (MS)	• Impairments requiring the use of a wheelchair																		
• Diabetes	• Schizophrenia	• Missing limbs or partially missing limbs	• Intellectual disability (previously called mental retardation)																		
• Epilepsy	• Muscular dystrophy																				
<p>Please check one of the boxes below:</p> <p> <input type="checkbox"/> YES, I HAVE A DISABILITY (or previously had a disability) <input type="checkbox"/> NO, I DON'T HAVE A DISABILITY <input checked="" type="checkbox"/> I DON'T WISH TO ANSWER </p>																					
Allison Ten Hoeve Your Name	04/09/2018 Today's Date																				

Users will be able to check one of three options for their Disability Status, and enter their name and the date they identified themselves (today's date by default):

- YES, I HAVE A DISABILITY (or previously had a disability)
- NO, I DON'T HAVE A DISABILITY
- I DON'T WISH TO ANSWER

Users can then scroll to page 2 of the official form to click submit.

Allison Ten Hoeve

04/08/2018

Your Name

Today's Date

Voluntary Self-Identification of Disability



Form CC-305
OMB Control Number 1250-0005
Expires 1/31/2020
Page 2 of 2

Reasonable Accommodation Notice

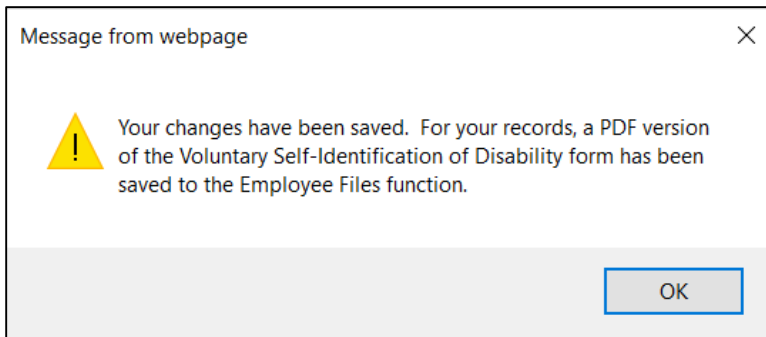
Federal law requires employers to provide reasonable accommodation to qualified individuals with disabilities. Please tell us if you require a reasonable accommodation to apply for a job or to perform your job. Examples of reasonable accommodation include making a change to the application process or work procedures, providing documents in an alternate format, using a sign language interpreter, or using specialized equipment.

¹ Section 503 of the Rehabilitation Act of 1973, as amended. For more information about this form or the equal employment obligations of Federal contractors, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at www.dol.gov/ofccp.

PUBLIC BURDEN STATEMENT: According to the Paperwork Reduction Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

 submit
 cancel

Once submitted, the system will display a message that lets the user know that a PDF version of the form has been saved and can be seen in the Employee Files function.

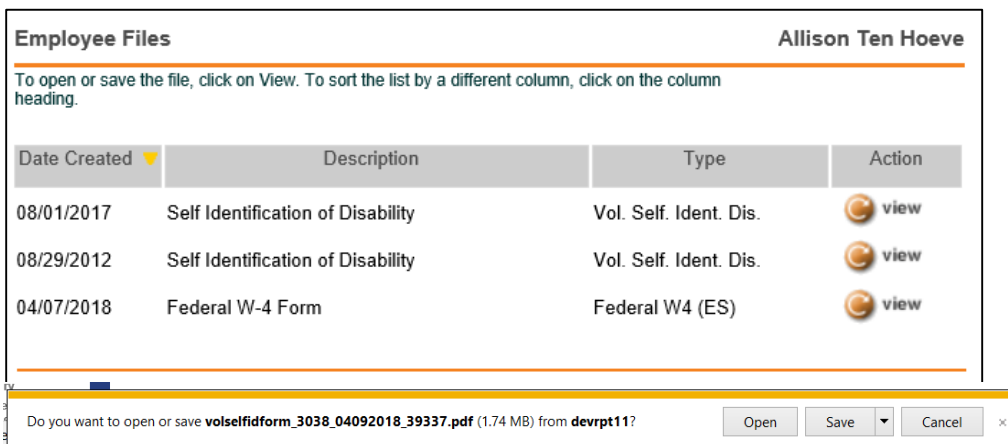


On the main list page of this function in Employee Self-Service, the system will display the historical list of self-identifications the employee has made.

Voluntary Self-Identification of Disability			Allison Ten Hoeve
			update
Date Entered	Next Self-Identification Date	Status	
08/01/2017	08/01/2022	No, I don't have a disability	
08/29/2012	08/29/2017	No, I don't have a disability	

The Employee Files function in Employee Self-Service will display the PDF Versions of the employee's Self-Identifications for the user to view or save.

Note: With this release, a new code of "SID" will be added to Common Object Dictionary for File Types in Manager Services to accommodate this new employee form that will be saved to Employee Files.



Updated Manager Services Functions

This section describes updated functions in Manager Services.

Common Object Dictionary, Pay Codes table

Codes F and G have been added to the list box for the field Puerto Rico W-2 Exempt Code on the Add and Update Common Object Dictionary for Pay Codes screens.

These codes represent:

- F. Vacation and sick leave liquidation payment to public employees under Act 211-2015; or
- G. Disaster Assistance Qualified Payment according to Administrative Determination No. 17-21.

Update Common Object Dictionary for Pay Codes

* Type Of Pay:	EXF
* Short Description:	Exem Sal PR F
Long Description:	Exem Sal PR F
Disposable Earning:	<input checked="" type="radio"/> Yes <input type="radio"/> No
W-2 Box 9: Adv Earned Income:	<input type="radio"/> Yes <input checked="" type="radio"/> No
W-2 Box 10: Dependent Care:	<input type="radio"/> Yes <input checked="" type="radio"/> No
W-2 Box 11: Nonqualified Plans:	<input type="radio"/> Yes <input checked="" type="radio"/> No
(up to 2000: W-2 Box12 Fringe Benefits):	<input type="radio"/> Yes <input checked="" type="radio"/> No
W-2 Box 12: Code:	<input type="radio"/> No
W-2 Box14: Other:	<input type="radio"/> No
Puerto Rico W-2 Box:	<input type="radio"/> No
Include in FMLA:	<input type="radio"/> No
Puerto Rico W-2 Exempt Code:	<div> A B C D E F G </div>

Demographics

The field “Self-Identified” has been re-labeled as “Self-Identified Race/Ethnicity” to distinguish from the new Voluntary Self-Identification of Disability function.

Demographics update

Personal Information:			
First Name:	Allison	Middle Name or Initial:	
Last Name:	Ten Hoeve	Second Last Name:	
Preferred Name (Nickname):		Social Security Number:	123-54-7897
Date of Birth:	08/08/1962	Marital Status:	Married
Gender:	Female	Race/Ethnicity:	Hawaiian/Pac Is
Self Identified Race/Ethnicity:	no	Identifies with two or more races:	no
Disability:	*no value	Tobacco User:	no
Veteran Status (VETS-100):	*no value	Veteran Status (VETS-100A):	*no value
Primary Language:	English	Veteran Status (VETS-4212):	*no-value
Lesbian Gay Bisexual Transgender:			
Address and Contact Information:			
Address Line 1:	228 S 114 W		
Address Line 2:			

Dependents – Add and Update

A new section has been added to the Add Dependents and Update Dependents screens for Insurance Information. The new fields are detailed below. None of the fields are required, but there are some logical rules that are enforced on paired fields such as City and State, Policy Number and Date.

Update Dependents

* = Required

Dependent Information

*First Name:

Roseanne

Initial:

*Last Name:

Fiala

Second Last Name:

*SSN:

294-82-9488

*Relation:

Spouse

*Date of Birth:

08/08/1962

*Gender:

Female

Status Information

*Status:

Active

Status Date:

Full Time Student:

☐ Yes
 ☒ No

Disability:

*no value

Tobacco User:

☐ Yes
 ☒ No

Insurance Information

Education Est.:

Salt Lake University

Employer Name:

Walgreens

Employer City:

Park City

State/Province:

Utah

Carrier Name:

Zip Insurance

Date Of Coverage:

01/01/1981

Policy Number:

87700-77

Medicare:

☐

Insurance City:

Greenburg

State/Province:

Kansas

Dependent Verification Documents

+ add

submit

cancel

Enter the necessary information as follows:

Field	Description
Education Est.	Enter the name of the school the dependent attends. This field accepts up to 20 alphanumeric characters.
Employer Name	Enter the name of the dependent's employer. This field accepts up to 30 alphanumeric characters.
Employer City	Enter the name of the city where the employer is located. This field accepts up to 20 alphanumeric characters. If Employer City is Entered, the associated State/Province is required.
State/Province	Click on the down-arrow and indicate the state where the employer is located. If this State/Province is entered, Employer City is required.
Carrier Name	Enter the name of the insurance company covering the dependent. This field accepts up to 20 alphanumeric characters.
Date of Coverage	Enter the date the dependent's coverage goes into effect. This field accepts up to 8 digits in the format MM/DD/YYYY.
Policy Number	Enter the policy number. This field accepts up to 15 alphanumeric characters. If Policy Number is entered, Date of Coverage is required.
Medicare	Select this option if the dependent is covered by Medicare.

Field	Description
Insurance City	Enter the name of the city where the benefit carrier is located. This field accepts up to 20 alphanumeric characters. If Insurance City is Entered, the associated State/Province is required.
State/Province	Click on the down-arrow and select the state where the benefit carrier is located. If this State/Province is entered, Insurance City is required.

Employer Deduction Contributions

In Manager Services, on the Employer Deduction Contributions function, when a user clicked View for an Employer Deduction Contribution record that had a Tier Formula, then clicked on the Tier Formula tab, the Tier data was not displaying. Also, if a user was updating an Employer Deduction Contribution after they had added Tier records, the Tier section they had just added was not displaying, and also the Submit and Cancel buttons were not displaying. This has been corrected.

Manual Payments

When a Manual Payment that had hours for 2 or more pay types for an employee was processed, and the employee also had a PTO Plan that accrued hours by hours worked, the accrual was not calculating correctly. This has been corrected.

Pending Transfers

In Manager Services, "Pending Transfer" now appears in the Summary Panel of employee-related functions if a future dated transfer exists.

Summary

Margo Thompson
Activities Assistant
Cons. Group / Olympics / US Corporate / Alpine Ski
Pending Transfer

Employee Details

Number: 3099
Status: Active
Hire Date: 12/11/2017
Reports To: Kristen L Clark

Direct Reports: 0

Demographics

Personal Information:

First Name:	Margo Thompson	Middle Name or Initial:	
Last Name:	Thompson	Second Last Name:	
Preferred Name (Nickname):		Social Security Number:	138-82-2882
Date of Birth:	08/08/1995	Marital Status:	Single
Gender:	Female	Race/Ethnicity:	White
Self Identified Race/Ethnicity:	no	Identifies with two or more races:	no
Disability:	*no value	Tobacco User:	no
Veteran Status (VETS-100):	*no value	Veteran Status (VETS-100A):	*no value
Primary Language:	English	Veteran Status (VETS-4212):	*no value
Lesbian Gay Bisexual Transgender:			

Address and Contact Information:

Address Line 1:	123 Main St	Zip Code:	07035
Address Line 2:		County:	Morris
City:	Lincoln Park	Country Access Code:	000
State:	New Jersey	Cell Carrier:	*no value
Country:	U.S.A.		
Home Phone:			
Cell Phone:			
Home Fax:			

Report Master Listing (and other buttons) in Header Bar

In Manager Services, it was found that repeated clicks in the header bar buttons for Report Master Listing, Job Server Queue, etc., could cause slowness to be experienced in the application by all users. This has been corrected so that only the first click on these buttons is processed.

Tobacco Attestation By Year

When a user changed the Tobacco Attestation for an employee by adding another record in the Tobacco Attestation By Year function in Manager Services, the system was not updating the corresponding Deduction and Employer Deduction records for the change. As a result, the employee's deduction did not match the rate for Tobacco usage status as defined in the Benefit Plan on the Benefit Costs tab. This has been corrected.

W-2 Data Generation and W-2 File Creation

If any Pay Code in Pay Codes Common Object has been given Puerto Rico W-2 Exempt Code F or G, and this Pay Code has been assigned to employees and accumulated in Pay Distributions for the year 2018, the codes and amounts will appear on the 2018 Puerto Rico W-2 file in the RS record in positions 431-443 and/or positions 488-500.

W-2 Data Generation, Forms

If any Pay Code in Pay Codes Common Object has been given Puerto Rico W-2 Exempt Code F or G, and this Pay Code has been assigned to employees and accumulated in Pay Distributions for the year 2018, the codes and amounts will appear on the 2018 Puerto Rico Form 499R-2/W-2PR in Boxes 16 and/or 16A.

Updated iCON Tools Functions

This section describes updated functions in iCON Tools.

Manual Payments

When a Manual Payment that had hours for 2 or more pay types for an employee was processed, and the employee also had a PTO Plan that accrued hours by hours worked, the accrual was not calculating correctly. This has been corrected.

Payroll Common Object Dictionary, Pay Codes table

Codes F and G have been added to the list box for the field **Puerto Rico W-2 Exempt Code** on the Add and Update Payroll Common Object Dictionary for Pay Codes screens. These codes represent:

- F. Vacation and sick leave liquidation payment to public employees under Act 211-2015; or
- G. Disaster Assistance Qualified Payment according to Administrative Determination No. 17-21.

Update Payroll Common Object Dictionary for Pay Codes

Type Of Pay: EXF

*Short Description: Exem Sal PR F

Long Description: Exem Sal PR F

☐ Required?

☒ Disposable Earning

☐ W-2 Box 9: Adv Earned Income

☐ W-2 Box 10: Dependent Care

W-2 Box 11: Nonqualified Pla:

☐ (up to 2000: W-2 Box12 Fringe Benefits)

W-2 Box 12: Code:

☐ W-2 Box14: Other

Puerto Rico W-2 Box:

☐ Include in FMLA

Puerto Rico W-2 Exempt Code:

Save Cancel Help

Taxable
Match FICA/FICM Taxable

A
B
C
D
E
F
G

W-2 Data Generation and W-2 File Creation

If any Pay Code in Pay Codes Common Object has been given Puerto Rico W-2 Exempt Code F or G, and this Pay Code has been assigned to employees and accumulated in Pay Distributions for the year 2018, the codes and amounts will appear on the 2018 Puerto Rico W-2 file in the RS record in positions 431-443 and/or positions 488-500.

W-2 Data Generation, Forms

If any Pay Codes in Pay Codes Common Object have been given Puerto Rico W-2 Exempt Code F or G, and this Pay Code has been assigned to employees and accumulated in Pay Distributions for the year 2018, the codes and amounts will appear on the 2018 Puerto Rico Form 499R-2/W-2PR in Boxes 16 and/or 16A.