



Version 2.065 Release Notes

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State Tax Changes

Massachusetts Paid Family and Medical Leave Insurance

Employers in Massachusetts, with few exceptions, are to begin to collect premiums for the State Paid Family and Medical Leave Insurance program for Massachusetts employees as of July 1, 2019. The costs of the premiums are generally shared between employee and employer. The total premium is 0.63% of each employee's gross wages, minus tips. Employers are responsible for 49.5% of the total premium, and up to 50.5% may be withheld from employees. Employers also have the option to pay some or all of the employee portions of the premiums. Premium withholdings are capped at the Social Security cap, which is \$132,900.00 for 2019.

The system will have already included the rates for the employee portion of the Family and Medical leave premiums effective July 1, 2019. These taxes will need to be assigned to the applicable employees either in the Manager Services Tax Elections function, the iCON Tools Employee Tax Option function, or the Manager Services Global Tax Assignment function.

Please note that going forward, Massachusetts FLI and MLI tax will automatically be assigned to new employees if their Work State is Massachusetts and the Auto Assign checkbox for MLI and FLI is selected in the State Tax Types common object, unless you have it as an exception in the State Tax Assignment Override function. Also, please review Pay Taxation Exemptions or Deduction Taxation exemptions regarding these taxes. We recommend that you check these settings and make any needed changes.

New Manager Services Functions

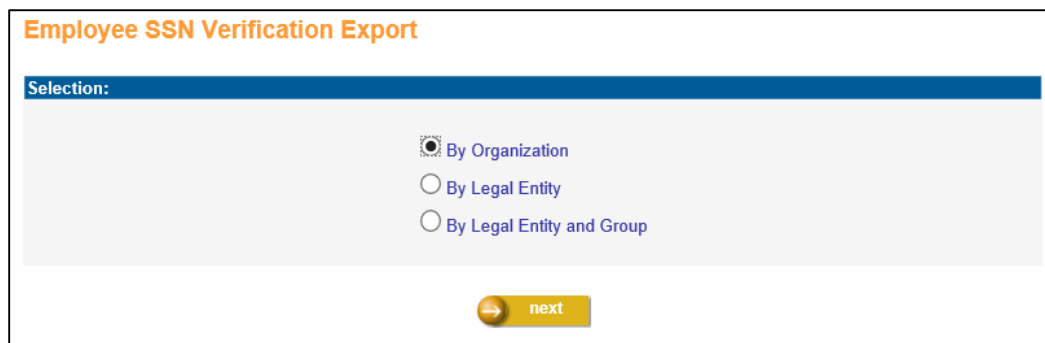
This section describes new functions in Manager Services.

Employee SSN Verification Export

This function has been added to Manager Services in the Reports menu. The purpose of this function is to create a file to interface with Social Security Number Verification Service of Business Services Online (BSO) at the Social Security Administration web site. This service allows you to complete an online form or submit specifically formatted files to request verification of names and Social Security Numbers of employees of your company for the purpose of ensuring correct information on W-2s. To use this service, you must register at <https://secure.ssa.gov/acu/IRESWeb/registration.jsp>.

Being this function creates a file with names and Social Security Numbers, it is important that only users authorized to view Social Security Numbers be allowed to access this function – so you must set Legal Entity Authorization, Organization Security, and Function Security appropriately.

The first screen of the function will allow the user to select one of three filtering methods: By Organization, By Legal Entity, By Legal Entity and Group.



The screenshot shows a web interface titled "Employee SSN Verification Export". Below the title is a "Selection:" header. Underneath, there are three radio button options: "By Organization" (which is selected), "By Legal Entity", and "By Legal Entity and Group". At the bottom right of the selection area is a yellow button with a right-pointing arrow and the text "next".



Once that selection is made – click next to access the second screen which allows the user to enter specific selection criteria. You may only want to select Payroll Active Employees as of a specific date, who have New Hire dates within a specific date range. Or you may want to select Terminated employees as of a certain date, hired within the current tax year – who will also still be getting W-2's.

Employee SSN Verification Export

* = Required

Selection By Legal Entity and Group:

*Legal Entity:	Olympics, Inc.	▼
*Payroll Processing Group:	Semi-Monthly	▼
*Payroll Status:	Active	▼
*As Of Date:	03/22/2019	📅
*From New Hire Date:	01/01/2017	📅
*To New Hire Date:	03/22/2019	📅 x

 next
  back



Once these filtering options have been made, click next to access the final screen which displays your selections and allows you to enter a file name. The export process can be viewed in the Job Server Queue, and once the job is complete, the resulting file will appear in Report Master Listing with the file name you specified appended by the job number.

Employee SSN Verification Export

* = Required

Selection By Group:

Legal Entity:	Olympics, Inc.
Payroll Processing Group:	Semi-Monthly
Payroll Status:	Active
As Of Date:	03/22/2019
From New Hire Date:	01/01/2017
To New Hire Date:	03/22/2019
*Report ID:	EmployeeSSNVerification x

 submit
  cancel

From Report Master Listing, you should save your file locally, so you can then login to the BSO site, and use the instructions they provide to submit the file. The BSO website then provides the ability to retrieve a results file tied to your file submission, based either on confirmation number or submit date and time. For more information on the specifics of using BSO for Social Security Verification – see the handbook they provide: (link valid as of the date of these release notes)

<https://www.ssa.gov/employer/ssnvsHandbook.pdf>.

The next section describes another new function in iCON that allows you to import the results file.

Employee SSN Verification Import

This function has been added to Manager Services in the Reports menu. The purpose of this function is to import the results file returned from the Social Security Number Verification Service of Business Services Online (BSO) at the Social Security Administration web site, to create an easily readable report in PDF format.

The import process will also create a CSV formatted file which will notify the user of any errors or issues with the process.

You must ensure that the file you are importing contains your Customer ID in the file name and is a *.TXT formatted file. If the results file you retrieve from the BSO website does not contain your Customer ID, you must rename the file before attempting to import it.


Click the browse button to browse to the location of the file, and click submit.

Employee SSN Verification Import
* = Required

***File Name:** C:\Users\mruberto\Documents\SSVSTest\2000-TEST

Browse...

The File Name must contain your Customer Number and be in .txt format

 submit

The import process can be viewed in the Job Server Queue. When the job completes, if the import is successful, there will be two resulting files in the Report Master Listing. One file is the Results Report in PDF format named EeSSNVerificationResultsRep-NNNNN.pdf where NNNNN is the job number. The other file is the status file for the import process. If the process completes without errors – the file will be named EmpSSNVerificationImport-NNNNN.csv where NNNNN is the job number. If the process encounters errors, the file will be named EmpSSNVerificationErrors-NNNNN.csv and there will be no PDF file generated.

Report Master Listing

Display Reports From Date: To Date:

refresh next

save selected delete selected

☐ Delete Reports By Date Range:

To view PDF files, you should [download](#) the latest Acrobat Reader for your platform. [Select All](#) [Unselect All](#)

To view CSV files, Microsoft Excel should be installed on your computer. '|' (pipe) has been used as delimiter in these files.

To view XLS files, Microsoft Excel should be installed on your computer.

To view XML files, Microsoft Internet Explorer OR any XML file viewer should be installed on your computer.

To view TXT files, Microsoft Internet Explorer OR any TXT file viewer should be installed on your computer.

Open/Save	Report Name	Date Run	Time Run	Select
	EeSSNVerificationResultRep-97994.pdf	03/22/2019	2:39 PM	<input type="checkbox"/>
	EmpSSNVerificationImport-97994.csv	03/22/2019	2:39 PM	<input type="checkbox"/>
	EmpSSNVerificationErrors-97991.csv	03/22/2019	11:13 AM	<input type="checkbox"/>

The Results Report will contain the information from the results file in readable format.

Date: 03/22/2019 Time: 15:17:36		Employee SSN Verification Report					Page: 1 User: MRUBERTO
SSN	Last Name	First Name	Middle Name	Date Of Birth	Number Holder Deceased	Verification Status	
XXXXX5959	DEGREGORIO	JOANNE	P	01/01/1977	Deceased	SSN is Verified	
258649977	ALLEGORA	BARTHOLOME	L	02/01/1978		SSN not in file (never issued)	
XXXXX7788	BRANT	CHRISTIAN		03/01/1979		Name matches, DOB does not match	
XXXXX9976	CARRAVA	LOUIS	W	04/01/1980		SSN did not verify; other reason	
255649977	DANFORTH	EARNHART		05/01/1981	Deceased	Name does not match; DOB not checked	
XXXXX9977	FRANKLIN	SUSAN		06/01/1982		SSN is Verified	
253649977	GRISSEL	HILDA	E	07/01/1983		Name does not match; DOB not checked	
Number Of Successful Verification :					2.00		
Number Of Unsuccessful Verification :					5.00		

The report will contain the information exactly as it appears in the imported results file for SSN, Name, and Date of Birth. Using other information from the file, the report will also indicate if the Number Holder is Deceased, and will indicate the status of the processing of the information that had been sent to BSO. These will be one of five statuses:

- SSN is Verified
- SSN not in file (never issued)
- Name matches; DOB does not match
- Name does not match; DOB not checked
- SSN did not verify; other reason

The report will summarize the number of successfully verified vs. non-verified records and display that at the end of the report.

It is indicated in the BSO for Social Security Verification handbook (referenced above) that for records that return a status of **SSN is Verified, Name matches; DOB does not match**, or **SSN did not verify; other reason**, then the first 5 positions of the SSN will be masked with an “X”.

Updated Manager Services Functions

This section describes updated functions in Manager Services.

ACA Data Generation – Build Data/Exceptions Report

The Build Data/Exceptions Report in the ACA Data Generation has been enhanced to check for invalid data that will be populated on the 1095-C Form (Part II and III).

The report will display a warning message if there are invalid characters in the name and address fields. Social Security Numbers that begin with invalid numbers (example the number 9) will also be flagged on the report.

Benefit Cost Report

This report in Manager Services has been enhanced in several ways. The report now includes costs of benefits under any cost method, displays more detail applicable to data that has been entered for benefit costs, and new report format options have been added. The full list of fields that are now on the report include:

- benefit group
- benefit category
- benefit plan
- benefit option
- policy number
- effective date
- age range (if applicable)
- upper salary limit (if applicable)
- tobacco use indicator
- percent of employee cost per employee and dependent
- employee cost per employee and dependent
- frequency of employee cost per employee and dependent
- coverage of employee cost per employee and dependent
- percent of employer cost per employee and dependent
- employer cost per employee and dependent
- frequency of employer cost per employee and dependent
- coverage of employer cost per employee and dependent

The prompt screen has been changed and allows the user to select one of six report formats. The CSV, XLS, XLSX, and TXT formats will only include data in rows and columns and no formatting, and all formats contain COD codes as well as short descriptions where applicable. If the user needs information that would normally be included in page headings in the PDF format, such as Date and Time run and other selection criteria, they can select to output the Criteria File in TXT format.

Benefit Cost Report

* = Required

Select Benefits

Benefit Groups	Benefit Categories	Benefit Plans
<input type="radio"/> All <input checked="" type="radio"/> Select	<input checked="" type="radio"/> All <input type="radio"/> Select	<input checked="" type="radio"/> All <input type="radio"/> Select
Addison Group Avanti Group BenCostRptGrp Betsy Test Grou BRITE BEN GRP COBRA Group COBRA Group-ZZ	Life Insurance Medical	Life Insurance MED POS PPO Medical

*Effective Date: 12/31/2019

*Report Name: BenefitCostRpt

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

Here is an example of the new report output in PDF format:

Date: 03/04/2019

Time: 11:28:37

Benefit Cost Report

Benefit Group: BenCostRptGrp

As Of: 12/31/2019

Page: 1

User: mruberto

Category	Plan	Option	Policy	Effective Date	Age Range	Up To Salary	Tob. Use	Per	Employee			Employer				
									Percent	Cost	Frequency	Coverage	Percent	Cost	Frequency	Coverage
Life Insurance	Life Insurance	Optional Life		01/01/2016	0-25	0.00	N	Employee:	80.0000	20.00	Semi-Monthly	10,000.00	20.0000	20.00	Semi-Monthly	10,000.00
								Dependent:	80.0000	0.00	*no value	0.00	20.0000	0.00	*no value	0.00
Life Insurance	Life Insurance	Optional Life		01/01/2016	26-50	0.00	N	Employee:	85.0000	80.00	Semi-Monthly	10,000.00	15.0000	80.00	Semi-Monthly	10,000.00
								Dependent:	85.0000	0.00	*no value	0.00	15.0000	0.00	*no value	0.00
Life Insurance	Life Insurance	Plan B		01/01/2019	0-29	20,000.00	N	Employee:	10.0000	1,000.00	Annually	10,000.00	90.0000	1,000.00	Annually	10,000.00
								Dependent:	10.0000	0.00	*no value	0.00	90.0000	0.00	*no value	0.00
Life Insurance	Life Insurance	Plan B		01/01/2019	0-29	999,999,999.99	N	Employee:	20.0000	1,000.00	Annually	10,000.00	80.0000	1,000.00	Annually	10,000.00
								Dependent:	20.0000	0.00	*no value	0.00	80.0000	0.00	*no value	0.00
Life Insurance	Life Insurance	Plan B		01/01/2016	0-25	20,000.00	Y	Employee:	80.0000	80.00	Weekly	10,000.00	20.0000	80.00	Weekly	10,000.00
								Dependent:	80.0000	120.00	Weekly	10,000.00	20.0000	120.00	Weekly	10,000.00
Life Insurance	Life Insurance	Plan B		01/01/2016	0-25	40,000.00	Y	Employee:	85.0000	80.00	Weekly	10,000.00	15.0000	80.00	Weekly	10,000.00
								Dependent:	85.0000	120.00	Weekly	10,000.00	15.0000	120.00	Weekly	10,000.00

Benefit Enrollment Defaults

In the Benefit Enrollment Defaults function, a new field has been added: Benefit group(s) authorized for First Time Enrollment.

***Note:** this new field only applies to employees who have a hire date that is within the Maximum number of days after Adjusted Hire Date that First Time Enrollment is available to new hire that is defined in this function.

To authorize all Benefit Groups to access the First Time Enrollment function in Employee Self Service, select the "All" radio tab. If only certain benefit groups are to be authorized for First Time Enrollment, click on the "Select" radio tab then select the applicable benefit group(s) to which First Time Enrollment should be authorized in Employee Self Service (Ctrl + mouse click to select more than one benefit group).

If an employee's benefit group is not one of the selected groups, the First Time Enrollment function will not appear in Employee Self Service.

Benefit Enrollment Defaults

* = Required

First Time Enrollment:

Benefit group(s) authorized for First Time Enrollment: ☐ All ☒ Select

Addison Group
Avanti Group
BenCostRptGrp
Betsy Test Grou
BRITE BEN GRP
COBRA Group
COBRA Group-ZZ

Maximum number of days after Adjusted Hire Date that First Time Enrollment is available to new hire(i.e., 30):

Allow Employee to Change Date of Birth in First Time Enrollment: ☐

Allow Employee to Change Address in First Time Enrollment: ☐

For age-costed benefits, use employee's age as of this date (MM/DD):

Open Enrollment:

Benefit group(s) authorized for Open Enrollment: ☒ All ☐ Select

Date Range that Open Enrollment is available to Employees: To:

Effective date of new benefit costs to be displayed during Open Enrollment:

Effective date of benefit elections made during Open Enrollment:

Effective date of FSA elections made during Open Enrollment:

For age-costed benefits, use employee's age as of this date:

Common Object Dictionary - Payroll Deductions

In Manager Services Common Object Dictionary for Payroll Deductions, a new item has been added to the list box for the field Deduction Type: 457(b) 3Yrs Ret. Catch-up. Selecting this Deduction Type will set the Default Annual Maximum Limit on this deduction for an employee to the amount set in Customer Management Module's Global Deduction Limits function. For Hosted and Outsource clients, Unicorn HRO maintains these Global Limits, and we will be setting the amount to twice the annual 457(b) limit (\$38,000 for 2019).

***Note:** The IRS rule for an employee's annual maximum 457(b) is as follows. Based on this rule, if an employee's maximum should be less than twice the annual limit for 457(b), the annual maximum must be set on the employee's deduction record.

The lesser of:

- Twice the annual limit of 457(b) plans (\$38,000 in 2019 and \$37,000 in 2018) **or**
- The basic annual limit plus the amount of the basic limit not used in prior years (only allowed if not using age 50 or over catch-up contributions).

Exit Interview

This function in Manager Services has been enhanced to allow the user to enter an exit interview record for the same interviewer for a different date. For example, if a terminated employee is re-hired, and terminates again, and has their second exit interview with the same interviewer, this record can now be added. This enhancement was also made on the Exit Interview tab of the Terminate Employee function.

J1 Visa – Legal Entity Definition

Manager Services has been enhanced to now allow you to identify a legal entity that employs J1 Visa employees. If the field Employs J1 Visa Employees is checked in Legal Entity Definition, then during Payroll Activation for employees in this Legal Entity, a field labeled J1 Visa will appear, with Yes or No radio buttons, to allow you to identify the employee as a J1 Visa employee.

Update Legal Entity Definition

* = Required

***Legal Entity:**

***Entity Name:**

Doing Business As:

***Federal Employer ID Number:**

***Description for Chart of Account:**

City Tax:

Work State:

Address:

City:

Zip:

Phone Number:

☐ Suspend Arizona SIT in December

Cease of Operations Date:

Paystub Additional Information Usage:

Tax Collection Agency:

Brite Star

County Tax:

Month:

State/Province:

Country:

Currency:

PERA Employer Number:

☐ Common Paymaster

Paymaster Entity:

☒ Employs J1 Visa Employees

J1 Visa – Payroll Activation

In the Misc. Payroll function, the New Hire function, and the Payroll Activation function, for any Legal Entity that has been identified as one that Employs J1 Visa Employees, a field will be displayed which allows you to identify the employee as a J1 Visa employee.

Payroll Activation

* = Required

Payroll Information:

*Employee No:	900615	*Tax Year:	2019
*Effective Date:	01/01/2019	*Payroll Status:	*no value
*Company:	Brite Star	*Pay Frequency:	*no value
*Payroll Processing Group:	*no-value	Time Card Exempt:	<input type="radio"/> Yes <input checked="" type="radio"/> No
*Deduction Group:	*no value	Check Sorting Code:	
*Scheduled Hours:		Suppress Printing of Direct Deposit Voucher:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Default Type Of Pay:	*no value	Accumulate Retirement Earnings:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Exempt From Workers Compensation:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
J1 Visa:	<input checked="" type="radio"/> Yes <input type="radio"/> No		

W-2 Information:

Retirement Plan:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Statutory Employee:	<input type="radio"/> Yes <input checked="" type="radio"/> No
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If J1 Visa field is set to Yes in the New Hire or Payroll Activation functions, when the resulting Tax Elections are generated, the following taxes will not be assigned to the employee: Federal FICA, FICM, FUTA, State NY SIT, NYSDI, NY FLI, Local NYC.

Lump Sums

In Manager Services, in rare scenarios where an existing lump sum did not have an Organization selected, the system was not allowing the user to select an organization. This has been corrected.

Messaging Setup – Tax Report Repository

Messaging Setup for the Tax Report Repository will now be available for our clients who outsource their Tax Processing with Unicorn HRO. In the Messaging Setup function in Manager Services, a new item has been added to the Process list box – MS Tax Report Repository, and a new Event has been added that corresponds to that process – After File Added.

This will allow the user to set up messages for whomever in their organization needs to know when new files are available to download from the Tax Report Repository function.

Messaging Setup

+ add

*Process: MS Tax Report Repository User: *All Users

*Event: After File Added

To View, click on information in the left column.

Message ID	Subject	Action
Test2	Test 3	notification list delete
test3	test2	notification list delete

+ add

You can add a new message for MS Tax Report Repository, After File Added (leave the User field defaulted to *All Users as this is not applicable for this Process) with wording similar to that in the screenshot below. This message can be sent to the Notification List set up for the message, which may include individual e-mail addresses or distribution lists (as defined in Microsoft Outlook).

Add Message

* = Required

Process: MS Tax Report Repository Event: After File Added

* Message ID: New Tax Files User: *All Users

Subject: New Tax Files have been added to Tax Report Repository

Message:

As of `EventDate` `EventTime`, new files have been placed in your repository for
`LegalEntity` `Description` for Tax Year `TaxYear`.

Add Data and/or Event Element:

Click on Element Description in order to add it to the bottom of the Message.

Event Elements:

User Causing Event
Date of Event
Time of Event

Data Elements:

Description
Legal Entity
Tax Year

→ submit
← cancel

New York Paid Family Leave

For common paymaster, for the first pay period of the year before no tax accumulator records have been created, the calculation of New York Paid Family Leave Insurance was incorrect. This has been corrected.

Quarterly Taxable Wage Balancing Report

When a payment with zero gross pay existed, the Detail report correctly showed no differences, but a difference appeared in the Summary report. The logic in the Summary report for this scenario has been changed to match that in the Detail report.

Tax Adjustment

When a user clicked on the History button in this function in Manager Services, the screen was not displaying properly. This has been corrected.

Tax Elections

When adding a record and clicking on the dropdown list in the Locality field and there were hundreds of entries, such as for Pennsylvania, the system took a long time to display the list. This has been changed to increase performance.

Tax Manager

For Employer State Unemployment Tax, the system was not allowing a Tax Rate of zero percent. This has been corrected.

Updated iCON Tools Functions

This section describes updated functions in iCON Tools.

Exit Interview Schedule

This function has been enhanced to allow the user to enter an exit interview record for the same interviewer for a different date. For example, if a terminated employee is re-hired, and terminates again, and has their second exit interview with the same interviewer, this record can now be added.

HR Common Object Dictionary - Payroll Deductions

Similar to the description above for Manager Services Common Object Dictionary, a new item has been added to the list box for the field Deduction Type: 457(b) 3Yrs Ret. Catch-up. Selecting this Deduction Type will set the Default Annual Maximum Limit on this deduction for an employee to the amount set in Customer Management Module's Global Deduction Limits function. For Hosted and Outsource clients, Unicorn HRO maintains these Global Limits, and we will be setting the amount to twice the annual 457(b) limit (\$38,000 for 2019).

***Note:** The IRS rule for an employee's annual maximum 457(b) is as follows. Based on this rule, if an employee's maximum should be less than twice the annual limit for 457(b), the annual maximum must be set on the employee's deduction record.

The lesser of:

- Twice the annual limit of 457(b) plans (\$38,000 in 2019 and \$37,000 in 2018) **or**
- The basic annual limit plus the amount of the basic limit not used in prior years (only allowed if not using age 50 or over catch-up contributions).

Payroll Tax Summary Interface

This function has been enhanced to support the new version 23 of the resulting file, which includes changes to reporting for the local taxes for Charleston, West Virginia and Madison, West Virginia.

This function has also been enhanced to write the codes for Employee and/or Employer Washington Family and Medical Leave insurance as WAFLIEE, WAMLIEE, and WAMLIER.

Reconciliation Tax Summary

This function has also been enhanced to write the codes for Employee and/or Employer Washington Family and Medical Leave insurance as WAFLIEE, WAMLIEE, and WAMLIER.

Updated Customer Management Module Functions

This section describes updated functions in Customer Management Module.

Generate RTS Export File

This function has also been enhanced to write the codes for Employee and/or Employer Washington Family and Medical Leave insurance as WAFLIEE, WAMLIEE, and WAMLIER.

Generate Tax Export File

This function has been enhanced to support the new version 23 of the resulting file, which includes changes to reporting for the local taxes for Charleston, West Virginia and Madison, West Virginia.

This function has also been enhanced to write the codes for Employee and/or Employer Washington Family and Medical Leave insurance as WAFLIEE, WAMLIEE, and WAMLIER.

Global Deduction Limits

A new item has been added to the list box for the field Deduction Type: 457(b) 3Yrs Ret. Catch-up, which will allow a user to enter a Default Annual Maximum that can be used for employee deductions. For Hosted and Outsource clients, Unicorn HRO maintains these Global Limits, and we will be setting the amount to twice the annual 457(b) limit (\$38,000 for 2019).