Version 2.066 Release Notes

08/20/2019

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Table of Contents

New Manager Services Functions

This section describes new functions in Manager Services.

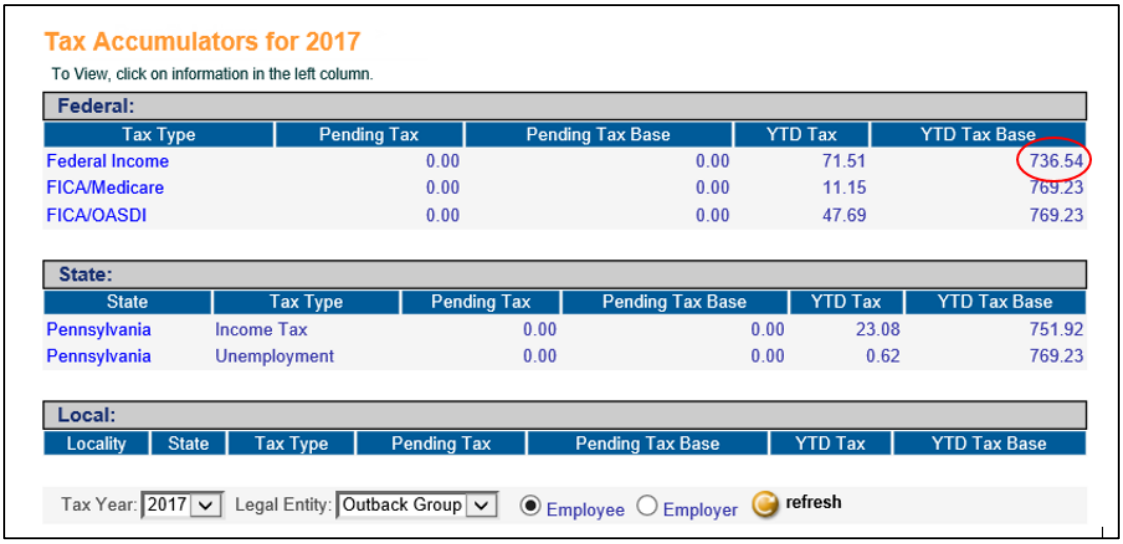
EEO-1 Reporting

This function has been added to Manager Services in the Reports menu. This function will replace the functions EEO-1 Reports, EEO-1 File Creation, and EEO-1 File Inquiry, and will allow the user to, from one prompt screen, produce either a PDF document or an upload file for EEO-1 reporting, or both. This function also will produce the newly required Component 2 data for this government survey.

The data for this survey is taken from Organization Setup, Demographics, Job Titles, Work History, Employment Status, Tax Accumulators and Pay Distribution.

Based on the organization structure and workforce snapshot From and To dates that you enter, the system will get all employees who were employed during that workforce snapshot. The system looks at each employee's Employment Status and Work History to determine where he or she was working and which position was occupied as during the workforce snapshot. Based on the Job Title and Organization Level on the relevant work history record, and the employees' gender and race in Demographics, counts are accumulated for each organization level.

As instructed by the EEOC, the salary band for an employee will be the amount from the employee's W-2 Box 1 for the year in the From and To dates, which comes from year to date tax base for Federal Income Tax in the Tax Accumulator function. The Total Number of Hours will be the hours for Pay Codes that have been flagged with the indicator "Include in EEO-1 Hours" in Pay Process Control within Pay Code Definition. The system will add up the year to date hours for those Pay Codes from Pay Distribution, for the year selected in the From and To dates. The release process will default all pay codes with the checkbox *selected* for "Include in EEO-1 Hours" – and **each Hosted and On-Premise customer will need to deselect** those pay codes that do not represent hours worked (such as Sick Pay, Vacation Pay, Bereavement, Jury Duty, etc…). **For customers who Outsource their payroll processing to Unicorn HRO, please contact PaySupport** if you have pay codes that should have the "Include in EEO-1 Hours" box deselected.



Tax Accumulators for 2017

To View, click on information in the left column.

Federal:

Tax Type	Pending Tax	Pending Tax Base	YTD Tax	YTD Tax Base
Federal Income	0.00	0.00	71.51	736.54
FICA/Medicare	0.00	0.00	11.15	769.23
FICA/OASDI	0.00	0.00	47.69	769.23

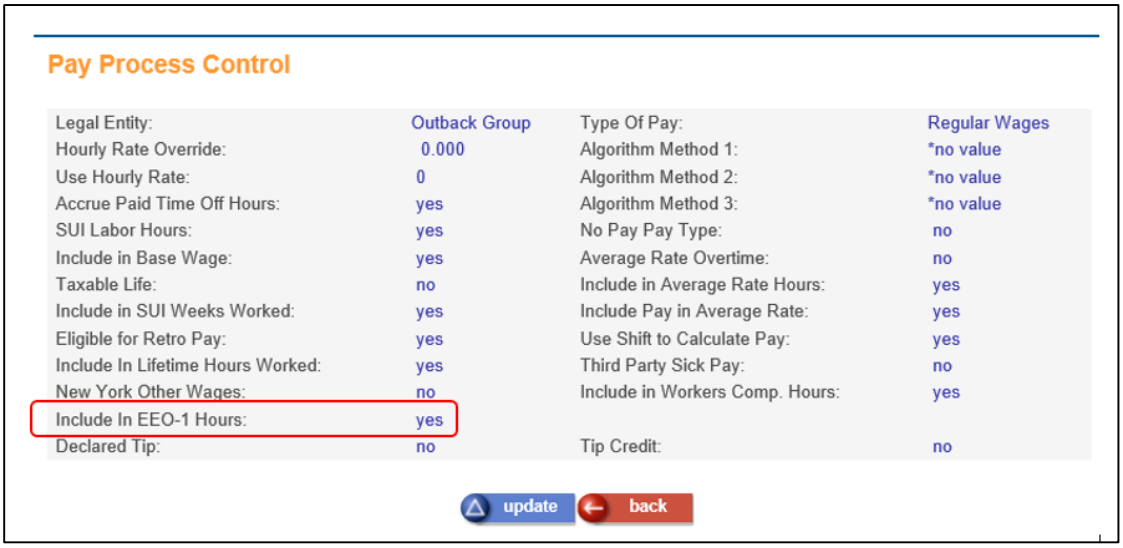
State:

State	Tax Type	Pending Tax	Pending Tax Base	YTD Tax	YTD Tax Base
Pennsylvania	Income Tax	0.00	0.00	23.08	751.92
Pennsylvania	Unemployment	0.00	0.00	0.62	769.23

Local:

Locality	State	Tax Type	Pending Tax	Pending Tax Base	YTD Tax	YTD Tax Base

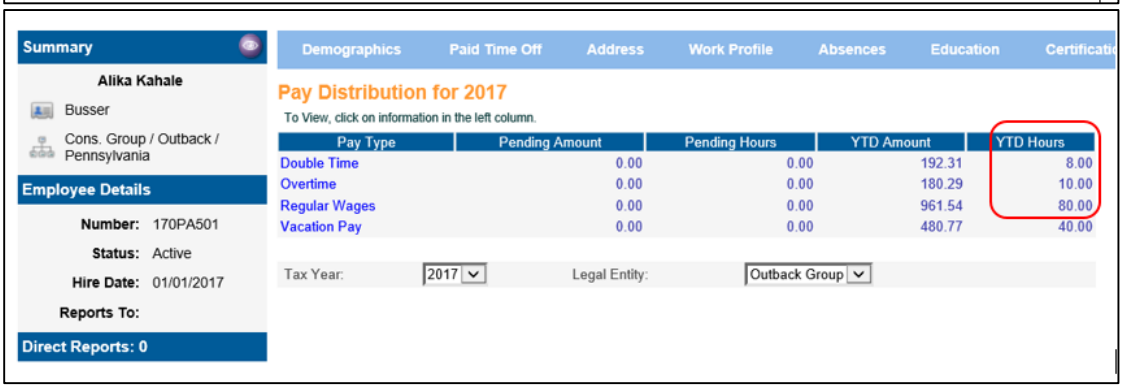
Tax Year: 2017 Legal Entity: Outback Group Employee Employer refresh



Pay Process Control

Legal Entity:	Outback Group	Type Of Pay:	Regular Wages
Hourly Rate Override:	0.000	Algorithm Method 1:	*no value
Use Hourly Rate:	0	Algorithm Method 2:	*no value
Accrue Paid Time Off Hours:	yes	Algorithm Method 3:	*no value
SUI Labor Hours:	yes	No Pay Pay Type:	no
Include in Base Wage:	yes	Average Rate Overtime:	no
Taxable Life:	no	Include in Average Rate Hours:	yes
Include in SUI Weeks Worked:	yes	Include Pay in Average Rate:	yes
Eligible for Retro Pay:	yes	Use Shift to Calculate Pay:	yes
Include In Lifetime Hours Worked:	yes	Third Party Sick Pay:	no
New York Other Wages:	no	Include in Workers Comp. Hours:	yes
Include In EEO-1 Hours:	yes		
Declared Tip:	no	Tip Credit:	no

update back



Summary

Alika Kahale

Busser

Cons. Group / Outback / Pennsylvania

Employee Details

Number: 170PA501

Status: Active

Hire Date: 01/01/2017

Reports To:

Direct Reports: 0

Demographics Paid Time Off Address Work Profile Absences Education Certificati

Pay Distribution for 2017

To View, click on information in the left column.

Pay Type	Pending Amount	Pending Hours	YTD Amount	YTD Hours
Double Time	0.00	0.00	192.31	8.00
Overtime	0.00	0.00	180.29	10.00
Regular Wages	0.00	0.00	961.54	80.00
Vacation Pay	0.00	0.00	480.77	40.00

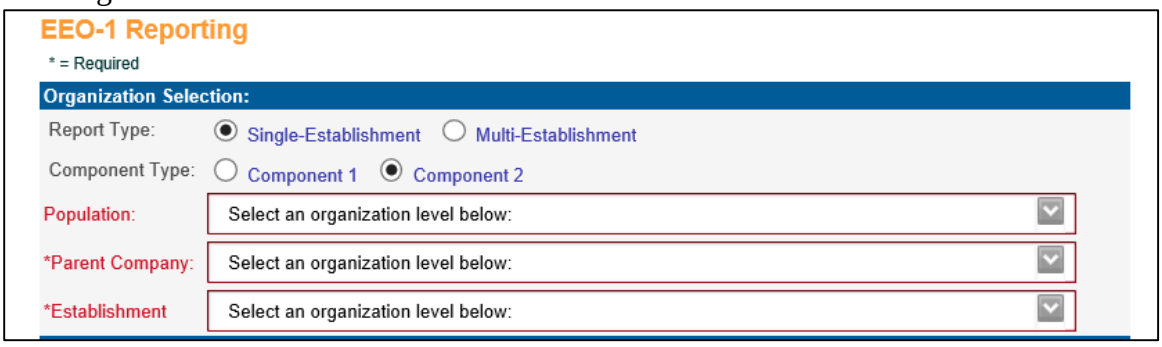
Tax Year: 2017 Legal Entity: Outback Group

The first screen of the EEO-1 Reporting function will allow the user to select to create either a Single Establishment report or a Multi-Establishment report, and either a Component 1 report or a Component 2 report. Component 2 reports will contain data categorized by Salary Bands for Employee Counts by Job Category and Gender-Race, and data categorized by Salary Bands for Number of Hours by Job Category and Gender-Race.

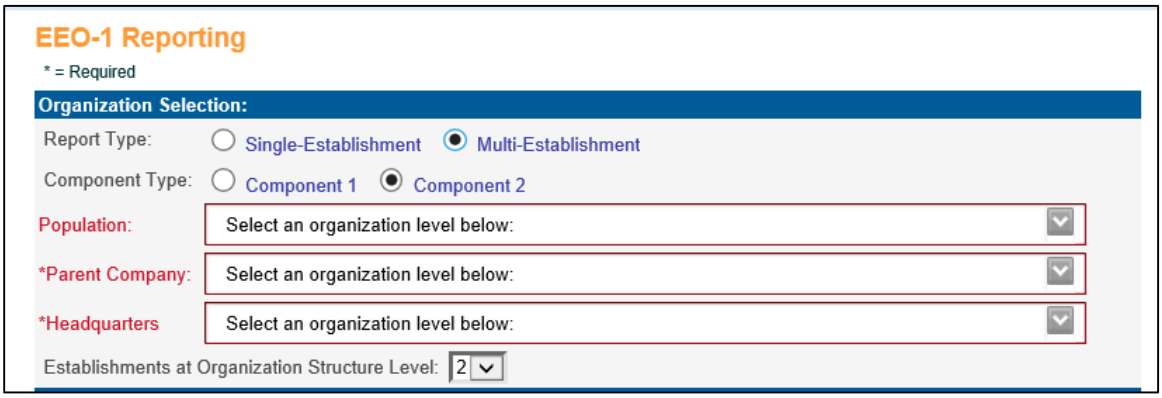
- **Single-Establishment** This selection is for a company with all employees located in one physical location.
- **Multi-Establishment** This selection is required for companies which have multiple locations. This report will include the Headquarters Data and the Individual Establishment Data. A Consolidated Report will also print for Multi-Establishment employers.

The Levels of Organization that need to be selected when you run this function are the Population, Parent Company, and Establishment (Single Establishment) or Headquarters (Multi-Establishment).

For Single Establishment:

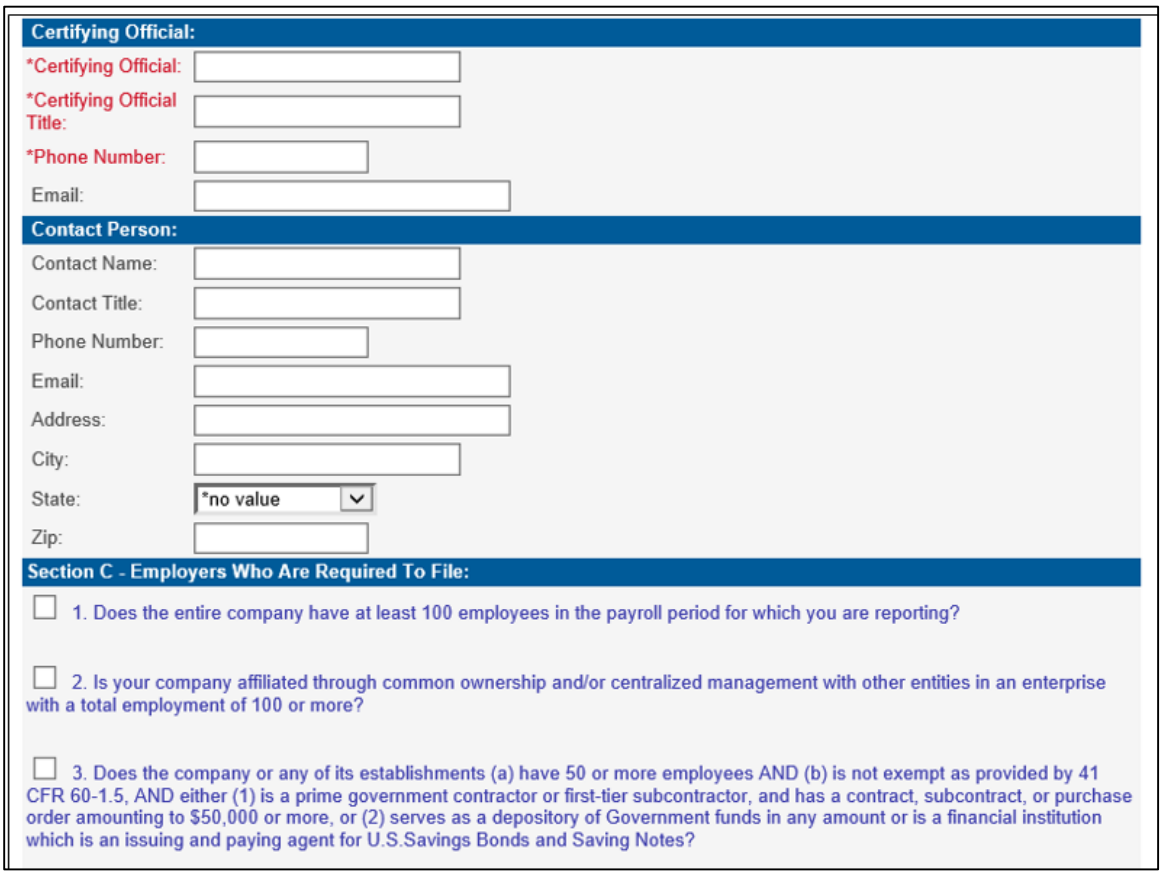


For Multi-Establishment:

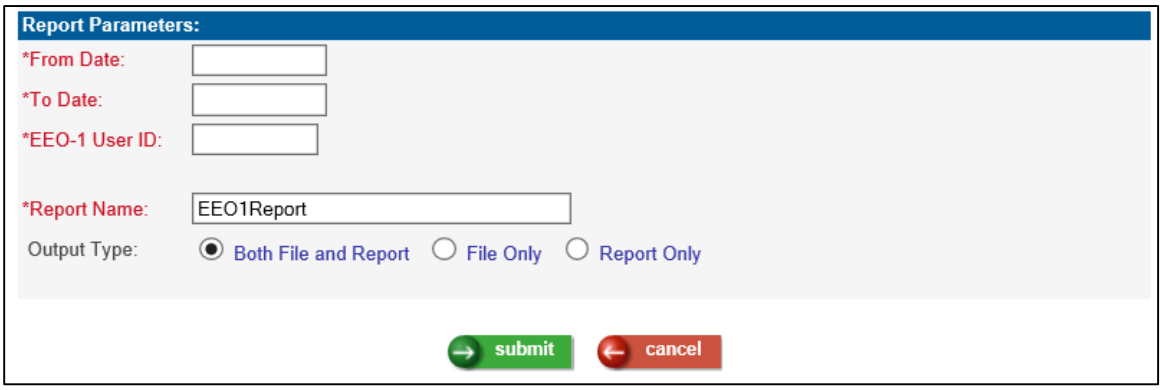


When Selecting Multi-Establishment, you will also be required to indicate at which specific Organization Level the headquarters is located, and at which Level of Organization your Establishments are located. Any employees below these levels will have their data summarized at the establishment level for the purposes of the EEO-1 survey.

Once you choose the type of report you want to create – enter data in the fields on the prompt screen such as information about the certifying official, contact information, and answers to required questions. If you check question 3, you will be required to enter the Dun and Bradstreet number for the company you are reporting for.



The next section is where you will enter the information regarding the range of dates you are including for the workforce snapshot. Per the instructions from the EEOC – this range should include a payroll period that occurs between October 1 and December 31 for the reporting year, what they call the "workforce snapshot." This is the period that will be used by the system to determine which employees were active during that time period, their demographic and job information, wages for the year, and hours worked for the year.



You will need to enter the EEO-1 User ID if creating a Component 2 report or file, as this is required now that Component 2 data is being captured by a new reporting system. This should be an 8-digit user id that you received when registering for the new system.

In this section, you can use the default report name or enter a different report name. You can also choose to output both the file and report, or the file only, or report only.

Once you have entered your data and made your selections, the job can be viewed in the Job Server Queue, and once complete, the results will appear in report master listing. There will be one PDF document and one upload file. Below is an example of the files that will appear if the report for Multi-Establishment Component 2 is run. The names of both the upload file and the PDF document will be appended by the Job Number.

Open/Save	Report Name	Date Run	Time Run	Select
	UploadFile2017EEO1USER-98917.txt	08/12/2019	11:10 AM	☐
	EEO1Report-98917.pdf	08/12/2019	11:10 AM	☐

The EEOC system for collecting Component 2 data for Multi-Establishment employers in 2019 gives the employer the option of reporting establishments with under 50 employees as:

- Type 6 records, only reporting information on the establishment and total employment (not categorized by Job Category, Gender-Race and Salary Band)
- Type 8 records, which will report the information categorized, the same as the establishments with over 50 employees.

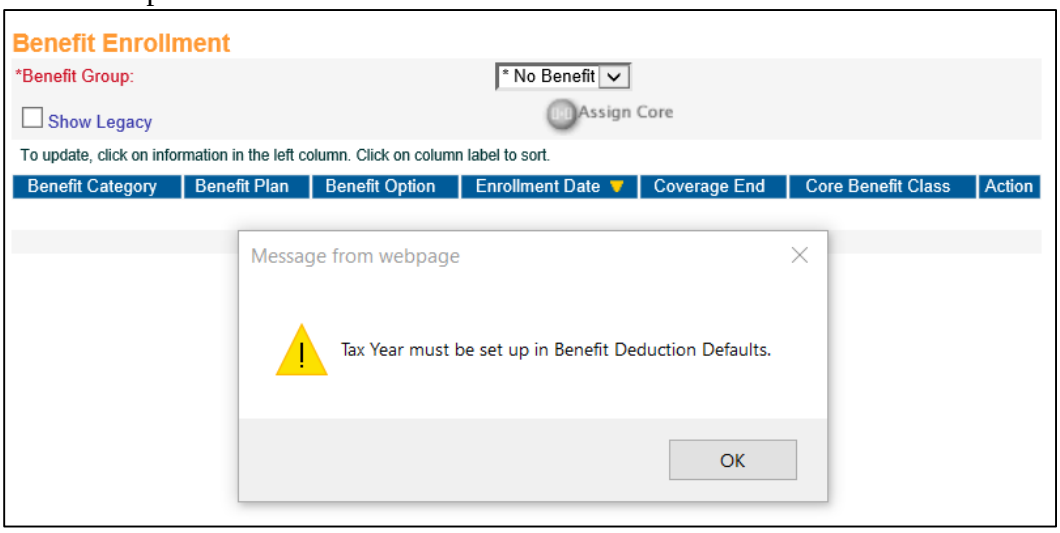
For the Component 2 upload file and PDF document, **iCON only supports Type 8**. The PDF document for Multi-Establishment Component 2 will print the employment data in the respective categories. For users who are entering the data into the EEOC system through manual entry, they can still use the printed PDF document and enter those “Under 50 Employee Establishments” as Type 6, and only enter employment totals uncategorized.

Updated Manager Services Functions

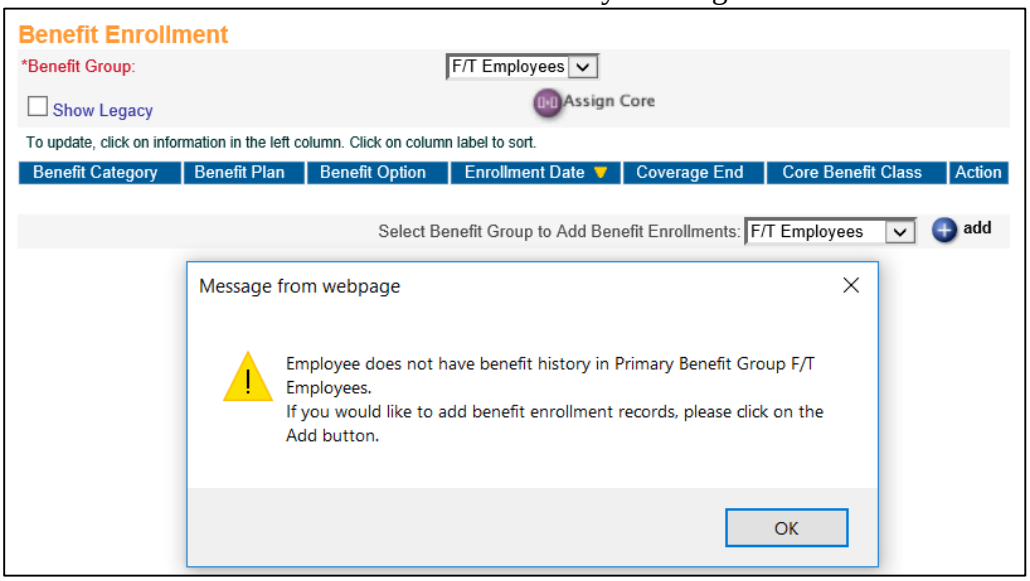
This section describes updated functions in Manager Services.

Benefit Enrollment

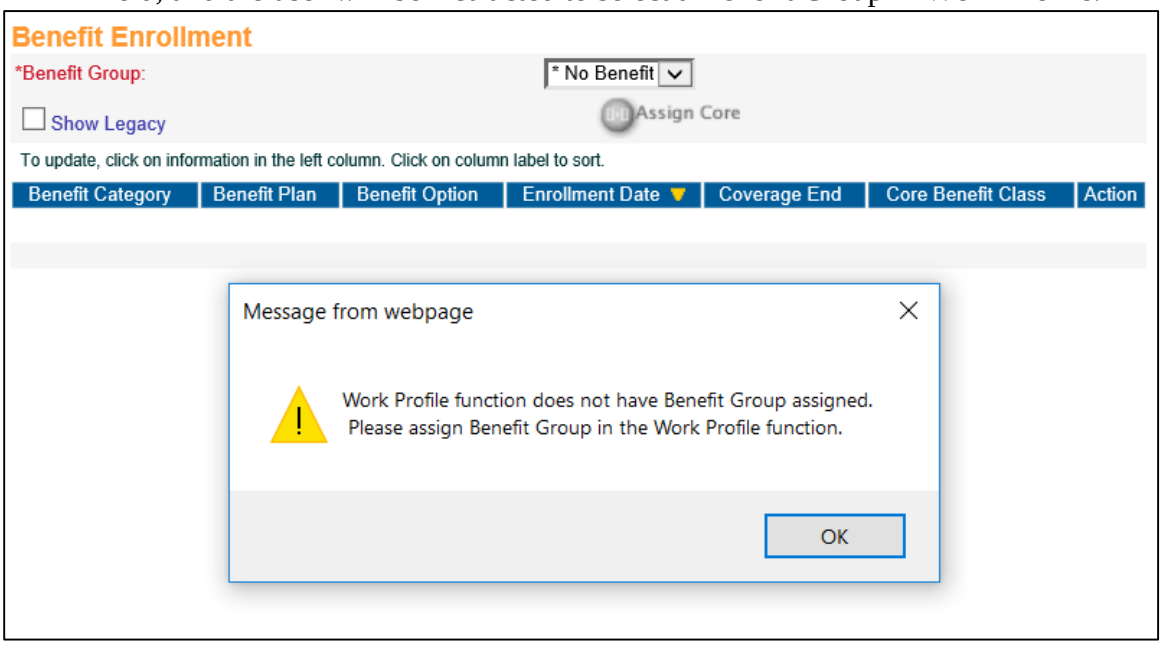
- If a user's Benefit Deduction Defaults record is not defined, the user will receive a message that their Benefit Deduction Defaults Tax Year needs to be defined to run the process.



- If the employee did not have Benefit History in iCON, the Benefit Group and Select Benefit Group to Add Benefit Enrollments fields were blank. The program has been improved as follows:
  - If the employee has a Primary Benefit Group defined in Work Profile, but Benefit History does not exist, then the Primary Benefit Group defined in Work Profile will be displayed in the Benefit Group field, and in the Select Benefit Group to Add Benefit Enrollments field. The user will then be instructed to add Benefit Enrollments by clicking the Add button.

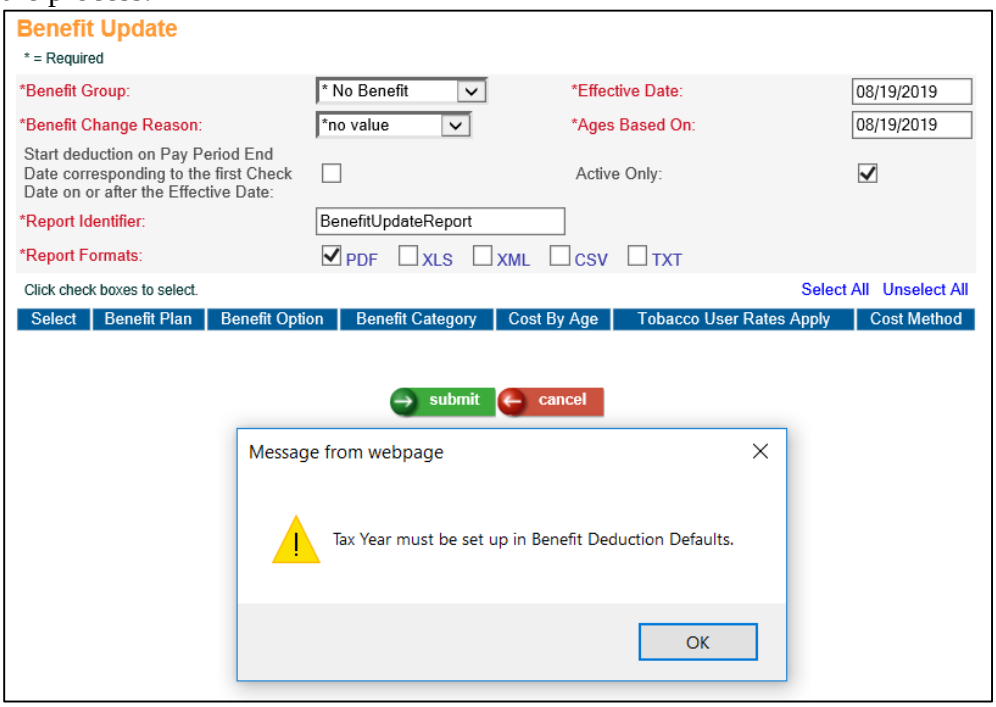


- If the Primary Benefit Group has not been defined for the employee in Work Profile, then the null value *No Benefit will be displayed in the Benefit Group field, and the user will be instructed to select a Benefit Group in Work Profile.



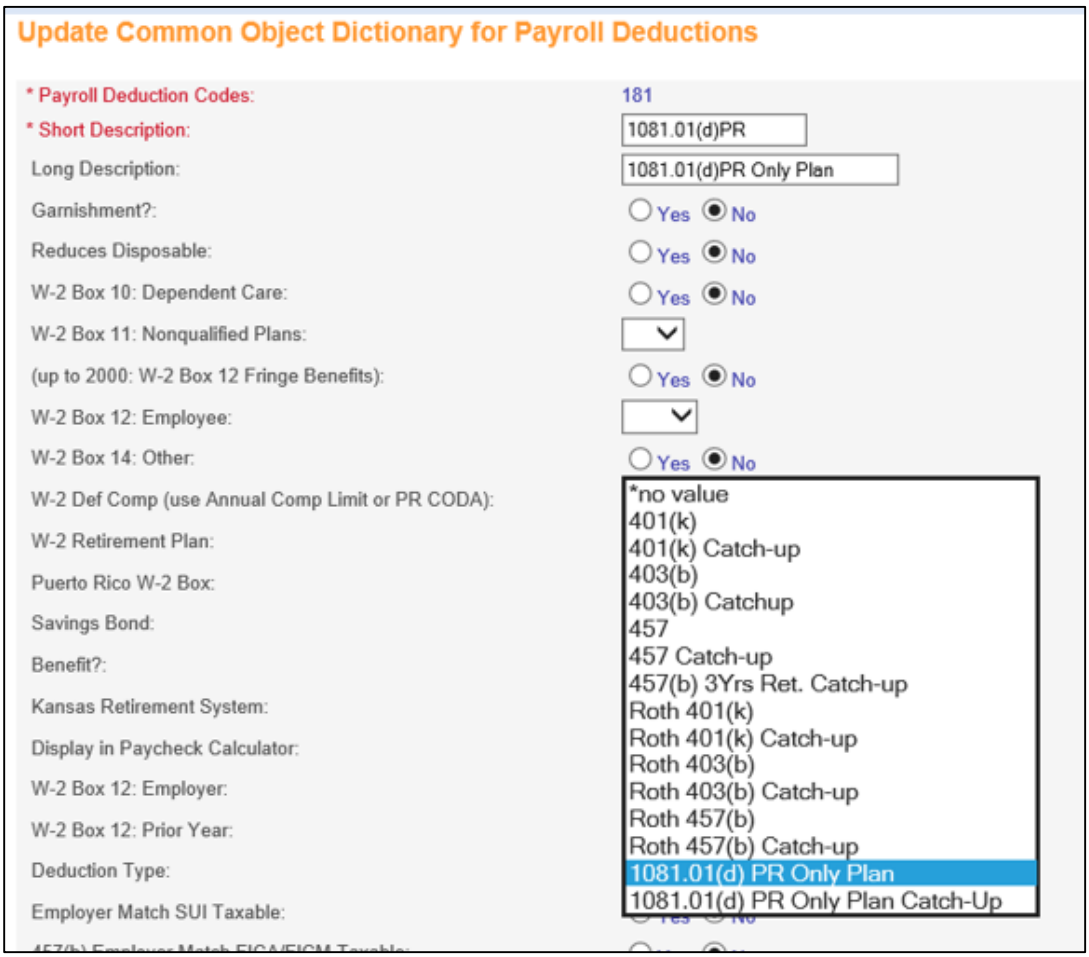
Benefit Update

If a user's Benefit Deduction Defaults record is not defined, the user will receive a message that their Benefit Deduction Defaults Tax Year needs to be defined to run the process.



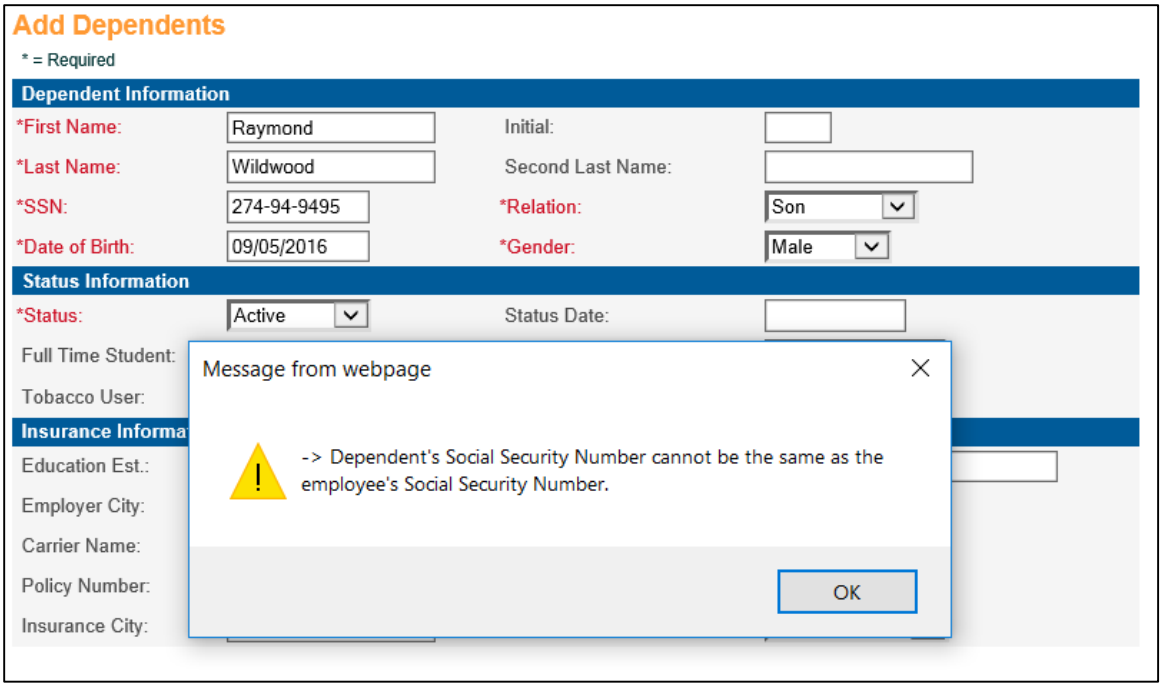
Common Object Dictionary – Payroll Deductions

Two new items have been added to the list box for the field Deduction Type: 1081.01(d) PR Only Plan, 1081.01(d) PR Only Plan Catch-Up, which allow a user to define deductions as this type, so that the Default Annual Maximums entered in Global Deduction Limits can be used for these Puerto Rico Employee Thrift Plan Deductions in the Employee Deductions functions. For Hosted and Outsource clients, Unicorn HRO maintains these Global Limits, and we will be setting the amounts to $15,000 for 1081.01(d) PR Only Plan, and $1,500 for 1081.01(d) PR Only Plan Catch-Up.



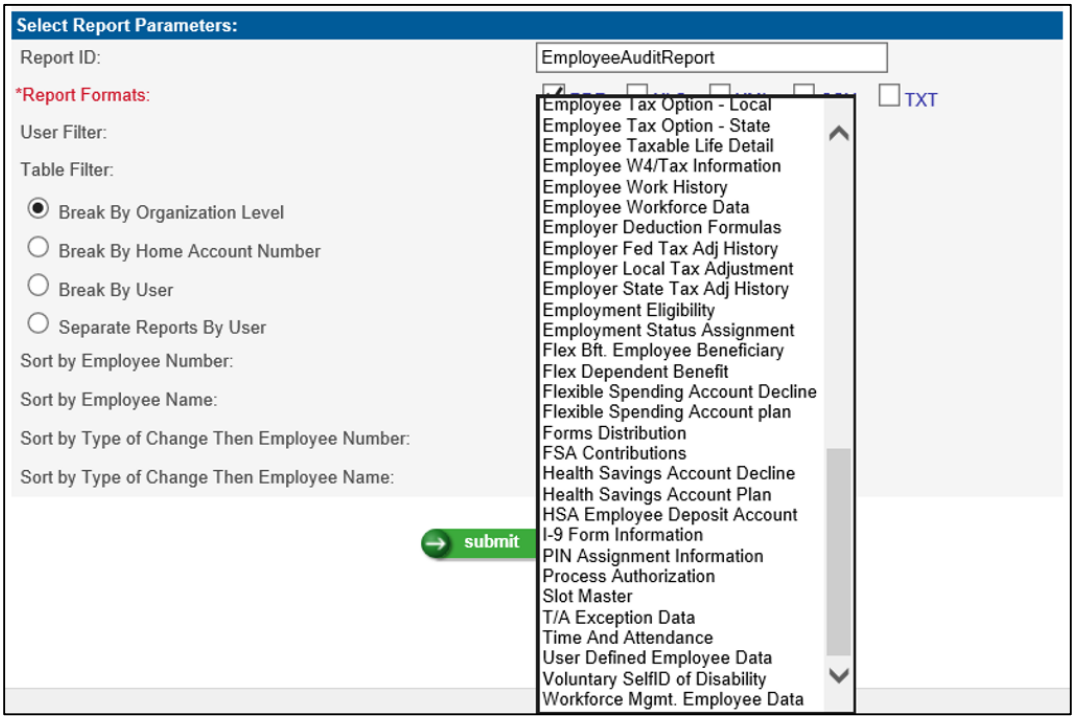
Dependents

The Dependents functionality has been enhanced to generate an error message if the dependent's SSN matches the employee's SSN.



Employee Audit Report

- This report has been enhanced to include Time and Attendance entries that are manually made in the iCON application. Two new items have been added to the list box for the field Table Filter in the Report Parameters section of this function: **T/A Exception Data** – which includes Time and Attendance data for exempt employees, and **Time and Attendance** – which includes data for non-exempt employees.



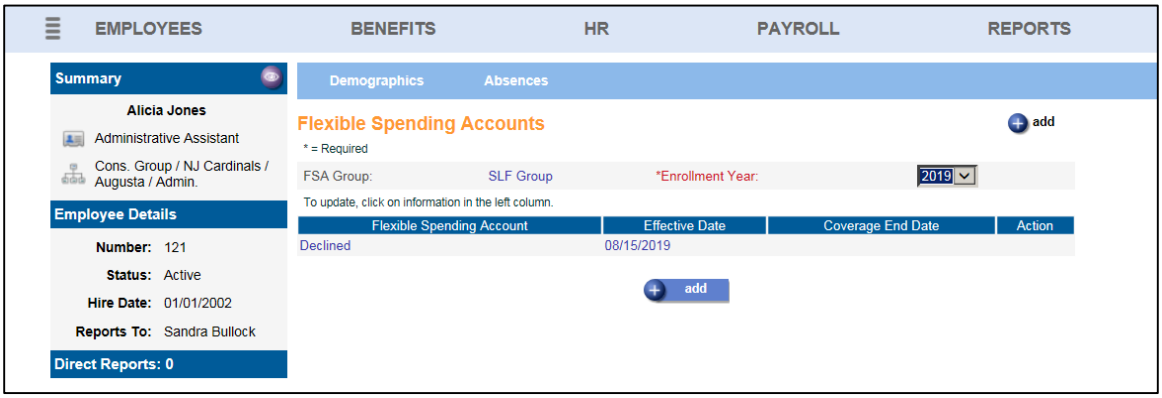
- In the Employee Self Service On-Line Enrollment Modules (First Time Enrollment / Open Enrollment / Life Events) Step 4, if the employee declined the Flexible Spending Account or the Health Savings Account Plan, the Declined record transaction was recorded in the database but was not being displayed on the Employee Audit Report. This has been corrected.

Employee Positions

If two users were in the Employee Positions function at the same time, adding new positions to two different employees, the wrong position could have been saved to an employee. This has been corrected.

Flexible Spending Account Plans

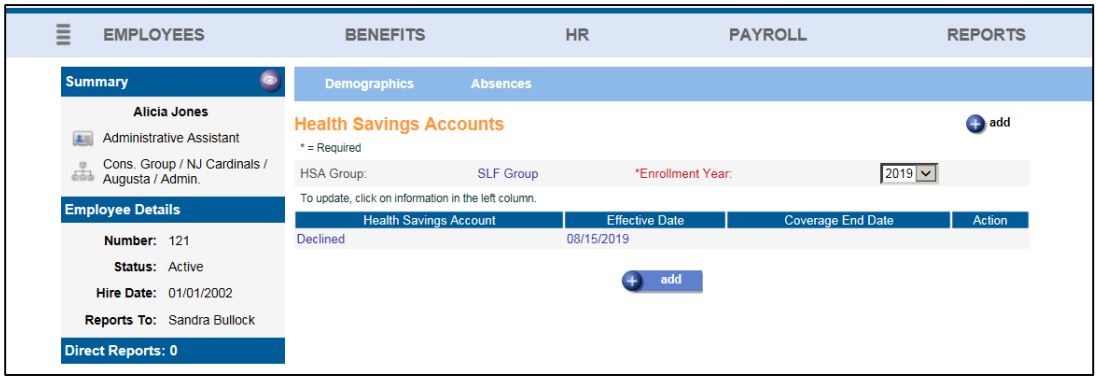
- If the Flexible Spending Account Plan was deleted and employees were enrolled in the plan, a message would be displayed that contained a misspelled word. This has been corrected.
- In the Employee Self Service On-Line Enrollment Modules (First Time Enrollment / Open Enrollment / Life Events) Step 4, if the employee declined the Flexible Spending Account or the Health Savings Account Plan, the Declined record transaction was recorded in the database but was not being displayed on the Flexible Spending Accounts function. This has been corrected and will display as follows:



Health Savings Accounts

- If an employee had an HSA Plan and an HSA Catch-up plan, with both employee and employer contributions, on the view and update screens for the HSA Plan, the Actual Employee Contribution field was incorrectly displaying the Actual Employee Contribution amount from the HSA Catch-up plan. This has been corrected.
- In the Employee Self Service On-Line Enrollment Modules (First Time Enrollment / Open Enrollment / Life Events) Step 4, if the employee declined the Flexible Spending Account or the Health Savings Account Plan, the

Declined record transaction was recorded in the database but was not being displayed on the Health Savings Accounts function. This has been corrected and will display as follows:

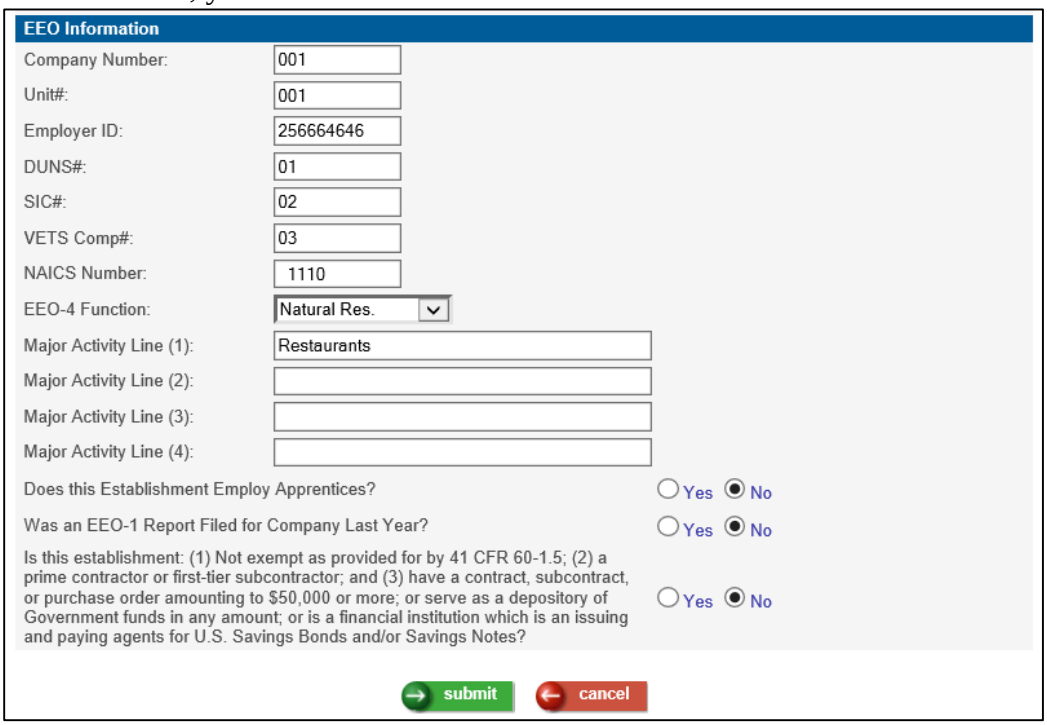


Manual Payment

Manual Payments were not recognizing if a Pay Code had an Hourly Rate Override set in Pay Code Definition>Pay Process Control. This has been corrected.

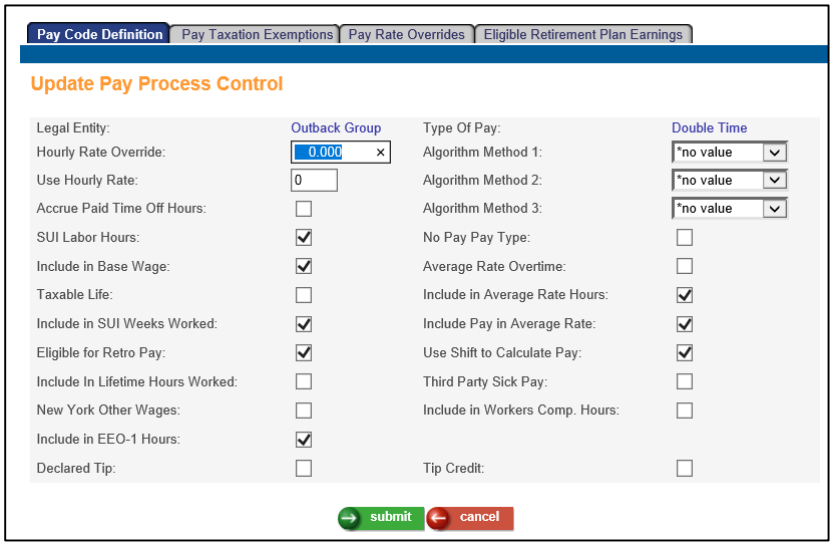
Organization Setup

A question has been added in the EEO Information section that is required for the Upload File for Component 2. It is a question about the individual establishment and whether it has certain Federal Contractor or other attributes. This will default to No when the release is deployed for all Organization Levels. If it pertains to any of your establishments, you will need to select Yes.



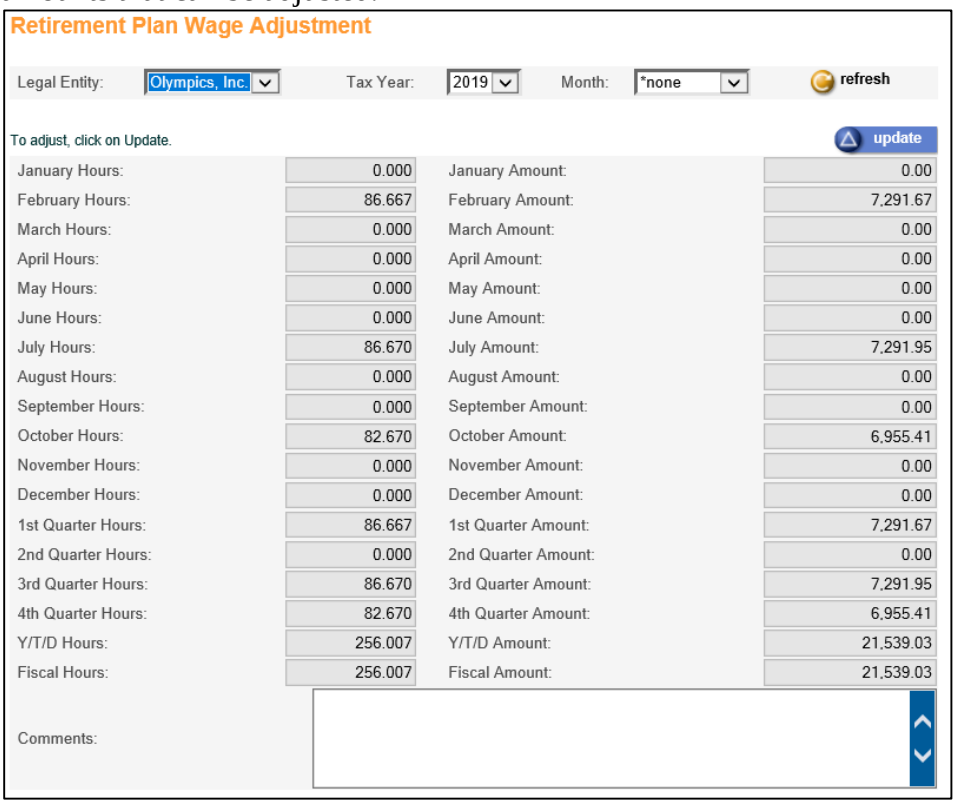
Pay Code Definition – Pay Process Control

As mentioned above in the New Function in Manager Services for EEO-1 Reporting, a new checkbox has been added to the Pay Process Control page. Check this box to indicate that the hours associated with the selected pay code should be included as Hours Worked for the EEO-1 Component 2 report.



Retirement Plan Wage Adjustment

This function has been updated to include Fiscal Hours and Fiscal Amount as amounts that can be adjusted.



Retirement Plan Wage Adjustment

Legal Entity: Olympics, Inc. Tax Year: 2019 Month: *none refresh

To adjust, click on Update. update

January Hours:	0.000	January Amount:	0.00
February Hours:	86.667	February Amount:	7,291.67
March Hours:	0.000	March Amount:	0.00
April Hours:	0.000	April Amount:	0.00
May Hours:	0.000	May Amount:	0.00
June Hours:	0.000	June Amount:	0.00
July Hours:	86.670	July Amount:	7,291.95
August Hours:	0.000	August Amount:	0.00
September Hours:	0.000	September Amount:	0.00
October Hours:	82.670	October Amount:	6,955.41
November Hours:	0.000	November Amount:	0.00
December Hours:	0.000	December Amount:	0.00
1st Quarter Hours:	86.667	1st Quarter Amount:	7,291.67
2nd Quarter Hours:	0.000	2nd Quarter Amount:	0.00
3rd Quarter Hours:	86.670	3rd Quarter Amount:	7,291.95
4th Quarter Hours:	82.670	4th Quarter Amount:	6,955.41
Y/T/D Hours:	256.007	Y/T/D Amount:	21,539.03
Fiscal Hours:	256.007	Fiscal Amount:	21,539.03

Comments:

W-2 Data Generation, W-2 Data Generation for Administrators

These functions have been updated so that when the Forms option is selected, for any W-2 for an employee who works in the state of Oregon, the Oregon Statewide Transit Tax withholding amount will print in Box 14 with the label ORSTT W/H.

W-2 Healthcare Cost Report

The W-2 Healthcare Cost Report has been enhanced to display the total annualized cost for Benefit Plans with a Costing Method based on Salary Percentage or Salary Based Percentage.

Updated Employee Self Service Functions

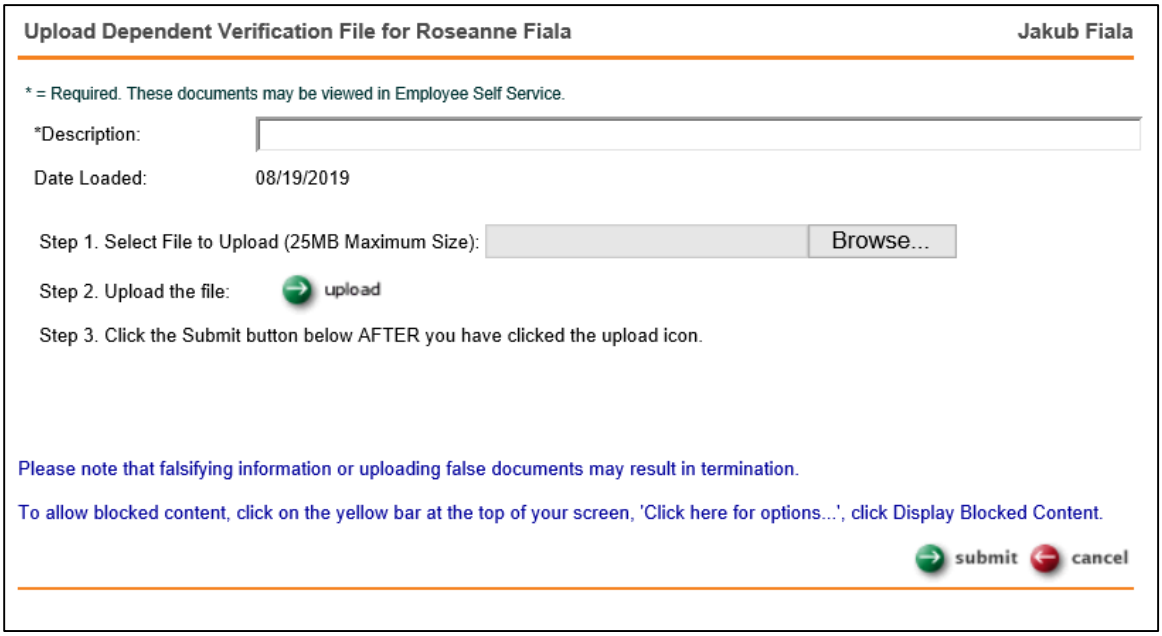
This section describes updated functions in Employee Self Service.

Address Information, Enrollment Functions (First Time Enrollment / Open Enrollment) – Verify Personal Information

The system was creating Messages when only Cell Phone Number or Cell Phone carrier was changed on the address screens in these functions, when messages for changes of address should only be generated if true address fields changed. This has been corrected.

Dependents, Enrollment Functions (First Time Enrollment / Life Events / Open Enrollment) – Dependent Verification

If the employee is required to submit dependent verification documentation, the following text has been added when the employee submits the documentation: "Please note that falsifying information or uploading false documents may result in termination."



Updated iCON Tools Functions

This section describes updated functions in iCON Tools.

Employer Benefit Plans

In the iCON Tools Employer Benefit Plans functionality, the field "Use payroll frequency to calculate deduction" had a blank space in the list box. The blank space has been removed in the "Use payroll frequency to calculate deduction" list box. The values for this field can only be Yes or No, and the system will default to No when a new Benefit Plan is added.

HR Common Object Dictionary – Payroll Deductions

Two new items have been added to the list box for the field Deduction Type: 1081.01(d) PR Only Plan, 1081.01(d) PR Only Plan Catch-Up, which allow a user to define deductions as this type, so that the Default Annual Maximums entered in Global Deduction Limits can be used for these Puerto Rico Employee Thrift Plan Deductions in the Employee Deductions functions. For Hosted and Outsource clients, Unicorn HRO maintains these Global Limits, and we will be setting the amounts to $15,000 for 1081.01(d) PR Only Plan, and $1,500 for 1081.01(d) PR Only Plan Catch-Up.

Manual Payments

The system was not allowing the user to enter 0 hours or wages amount for a pay code. This has been corrected.

Reconciliation Tax Summary

This function was including the incorrect quarterly amount for gross wages for second quarter for Washington Employee Family Leave Insurance (WAFLIEE) and Washington Employee Medical Leave Insurance (WAMLIEE). This has been corrected.

W-2 Data Generation, W-2 Data Generation for Administrators

These functions have been updated so that when the Forms option is selected, for any W-2 for an employee who works in the state of Oregon, the Oregon Statewide Transit Tax withholding amount will print in Box 14 with the label ORSTT W/H.

Updated Customer Management Module Functions

This section describes updated functions in Customer Management Module.

Generate RTS Export File

This function was including the incorrect quarterly amount for gross wages for second quarter for Washington Employee Family Leave Insurance (WAFLIEE) and Washington Employee Medical Leave Insurance(WAMLIEE). This has been corrected.

Global Deduction Limits

Two new items have been added to the list box for the field Deduction Type: 1081.01(d) PR Only Plan, 1081.01(d) PR Only Plan Catch-Up and which will allow a user to enter a Default Annual Maximum that can be used for these Puerto Rico Employee Thrift Plan Deductions in the Employee Deductions functions. For Hosted and Outsource clients, Unicorn HRO maintains these Global Limits, and we will be setting the amounts to $15,000 for 1081.01(d) PR Only Plan, and $1,500 for 1081.01(d) PR Only Plan Catch-Up.

Record 6 Adjustment

This function has been improved in that it now will no longer include inactive customers or inactive legal entities.