



Version 2.073

Release Notes



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Updated Manager Services Functions

This section describes updated functions in Manager Services.

Audit Report and Employee Audit Report

This release includes more functions being added for Auditing reporting.

The following employee functions have been added to the **Employee Audit Report**:

- Certifications
- Education
- E-mail Addresses
- Employment Status – ACA Employment Status

The following batch process functions have been added to the **Employee Audit Report**:

- Lump Sum Import
- Deduction Data Import
- Employer Deduction Import

The following functions have been added to the **Audit Report**:

- Common Object Dictionary – E-Mail Address Types
- Common Object Dictionary – File Types
- HR System Defaults – select the following tables to capture ALL changes to data within the HR System Defaults function
 - HR System Defaults
 - HR System Defaults Extension

Benefit Plans – Plan Definition

The screen for the Plan Definition has been updated in Manager Services. In this new release, to indicate that a Benefit Plan is a High Deductible Health Plan, the Plan Definition tab now contains a checkbox labeled High Deductible Health Plan.

save the data. The system will also save the benefit plan when you click on either the Zip Code Availability or Benefit Costs tabs.

Plan Definition Coverage Calc. Eligibility G/L & Admin. Costs On-Line Enroll. Options Zip Code Avail. Benefit Costs

Plan Definition:

* Carrier: Aetna Policy ID:

Active Defined Contribution

Taxable Group Term Life Insurance Medical Coverage for State New Hire Reporting Purposes

Allow beneficiaries to be specified Display plan on Benefit Statement

High Deductible Health Plan

*Please Note: The previous field to indicate that a Benefit Plan was a High Deductible Health Plan was the existence of a dollar value amount in the field Maximum HSA Contribution Allowed. The process of the deployment of the release

will ensure that all customers that had a value in this field for any Benefit Plan will now display the High Deductible Health Plan checkbox as checked. This change was necessary related to changes being made to the Health Savings Account Plans function in Manager Services – which are detailed later in this document.

Deductions – Recurring Adjustments

The Deductions function has been enhanced to allow for a recurring adjustment to an employee Deduction. A new field – a checkbox – labeled Recurring Adjustment has been added to the add and update screens for Deductions. When this checkbox is selected, a new field “Last Pay Ending Date for Recurring Adjustment” will appear, and this field will be required. By checking this box, the “One Time Adjustment” field and the “Period End Date for Adjustment” field will also become required. The adjustment amount in the “One Time Adjustment” field will occur on the deduction for the pay periods from the “Period End Date for Adjustment” to the “Last Pay Ending Date for Recurring Adjustment.”

These new fields will be added to the functionality for Deduction Data Import in a future iCON Update.

The screenshot shows the 'Update Deduction' screen for Ingrid Eriksson. The 'Legal Entity' is 'Olympics, Inc.'. The 'Recurring Adjustment?' checkbox is checked and highlighted in yellow. Other fields include:

- Payroll Deduction:** Auto Allowance
- Start Date:** 01/01/2022
- Frequency:** Each Pay Period
- Fixed Amount:** 100.00
- Percent of Regular Wages:** 0.0000
- Percent of Supplemental Wages:** 0.0000
- Annual Maximum:** 99999999.99
- Default Annual Maximum:** 99999999.99
- Monthly Maximum:** 99999999.99
- Minimum Per Payment:** 0.00
- One Time Adjustment:** 0.00
- Maximum EE/ER Combined:** 99999999.99
- Rate Per Labor Hour:** 0.0000
- Override Reduce Disposable:** *Use default setting
- Reference Type:** *no value
- Reference Number:** (empty field)
- Active:** (radio buttons)
- End Date:** 12/31/9999
- Arrears Option:** Full/No Arr (A)
- Fixed Amount - Supplemental:** 0.00
- Percent Based On:** *no value
- Priority (000 highest):** 0
- Lifetime Maximum:** 99999999.99
- Fiscal Year Maximum:** 99999999.99
- Quarterly Maximum:** 99999999.99
- Maximum Per Payment:** 99999999.99
- Period End Date For Adjustment:** (empty field)
- Last Pay Ending Date For Recurring Adjustment:** (empty field)
- Algorithm Category:** *no value

Employer Deductions – Recurring Adjustments

The Employer Deductions function has also been enhanced to allow for a recurring adjustment. A new field – a checkbox – labeled Recurring Adjustment has been added to the add and update screens for Employer Deductions. When this checkbox is selected, a new field “Last Pay Ending Date for Recurring Adjustment” will appear, and this field will be required. By checking this box, the “Adjustment Amount” field and the “Adjustment Effective Date” field will also become required. The adjustment amount in the “Adjustment Amount” field will occur on the employer deduction for

the pay periods from the “Adjustment Effective Date” to the “Last Pay Ending Date for Recurring Adjustment.”

These new fields will be added to the functionality for Employer Deduction Import in a future iCON Update.

The screenshot shows the 'Update Employer Deduction' form for employee Ingrid Eriksson. The form is divided into several sections:

- Employee Details:** Name: Ingrid Eriksson, Title: Team Trainer, Cons. Group: Olympics / US Corporate / Figure Skate / Women / California / Northern. Number: 900439, Status: Active, Hire Date: 01/03/2020, Reports To: (blank), Direct Reports: 0.
- Update Employer Deduction:**
 - * Payroll Deduction: Co. Paid Life
 - * Start Date: 01/01/2022
 - * Frequency: Each Pay Period
 - Fixed Amount: 52.20
 - * Adjustment Amount: 0.00
 - Recurring Adjustment?
 - Percent of Regular Wages: 0.0000
 - Percent of Employee Contribution: 0.0000
 - Minimum Per Pay Period: 0.00
 - Maximum Per Month: 999,999,999.99
 - Maximum Per Year: 999,999,999.99
 - Maximum Total: 999,999,999.99
- Legal Entity:** Olympics, Inc.
- Active:** Yes No
- End Date:** 12/31/9999
- Fixed Amount - Supplemental:** 0.00
- * Adjustment Effective Date:** (blank)
- * Last Pay Ending Date For Recurring Adjustment:** (blank)
- Percent of Supplemental Wages:** 0.0000
- Up To Percent of Employee Wages:** 0.0000
- Maximum Per Pay Period:** 999,999,999.99
- Maximum Per Quarter:** 999,999,999.99
- Maximum Per Fiscal Year:** 999,999,999.99
- Use Tier Formula:** No

Buttons for 'submit' and 'cancel' are located at the bottom of the form.

Employee Search

- *Reports to (Last Name) – Search Results* - When searching in the Employee Search field by Reports to (Last Name), the search results screen displayed the Job Title and Organization of the supervisor, not the employee. This has been corrected to display the Job Title and Organization of the employee.
- *Last Name – Search Results* - When searching in the Employee Search field by Last Name – the search results screen displayed a yellow upward or downward pointing triangle when you click on the text of a column heading to sort by that column ascending or descending. However, when you clicked on the triangle itself, the system was returning a blank screen for a function. This has been corrected.

Health Savings Account Plans

The screens for adding and updating Health Savings Account Plans have been enhanced in this release. The detail setup for a Health Savings Account Plan previously had only one field for a dollar value amount for Maximum Contribution. This has now been replaced with three fields:

- **Total Maximum Contribution:** here the user would enter the amount set by the IRS for the maximum that can be contributed to this plan annually – by both Employee and Employer – during the enrollment year. (For 2022 this is \$7,500.00 for Family Coverage and \$3,650.00 for Self-Only Coverage.)

- **Employer Maximum Contribution:** here the user would enter the amount that will be contributed by the Employer annually for the enrollment year. This field will accept a value of \$0.00.
- **Employee Maximum Contribution:** this is a system calculated read-only field that is the difference between the Total Maximum Contribution and the Employer Contribution, and it represents the Employee Contribution for the year. If the employer contributes nothing, the Employee Maximum Contribution will be equal to the Total Maximum Contribution.

Update Health Savings Account Plans
* = Required

Enrollment Year: 2023
HSA Group: SLF Group

*Health Savings Account: Medical Self
*Payroll Deduction: HSA Employee

*Total Maximum Contribution: 3650.00
Employer Maximum Contribution: 1000.00
Employee Maximum Contribution: 2650.00

Login Screen

In some scenarios, when users double-clicked on the login button after entering their User Name and Password on the Manager Services Login screen, Web Speed Errors appeared. This has been corrected.

Organization Security related to Payment History and Paycheck Info.

In some scenarios, when users had access to both the Payment History and Paycheck Info. functions, and the Organization Security for the users was set to No Salary for a particular Organization Level, those users could possibly see salary information within Paycheck Info. that they were restricted from seeing in Payment History. This has been corrected so that the Paycheck Info. function follows the same Organization Security rules related to salary that the Payment History function does.

Paid Time Off Policies – added Carry Over Option for First Year Rules

A new field has been added to the accrual rule definition for First Year Accrual Rules. If a Paid Time Off Policy has been setup to allow for a Carry Over Option and First Year Rules, then the First Year Rules add and update screens will now allow the user to enter how many hours can be carried over from the first year to the next year. If the employee still has hours in their balance at the end of the year – these hours will carry over to the next year when the employee’s new Paid Time Off records are created for the new plan year.

Update Paid Time Off First Year Accrual Rule

Paid Time Off Policy:	
Paid Time Off Group: Pay Period FY	Paid Time Off: Sick Time
Paid Time Off Type: Calendar	Plan Date: 01/01/2017

If an employee is hired between November and December

The employee will accrue hours based on pay periods not to exceed hours within a given year.

Maximum carry over policy for this Paid Time Off is hours per year.

Position Assignment and Position Control

Under certain data conditions with data in the Organization Setup function, the Position Control and Position Assignment screens did not load properly. This has been corrected.

Quarterly FLI MLI Wages and Hours Export

This function has been updated in preparation for the reporting of Washington Long Term Care Insurance Fund (LTCI) information to the State of Washington, for which contributions are expected to begin in January of 2023. Generally, all employees subject to Washington FLI and MLI will be subject to Washington LTCI, however the state does allow for exemptions. On the electronic file that reports wages and hours for all three insurance taxes, the state now requires that an employee's exempt status for Washington LTCI be displayed on the last column of the CSV file. If an employee should be exempt from Washington LTCI, they should have the tax assigned to them in the Tax Elections function, and the **Exempt (from withholding)** field should have *Yes* selected.

Summary	Demographics	Paid Time Off	Address	Work Profile	Absences	Education	Certificati
<p>Helen P Washington</p> <p>Certified Public Accountant</p> <p>Cons. Group / Outback / Washington</p> <hr/> <p>Employee Details</p> <p>Number: 170WA</p> <p>Status: Active</p> <p>Hire Date: 11/08/2018</p> <p>Reports To: George District</p> <hr/> <p>Direct Reports: 0</p>	<h3 style="color: #e67e22;">Update Tax Elections - State</h3> <p><small>* = Required</small></p> <p>* Effective Check Date: 01/01/2022</p>			<p>Legal Entity:</p> <p>Washington</p>		<p>Outback Group</p> <p>Long Term Care</p>	
		<p>Active (accumulate wages): <input checked="" type="radio"/> Yes <input type="radio"/> No</p>		<p>Exempt (from withholding): <input checked="" type="radio"/> Yes <input type="radio"/> No</p>			
		<input type="button" value="→ submit"/> <input type="button" value="← cancel"/>					

The state has also updated their specifications for the file and requires column headings. An example of how the file would appear if opened in Notepad is displayed below.

```

File Edit Format View Help
SSN, LastName, FirstName, MiddleInitial, Hours, Wages, WACaresExempt (Y/N)
293-84-9328, Jones, Charles, , 40, 1200.00, N
293-84-3444, Sampson, Charlene, , 40, 1134.62, N
292-93-8492, Washington, Helen, P, 40, 514.96, Y
170-65-7844, Matrixxx, Washington, , 40, 557.69, Y
192-38-3344, Li, Jonathan, , 80, 2000.00, Y

```

W-2 Register – Massachusetts FLI and MLI Taxable Wages

Because the employer match for 401k and similar retirement deductions should be added to Massachusetts SUI Taxable Wages if the flag is marked in Payroll Common Object -Deductions, and because we updated the system calculation for Massachusetts FLI and MLI Taxable Wages for this legal requirement, the W-2 Register has been updated to include the employer match for 401k and similar retirement deductions in the Calculated Wages column. The report should no longer display any differences between Taxable Wages and Calculated Wages for Massachusetts FLI and MLI.

WFM Field Setup

If there was more than one WFM Field setup with a WFM Type of “Pull-down,” and the same WFM Code value is used in “Setup COD” in both or all of the WFM Fields, but there were different WFM Descriptions on the WFM Code values, the system was displaying the WFM Description of the first matching WFM Code instead of the description of on the WFM Code for the WFM Field that you are working with. This has been corrected.

Updated Employee Self Service Functions

This section describes updated functions in Employee Self Service.

Certifications

An enhancement has been made in this function to include more columns on the landing screen if an employee has Certification records. Previously, the columns on this screen in Employee Self Service only included **Certification/License/Degree**, **Name of License/Certification**, **License Number**, and **Action**. After the deployment of this release – the columns that will appear will include the previous columns mentioned plus **Conferring Body**, **Date Granted**, and **Certification Expiration**.

Certification/License/Degree	Name of License/Certification	License Number	Conferring Body	Date Granted	Certification Expiration	Action
Cisco Network	CCNA	CCT1253698	Cisco Systems San Francis	01/01/2021	12/31/2023	delete

Direct Deposit Accounts

An enhancement has been made in this function to prevent a user from deleting all direct deposit accounts when a Legal Entity's Direct Deposit Preferences function in Manager Services has the Partial Pay field set to NO. Employee users will be instructed to add the new Direct Deposit Account records before deleting any unwanted Direct Deposit Account records. For employees who want to no longer have their pay direct deposited to a bank account, and want to receive a paper check, a user in Manager Services will need to delete all the employee's Direct Deposit Account records.

Updated iCON Tools Functions

This section describes updated functions in iCON Tools.

W-2 Register – Massachusetts FLI and MLI Taxable Wages

Because the employer match for 401k and similar retirement deductions should be added to Massachusetts SUI Taxable Wages if the flag is marked in Payroll Common Object -Deductions, and because we updated the system calculation for Massachusetts FLI and MLI Taxable Wages for this legal requirement, the W-2 Register has been updated to include the employer match for 401k and similar retirement deductions in the Calculated Wages column. They report should no longer display any differences between Taxable Wages and Calculated Wages for Massachusetts FLI and MLI.

Updated Customer Management Module Functions

This section describes updated functions in Customer Management Module.

W-2 Register (as part of Payroll Express Workflows) – Massachusetts FLI and MLI Taxable Wages

Because the employer match for 401k and similar retirement deductions should be added to Massachusetts SUI Taxable Wages if the flag is marked in Payroll Common Object -Deductions, and because we updated the system calculation for Massachusetts FLI and MLI Taxable Wages for this legal requirement, the W-2 Register has been updated to include the employer match for 401k and similar retirement deductions in the Calculated Wages column. They report should no longer display any differences between Taxable Wages and Calculated Wages for Massachusetts FLI and MLI.