Version 2.073 Release Notes

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Table of Contents

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**:

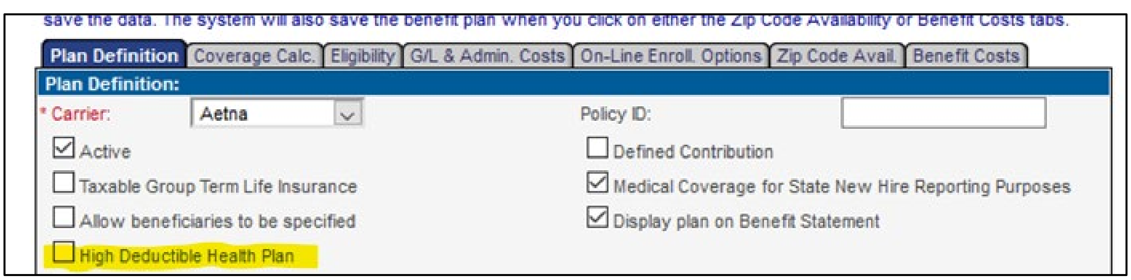
- Lump Sum Import
- Deduction Data Import
- Employer Deduction Import

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.

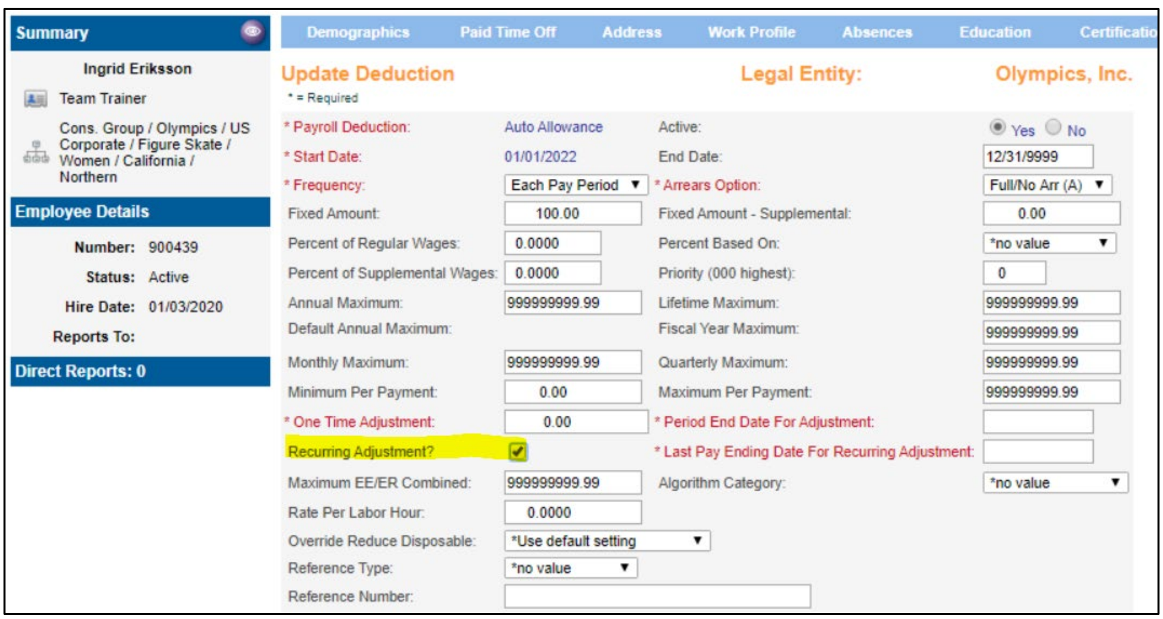


*Please Note: The previous field to indicate that a Benefit Plan was a High Deductible Health Plan was the existence of a dollar value amount in the field Maximum HSA Contribution Allowed. The process of the deployment of the release will ensure that all customers that had a value in this field for any 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.”

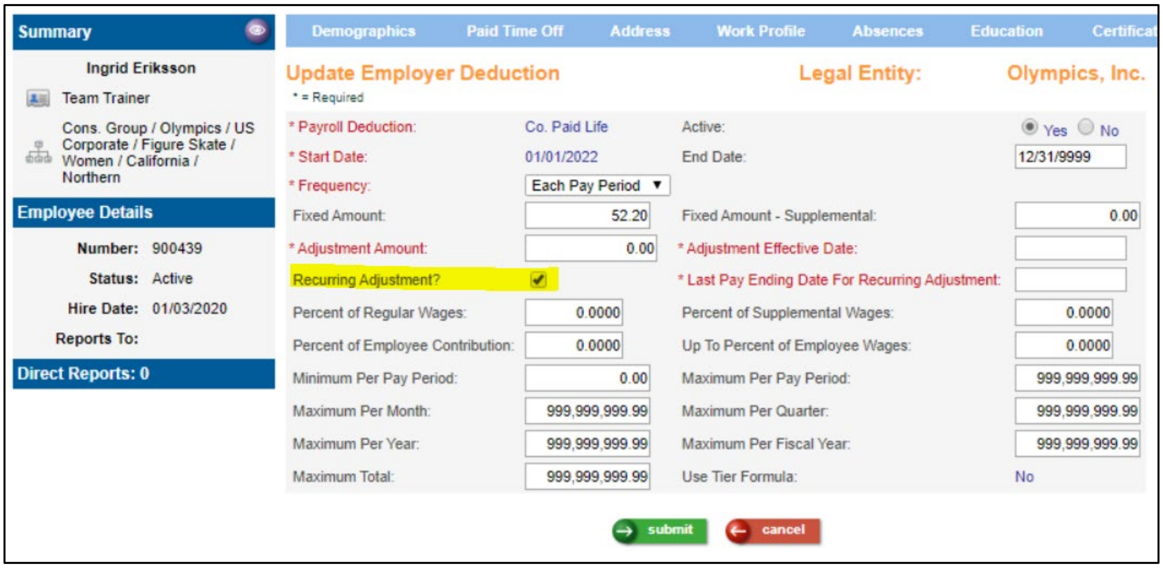
These new fields will be added to the functionality for Deduction Data Import in a future iCON Update.



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.



Employee Search

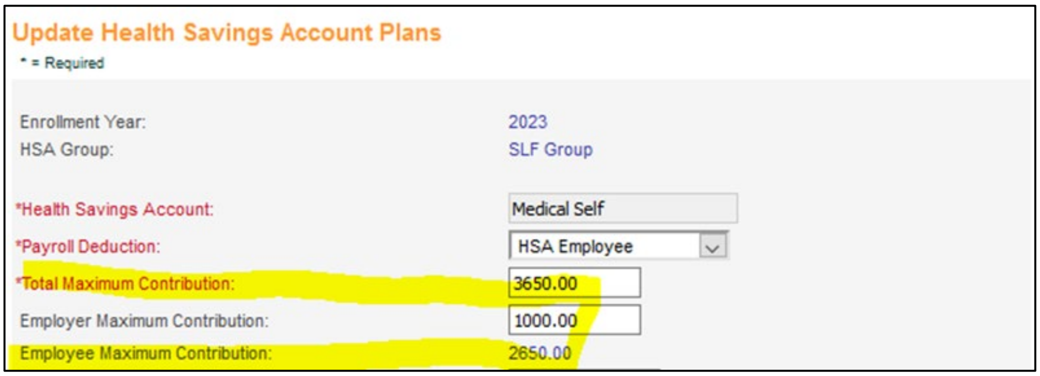
- *Reports to (Last Name) – Search Results* - When searching in the Employee Search field by Reports to (Last Name), the search results screen displayed the Job Title and Organization of the supervisor, not the employee. This has been corrected to display the Job Title and Organization of the employee.
- *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.



Login Screen

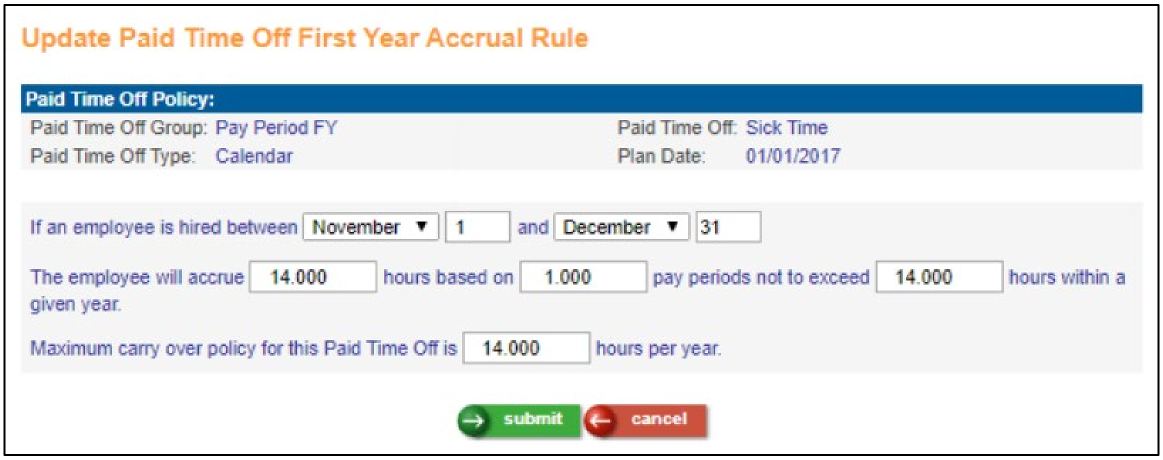
In some scenarios, when users double-clicked on the login button after entering their User Name and Password on the Manager Services Login screen, Web Speed Errors appeared. This has been corrected.

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.

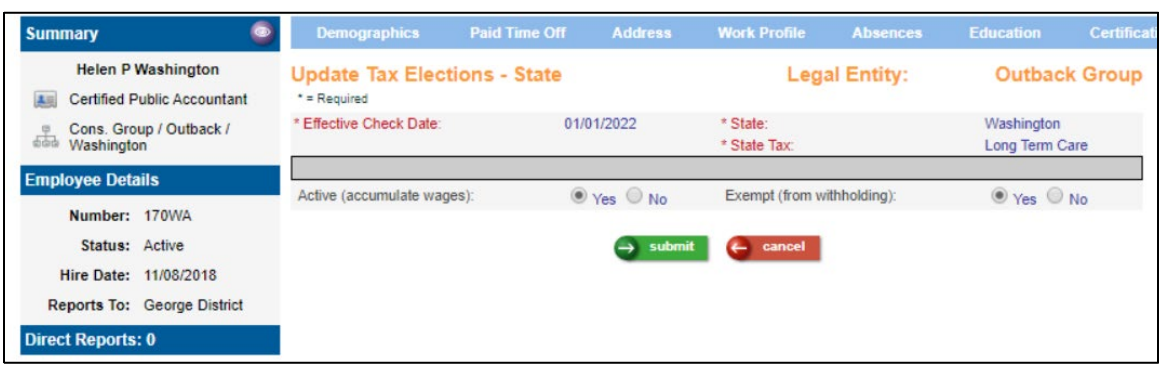


Position Assignment and Position Control

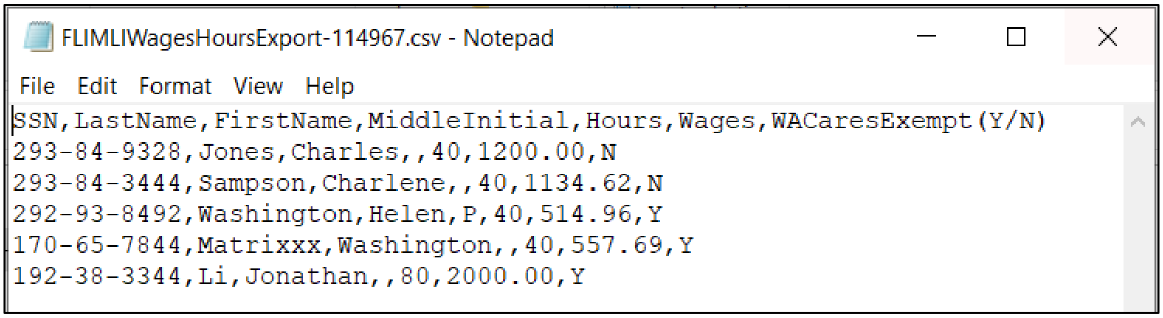
Under certain data conditions with data in the Organization Setup function, the Position Control and Position Assignment screens did not load properly. This has been corrected.

Quarterly FLI MLI Wages and Hours Export

This function has been updated in preparation for the reporting of Washington Long Term Cares 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.



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.



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

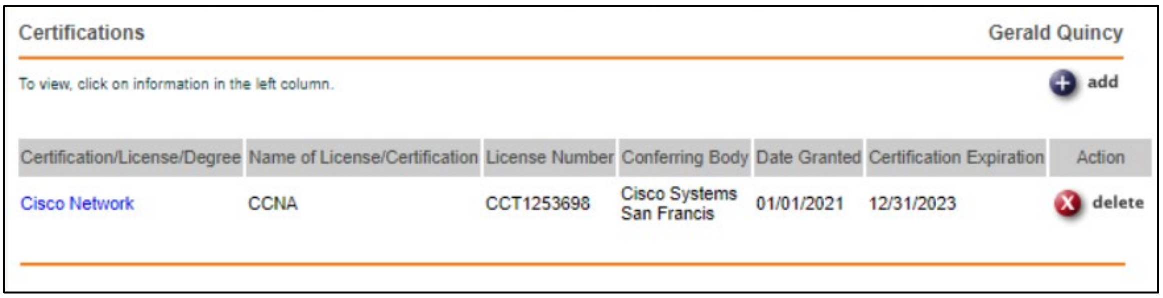
If there was more than one WFM Field setup with a WFM Type of "Pulldown," and the same WFM Code value is used in "Setup COD" in both or all of the WFM Fields, but there were different WFM Descriptions on the WFM Code values, the system was displaying the WFM Description of the first matching WFM Code 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**.



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.