

Version 2.075 Release Notes



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New Manager Services Functions

This section describes new functions in Manager Services.

Salary Change Import Reversal

This new function, which appears under the HR Actions menu, provides the ability to delete Salary Change records that were imported into the system using the Salary Change Import function. The iCON baseline Salary Change Import function only currently imports Standard Compensation Method salary changes, so this reversal will similarly only reverse Standard Compensation Method salary changes done by import.

Please assign this function to the appropriate users in Function Security. **Please Note:** The "Delete" option in Function Security for this function controls the appearance of the "Reverse" button next to the path of the file name in the list screen for the function. This option must be checked for users to actually perform the reversal of an import.

This function will also delete any related Compensation Method records and Salary History records that were created with the initial import.

The system displays the import date, time and full path of the import source with the name of files that were imported. Click on the Reverse button next to the desired file to delete all of the salary change records that were added when this file was imported. To refresh the list of imported files, click Refresh.

You will be asked to confirm that you are sure you want to process the reversal. Click OK to proceed or click Cancel to exit without reversing any data.

If you click OK, the system will proceed to remove any data records created by the file you selected, and will confirm that the Salary Change import entries have been removed.

ea.			
mport Date	Import Time	Import Source	Action
4/25/2023	10:47:40	/pdf/uploads/2000-4541SallmportReverseStaging.csv	🥥 reverse
		C refresh	



Updated Manager Services Functions

This section describes updated functions in Manager Services.

Benefit Statement

On this screen report, under certain data conditions, the Employer Cost column for the selected Health Savings Account plan was not displaying "N/A" as it should. This has been corrected.

Benefit Cost Import

Previously, users could only complete Benefit Cost Import for Benefit Plans that were costed by Standard Costing methods. This function has been enhanced so that it now allows for Benefit Cost Import for Benefit Plans that are costed By Age or By Salary.

Here is an example of a *Benefit Plan Costed By Age* that has not yet had Benefit Costs entered.

Update Ben	efit Plans											
* = Required												
* Group:	SGM Benefits	*	Category:	Suppl. Life In	is 🗸							
* Plan:	Suppl. Life 🗸 🗸	*	Option:	Employee Or	nly 🗸							
Click on each ta save the data. T	Click on each tab to enter information about the benefit plan. When you have entered all information, click on the Submit button to 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:	Cigna 🗸		Policy ID:									
Active Defined Contribution												
Taxable Group Term Life Insurance Medical Coverage for State New Hire Reporting Purposes												
Allow benef	Allow beneficiaries to be specified											
High Deduc	tible Health Plan											
	liant Plan											
Self-Insured	1 Plan											
Wellness P	lan											
U Weiness I	lan											
Costing:												
🗹 Use pay fre	quency to calculate deducti	on	Cost Method:		Amount 🗸							
Cost by age	9		Employee Deductio	n:	Supp. Life 🗸							
Cost by tob	acco user status		Employer Deduction	n:	Supp. Life 🗸							
Report cost	on W-2											
		aubmit	cancel									
		Submit	Cancer									

the data in the	CL DI										
Update Ben	lefit Plans										
* = Required											
* Group:	SGM Benefits	*	Category:	Suppl. Life Ins 🗸							
* Plan:	Suppl. Life 🗸 🗸	*	Option:	Employee Only 🗸							
To add a record, enter information and click Done. Click Reset if you need to clear the data that was entered. To update a record, click on the information in the left column. This will highlight the record and display the information in the right hand section where it can be modified. When you have finished changing the data, click Done to save your changes. When you are finished entering all data, you may click on another tab to work with other areas of the benefit plan, or click on either the Submit or Cancel button to go to the main list page.											
Plan Definition Coverage Calc. Eligibility G/L & Admin. Costs On-Line Enroll. Options Zip Code Avail. Benefit Costs											
Benefit Costs L	by Amount by Age:										
Effective D	ate From Age	To Age Action	* Effective Date:		From Age:						
					* To Age:						
				Employer Cost per	Employer Cost per						
			Cost	Linpioyee	Dependent						
			Frequency:	*no value	*no value						
			Units of Coverage								
			onito or oprorago	·							
				Employee Cost per Employee	Employee Cost per Dependent						
			Cost:								
			Frequency:	*no value 🗸	*no value 🗸						
			Units of Coverage	c							
				🔁 done 🕘 rese	et						
•					•						
		→ submit	e cancel								

In the Benefit Cost Import function – there are now three radio buttons that allow the user to select whether they are importing for a Standard Cost benefit plan, a benefit plan with Cost Based on Age, or a benefit plan with Cost Based on Salary. Select the radio button for the type of Costs you are importing for. In this example – select Cost Based on Age.



For Benefit Plans Costed By Age – the following is the layout of the import CSV file (opened in Excel) – please note the fields **From Age** and **To Age**.

Benefit Group	Benefit Plan	Benefit Option	Effective Date	From Age	To Age	ER cost Per EE	EREE Per	EREE Coverage Amount	ER cost Per DEP	ERDP Per	ERDP Coverage Amount	EE cost Per EE	EEEE Per	EEEE Coverage Amount	EE cost Per DEP	EEDP Per	EEDP Coverage Amount
SGM	SPL	EE	1/1/2023	18	24	0.2	12	10000				0.8	12	10000			
SGM	SPL	EE	1/1/2023	25	34	2.5	12	10000				7.5	12	10000			
SGM	SPL	EE	1/1/2023	35	44	7	12	10000				13	12	10000			
SGM	SPL	EE	1/1/2023	45	54	15	12	10000				35	12	10000			
SGM	SPL	EE	1/1/2023	64	99	40	12	10000				60	12	10000			

Importing the above file results in the following on the Benefit Costs tab for this Benefit Plan:

Update Ben	efit Plan	S									
* = Required											
* Group:	SGM Benef	its		Category:	Suppl. Life Ins 🗸						
* Plan:	Suppl. Life	~		Option:	Employee Only 🗸						
To add a record, enter information and click Done. Click Reset if you need to clear the data that was entered. To update a record, click on the information in the left column. This will highlight the record and display the information in the right hand section where it can be modified. When you have finished changing the data, click Done to save your changes. When you are finished entering all data, you may click on another tab to work with other areas of the benefit plan, or click on either the Submit or Cancel button to go to the main list page.											
Plan Definition Coverage Calc. Eligibility G/L & Admin. Costs On-Line Enroll. Options Zip Code Avail. Benefit Costs											
Benefit Costs b	y Amount b	y Age:		1							
Effective Date	From Age	To Age	Action	* Effective Date:	01/01/2023	From Age: 018					
01/01/2023	018	024	🎯 view 🚺 delete			* To Age: 024					
01/01/2023	025	034	🎯 view 🔕 delete		Employer Cost per Employee	Employer Cost per Dependent					
01/01/2023	035	044	🎯 view 🔕 delete	Cost:	0.2000	0.0000					
01/01/2023	045	054	🌀 view 🔞 delete	Frequency:	Monthly 🗸	*no value 🗸					
01/01/2023	064	099	🙆 view 👩 delete	Units of Coverage	10,000.00	0.00					
			•		Employee Cost per Employee	Employee Cost per Dependent					
				Cost:	0.8000	0.0000					
				Frequency:	Monthly 🗸	*no value 🗸					
				Units of Coverage	10,000.00	0.00					
					🌖 done 🥥 rese	et					
4						•					
			→ submit	e cancel							

Here is an example of a *Benefit Plan Costed By Salary* that has not yet had Benefit Costs entered.

Update Ben	nefit Plans					
* = Required						
* Group:	SGM Benefits	*	Category:	Medical	~	
* Plan:	PPO Medical 🗸	*	Option:	EE + Child(ren) 🗸	
Click on each ta save the data. T	b to enter information about The system will also save the	the benefit plan. Wher benefit plan when you	you have entered click on either the	all information, Zip Code Availa	click on the Sub bility or Benefit	mit button to Costs tabs.
Plan Definition	Coverage Calc. Eligibility	G/L & Admin. Costs	On-Line Enroll. O	ptions Zip Cod	de Avail. Benet	it Costs
Plan Definition	:					
^ Camer:	Blue Cross V		Policy ID:		PPOEE+Chil	
Active			Defined Con	ntribution		
Taxable Gr	oup Term Life Insurance		🗹 Medical Cov	verage for State	New Hire Repo	rting Purposes
Allow benet	ficiaries to be specified		🗹 Display plan	on Benefit Stat	ement	
High Deduc	ctible Health Plan					
🗹 ACA Comp	liant Plan					
Self-Insure	d Plan					
Wellness P	lan					
0						
Costing:			Cost Mathed		Salary Dat Dr	
Use pay fre	equency to calculate deductio	n	Employee Destru	ation:	Modical	
Cost by age	e		Employee Deduc	cuon.	wiedical	~
Cost by tob	acco user status		Employer Deduc	ction:	Medical	~
Report cost	t on W-2					
		→ submit	e cancel			
Update Ben	nefit Plans					
* = Required						
* Group:	SGM Benefits	,	Category:	Medical	~	
* Plan:	PPO Medical 🗸		Option:	EE + Child	(ren) 🗸	
To add a record,	, enter information and click	Done. Click Reset if yo	ou need to clear the	e data that was	entered. To upd	ate a record,
click on the infor can be modified	rmation in the left column. Th I. When you have finished ch	us will highlight the real anging the data, click	cord and display the Done to save your	e information in changes. When	the right hand s you are finishe	ection where it d entering all
data, you may c	lick on another tab to work w	vith other areas of the	benefit plan, or click	k on either the S	Submit or Cance	el button to go to
Dian Defer		Off & Advise Or i	On Line Freet, C	ations 7 7 a c		10
Plan Definition	Coverage Calc. Eligibility	G/L & Admin. Costs	On-Line Enroll. Op	ptions Zip Cod	e Avail. Benef	it Costs
Denent Costs I	Effective Date	Action	* Effective Date:			<u></u>
		- iston				
				Total Cost pe	r Tota	l Cost per
			Cost:	Linpioyee	Deb	
			Frequency:	*no value	✓ *no	value 🗸
			Units of Coverage	e:		
				done	🥑 reset	
Lin To Salar		R Pays % Action	Salary Percent			
Op to Salar		Action Action	* Salary Up To:		(0.00
			Employee Pays	%:		
			,			
				done	reset	
				-	-	-
4						
		→ submit	e cancel			

To import costs for this Benefit Plan, in the Benefit Cost Import function – select Cost Based on Salary.

Benefit Cost Import
* = Required
*File Name: Choose File 2000 Ben Cing-MR.csv The File Name must contain your Customer Number and be in .csv format
○ Standard Cost ○ Cost Based on Age Cost Based on Salary Range
→ submit

For Benefit Plans Costed By Salary – the following is the layout of the import CSV file (opened in Excel) – please note the columns **Employee Pays %** and **Max Salary**.

Benefit Group	Benefit Plan	Benefit Option	Effective Date	Total DEP Cost	Total DEP Per	Total DEP Coverage Amount	Total EE Cost	Total EE Per	Total EE Coverage Amount	Employee Pays %	Max Salary	
SCM	PPO	ECH	1/1/2023				10000	12		2.5	550)00
SCM	PPO	ECH	1/1/2023				10000	12		3	650)00
SCM	PPO	ECH	1/1/2023				10000	12		3.5	750)00
SCM	PPO	ECH	1/1/2023				10000	12		4	850)00
SCM	PPO	ECH	1/1/2023				10000	12		10	9990)00

Importing the above file results in the following on the Benefit Costs tab for this Benefit Plan:

Undate Ren	efit Plans							
* = Required	cht i fullo							
* Group:	SGM Benefits			* Category:	Medical	×		
* Plan:	PPO Medical	~		* Option:	EE + Child(ren) 🗸		
To add a record, click on the infor can be modified. data, you may cl the main list pag	enter information mation in the le When you hav ick on another t e.	on and click D ft column. Thi e finished cha ab to work wit	one. Click Reset if s will highlight the nging the data, clic th other areas of th	you need to clear the record and display the ck Done to save your o e benefit plan, or click	data that was e information in tl changes. When on either the So	ntered. To he right ha you are fin ubmit or Ca	update a record, nd section where it ished entering all ancel button to go to	D
Plan Definition	Coverage Calo	Eligibility	G/L & Admin. Cost	ts On-Line Enroll. Op	tions Zip Code	Avail. Be	enefit Costs	
Benefit Costs b	y Salary Perce	ent:	a!	* Effective Deter	01/01/2022			-
Effective D	late	AC Ac	aon Malete	"Effective Date:	01/01/2023			
01/01/2023		9.00			Total Cost per Employee		Total Cost per Dependent	
				Cost:	10,	000.0000	0.	.00
				Frequency:	Monthly	~	*no value 🛛 🗸	
				Units of Coverage	-	0.00	(D.(
					\ominus done	ieset	:	
Up To Salary E	E Pays % ER	Pays %	Action	Salary Percent:	F			
55,000.00	2.5000	97.5000 🎯	view <u>()</u> delete	* Salary Up To:	Ļ			
65,000.00	3.0000	97.0000 🎯	view <u>()</u> delete	Employee Pays %	6:			
75,000.00	3.5000	96.5000 🥥	view <u>()</u> delete		A done	Concept		
85,000.00	4.0000	96.0000 🥥	view 🔕 delete	•	Unie	Jieset		-
4			· • ··)	•
			🖾 submit	cancel				

Common Object Dictionary – E-Mail Address Type

Users were previously able to delete a record from the COD Table for E-Mail Address Type, even if the E-Mail Address Type code was in use in the **E-Mail Addresses** function. This has been corrected.

Common Object Dictionary – Relationship Type

Users were previously able to delete a record from the COD Table for Relationship Type, even if the Relationship Type code was in use in the **Emergency Contacts** function. This caused errors in the **Employee Direct** function in iCON Tools. This has been corrected.

Common Object Dictionary – State Tax Types

The required State Tax Types codes SIT1, SIT2, SIT3, SIT4, SIT5, and SIT6 – which represent the Arizona State Income Tax percentage rates – have had their Short Description and Long Description changed to the following throughout the application. These descriptions now represent only the state income tax percentage rates in effect for 2023.

0.5% AZ SIT6 1.0% AZ SIT1 1.5% AZ SIT5 2.0% AZ SIT4 3.0% AZ SIT2 3.5% AZ SIT3

Here are examples of how the rates will now look in MS-Tax Manager and MS-Tax Elections:

Tax Manager					
* = Required					
Selection:					
Тах Туре:	O Federal		O Employer		
	State		Employee		
	O Local				
*Display current and future taxes as of:	04/25/2023				
Federal:					
Federal Tax:	*no value	~			
State:					
State/Province:	Arizona	~			
State Tax:	*no value	~			
Local:	*no value	*			
State/Province:	0.5% AZ SIT6				
Locality:	1.5% AZ SIT5		~		
Local Tax:	2.0% AZ SIT4 3.0% AZ SIT2 3.5% AZ SIT3				
	Employ/Training	g			

Summary 🥥	Address	Education	Employe	e Positions	Employee Ov	verview	Employment Status	Paychecl
Diamond Arizona	Tax Election To update, click on	S	left column.	Click to acce New York Ci	ess the address looku ity/Yonkers, Ohio cities	p site for: s, Ohio school dist	tricts, Pennsylvania localitie	95
USA / Alpine Ski / Womens Team / California / Northern	Federal:							🕣 add
Employee Details	Eff. Check D 01/15/2023	ate B Federa	Tax Type Il Income	Filing Married	Status Exem	pt. Active 000 yes	Action	elete
Number: 3212	01/01/202	1 Fed. U	nempl.	*no value		000 yes	🎯 view 🔇 d	elete
Status: Active	01/01/2021	FICA/N	/ledicare	*no value		000 yes	🎯 view 🔇 d	elete
Hire Date: 01/01/2021	01/01/202	01/01/2021 FICA/OASDI				000 yes	🎯 view 🔇 delete	
Reports To: Direct Reports: 0	State: Eff. Check Dat 12/05/2022 12/05/2022 01/01/2021 01/01/2021	e State Arizona Arizona Arizona Arizona	Tax 1.5% AZ SIT Income Tax Unemploym WorkersCom	Type 5 S 5 s ent *r np Ins *r	Filing Status ingle no-value no-value no-value	Exempt Act no 000 yes yes yes	tive Action	e add delete delete delete
	Local:	Resident	Locality:	no value			×	e add
	Eff. Check I	Work Loo Date L Date: 04/25/2	cality: * .ocality S 023 Le	novalue tate Tax 1 egal Entity: Oly	Type Filing mpics, Inc. ✔ Sta	Status tus: Active 🚗	Exempt. Active	Action

Employee Audit Report

The Employee Audit Report will now report on records that were added to the Address function and E-Mail Addresses function using the import functions Employee Address Import and E-Mail Address Import.

To select the specific tables for these records in the Employee Audit Report, choose Employee Addresses or Employee E-Mail Addresses in the Table Filter field on the prompt screens for the report.

EMPLOYEES	BENEFIT	Emp Local Tax Adj Hist Emp State Tax Adj History	-	PAYROLI
Employee Audit Report * = Required Selection By Organization and Date	:	Employee ACA Status Employee Account Distribution Employee Addresses Employee Benefits Employee Benefits - Flex Employee Certification Employee Coleme	l	
Organization: Legal Entity: From Date: To Date:	CONS. Group Olympics Olympics, Inc. 04/21/2023 04/21/2023	Employee Claims Employee Ded Adj History Employee Deduction Formulas Employee Deduction Options Employee Dependents Employee Direct Deposit Accts		
Select Report Parameters:		Employee Direct Deposit Dates Employee E-Mail Addresses	. 1	
Report ID: "Report Formats: User Filter:		Employee Education Employee Fed Tax Adj History Employee HSA Deposit Dates Employee Injuries		
Table Filter:		Employee Addresses	~	
Break By Organization Level Break By Home Account Numbe Break By User Separate Reports By User	r	At Level: 2 V		
Sort by Employee Number:		•		
Sort by Employee Name:		0		
Sort by Type of Change Then Employ	ee Number:	0		
Sort by Type of Change Then Employ	ee Name:	0		

When the report prints, records added using these two imports will display "Job" for the App (Application) – instead of "MS" for Manager Services or "iCON Tools."

Date: 04 Time: 14:	/21/2023 33:27		Emplo For All Employee Tab	yee Audit Report les, From 04/21/2023 To 04/21/2023			Page: 1 User: mruberto
For Orgar	nization Levels	: YANKS / OLYMP					
Organizat	ion Level:	YANKS / OLYMP					
Date Time	User App	Employee Number Name	Table Field Description	Key Information	Act	Old Value New Value	
04/21/2023	mruberto	3181	Addresses	Work Address / 06/01/2021 / Active	А		
11:11:43	Job	Connors, Chuck	Address			56 Wendt Ln	
			Address Type			Work Address	
			City			Wayne	
			Country			U.S.A.	
			Effective Date			06/01/2021	
			Employee Number			3181	
			State/Province			Florida	
			Status Of Address			Active	
			Zip Code			77721	
04/21/2023	mruberto	3181	E-Mail Addresses	Home E-Mail	Α		
14:32:42	Job	Connors, Chuck	E-Mail Address			MR1@gm.com	
			E-Mail Address Type			Home E-Mail	
			Employee Number			3181	
04/21/2023	mruberto	3182	E-Mail Addresses	Alternate EMail	Α		
14:32:42	Job	Shields, Yarnell	E-Mail Address			MR1@yahoo.com	
			E-Mail Address Type			Alternate EMail	

Messaging Setup – Process: ES Address, Event: Tax Change Needed

A new Messaging Event has been added in this release, under the Process: ES Address – the event is "Tax Change Needed." This Messaging Event can now be configured so that when changes happen in Employee Self Service related to employee Address Information changes and related Tax Election changes, the appropriate HR / Payroll team members can be notified. These staff members can then notify the employee to coordinate any forms needed for the Tax Change.



The message can then be set up like any other Messaging Setup Record with the relevant e-mail addresses on the Notification List.

***Please note: the trigger for this event message can only occur for employee users who do not have access to the Employee Self Service function "W-4 Forms (Federal and State)" based on their ESS Login Group and Employee Security setup.

Add Me	ssage				
* = Required	1				
	Process:	ES Address		Event:	Tax Change Needed
	* Message ID:	ESAddrTxChg		User:	*All Users
.					
Subject:	ESS Address Change w	ith Tax Change			
Message:					
moodgor					
On `Ev requir Please the ne	ventDate` at `EventT res a tax change. e contact employee n ecessary paperwork.	ime` user `EventUser` made a umber ` <u>Emp</u> #`, ` <u>EmpName</u> ` at (an address c Org ` <u>Qrglvl</u> `	hange that to coordi	.nate
Add Data a	and/or Event Element:				
	Click on	Element Description in order to ac	d it to the bott	om of the Me	essage.
	Event El	ements:	Da	ata Elements	5:
	User Ca	using Event 🔔	Er	mployee Nar	ne 🔺
	Date of I	Event	Er	mployee Nur	nber
	Time of I	_vent	U	rg/Levei	-

Pay Code Definition / Pay Process Control – Include in Total Hours Worked

A new field has been added to the Pay Code Definition / Pay Process Control tab – Include in Total Hours Worked. This checkbox should be "on" if this pay code represents actual hours worked (for example – Vacation or Sick pay codes would have this field not checked, but Regular Wages and Overtime pay codes would have this field checked). If this checkbox is on, the hours worked will be accumulated in a separate column on the screen for an employee payment in Employee Self Service, on the Paycheck Information function. This is a requirement only for companies that have California Employees to provide the employees with information that separates Total Hours Worked from Total Hours for payroll payments.

This new field in Pay Process Control will be – by default – unchecked for all Pay Codes in all Legal Entities when the release is deployed.

If you are a **Hosted** customer and your organization is under this California Requirement – please make sure this field is appropriately checked or unchecked in the system before your next payroll for all Legal Entities and all Pay Codes. If you are an **Outsource** customer and your organization is under this California Requirement – please email <u>PaySupport@unicornhro.com</u> a list of pay codes, by legal entity, that should have this setting checked.

Pay Code Definition Pay Taxat	ion Exemptions Pay Rate Overrides	Eligible Retirement Plan Earnings	
Jpdate Pay Process Co	ntrol		
Legal Entity:	Olympics, Inc.	Type Of Pay:	Overtime
Use Hourly Rate:	2	Algorithm Method 2:	Special Rates ∨
Accrue Paid Time Off Hours:		Algorithm Method 3:	Shift Diff. 🗸
SUI Labor Hours:		No Pay Pay Type:	
Include in Base Wage:		Average Rate Overtime:	
Taxable Life:		Include in Average Rate Hours:	
Include in SUI Weeks Worked:		Include Pay in Average Rate:	
Eligible for Retro Pay:		Use Shift to Calculate Pay:	
Include In Lifetime Hours Worked:		Third Party Sick Pay:	
New York Other Wages:		Include in Workers Comp. Hours:	
Include in EEO-1 Hours:		Include in Total Hours Worked:	
Declared Tip:		Tip Credit:	
COVID-19 Leave Type:	*no value 🗸 🗸		

Paycheck Info	ormation	ו				Ro	odney Arizon	a Blinkman
			0	ık				
Pay Period Start	Date P	ay Period Er	nd Date Issuan	ce Date	Payment N	lumber	Gross Amount	Net Amount
04/01/2023	3	04/14/20	23 04/14	/2023	2429	8	2,864.08	2,230.53
Type Of Pa	ау	Total Hours	Hours Worked		Rate		Amount	Year To Date
Overtime		2.000	2.000			49.0055	5 98.01	98.01
Regular Wages		68.670	68.670			32.6703	3 2,243.35	2,243.35
Vacation		16.000				32.6703	522.72	522.72
Gross Pay:							2,864.08	2,864.08
Total All Hours		86.670						
Total Hours W	orked:		70.670					
Тах Туре	State	Locality	Taxable Wages		Tax Amoun	t	Year To Date	
Federal Income			2,864.08			342.85	342.85	
FICA/Medicare			2,864.08			41.53	3 41.53	
FICA/OASDI			2,864.08			177.57	177.57	
Income Tax	Arizona		2,864.08			71.60	71.60	
Tax Totals:						633.55	633.55	
	Ded	uction		Emj	ployee Dedu Amount	uction	Year To Date	
Deduction Tot	tals:					0.00	0.00	

Rehire (HR) and Rehire (Payroll)

A reminder message has been added to these two functions.

For Rehire (HR) – when a user selects the Organization, and the Org Level 2 is different from their home Org Level 2, a message will appear that will remind the user to use the Payroll Activation function to activate an employee for payroll in a new Legal Entity.

Click the OK button in the message box to continue processing.

Summary 🎯	Address	Education	Employee Positions	Employee Overview	Employment St	atus Paycheck
Martina McBride	Pohiro (H					
Manager			Message fr	om webpage		
CONS. Group / Yellowbird / Operations		If Employee is I	being rehired into a new Le	egal Entity, use the "Payroll	Activation" feature	to
Employee Details		complete the re	ehire process.			
Number: 3333			-			•
Status: Active	1		L	OK		~
Hire Date: 01/15/2014	Barreto Ta		6 9	EL 0.4. T		×
Reports To: Sarah M Sanchez	Reports To:			FLSA I	vpe:	^no value 🗸
Direct Reports: 0	Benefit Start [Date:	01/15/2014	Date:		01/15/2014
	Enroll in (Onboarding				
			→ subm	it e cancel		

For Rehire (Payroll) – the reminder message appears immediately when accessing the function.

Click the OK button in the message box to continue processing.

Payroll Status Mis	sc. Payroll				
Martina M	McBride		Message	from webpage	
Manager CONS. Group / Yellowbird / Operations		if Emplo	yee is being rehired in a new Le e the Rehire.	egal Entity, use the "Payroll A	ctivation" feature to
Payroll Status	ormation in the left c	olump		ОК	
Company		Payroll Status	Effective Date	Action	
Yellowbird	Active		06/12/2014	🔇 delete	
Yellowbird	Active		01/15/2014	🔇 delete	
Legal Entity:		Yellowbird	add		

Updated Employee Self Service Functions (Classic ESS)

This section describes updated functions in Classic Employee Self Service.

Address Information

This function has been updated to now – on change or add of an address that includes proper address fields (Address Line 1, Address Line 2, City, State, Zip, Country, County) – prompt the employee user to question whether this change in address also requires a change in Tax Elections. Their current Tax Election will be displayed in the background of this message box. If the employee user has access to the W-4 Forms function in Employee Self Service, then clicking OK for Yes will take the user to that function. Clicking Cancel to this message will return the employee user to the landing screen for the Address Information function.

Apps 📀 LivQA ESS	🚱 LivQA MS 🔇	NewQA	jwsbnewqa say	s			
	Tax Elections		oes this Address X if Yes otherwis	change require a chan e click Cancel.	ge in your Tax	Elections	? Click
ICON	Federal:	_			ок		Cancel
Personal	Eff. Check Date		IGA I YUC	F WHILE CIDING	LACING	-	
Committee Floring	02/01/2020	Fed. Ur	nempl.	no value	000	yes	
1095-C	02/01/2020	Federal	Income	Head of House.	000	yes	
Employee Directory	02/01/2020	FICA/M	ledicare	no value	000	yes	
Voluntary Self-	02/01/2020	FICA/O	ASDI	no value	000	yes	
Identification of							
Disability	(Ph. 1)						
Personal Data	State:						
1-9	Eff. Check Date	State	Tax Type	Filing Status	Exempt.	Active	
Address Information	02/01/2020	California	Disability	"no-value		yes	
E-Mail Address	02/01/2020	California	Income Tax	Head of House:H	000	yes	
Dependents	02/01/2020	California	Unemployment	"no-value		yes	
Education							
Emergency Contacts	and a second						
Change Password	Local:						
JOD Reviews	Eff. Check Date	Locality	State Tax T	ype Filing Status	Exempt.	Active	
Salary History							
Skills Information							
Certifications							
Employee Files							
Training Classes							
Training Enrollment							
Notification Elections							

If the employee user does not have access to the W-4 Forms function, clicking OK for Yes will prompt another message to appear, directing the employee to contact their HR or Payroll Department to request the necessary tax election changes made. Clicking OK or Cancel on that message will also return the employee user to the landing screen for the Address Information function.

← → C ▲ Not ∴ Apps S LivQA ESS	secure gwsbnewc	qa/scripts/c NewQA ESS	giip.exe/WSe 🔇 NewQA	ervice=g gwsb	wsbnewqaEmpl	oyee/GWMa	in.r?Sessio	on=AC3RO0	QAG4KD817T0COH
Welcome, Ashton Colorado	Tax Elections			To cha reque:	inge your Tax Elec st changes to you	ctions, contac ır Tax Election	t your HR , is as soon a	/ Payroll Dep as possible.	partment to
Personal Consent for Electronic	Federal: Eff. Check Date 01/01/2021	Fed. Un	Tax Type empl.					ОК	Cancel
1095-C	01/01/2021	Federal	Income	Singl	e	000	yes		
Employee Directory Voluntary Self- Identification of	01/01/2021 01/01/2021	FICA/M FICA/O	ASDI	*no v *no v	alue	000	yes		
Personal Data	State:								
• 1-9	Eff. Check Date	State	Tax T	vpe	Filing Status	Exempt	Active		
Address Information E-Mail Address Dependents	01/01/2021 01/01/2021	Colorado Colorado	Income Tax Unemployme	ent	Single *no-value		yes yes		
Education Emergency Contacts	Local:								
Change Password Job Reviews	Eff. Check Date	Locality	State Ta	іх Туре	Filing Status	Exempt.	Active		
Salary History Skills Information Certifications									

A related change has been made in Manager Services Messaging Setup function (see details above), so that when an employee user does not have access to the W-4 Forms function, and clicks on OK for Yes to the question about a tax change being required, then OK to the message about contacting their HR / Payroll Department, a Messaging Setup record can be created for Process: ES Address, Event: Tax Change Needed, that will alert HR or Payroll Staff on the Messaging Notification List who would be responsible for contacting the employee to coordinate any forms needed for the Tax Change.

Paycheck Information

As mentioned above, based on the new checkbox in Manager Services Pay Code Definition / Pay Process Control – "Include in Total Hours Worked" - the system will display a "Total Hours" column and an "Hours Worked" column for each payment in the Paycheck Information function detail. For Pay Codes that have the "Include in Total Hours Worked" checked, the hours for these Pay Codes will appear in the "Hours Worked" column and will be included in the "Total Hours Worked" that appears on the payment detail.

Paycheck Info	ormation	ı				Ro	odney Arizon	a Blinkman
			0	ĸ				
Pay Period Start	Date P	ay Period Er	nd Date Issuan	ce Date	Payment N	umber	Gross Amount	Net Amount
04/01/2023	3	04/14/20	23 04/14	4/2023	2429	8	2,864.08	2,230.53
Type Of Pa	ау	Total Hours	Hours Worked		Rate		Amount	Year To Date
Overtime		2.000	2.000			49.0055	5 98.01	98.01
Regular Wages		68.670	68.670			32.6703	2,243.35	2,243.35
Vacation		16.000				32.6703	522.72	522.72
Gross Pay:							2,864.08	2,864.08
Total All Hours		86.670						
Total Hours W	orked:		70.670					
Тах Туре	State	Locality	Taxable Wages		Tax Amount	t	Year To Date	
Federal Income			2,864.08			342.85	342.85	
FICA/Medicare			2,864.08			41.53	41.53	
FICA/OASDI			2,864.08			177.57	177.57	
Income Tax	Arizona		2,864.08			71.60	71.60	
Tax Totals:						633.55	633.55	
	Ded	uction		Emj	ployee Dedu Amount	ction	Year To Date	
Deduction Tot	tals:					0.00	0.00	

Updated iCON Tools Functions

This section describes updated functions in iCON Tools.

HR Common Object Dictionary – Relationship Type

Users were previously able to delete a record from the HR COD Table for Relationship Type, even if the Relationship Type code was in use in the **Employee Emergency Contacts** function. This caused errors in the **Employee Direct** function in iCON Tools. This has been corrected.

HR Common Object Dictionary – E-Mail Address Type

Users were previously able to delete a record from the HR COD Table for E-Mail Address Type, even if the E-Mail Address Type code was in use in the **Employee E-Mail Addresses** function. This has been corrected.

Updated Customer Management Module Functions

This section describes updated functions in Customer Management Module.

Function Security – Copy Feature Added

In Function Security in Customer Management Module, users are now allowed to copy the Authorized Functions from one user to another.

User:	BLass	 Copy To User: 	JBoniger ~ Co	ру
Autho	rized Functions	^	Unauthorized Functions	^
Bank	Check Stock Sequence		Account Type	
Bank	Definition		Activity Report	
Bank	Master		Additional Services	
			Address Status Type	
			Address Type	
			Application Identifiers	
		<-	Audit Purge	
			Audit Report	
		->	CARES Act ER FICA Deferral Election	
		-	Charges Detail	
			Check Stock	
			Check Stocks	
			Close Payroll Queue	
			Cost Unit	
			Customer Bank Information	
			Customer Check Information	
			Customer Fund Options	
			Customer Information	
		~	Designation Code	~

The system will prompt you to confirm the copy with a pop-up message. Click Yes to confirm or no to cancel the copy.



The system will also ask you to confirm whether you want to retain any existing function security Authorized Functions on the target user. Click Yes to confirm, or No to completely overwrite the target user's security with that from the source user (so the two users will have exactly the same Authorized Functions) or click Cancel to exit the Copy feature.



Record 6 Inquiry (HOSTED CUSTOMERS)

This function has been updated to allow a user to sort the top table by clicking on a column heading. For example – to click ascending by Effective Date – click the column heading, and then click again to click descending by Effective Date. You can also toggle click to sort by Customer, Override Date, or Impound code.