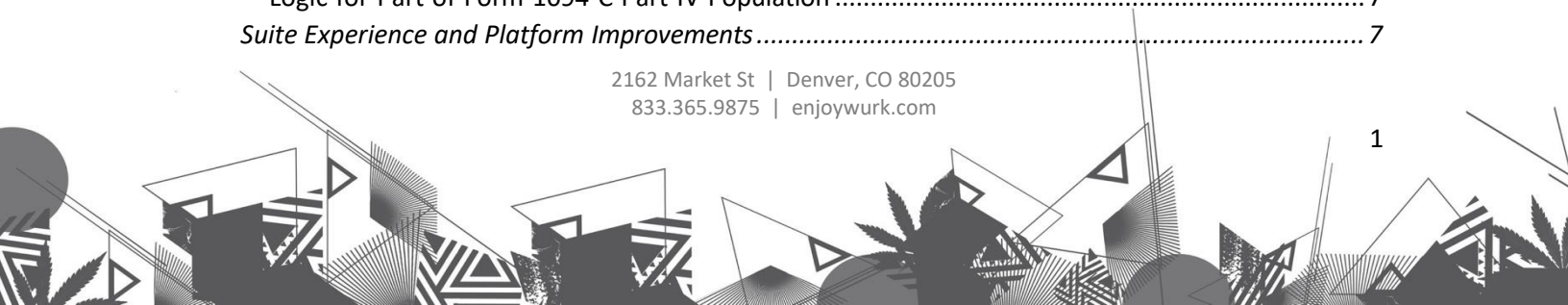


Release 82, August 2022

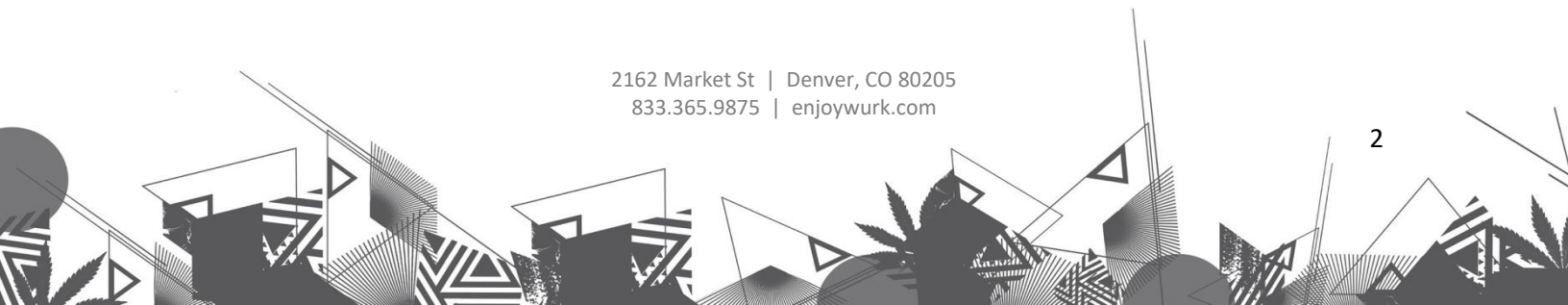
Wurk is a continually improving and evolving application. As part of our commitment to full transparency, we provide release notes that summarize the latest enhancements to Wurk functionality and usability.

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Payroll

Lock In Letter Received Setting Now Enforces that EE Withholding Can't Be Edited

In an Employee Information record, when users edit Federal Withholding, if the **Lock In Letter Received** check box is checked, the **EE Withhold** field is now automatically grayed out and un-editable. Previously, if the **Lock In Letter Received** check box was checked, the **EE Withhold** field was still editable.

Also, when an employee's **Lock In Letter Received** box is checked and they try to submit a new W-4 form marked as exempt, the system will not allow this.

Payroll Register: Grand Totals Report is Now Available

In the Payroll Prep Process page's View Payroll section, a new **Payroll Register: Grand Totals** report is available. Prior to this release, in order to view the Grand Totals, you needed to run the full **Payroll Register: By PST** report, and then go to its Grand Totals page. Now you can simply run the **Payroll Register: Grand Totals** report to see only that Grand Total data.

Scheduler

Schedules

Updated Schedule Hours Column Calculation in Schedule Views

Previously, an employee's total scheduled hours displayed in a column next to their name in all Schedule Views, but it was not dynamic according to which Schedule View you were in.

What's changed: An employee's scheduled hours will now reflect the number of hours based on which Schedule View you are in.

Example: If an employee has 40.00 hours of total scheduled time and they work 8.00 hours a day, if you are looking at their schedule from the Day View, the scheduled time in the column next to the employee's name will display 8.00.

HR

Benefits

Benefits Change Requests Detail Report: Retention of Approved Requests

Within the Benefits Change Requests Detail report page, we have added functionality to the report to retain the information for approved requests. We have added an additional option in the Filter for **Include Approved Benefit Change Requests**. This is not enabled by default and must be selected.

Once you enable the option, the approved requests will appear on the report and the **Status** column will show **Approved** for those requests that have been approved.

You can also further filter the report to include adding a filter on the Status column, i.e., you can configure a filter at the top of the Status column to: = and Approved.

Sorting, filtering, grouping, and exporting will work as expected and include those items in Approved status when this status is enabled to show on the report.

Employee Maintenance

Birthday Notifications

The ability for managers and employees to control whether birthday notifications are sent is now available. This is dependent on the following:

- Employee birth dates are entered into their employee profiles in the Dates widget.
- A Birthday notification is defined under Settings > Global Setup > Notifications, in the Account category.

A new **Birthday Notifications Opt In/Opt Out** feature has been added to the system and is available to managers and employees within employee profiles. When selecting Opt In, birthday notifications will be sent out to the recipients defined in the Birthday Notification. When Opt Out is selected, no birthday notifications will be sent to any of the recipients defined in the Birthday Notification.

Security: The option is enabled through security profiles. This is done in the **Employee** section of the **HR** (Admins & Managers) and **ESS** (Employees) tabs. Under the **Demographics** setting drop-down, select View/Edit (Custom), select the Permissions button, and set **Birthday Opt In/Opt Out** to View or Edit. View access will only allow users to view the option without the ability to change it.

Employee Profiles: Once enabled in security, the Birthday Notifications field will display in the Account Demographics widget of employee profiles where employees and managers can select Opt In and Opt Out under the drop-down. An Info icon explains that selecting Opt Out will result in no notifications being generated.

Employee Information Report Page: The Birthday Notification column is available to be pulled into the Employee Information report page.

Employee Profile PDFs: From employee profiles, when selecting Download PDF, the Birthday Notification is an option in the Account Demographics section. Selecting it will include it in the PDF.

Employees Import Template: The Birthday Notification field is available as an import field in the Employees import template in the Demographics section. This import field will allow the update to multiple employees' Birthday Notification fields at once. Enter 1 to Opt In or enter 2 to Opt Out.

HR Actions: The My Information HR Action will include the Birthday Notification action item. This action item will have the ability to override security restrictions, allowing or disallowing users to submit the HR Action for or with that item. When employees receive the HR Action, they can indicate whether or not they would like their birthday to be included in notifications. Upon approval within the workflow process, the Birthday Notifications field in the Demographics section of the employee record will be updated with either Opt In or Opt Out.

Data Retention: Once a birthday notification has been added to the employee profile, it will adhere to Data Retention policies as defined in your system.

Direct Deposit Widget: Viewing of Account Numbers Updated

For users with Unmasked checked for the Direct Deposits security permission within their security profiles, they will now see the full account number within the widget. Previously, for users to view the account number, the View/Edit option under the Actions icon had to be used, which opened the entire entry.

E-Verify

New Unique Entity Identifier for Federal Contractors

WFR-309266 & WFR-312436: Effective April 4, 2022, the federal government will no longer use the Data Universal Numbering System (DUNS) number to uniquely identify federal contractors. As a result, federal contractors are required to obtain a UEI (Unique Entity Identifier) number from SAM.gov and update that Identifier in E-Verify.

- The UEI field will be available by approximately October 1st, 2022 in E-Verify.
- We have now provided a field in the E-Verify Marketplace Setup (Settings > Marketplace > Marketplace Setup > E-Verify Edit icon) for you to enter your UEI (Unique Entity Identifier) so it can be updated to E-Verify.
- If “Federal Contractor With FAR E-Verify Clause” is selected in the drop-down for 'Organization Category', you must enter the UEI number in the UEI field.
- A link to the sam.gov website has been provided next to the UEI field for customers to learn more and obtain the UEI number if required.

Forms

U.S. Government Form I9: Masking of Social Security Number

The Social Security Number (SSN) entered in Form I9 will now be masked and will only display the last 4 digits of the number (****1212). Managers who have Unmasked enabled in the Social Security setting of their security profiles will be able to view the full SSN. Employees will have default access to view their full number. Downloaded and printed versions of the form will display the full unmasked number regardless of security settings.

Surveys

Assigned Surveys: Read-Only

For surveys that have been assigned from the Surveys set up page, (Settings > HR Setup > Surveys) these surveys cannot be edited. Inside the Survey, the fields will also be grayed out when used in a Survey Collector. Prior, although the fields could not be edited, they had the appearance they could be since they were not grayed out.

Previously, when selecting the edit icon, the message stated the following, leading users to believe changes could be made but not saved.

Changes will not be saved. Survey is used in Survey Collector.

Now, when selecting the edit icon, an updated warning message displays stating the following, indicating that edits and changes cannot be made at all.

Changes cannot be made. Survey is used in Survey Collector.

Additionally, once a survey is assigned, the edit icon will be replaced by an eye icon, indicating it can no longer be edited, but can be viewed.

Survey Reports: Question Name and Question Title in Reports

In Survey Reports (Survey Answers Report, Survey Answer Statistics, Survey Results Details) the Question Name will be displayed if the Question Title is left blank in surveys.

Talent

Performance Review Profiles: Ability to View Job Descriptions

Managers with security permission to view Jobs will now be able to see employee job descriptions in their employees' performance reviews, providing a Default Job has been assigned to employees, and that the Job assigned contains a description.

- Employees with permission to view Jobs can see their own Default Job description from their performance review. The security setting that allows for this is the **Jobs** setting in the **Employee** section of the HR and ESS tabs of security profiles (HR tab for managers, ESS tab for employees.) This setting should be set to View (for employees) or Edit (for managers and admins.)
- The Job Descriptions are pulled from Jobs which is where the descriptions are defined. This is located under HR Setup > Jobs. The Default Job is assigned to employees in the Pay Information widget of Employee Profiles.

To enable the Job Description to be visible in the Performance Review, you will need to select the **Job Visible** setting within Performance Review Profiles which is located in the **Options** widget on the Main tab. Review Profiles are located under HR Setup > Performance Review > Review Profiles.

- Once **Job Visible** is enabled in the Review Profiles, users with proper security permissions will see a **View Job Description** option from the drop-down under the **View Prior Reviews** button. A pop-up will open and display the Job Description.

Performance Review Profiles: Visibility of Notes

The ability for managers and/or employees to view the notes they add to a performance review has been expanded to include a new **Notes Visible** setting within the Options widget of Review Profiles (HR Setup > Performance Review > Review Profiles). This setting has a drop-down containing the following options:

- **All:** Everyone (managers & employees) has visibility to all notes.
- **Yours:** Managers can see their own and employee's notes. Employees can see only their notes.
- **To All Except Employee:** Everyone (managers & employees) can see their own notes and managers can see all notes from all people.

Performance Review Profiles: Impacts of Updates to Review Profiles

Any changes made to a Review Profile will have no impact on performance reviews with a status of Finalized, Skipped, or Ended.

Performance Reviews: Refresh Button Added for Reviews In Progress

A **Refresh Workflow** button has been added to Performance Review Request workflows to refresh edited workflows for In Progress, non-finalized performance reviews. When a workflow is edited while a

review is moving through the review cycle, the refresh button will update the workflow and ensure To Do Items are reassigned as configured in the workflow. The refresh process will send the review back to the beginning without any loss of entered data.

A warning message will display when using the button. Example text below:

There are 2 in-progress reviews. Any saved changes will update and restart the performance review workflow for all in-progress reviews. Do you want to continue?

Note: Contact Support if a workflow refresh needs to be performed.

Cross Product

Hot Features in This Release

Affordable Care Act

Break In Service Logic Updates

The Break In Service logic has been updated to ensure it is working properly in all cases, including when an employee is enrolled in a plan or not enrolled in a plan. Break In Service is the provision in the ACA regulations that states for any break in service under 13 weeks, the individual should remain in the existing measurement period (26 weeks for educational institutions). The system calculates each employee's ACA Timeline accurately so users can be certain they are reporting properly as well as offering benefits when required.

Affordable Care Act (ACA)

Logic for Part of Form 1094-C Part IV Population

EINs that were previously not able to be included are now populated on Form 1094-C Part IV. The logic for the Form 1094-C population has been adjusted and now allows all active EINs within the **Part of the Following ACA ALE Group** to be included. As before, an EIN must not be marked as Inactive, but the Maximum Years Forward no longer prevents the EIN from being included in the Form 1094-C. Users responsible for ACA reporting can include all EINs that are part of an Aggregated ALE Group, ensuring that their reporting is correct when populated and will not require any manual intervention on their part.

If the Applicable Large Employer (ALE) is part of an Aggregated ALE Group (a group of related EINs that must be added together when determining ALE Status), each related EIN must be included in Part IV of the Form 1094-C. The system populates this automatically based on the list selected in the **Part of the Following ACA ALE Group** widget, which allows a user to create a listing of EINs that is then populated in Form 1094-C Part IV.

Suite Experience and Platform Improvements

Broadcast Messaging: Security Permissions

For companies with Broadcast Messaging enabled, company administrators can now restrict certain users or security profiles from being able to create or send Broadcast Messages. A security item titled **Send Broadcast Communication** is located on the HR Tab, in the Employee Related Functions widget of the security profiles.

If this security item is enabled, the user has the **Communicate** button displayed as an option on the Employee Information screen and any other applicable screens. If this item is disabled, the user does not have the **Communicate** button as an option.

This checkbox is disabled by default for new security profiles.

For existing security profiles, if the Broadcast Message Templates field has View enabled (Global Tab > Global Setup widget), then the **Send Broadcast Communication** field will be enabled as well (HR Tab > Employee Related Functions widget).

Note: Contact Support if Broadcast Messaging is a feature that you would like turned on.

Phone Number Validation in Personal Information & Account Contacts Widgets

The phone number fields in the Personal Information and Account Contacts widgets are now validated to only allow numeric values. Special characters and alphanumeric values are not allowed. Previously, any value could be entered in these fields.

Dashboards

Improved Printing for Chart Tiles on Dashboards

Users can now print Charts directly from the Tiles settings level on any Dashboard so you don't need to print them separately from different places. When a Dashboard page is opened and at least one Chart Tile is added, when the **Print** button is clicked directly on a Chart Tile on the Tiles settings level, the preview page is displayed with the appropriate Chart from the appropriate saved view on it. When the following message displays for a user, a blank page is displayed in the preview.

No data to display

Note: This is the same as in the Print option from the report itself.