Release 87, June 8, 2023

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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General

Social Security Number Verification Service Process Change

The Social Security Administration (SSA) recently made a change to how Business Services Online (BSO) is accessed for the Social Security Number Verification Service (SSNVS).

Users must now create an account through the Social Security Administration and use a Two-Factor Authentication method to access the account. You can set up an account via **Login.gov** or **ID.me**.

- For instructions on how to create an account through Login.gov, please visit this site: https://www.login.gov/help/get- started/create-your-account/
- For instructions on how to create an account through ID.me, please visit this site: https://help.id.me/hc/en- us/articles/202673924-Creating-your-ID-me-account#:~:text=Go%20to%20the%20ID.me%20sign%2Din%20page%2C%20then,set%20up%20multi%2Dfactor%20authentication.

Based on the above change, we will be working toward removing this service in its current state.

What to expect in the near future

The SSNVS button will still be available in the product. When accessed, you will be redirected to the government's site. This re-direct should be available by the next system release.

The Social Security # Verification Service Marketplace app will be removed in a future release. The Social Security Verification button will still be available, thereafter, as a re-direct based on the user's security profile settings.

Payroll

Deduction Eligibility Settings

At Settings > Payroll Setup > Deductions, the system includes new settings that enable you to configure eligibility requirements based on start date, hired date, and work hours.

The Define Eligibility section contains new settings for configuring deduction eligibility.

You can select the checkbox for Based on Dates or Hours. This gives you further options to define eligibility based on employee start date/hired date or employee work hours.

Payroll Comparison Report

To help you easily track whether totals for the current payroll are in line with previously finalized payrolls, the system now includes a new report named Payroll Comparison, which you can access in the following ways:

- Go to Payroll > Reports > Payroll History > Payroll Comparison Report.
- Go to Payroll > Process Payroll.

By default, the Payroll Comparison report compares the current non-finalized payroll to the last matching payroll. To determine the last matching payroll, the system looks at Payroll Type (such as Regular), the pay period profile, and the payroll's EIN.

> **Note:** Payroll Types other than Regular (such as Supplemental) do not have pay period profiles. Therefore, the system compares to the last matching type of payroll that was run for the same EIN.

You can configure the report to compare the payroll to a payroll other than the default. Just open Filters and select a different payroll in the Payroll list box. The Payroll list box allows you to select past payrolls of all types.

> **Tip:** The **Last matching mo.** payroll filter behaves similarly to the **Last matching payroll** filter, but **Last matching mo.** matches the monthly frequency (week in the month). This filter is handy when certain earnings and deductions are calculated only once a month.

The Payroll Comparison report displays differences between the payrolls, broken down by the following payroll categories:

- Number of employees paid: Select **# Paid employees** to see the paid employee numbers by subcategory (such as 2 Terminated employees and 50 Active employees).
- Number of pay statements: Select **# Pay statements** to see the pay statements by subcategory (such as 3rd Party Sick, Bonus, Manual, Regular, Void).
- Deductions: Subcategories are based on your E/D/T Name.
- Earnings: Subcategories are based on your E/D/T Name.
- Net Pay: Subcategories are Checks and Direct Deposits.
- Reimbursement: Subcategories are based on your E/D/T Name.
- Taxes: Subcategories are based on your E/D/T Name.

For each of those categories, the columns in the report display the following information:

- Compare from payroll values
- Compare to payroll values
- Variance amount

- Variance percent

Tip: To make the differences easy to visually scan, the default sorting of the list is set with Variance Amount sorted highest to lowest. The Variance Amount uses the absolute value of the variance, which means that the largest variances will appear at the top of the report, regardless of whether they are positive or negative.

You can select View Detailed Records for a category in the report, and the system will display a report with more details about the differences for that category.

Example: Select View Detailed Records next to **Regular earnings** to see a report named **Payroll comparison - Regular earning details**. This report gives you a list of all employees with regular earnings. The default sorting for this report also places the largest differences at the top of the report, regardless of whether they are positive or negative.

TLM

Leave of Absence

NEW Historical Intermittent Leave

Previously, if managers needed to update leave cases after time was already taken and paid out for employees on leave, the entries could be updated with the new dates and times only in the Leave Case; the updated hours could not be posted to a locked timesheet or be automatically processed for payroll.

What's changed: Leave entries in past leave cases and timesheets can now be updated after timesheets and pay periods have closed.

In the Leave of Absence Profile, the previous Restrict Leave Entries Generating For Locked Pay Periods checkbox setting in the Restrictions section has been replaced with a new drop-down, **Leave Entries On A Locked Pay Period**.

The following options are available from the Leave Entries On A Locked Pay Period drop-down:

- **Allow Leave Entries For Locked Dates Without Timesheet Population:** This allows you to post hours to the Leave Case without the hours populating the locked timesheet.
- **Allow Leave Entries For Locked Dates With Timesheet Population:** This allows you to post hours to the Leave Case, which will also populate the locked timesheet.
- **Restrict Leave Entries Generating For Locked Dates:** This restricts leave entries from being updated and generated for locked dates in the Leave Case.

Timesheet Correction and Populating the Timesheet

If the Allow Leave Entries For Locked Dates With Timesheet Population option is chosen along with the **Timesheet Correction** option enabled (under Available Functionality), a manager can add or update time in the Leave Entries widget of the Leave of Absence Case, save, and then select the Populate Timesheet button. A Populate Timesheet pop-up message will display. When the Populate button is selected, the corresponding locked pay period will reopen the timesheet, populate the leave hours, and will be ready for payroll, similar to the Historical Timesheet Correction process.
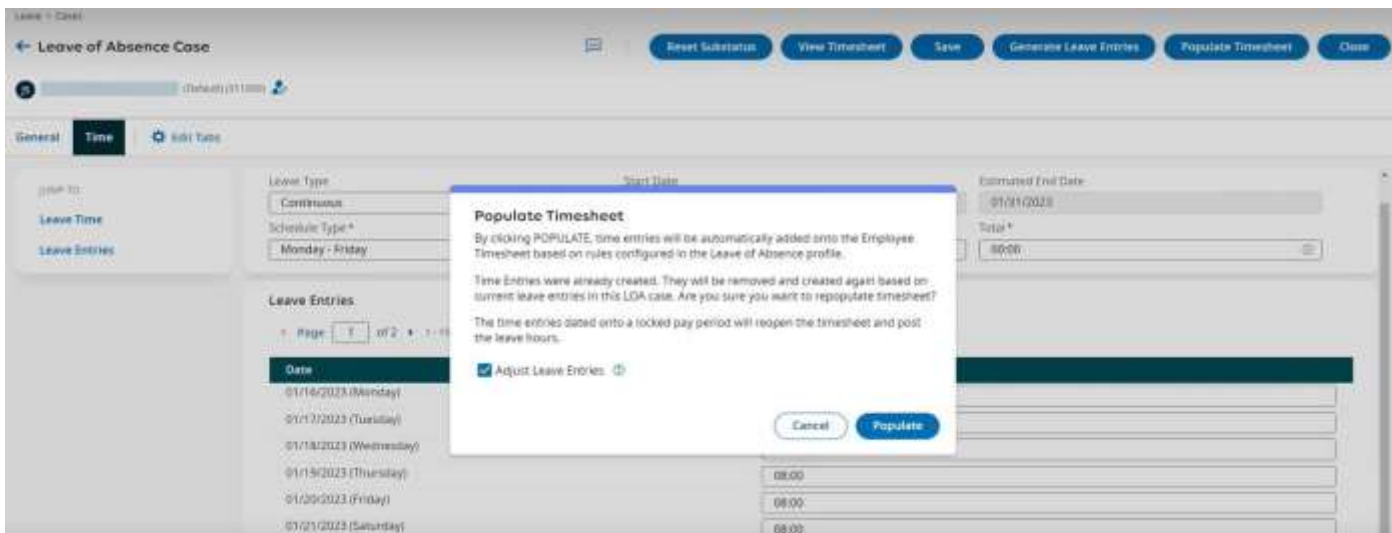
If the same settings are chosen and a Leave of Absence workflow is set, a manager can go to their To Do Item or the All To Do Items report (My Reports > System Reports > System Utilities > All To Do Items) and select the Populate button next to the applicable employee. A Populate Timesheet pop-up will display, indicating that the manager is about to generate leave entries that will populate the timesheet. The time entries dates from a locked pay period will reopen the timesheet and post the leave hours there.

If there is no workflow set and a leave case is created, the Populate Timesheet pop-up will contain a similar message.
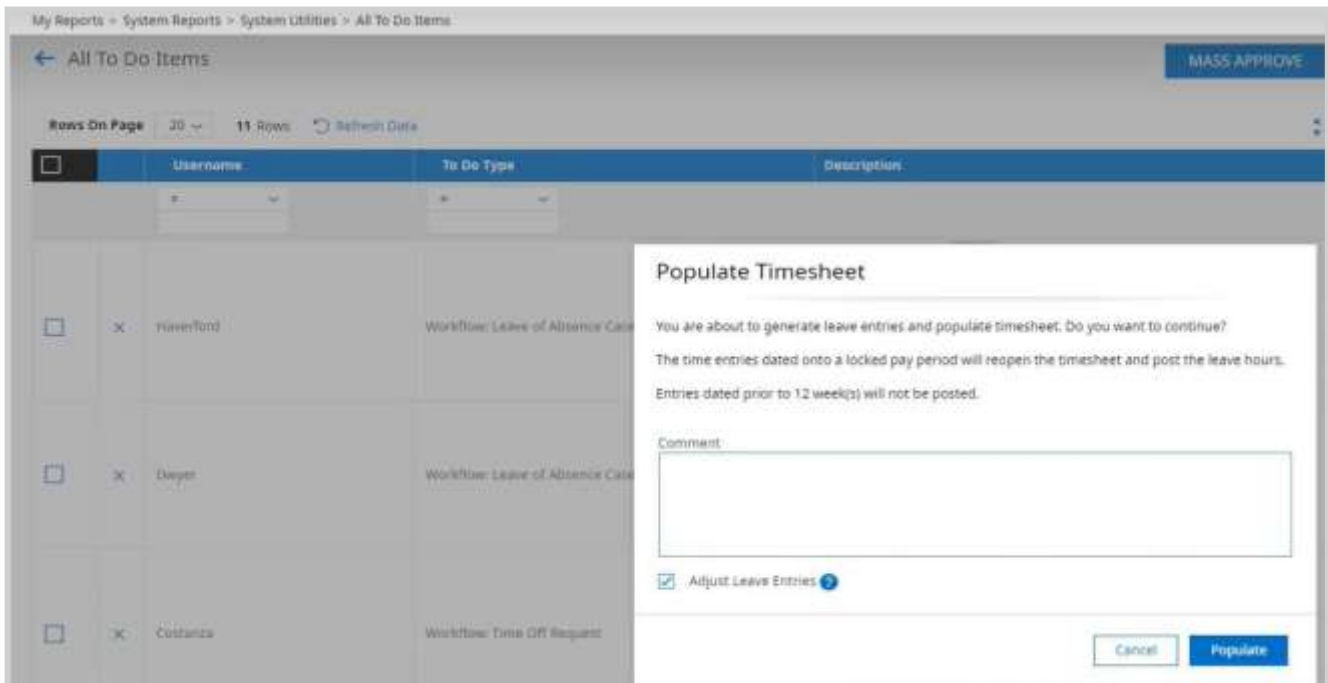
When Timesheet Correction is enabled for the company, the following Extra Settings options in the Timesheet Profile are available to enable/configure:Allow Corrections In Current Year Only

- Allow Corrections In Last_
- Require Timesheet Correction Note
- Require Timesheet Correction Reason Code

If these settings are enabled, the Populate Timesheet pop-up will respect these configured Timesheet Profile settings and will indicate the applicable information in the pop-up.

Intermittent Leave Corrections

If Timesheet Correction **is not** enabled for the company, managers can still update leave entry time and select the Populate Timesheet button and the updated hours will populate the timesheet, but the timesheet will remain locked.

Scheduler

Advanced and Basic Scheduling

NEW Week View Drag and Drop

In the Advanced and Basic Scheduling Week view on mobile and desktop, managers can now select and drag an assigned shift and drop it into another day in the Week view to reassign the shift to a different employee. When the shift is selected and dragged, the day will be highlighted gray to indicate that you can drop it there.

Constraints will be validated when dragging and dropping a shift.

In **Basic Scheduling** only, the **Max # Shifts Per Day** setting under Global Setup > Company Setup > Work Schedules Policies will be validated; if a manager attempts to assign more than 1 or 2 shifts to an employee (depending on the number chosen for Max # Shifts Per Day), the manager will receive an error message.

Once a shift is dropped into another day, for companies with TLM enabled, a Posted schedule status will automatically be updated.

Note: If an employee is not qualified for a shift through drag and drop, a red caution icon will display in the bottom corner of that shift.

In **Advanced Scheduling** only, if a shift needs to be removed but not reassigned immediately, you can drag that shift to the applicable day in the Open Shifts panel and it will be an open shift; you can also drag an open shift from the Open Shifts panel and drop it into a day.

Managers also have the ability to select and drag multiple shifts and the shifts will then be assigned to the day they are dropped into, or the day chosen in the Open Shifts panel (for Advanced Scheduling).

Tip: For PC users, hold the Ctrl button down while selecting the shifts. For Apple users, hold the Command button down while selecting the shifts.

If you want to drag and drop shifts to multiple days, you will need to drag each shift individually.

HR

Custom Forms

Custom Form Layout Change

The legacy layout of Custom Forms can cause issues for users completing forms due to the left side (Form view) and right side (Web form view). Additionally, completing the form by inputting information directly in the form has not been supported. In this release, we are updating the layout of Custom Forms to allow users to input data directly into the form and eliminate the side by side view.

In Custom Forms, there is now a **Form View** and an **Image View** that can be used independently to complete the form.

When zoom is used, the image will dynamically adjust to remain centered and is responsive to the browser size. The zoom will remain "sticky" until reset.

The following changes have been made to both desktop and mobile and include ESS and MSS Custom Form View, Applicant Custom Form, Benefits Custom Form and HR Action Custom Forms.

- The changes to the Benefits Custom Form will be within the pop-up.
- If no fields are present in a form, the inline message appears in the web form view beneath the title.
- Desktop: The default view will have the image form view visible and the web form view collapsed.
- Mobile: The default view will have the web form view expanded and the image form view collapsed.
- Once a user changes a view it will stick and remain with what the user has configured.

Employee Documents

Document Upload ID Column Added to Employee Documents Report

We have added a **Document ID** column to the Employee Documents report. This column is not a default column and can be added to the report. When added, the column will populate with the DocUploadID assigned by the system to each document. The report is located under HR > HR Maintenance > Employee Documents.

*This column will also display in the **Employee Documents** widget within employee profiles.*

Forms

Error Message Added When Checklist Added to Employees with Existing Checklist

When an HMRC Starter Checklist was added to multiple employees from the HMRC Starter Checklist report, and employee(s) had already been assigned to a checklist for that period of employment, an error appeared indicating the checklist already existed for that same period of employment, but users were not able to distinguish which employees were impacted.

In this release, we are providing detailed error message(s) that lists the employee(s) with their name(s) when an HMRC Starter Checklist already exists for that same period of employment for the same employee(s).

"An HMRC Starter Checklist already exists for [Employee Name] for this period of employment."

OSHA 300A Form Updated

In OSHA Form 300A, we have removed the SIC number from the form as it was an unsupported field. With the removal of this number, errors will be avoided when finalizing the form.

HR Actions

New Permission Added to Disable 'Effective From' Field

To control users' ability to access the **Effective From** field in HR Actions, we have added a new security permission.

Mass Delete of Assigned HR Actions

We have added the ability for users to mass delete assigned HR Actions. The option is available on the Open and Submitted tabs. Checkboxes and a Delete button have been added to these pages. The checkboxes are at the row-level and can be checked and then the Delete button can be selected to remove the items.

Recruitment

Offer Letters: Signed Applicant Offer Letters Displayed in System

In this release, we have fixed an issue where an applicant's signed offer letter was not displaying in the system, neither in Recruitment nor in Employee Documents once the employee was hired; only the unsigned document was available. You will now be able to view both signed and unsigned offer letters in the following places.

- Recruitment > Offer Letters in the **Applicant Documents** widget.
- Employee Accounts, in the **Employee Documents** widget.

Cross Product

Report Hub

Report View Creation Wizard

You are now able to quickly select important data points tied to columns, find matching reports based on the data points/columns selected, and use these reports to create saved views tied to a standard report.

Security: Users must have permission to the Overview Tab to access the Report View Creation Wizard, which is granted via their security profile and is found under the Reports section on the Reports tab. The Overview permission controls access to the Overview tab, the search experience, and the Report View Creation Wizard experience.

To get started with the Report Builder, select the **Build Report** button.

Choose Category & Columns

By default, when you arrive in the experience, the **Choose Category & Columns** step is shown. In addition, the first domain available on the Overview Tab via Popular Solutions, such as My Team or Time Management, is the same domain shown first for the first step of Report View Creation Wizard.
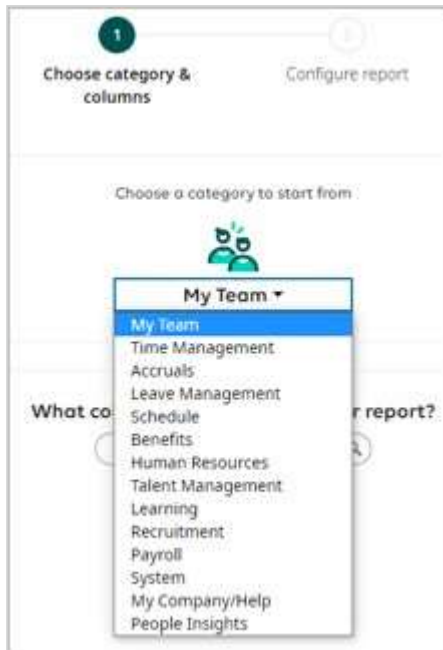
Depending on the domain selected, different categories of columns will be shown. Each category will contain one or more columns that are linked to the reports within the selected domain. The available domains, column categories, and columns will depend on the permissions granted to users and the sub-systems and available functionality items and marketplace products enabled for a company.

You can expand one category at a time to view the columns (or data points) that are critical for any reporting needs, and up to 15 different columns can be selected at a time. Selected columns will appear in the right-side panel, named Choose Matching Report. In addition, you can input one or more search terms to find specific columns across multiple column categories. For example, you can input "Employee Date" to find all columns matching that terminology. If a search is unsuccessful in finding matching columns, you can try other search criteria or expand any of the categories to review the overall choices.
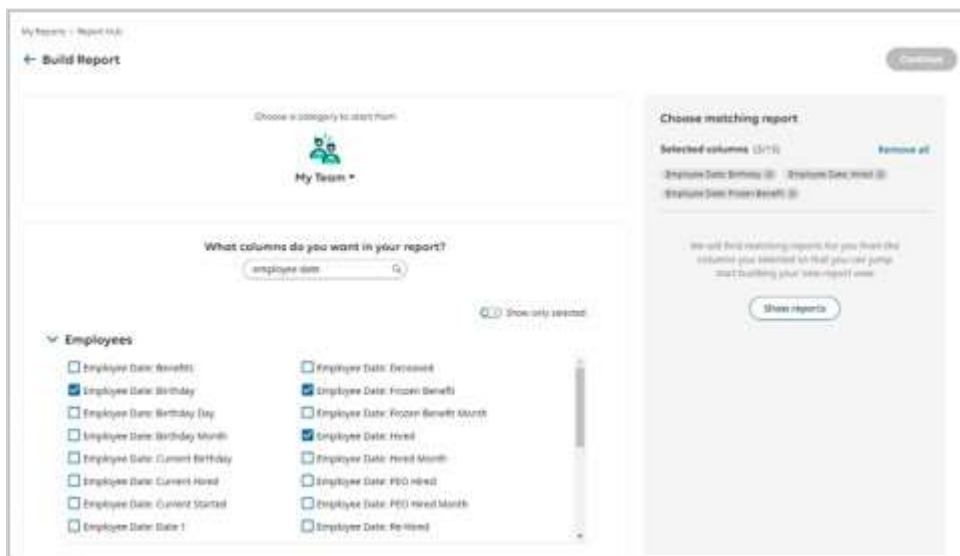
You can use the **Show Only Selected** toggle to only display selected columns across one or more categories within a domain.

Show Reports

Once you make the desired selection, you can select **Show Reports** to locate the best matching standard report containing some or all the selected columns. Some reports that are listed may not contain all of the selected columns, and listed reports will display any columns which are not available. In addition, reports will provide a percentage match score, allowing you to easily identify how close of a match a report is to the columns selection. If you want to remove one or more columns from the selection, you can select the remove X to the right of any pill shown. Selecting **Remove All** will deselect all columns.

Once you select a report, you can select **Continue** to proceed to the second step, named **Configure Report**.

> **Note:** Known issue: In rare cases, some dynamic columns based on configuration settings may be displayed in the columns list which are not enabled. This issue will be addressed in a future release.

When you proceed to the second step, named Configure Report, you can access common report settings and preview the actual data you will see in the pending new report view.
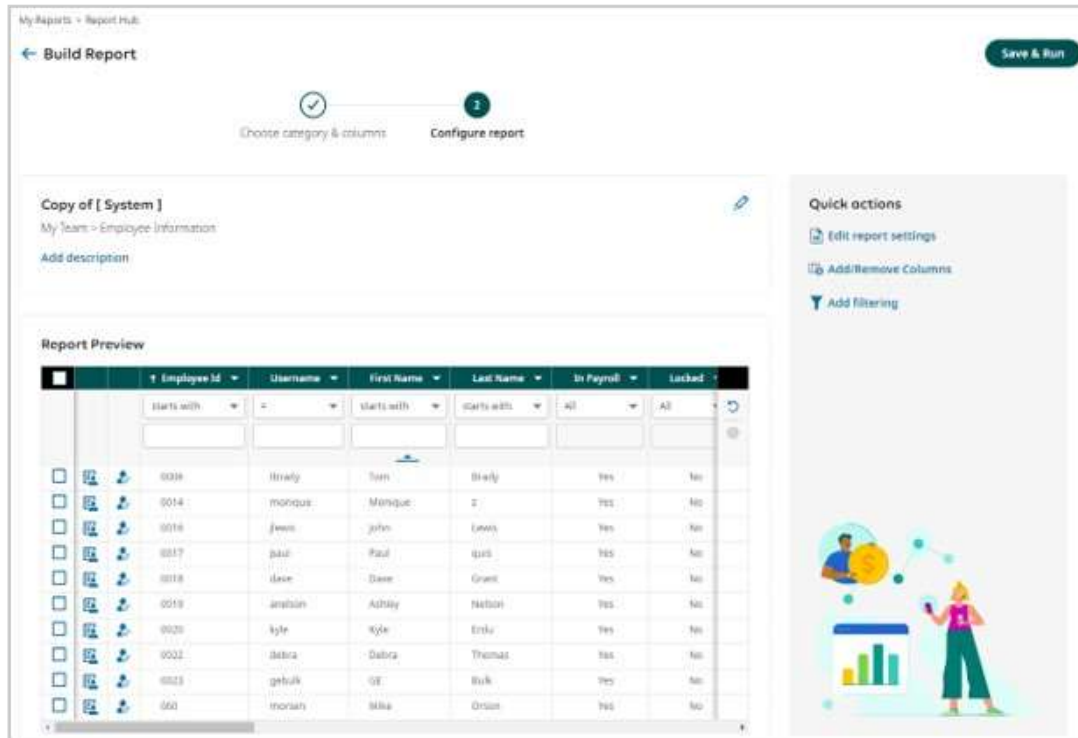
In the top section, you can preview the name of the pending new report view, which is set as "Copy of [System]" by default. You can double-check the navigation path of the chosen report, which is shown below the view name. By selecting **Add Description**, **Edit Report Settings** icon, or the **Edit Report Settings** quick action, you can edit both the name of the pending new report view and write a description. Selecting **Apply** adds the name or description changes to the view.
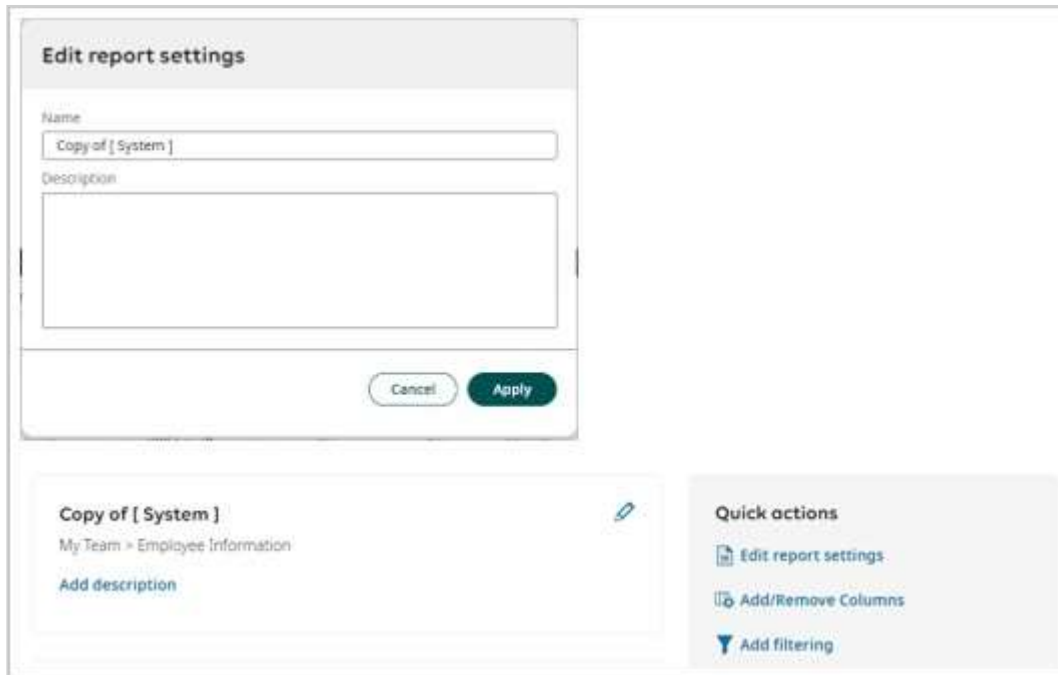
Report View

The **Report View** section provides an accurate representation of the visible/current columns available with the pending new report view and the actual data you would see in those columns. You can scroll from left to right to review all current columns and interact with inline filtering, sorting, grouping and other settings to make adjustments to the view.

If the columns selected in step 1 are not automatically available in the current set of columns, these are automatically added to the pending new report view. These will appear on the right of the report view in an A-Z order.

Note: An extra auto-add selected columns feature will be provided in a future release, which allow users to choose if only selected columns from the first step will be automatically added to the pending view, and this option would exclude any default current columns from the standard report.

You can select the **Add/Remove Columns** quick action to add, reorder, and remove columns from their pending new report view. The **Add/Remove Columns** pop-up is the same experience found when reports are opened directly in the application. You can then select **Apply** to the column selection and order, and these changes will be reflected in the **Report Preview** section.
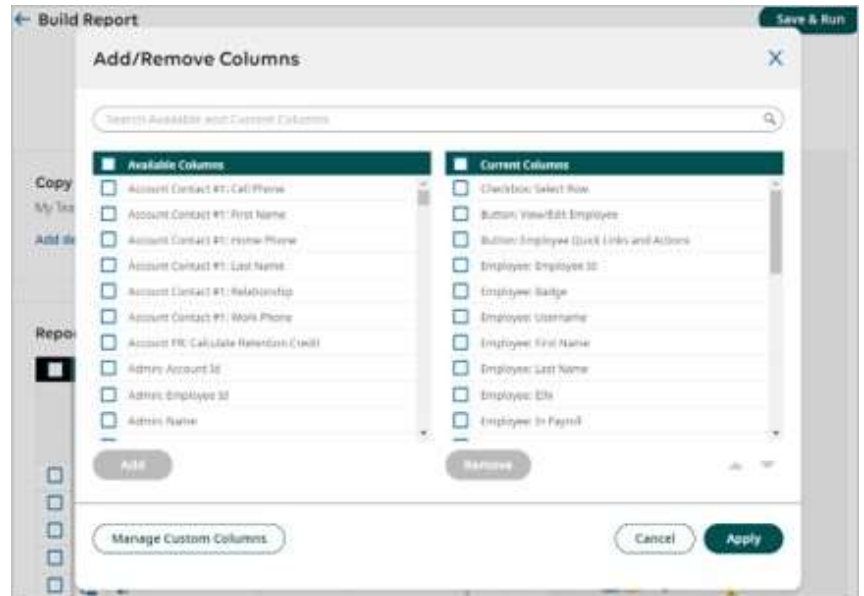
You can select the **Add Filtering** quick action to set filtering for the employees selected, date ranges, columns, and more for the pending new report view. The **Filters** panel displayed is the same experience found when reports are opened directly in the application. You can then select **Apply** to commit changes made to the Global and Column and Custom tabs, these changes will also be reflected in the Report Preview section.
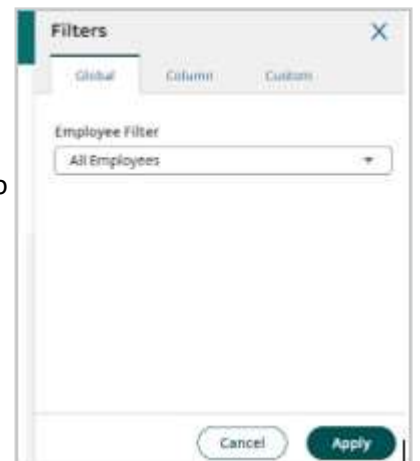
When you select the **Save & Run** button, the report view is saved and you are navigated way from the Report View Creation wizard and the chosen report is presented. The chosen report will display the saved view you just created.

Pagination for Matched Reports

Whether using desktop or mobile, the system will help you view multiple results. You will be able to view more than the initial top 10 reports which are shown in the Matched Reports section. If your search generates matched reports, based on your column selection, and they exceed more than 10, additional pages of results can be accessed.

- Pagination will only allow 10 rows to be displayed at a time.
- If you modify the selected columns and the matched results auto-refresh, you will be automatically returned to the first page of the matched reports results.
- If you are on the first page of results and make a selection and then switch to any other page, the selection on the first page is still preserved.
- If you switch to any other page and make a selection there and then return to the first page, the previously selected item on the other page is opened.

Security Profiles: New Permission Added for Groups

The **Groups** security permission has been added to security profiles and helps control visibility of groups widget in the employee profile and its actions. This permission is located in the **Employee** section of the **HR** tab in security profiles. It has the following characteristics.

We have added a new **View all groups the employee is a member or manager of** checkbox, which allows the user to see all the groups the employee is in even if the user does not have permission to those groups.

- **Name**: Groups
- **Info Icon**: "This allows users to see which groups the employee is a member or manager of"
- **Blank**: Doesn't have permission to view.
- **View**: Has permission to view and only sees the groups the employee is a member or manager of if the user has permissions to see those groups.
- Checkbox: View all groups the employee is a member or manager of
- **Info Icon**: "This will allow the user to view all the groups the employee is in even if the user themselves do not have permission to view or edit those groups"
- **Default Value**: Off, not selected.
- **Authentication Level**: Medium (Only managers or admins have access to this widget)

Impacts to Groups widget in Employee Profiles:

- The Actions column values only appear if the user has access to edit group members or edit group permissions.
- The Actions column values are blank if the user does not have permission to edit group members or edit group permissions.
- These permissions are added by an administrator within the group itself.