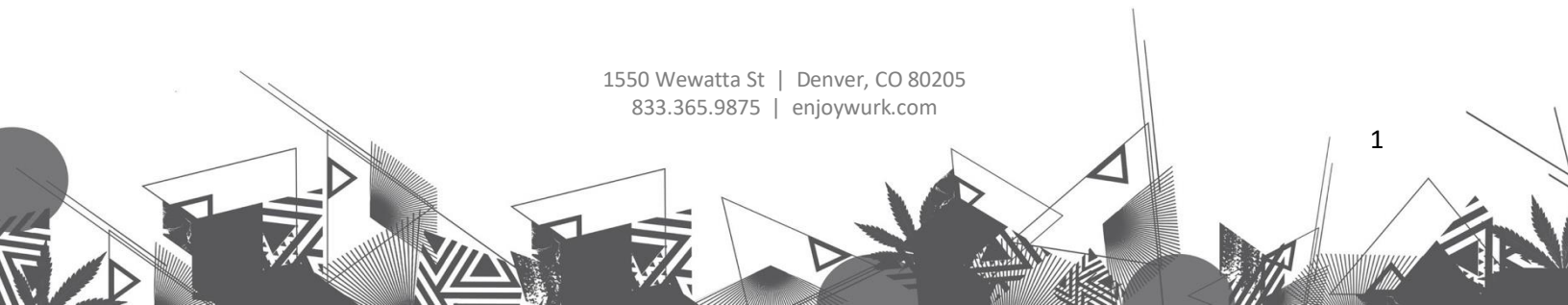


Release 91, February 9, 2024

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.

- PAYROLL** **2**
 - NEW ER/EE SCHEDULED DEDUCTION/EARNING COLUMNS AVAILABLE 2
 - FEDERAL W-4 WEBFORM UPDATED 2
 - HISTORICAL CORRECTIONS 2
 - Last Run Historical Date Column* 2
- TLM** **3**
 - ACCRUED THRESHOLD (ACCRUALS 2.0 ONLY) 3
 - LEAVE OF ABSENCE 3
 - Timesheet Change Request* 3
- SCHEDULER** **3**
 - OPEN SHIFTS 3
- HR** **3**
 - BENEFITS 3
 - Benefits Enrollment: Beneficiary Sections Updated to Table Format* 3
 - Benefit Plans Widget in Employee Profiles Updated to Report View* 4
 - EMPLOYEE INFORMATION 5
 - EEO-1 PDF DOWNLOAD BUTTON ADDED 5
 - I9 FORMS & E-VERIFY: CITIZENSHIP NAME CHANGE IN STATUS SELECTIONS 5
- CROSS PRODUCT** **5**
 - NOTIFICATIONS 5
 - Notification Preferences Report* 5
 - EMPLOYEE DOCUMENTS 6
 - Display Name for Uploaded Documents on Employee Profile or Employee Documents* 6
 - Document Type Filters* 6
 - REPORT HUB 6
 - Column Feedback in Report Hub* 6
 - EASE OF USE ENHANCEMENTS 7
 - Reporting Updates* 7
 - Today's Tasks* 8
- SUPPORT** **9**



Payroll

New ER/EE Scheduled Deduction/Earning Columns Available

The following new columns are now available to add to the **Earning/Deduction/Tax Listing** report (under Team > Payroll > Reports > Pay History > Earning/Deduction/Tax Listing and My Reports > Payroll Reports > Pay History > Earning/Deduction/Tax Listing):

- Scheduled Deduction: ER Amount
- Scheduled Deduction: EE Amount
- Scheduled Deduction: ER Percent
- Scheduled Deduction: EE Percent
- Scheduled Earning: EE Amount
- Scheduled Earning: EE Percent

These columns allow users to compare the earnings and deductions withheld with the employee's scheduled deduction/earning amounts.

Federal W-4 Webform Updated

The latest version of the Federal W-4 Webform for 2024 is now available.

Historical Corrections

Last Run Historical Date Column

Previously, the Last Ran date column on the Process Timesheet report (under Team > Payroll > Process Timesheet) did not clearly indicate whether the correction on a pay period was run through historical corrections or the original pay period. A new column is now available on the Process Timesheet report, Last Run Through Historical. This column contains a date of when it was run through the historical correction process.

If the corrections were included in the most current process and both the Last Ran and Last Run Through Historical dates are the same, then those were processed through historical corrections. If the current process date is not shown in Last Run Through Historical, those were processed in the original pay period and do not come through to a new payroll.

TLM

Accrued Threshold (Accruals 2.0 only)

For the Accrual Profile > Maximum Accrued Amount rule, a new **Generate Notification** setting is available. You can enable the option to have a global notification sent when the threshold value has been reached.

Note: This must be enabled by the Wurk Team. Please contact Support.

Leave of Absence

Collect Documents Workflow

Since the information and documentation collected with a leave case is personal and time sensitive, new provisions have been made to collect new documentations from a leave case.

Note: This must be enabled by the Wurk Team. Please contact Support.

Timesheet Change Request

Ability to Submit on Behalf of Employees

Managers can now submit timesheet change requests on behalf of their employees.

Scheduler

Open Shifts

Mass Assign

Open shifts were limited to be assigned to one employee at a time. With these enhancements, managers can create and assign shifts to multiple employees at a time.

Assigning Shifts: When selecting Add New Shift, the Manage Shift: Employee Selection window has been updated to allow for multiple employee selection. Upon Save, shifts are created and assigned to selected employees.

NOTE: max 100 EE's can be selected at a time

HR

Benefits

Benefits Enrollment: Beneficiary Sections Updated to Table Format

In the benefits enrollment pages where beneficiaries can be added, the beneficiary sections of the Plan Details page was previously a report style view. We have updated this view so it now appears in a table view. The Plan Details page displays after using the Select button to select a plan.

When employees select beneficiaries, they will first be shown those marked as beneficiaries from their account contacts via a card view, and if needed they can add beneficiaries from existing contacts not currently marked as beneficiaries or add new contacts as beneficiaries.

Using **+Add** for each section, employees can select from their existing contacts those designated as beneficiaries. If none exist, the pop-up has an **Add beneficiary** button which can be used to quickly add a new contact designated as a beneficiary and then simultaneously select that new contact.

- On the **Choose beneficiaries** pop-up, only contacts designated as beneficiaries will display. You can select one or more contacts and then save.
- After selecting and saving your beneficiary selections, another pop-up will display where you will designate the percentages each selected contact should receive. Percentages in each table (primary or contingent) must total 100%.

Once beneficiaries have been added, the triple-dot action ellipses within the row of the table can be used to view/edit the contact or remove a person from the beneficiary list. When done, the card view will display a summary of your selected beneficiaries.

Choose your beneficiaries
Who would you like to get the money from this insurance?
You need at least 1 and up to 4 beneficiaries

Actions	Name	Relationship	Birthdate	Percentage
...	Mark Willett	Husband	02/05/1970	100
Total percentage				100%

Choose your contingent beneficiaries
If your primary beneficiary(s) unfortunately died, who should then get this money?
You need at least 0 and up to 4 beneficiaries

Actions	Name	Relationship	Birthdate	Percentage
...	Jeffrey Willett	Son	03/14/2005	50
...	Jennifer Willett	Daughter	04/11/2007	50
Total percentage				100%

Assign percentage
What percentage of the money should selected beneficiary(s) receive? (Total beneficiary amounts must add up to 100%)
Mark Willett
Percentage: 100

Assign percentage
What percentage of the money should selected contingent beneficiary(s) receive? (Total beneficiary amounts must add up to 100%)
Jeffrey Willett
Percentage: 50
Jennifer Willett
Percentage: 50

Basic AD&D
Coverage Level: Basic AD&D Insurance
Beneficiaries (1): Mark Willett
Contingent Beneficiaries (2): Jeffrey Willett, Jennifer Willett
Plan Highlights: Company provided AD&D Insurance 1.5x annual base salary
Coverage: \$60,000.00
Selected

Benefit Plans Widget in Employee Profiles Updated to Report View

The Benefit Plans widget within employee profiles was formerly in a table format. To make the widget easier to use, this widget has now been converted to a report which will make it easier to view desired data. With the view being converted to a report, you can edit and then save your view and when returning to the widget, your saved view is available - or if you had saved your view as your new default view, the widget will open to that view. Another advantage of the report view is that you can view enrolled and waived plans at the same time versus the table view, which contained buttons where you would have to select the view.

The report will default to show current, non-waived plans as the table view did, but with this report view, you can remove the "Show current plans only" report filter to show all plans. The column filter can also be used to show waived plans and you can also bring in a column to see waived reasons.

	Plan Name	Coverage Level	Deduction 1 Effective From	Deduction 1 Effective
	[input]	[input] Waived	[input]	[input]
	1 earning / 1 deduction	test	01/01/2024	12/31/9999
	Basic Life Insurance Plan	Employee	01/01/2024	12/31/9999

Plans can be added via the +Add New button. Actions are available to View/Edit or Delete (which is dependent on the user's security permissions.) The hyperlinked plan titles, when selected, will open the plan for viewing and possible editing.

Note: This must be enabled by the Wurk Team. Please contact Support.

Employee Information

EEO-1 PDF Download Button Added

A Download PDF button is now available in the EEO-1 Component 1 form file (HR > Forms > Government Forms > EEO-1). When selected, the PDF version of the EEO-1 form will download.

I9 Forms & E-Verify: Citizenship Name Change in Status Selections

To match the latest version of the Form I-9, in the Status drop-down under the Citizenship tab on the E-Verify page, **An Alien Authorized to Work** has been renamed to **A noncitizen authorized to work**.

Cross Product

Notifications

Notification Preferences Report

A new report, Notification Preferences, is now available under My Reports > System Reports > System Utilities > Notification Preferences. Using this report, managers can confirm which notifications their employees have and have not opted into to ensure they are receiving the appropriate notifications.

Employee Documents

Display Name for Uploaded Documents on Employee Profile or Employee Documents

The display name and file date on Employee Documents, Company Documents, and Incidents now appear as expected. The display name field auto populates with the file name, but it can be changed. If it is changed, the display name matches the new name and not the original file name.

Document Type Filters

Visible By

Employees can now upload a document and make it visible to only themselves and their HR representative.

This filter allows only the employee that uploads a document to view it.

A new Document Type Filter titled **Creator** has been added with the following description: Document Types with this filter alone are visible as a selectable type to all users. If the Document Type with self-filter is selected for an uploaded document, then that document is visible to the user who has uploaded the document.

Creator - Download By

Employees can now upload a document and make it visible to only themselves and their HR representative. A new Document Type filter, Creator, can be created and allows only the employee that uploads a document to view it.

The Document Type with this filter alone is visible as a selectable type for all users. If the Document Type with a self-filter is selected for an uploaded document, the document is visible to the user who uploaded the document.

Note: This must be enabled by the Wurk Team. Please contact Support.

Report Hub

Column Feedback in Report Hub

Users can now send a request when there is a data column they want to see inside a report. The requests can eventually be applied back into the product for the reports they need.

Users must have access to the Report Hub and Report Builder to submit these requests. This access is granted via Reports > Report Hub > Overview. This applies to the Custom Report Builder process (Step 1).

A feedback option displays in the column selection section of step one in the Report Hub Report Builder. This option is available in both Desktop and the Mobile Application. The label for the option reads:

Missing a column? Send a request!

When the option is selected, a panel displays where the user can provide feedback on a missing column need for a report and general comments based on their creation. The panel is titled **Missing column request**, and includes the following subtitle or description:

Which column would you like to be added to a report?

Information about the user attempting to submit feedback displays such as their Full Name, Company and EIN name, and the name of their assigned Role Profile.

Note: The name of the Role Profile assigned to the user displays, but the responsibilities assigned to that role profile do not display.

Two required fields display for users to submit the column they need and what report it should be added to:

- Column name
- Report name

An additional text area is provided within the dialog so users can provide comments on why this column is needed or any other feedback. This area is titled **Tell us more about why this column is needed**. Text in the field is:

Please share your use case and why this column is important.

Users can Submit or Cancel their feedback.

Ease of Use Enhancements

Reporting Updates

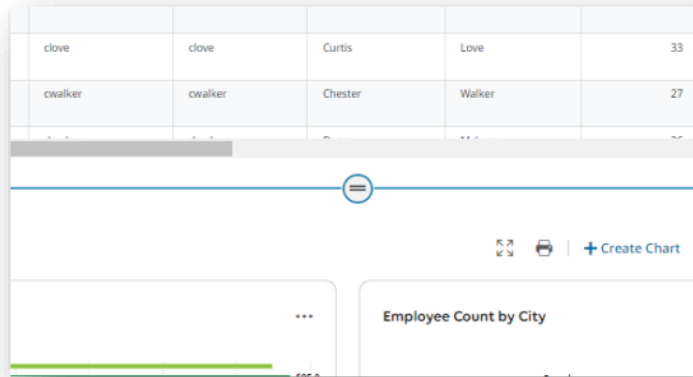
Banded Rows in Data View

Improvements has been made to the display of the data grid inside reports using banded colored rows. This addition will help break up the data and make it visually easier to digest.

	Picture	Employee Id	Username	First Name	Last
		starts with	=	starts with	sta
<input type="checkbox"/>		ascarborough	ascarborough	Alison	Scar
<input type="checkbox"/>		bjames	bjames	Brandon	Jame
<input type="checkbox"/>		blamb	blamb	Brett	Lam
<input type="checkbox"/>		clove	clove	Curtis	Love
<input type="checkbox"/>		cwalker	cwalker	Chester	Wal

Click and Drag to Expand Sections

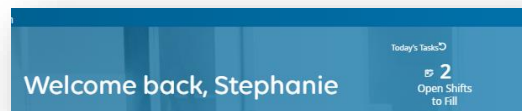
Providing the ability to click and drag to expand either the data view or chart view in reports so that you can maximize your viewing experience when the view mode is set to data and charts.



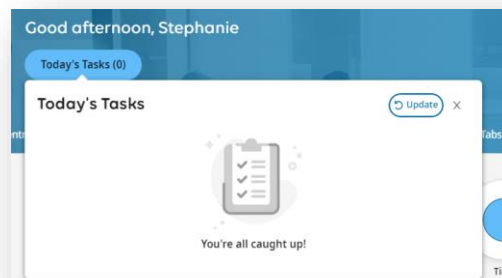
Today's Tasks

Today's Tasks provide crucial information about what managers need to pay attention to in the moment. To save overall space, Today's Tasks will be represented as a single pill underneath the welcome message as you log in. The total number of tasks will display, and as you click, the data will be refreshed to show your individual categories to act on.

Old View:



New View:



Support

For any more information or questions related to the release notes, please contact our Support team at support@enjoywurk.com.

