Release Notes

Release 94, August 8, 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.*

Highlights From This Release

Employee Checklists

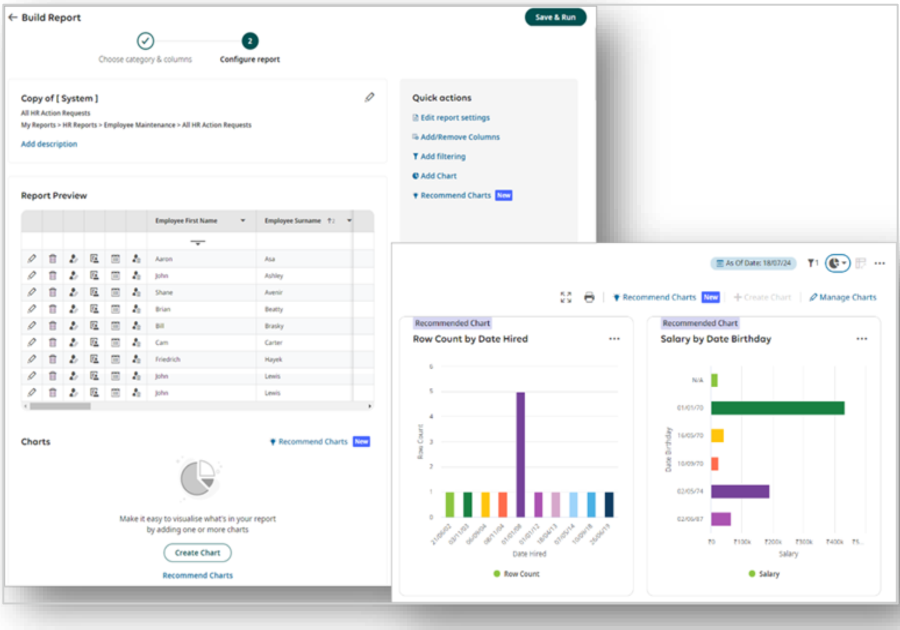
Updates have been made to the Employee Self Service experience for Withholding Form checklist items. This includes a new **Status** column to help employees track if they have submitted each form (State & Federal).

Scheduler

When selecting a shift, a window displays options for Manage Shift, Copy, and Remove. Manage Shift opens the shift details for editing, Copy allows for pasting onto another employee or day, and Remove deletes the shift.

Reports & Charts

For reports that support charts, a new feature is available that will suggest popular chart configuration settings when users choose to display report data via a chart, which makes it easier to add a chart to show report data.



Cross Product

Employee Checklists

Updates have been made to the Employee Self Service experience for Withholding Form checklist items. These are listed below.

State Withholding Bypass Report Selection Screen: Submitting Forms Behavior

Users with the appropriate security permissions are now consistently returned to the withholding form selection screen whenever they submit a form.

Behavior: Submitted Forms

- When each form is submitted, including Federal and State forms, the submitted form disappears and the user is returned to the Withholding Form selection screen.
- For the Federal form, this occurs after the user completes the Sign & Submit action.
- For any State form, this occurs after users selects OK in the confirmation screen after they complete the Submit action.
- If the user accesses another checklist item in the same checklist, or leaves and returns to the checklist, when they open the checklist item, it displays the last form they were viewing or the selection screen if it was the last screen they viewed.

State Withholding Bypass Report Selection Screen: Form Link Returns User to Same Form

Users can now open the same form via the form selection screen links so they can easily return to it if they have saved changes but have yet to submit the form. If a form has been rejected and a user needs to make one or more corrections before re-submitting it for approval, users can return to the form to make corrections and avoid creating duplicate or redundant forms.

Behavior: Unsubmitted Forms

- If a user selects the form link for a particular form, including a Federal or State form, the system creates one form. Each time a user selects the link for a form, it returns them back to the same form that was initially created.
- If this form is submitted or processed, the form is displayed in a read-only state to the user.

- If the form is rejected, the same form displays again in an editable state to the user.
- If the form is deleted, a new form is created when the form link is selected again.

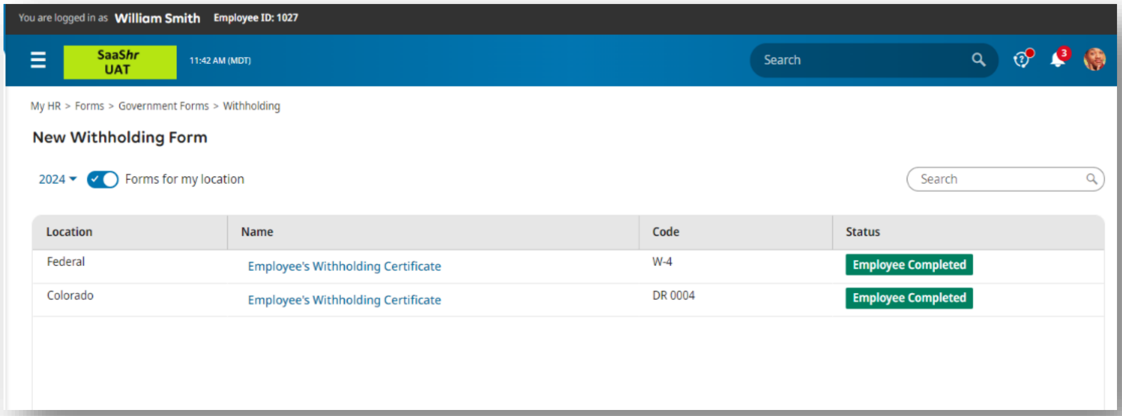
State Withholding Bypass Report Selection Screen: Status Column Added to Employee Experience

A new **Status** column has been added to the employee's state withholding forms checklist page. This will help employees track if they have submitted each form only when using the links in the selection screen and applies whether the 'Forms my location' toggle is enabled or disabled.

Employees can also check each form's status when accessing My HR > Forms > Government Forms > Withholding.

Forms processed outside the checklist will not generate statuses.

Status Column	Status Description
New	**Will display when a user has either not yet opened a form or has opened and saved but not submitted a form.**
Employee Completed	**Will display if the user has performed the Signed & Submitted/Submitted action in a form.**
Processed	**Will display if a manager or admin has processed the employee submitted forms (via To Do's and the MSS Government Forms report handled by a manager)**



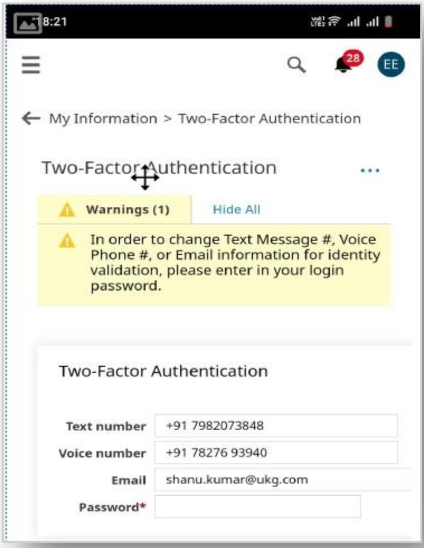
Security and Authentication

Authentication and Authorization - Two Factor Authentication

Employee Self-Service Two-Factor Authentication Page on the Mobile Application

Users can now change their Two-Factor destinations from the Mobile Application so clients who exclusively use the Mobile App can change their Two-Factor settings and keep their information updated on the go. The following page is now available on the Mobile App:

My Information > Two-Factor Authentication



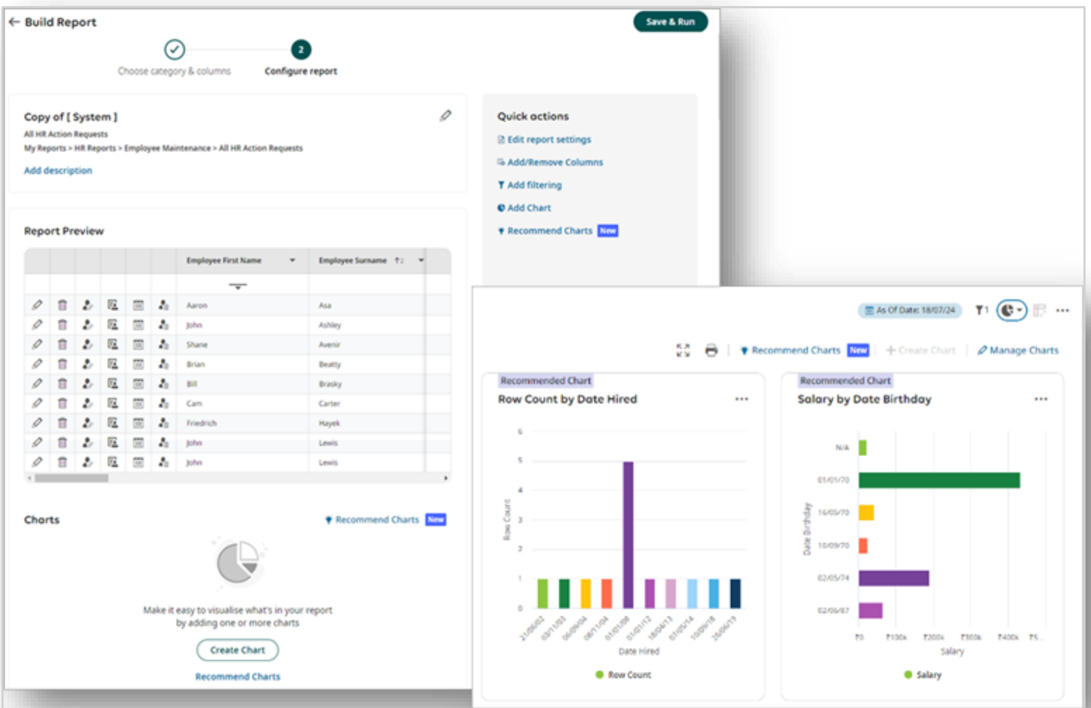
Reports & Charts

Recommended Charts for Reports

For reports that support charts, a new feature is available that will suggest popular chart configuration settings when users choose to display report data via a chart, which makes it easier to add a chart to show report data. When users choose the "View Charts & Data" or the "View Charts" option, they will have the option to create a chart, select an existing chart, or select a "Recommend Chart" for the report.

Recommended charts are charts that our proprietary data has indicated are often used with the selected report data. Using Recommend Chart rather than creating a chart manually saves users time and effort, while displaying their data in a tried-and- true format. After a user has added a recommended chart, they can edit or delete it as with any other chart.

This feature is also available in the Report Hub's Report Builder functionality. In the Report Builder, users can choose the **Recommend Charts** link. Every time a user selects the **Recommend Charts** link, a random selection of available charts will be shown from which they can choose. Charts are recommended based on the data columns included in the report.



Select All on All Scheduled Reports

The All Scheduled Reports report now includes a "Select All" option for selecting records to mass edit.

System Generated Emails Report - Error Column

When sending an email with large attachments (exceeding 25MB in size), the system restricts the email, and an error is logged. To view these errors, a new **Error** column has been added to the System Generated Emails report. My Reports > System Reports > System Utilities > System Generated Emails This column is included in the report by default.

Payroll

Reports

Updated Report Column in Account Taxes

In the **Account Taxes** report (Team > Payroll > Employee Payroll Maintenance > Taxes), the Claim Dependent/Amount/Credits column has been renamed to **Claim Dependent/Credits/Total Claim Amt**.

Massachusetts: Parameter Removed

From Account Tax Jurisdiction: Massachusetts, the **Total annual wages** field is no longer available; the flat supplemental wage method is not supported.

North Carolina: Added State Occupational Code

For North Carolina users configuring a Tax Jurisdiction, the North Carolina ER SUTA Tax Codes widget now includes an **Occupational Code** field.

Payroll Processing: Annual Max amount processed incorrectly

Previously, when a customer had a scheduled earning with a zero amount and an Annual Max amount, the payroll process created a pay statement with the Annual Max amount. This has been fixed, and in this situation, the payroll process will now calculate pay statements correctly.

Taxes: State tax column caused an error on a report

Previously, when a client pulled in the column "State Tax: State Elected Percentage Rate" into the Taxes report, the report stopped loading and gave a "Difficulty Retrieving Data" error; the report loaded when the column was removed.

This has been fixed, and the column specified can now be added to the report without error.

TLM

Meal and Break Compliance: Washington

To report on lunch and break time compliance, a new report is available within the Team > Time > Reports > Calculated Reports > Lunch and Break report. Located in the upper right of the page, a new View Compliance option is available. When chosen, the new view is of the new Lunch & Break Compliance report. Data for this report is generated based on settings made within the Add Extra Time (Counters) Pay Calculation rule.

Scheduler

Copy/Paste Shifts

Clicking on a shift in the Day, Week, or Month view provided the shift details, but not a quick way for the user to delete or copy the shift. Now, when selecting a shift, a window displays options for Manage Shift, Copy, and Remove. Manage Shift opens the shift details for editing, Copy allows for pasting onto another employee or day, and Remove deletes the shift.

Both Copy and Remove have subsequent confirmation messages that allow you to continue or cancel the transaction. Validations are in place to ensure rules and policies are followed.

Schedules: Changing the cost center in Schedule Daily Rule not updating existing schedules

Previously, when a user updated a cost center on a Schedule Daily Rule, sometimes existing schedules were not changed to match. This has been fixed, and when users update a cost center on a Schedule Daily Rule existing schedules will now change as expected.

HR

Base Compensation

Support for Base Compensation Notes

Within the Base Compensation Widget on the employee record, there's an ability to add a note to each base compensation line and these notes can also be viewed within the Base Compensation History Report. In this release, in addition to the employee record, we are adding support for Base Compensation notes in the HR Actions for Regular, Hire, Rehire, Termination.

Edit Icon for Beneficiaries in My Benefits Updated

During non-enrollment periods, employees can edit their beneficiaries. Previously, it wasn't clear to the employee how to do this from the My Info > My Benefits > Benefit Plans page. Originally there was just an edit icon (pencil) and not all employees understood that they could edit their beneficiaries by selecting this icon. Now, we've updated the icon with helpful text and it now displays as **Edit beneficiaries**.

> **Note:** Employees can edit their beneficiaries between enrollment periods only if they have "Edit Beneficiaries Between Enrollment Periods" enabled in their security profile. This is under the Employee Self Service tab, in the Benefits widget.