Release Notes

Release 103, January 29, 2026

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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The list of widgets available for the Onboarding Tab now includes the First day widget. It displays essential information for new hires, including shift details, manager information, and work location.

Release Notes

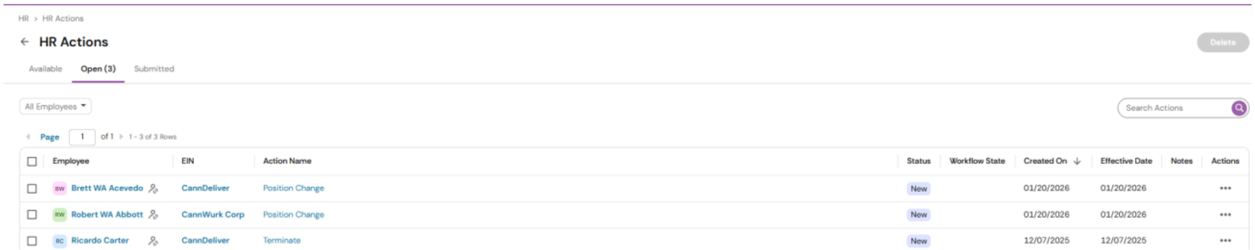
Cross Product

HR Actions

HR Actions: Interface Updates and Modernization

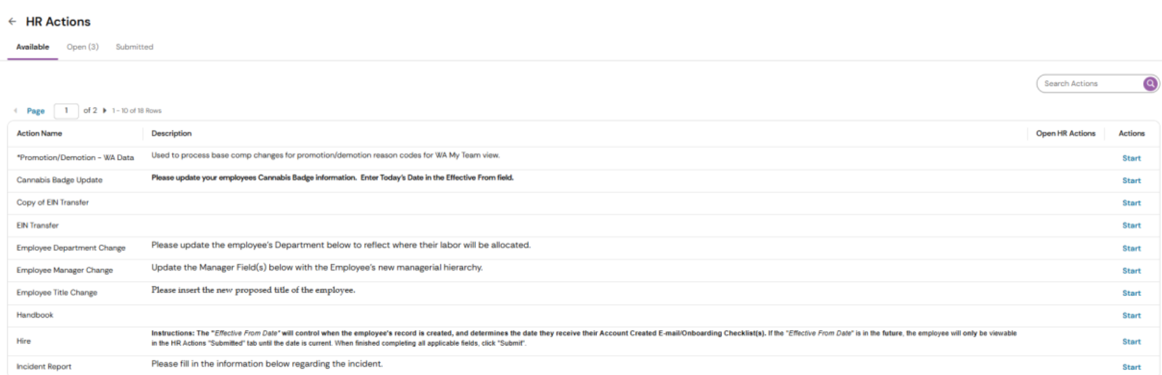
Details

We have updated and revamped the HR Actions functionality in the User Interface by providing a more modern experience to all customers.



HR Actions: Changes in Open Tab Layout

We have revamped the interface of the Available tab in the HR Actions, providing a more modern experience for all customers.



Integrations

Entra ID Integration

Details

The Entra ID and Wurk integration helps your IT team minimize time spent on manual account management, enabling them to focus on higher-value strategic initiatives. This automated synchronization improves efficiency while providing peace of mind through accurate and secure data handling.

Before you begin setting up the integration, please confirm that your organization has one of the following Microsoft Entra ID licenses:

• **Microsoft Entra ID P1**: Provides API and single sign-on (SSO) functionality required for integration.

• **Microsoft Entra ID P2**: Includes all P1 features plus advanced identity protection and governance tools.

• **Microsoft Entra ID Governance**: Offers advanced identity life cycle management and access certification features used in integrations.

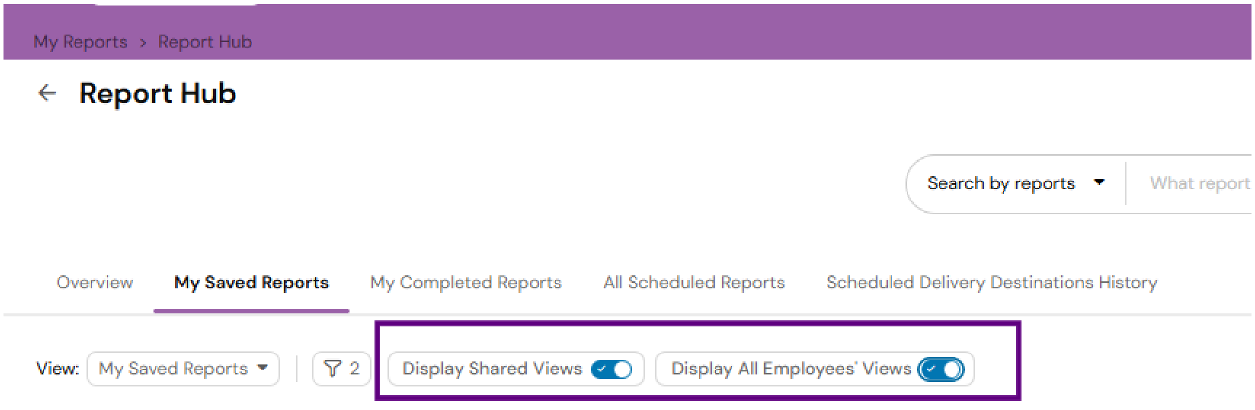
Note: Please speak with your Customer Success Manager for more information about the i integration.

Reports and Charts

All Saved Views Visibility

Administrators and other users with applicable permissions now have the ability to see all saved views that exist for their organization inside of the My Saved Reports tab in the Report Hub. When the user's security profile has the **All Company Employees** option next to the My Saved Reports permission enabled, they will see a **Display All Employees' Views toggle** in their My Saved Reports tab. The Others' Settings toggle now reads **Display Shared Views.**

When a user enables the **Display All Employees' Views** toggle, they can see all saved views across the company, including personal-only views that are not shared with anyone (including the logged-in user). Users must have the **Display Shared Views** toggle enabled in order to enable the **Display All Employees' Views toggle.**



Change Ownership of Saved Reports

Administrators and other users with applicable permissions can now change the ownership of a saved view to themselves.

When the user's security profile has the **Can Change A View's Ownership To Themselves** option next to the My Saved Reports permission enabled, they will have the option to add a **Change View's Ownership To Me** column in their My Saved Reports report

Tip: After you take ownership of a view, double-check the email and schedule report configurations.

Note: When a report's ownership changes, the view's settings are changed so that the Default checkbox is unchecked, even if the previous owner had enabled this checkbox.

Share Saved Report with an OAuth Account for Integration Access

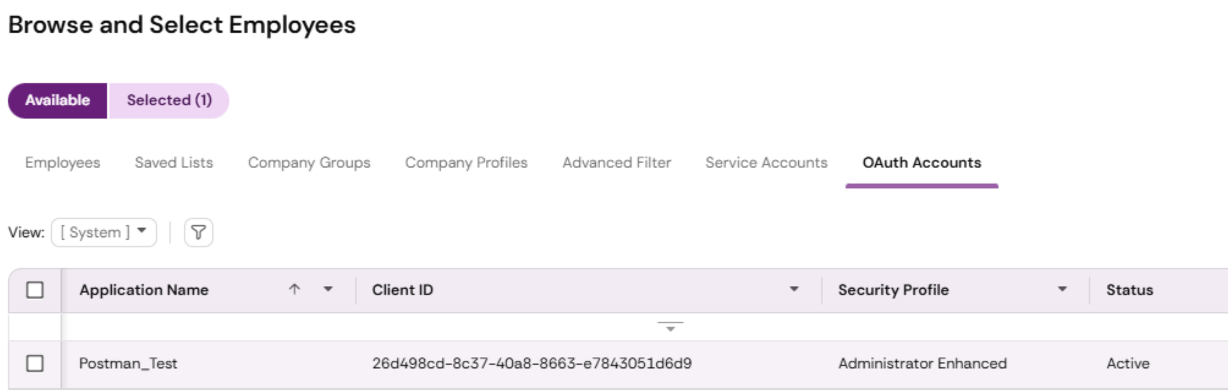
Details

Users can now share a saved report directly with a specific OAuth account so that integrations authenticated with that account can retrieve the report without requiring a human user's credentials. This improves auditability, streamlines report-driven integrations, and ensures secure access to the reports needed by integrations by restricting share access to the OAuth accounts.

Report owners or administrators can share a report with an integration using these steps:

1. From the Save View > Share option or the Share Link To Report option, go to the OAuth Accounts tab.
2. Select an active OAuth account from the list.

3. **Save**. The OAuth account can now access the report via the REST v1/saved report endpoints



Checklists

Checklists: Checklist Improvements & Redesign - **UPDATE**

Details

The landing page displays the name of the employee assigned to each Checklist Item, visible under the respective item for all user personas. The Employee Photo and Name are visible.

User context is added on the Checklist item screen within the instruction box.

Mark As Complete and Reset in MSS View

The MSS landing screen in the new checklist experience now displays Mark as complete and Reset icons at the Checklist item level for some of the items. It will remain hidden for Checklist items that do now show the buttons at the Checklist item screen.

Similarly, the Reset icon appears only after a checklist item has been completed and remains hidden for items that do not support resetting.

Additionally, users now see contextual inline messages: “Marked as done” when marking an item complete, and “ is no longer marked as done” when resetting an item.

These items must be complete or submitted before they are automatically marked as complete. However, after toggling away, the Mark as Complete option becomes available again.

The Mark as Complete option is not available for certain Checklist Items. These items must be complete or submitted before they are automatically marked as complete. However, after toggling away, the Mark as Complete option becomes available again.

Groups on the Checklist Landing Page

The group selection is included on the Checklist landing page so the system recalls the user selection and users can focus on the groups they want. When the user collapses any groups, the application remembers the collapse state of the group before navigating to the Checklist Items when the user returns on the landing page.

If the user expands any groups before navigating to the Checklist Items, when they return on the landing page, it remembers the expanded state of the group.

> **Tip:** Applies on refresh and session end.

Checklists: Show Previous Year's Withholding Form

If you are adding the Withholding Screen Link for the current year, and the form is not yet available, the system previously gave an error and did not allow the screen link to be added to the Checklist and subsequently assigned to the employee. We have updated the system so it allows the screen link to be added and uses the previous year's withholding form and allow the assignment.

AI Generated Field Mapping Improvements

When importing fillable field-based PDFs into a custom form, the system is now more accurate when classifying employee-related fields such as Name and Address fields.

Downloading Checklist PDFs

When you download a Checklist PDF, only the items assigned to you are included in the PDF. This is to ensure that sensitive tasks aren't shared with people who should not see them.

Under the Open Checklist > Click Download icon:

- Users with appropriate permissions can download the full checklist with all items visible. The PDF content matches the content of the Checklist on the user interface.
- A tooltip is available on the Edit (gear) icon on the Landing screen.

Release Notes

Security and Authentication

Account Self Unlock with 2FA - UPDATE

Account Self Unlock with 2FA (Policy Based Lockout)

When a user is blocked from the application, they can securely self-unlock using a second factor so they can regain access without administrator intervention. The following apply:

- The user has the Self-Unlock feature enabled.
- The Authentication Policy exists and defines lockout wait intervals.
- The user has at least one eligible factor (TOTP enrolled and/or verified email or phone for Email/Voice/Text).

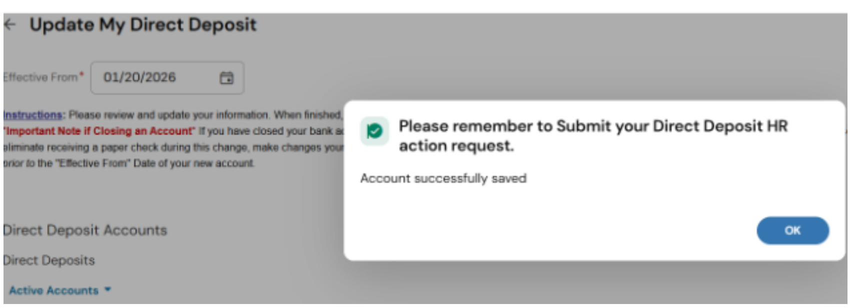
Account Self-Unlock with 2FA (Guardrails)

If you attempt to unlock your own account, and you input your 2FA code incorrectly enough times based on the company's policy, then you cannot self-unlock your account. A system administrator or other user with the appropriate security permissions needs to unlock your account

Payroll

HR Action: Direct Deposit Message

Details When an employee has a direct deposit HR action request, once they save their changes, a reminder message to submit the HR action for approval will display.



OBBB: Added Box Type Codes and Box 14 Updates

Details Starting tax year 2026, per One Big Beautiful Bill (OBBB), the following new Box Type deduction and earning codes for W2 were added:

• **12ta** - Trump account: Employer contributions under a section 128 Trump account contribution program paid to a Trump account of an employee or a dependent of an employee.

• **12tp** - Non-SSTB tips: Total amount of cash tips reported to the employer. The employer is not a specified service trade or business. Use this amount in determining the deduction for qualified tips on Sch. 1-A (Form 1040). The following required fields display when 12tp - Non-SSTB tips is selected:

Non-SSTB tips or Treasury Tipped Occupation Code

• **12ts** – SSTB tips: Used to record tip earnings received from customers in cash when the employer qualifies as a Specified Service Trade or Business (SSTB). This is for FIT, SIT, SOC, MED, FUTA, SUI, SDI,and local income tax with no exceptions. Note: Do not use this amount in determining the deduction for qualified tips.

• **12tt** – Qualified overtime: Total amount of qualified overtime compensation. Use this amount in determining the deduction for qualified overtime compensation on Sch. 1-A (Form 1040).

Tipped earning codes will post to 12tt= Qualified overtime and Box 7 - Social Security Tips.

Additional Updates -Box 14 – Other was renamed to Box 14 – Other(a). Box 14b: The 2026 Form W-2 was updated to include this box for use with the Tipped Occupation codes included in One Big Beautiful Bill.

Earnings and Deductions Automation of Creation of OBBB Earning Codes

Details New One Big Beautiful Bill (OBBB) earning codes are created at the Admin Level automatically. All client companies receive the new OBBB earning codes without manual intervention.

Retirement:

Secure 2.0: Roth Catch-Up for High Earners 50 or Over

Details Beginning January 1, 2026, all catch-up contributions made by employees who meet both conditions below must be Roth (after-tax) contributions: • The employee is 50 years of age or older and • The employee's Medicare-subject wages for the prior calendar year are $145,000 or higher (adjusted annually for inflation) Additional Details For more information and configuration steps, refer to the Roth Catch-Up for High Earners 50 or Over User Guide.

Forms:
Colorado W-4 Update

Details The latest version of the Colorado W-4 (Colorado DR 0004 form) is now available for 2026.

Louisiana W-4 Update

Details The latest version of the Louisiana L-4 form is now available for 2026.

State W-4 2025 Updates

Details The latest versions of the following 2025 W4 forms are now available:

• Alabama A-4 Form • Georgia Form G-4

• Idaho ID W-4 (PDF)

• Minnesota W-4 MN

Withholding Forms 2026

Details All state withholding forms are now available under year 2026 for employees to add.

TLM

Pay Calculation: Weekly Overtime for FLSA

New items are available for the purpose of tracking FLSA overtime hours and tips. This federally mandated tracking is for all work hours over 40 in a week, regardless of the length of a pay period. This fulfills the needs for the One Big Beautiful Bill Act (OBBBA).

Group Punch Improvements

New additions to the Group Punch page have been made with this release.

The Group Punch page now has Sort and Filter icons.

- Sort allows you to list the order of employees from Newest, Oldest, and Alphabetical.
- Filter allows you to display employees that meet specific criteria based on Punch Status, Group, or EIN. An Advanced Filter gives you options based on Manager.

- You may search by cost centers in the Group Punch page.
- The last used filter setting and punch view now remain when accessing the page so that these do not need to be chosen each time.

To the right of the Filter icon are three dots that allow you to choose cost centers to appear on your list of employees, so it can be searched.

- In the Manage Group > Manage Employee > Browse and Select Employee window, once Apply is chosen, a new inline message displays the complete employee information immediately without needing to click Save.
- Group Punch option is now available on the Attendance Board, both desktop and mobile.

Note: Adding Group Punch for your team requires the appropriate security profile permissions.

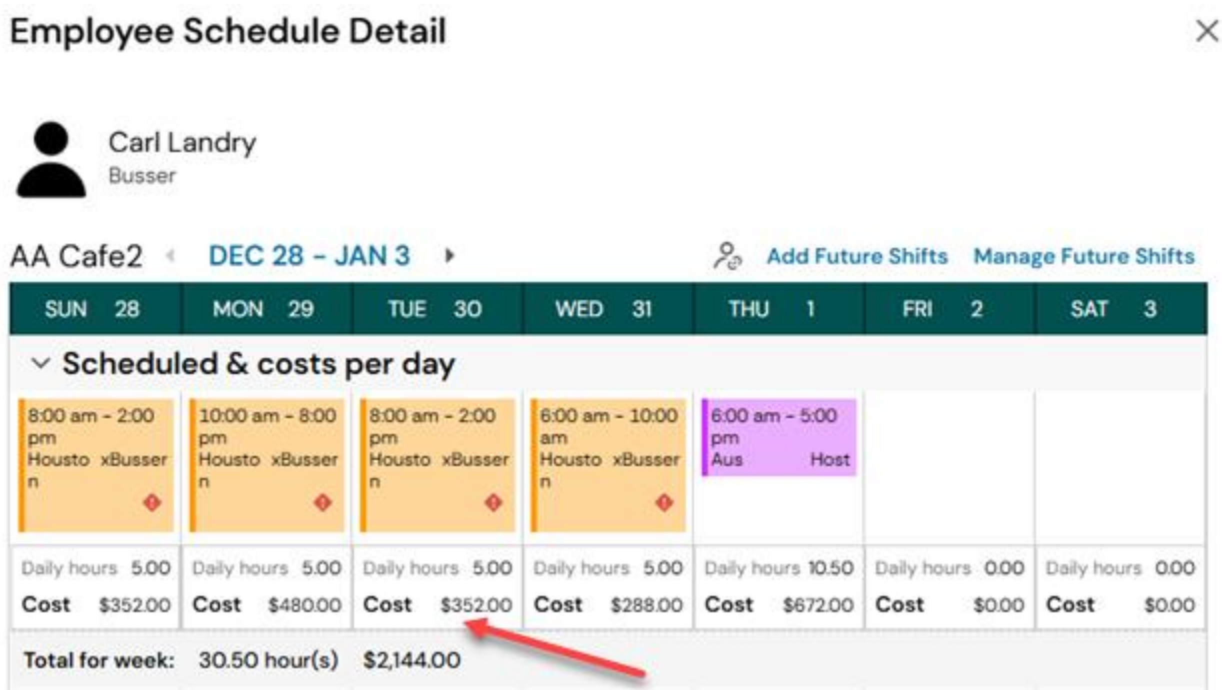
Scheduler

Daily Shift Costs in Scheduler View - UPDATE

Details

There had not been a way to see individual daily costs per employee in the schedule view. Now, it is possible to view these costs in the **Employee Schedule Detail** window.

Note: This requires the Auto Estimate Schedule Costs to be enabled.



The refresh option is within the window for the estimated costs per day for the employees listed. Also, the Refresh action in the metrics section refreshes the estimated costs per day for the employees on the current page.

Scheduler Home New Experience - UPDATE

Details

A new Scheduler Home page is available to reduce time in the creation, setup, and management of schedules. New schedules no longer have the requirement for cost centers or skills by default, unless you have marked them as required.

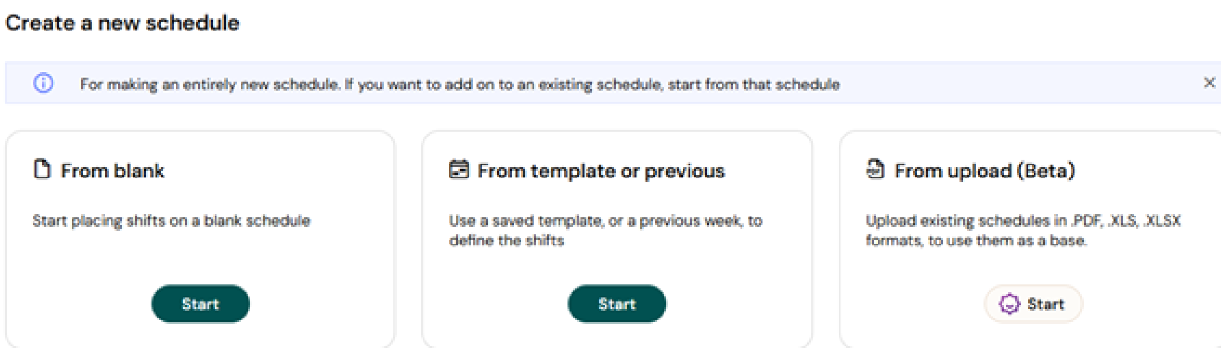
The 'Try the new experience' toggle at the top-right of the Schedules page converts the page to the new experience.

The new page presents an easy to view experience of your schedules and assignments. Sections on this page include:

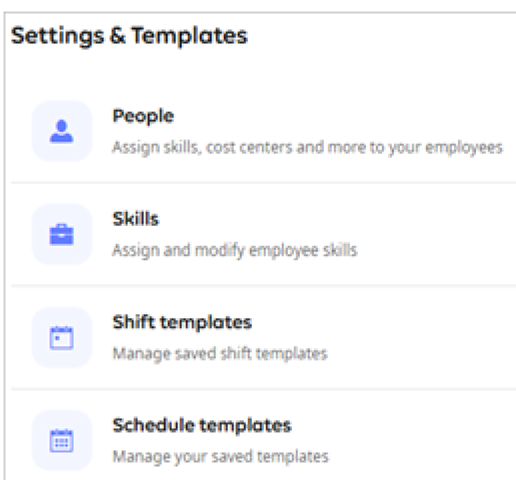
- Your schedules - displays up to ten new schedules at a time.
  - Selecting the name of the schedule takes you to the Week View of the schedule.
  - The 'Add new' button allows you to add a new schedule.
  - The 'View full report' link brings you to the full list of schedules.

- The Actions menu offers options such as Add New Shifts To Schedule, Open in Month or Day View, and Manage Settings.

- Create a new schedule - allows for the creation of a new schedule from a blank schedule, from a saved template or previously week, or from an uploaded document (*coming soon*).



- Settings & Templates - allows you to set skills, cost centers, templates and more for the employees of the schedule by using the links for People, Teams & Cost Centers, Skills, Shift Templates, and Schedule Templates. Each option takes you to the appropriate Ready page for setup.



Additional Details

If you create a new shift from the Open Shift window, the Save option now contains a drop-down option to save it as a template, adding it to the library of shift templates which are available as a selection for quick assignment or as a base for a new schedule.

Scheduled Cost Centers and Skills

Companies were required to set up Scheduled Cost Centers and Skills to use Scheduler when creating schedules and shifts. With this release, the requirement for scheduled cost centers and skills when adding, modifying, qualifying, or creating a shift has been removed. New shifts may be added or modified without them.

This also removes these former requirements from the following Scheduler Imports.

- Schedule Shifts
- Template Shifts
- Workload Template

The titles of some fields have changed to remove the former requirement, such as 'Select Required Cost Center' is now 'Select Cost Center'.

Optional Cost Centers and Skills

Within the Scheduler Setup > Schedule Settings, if the Optional Cost Center and Skills option is checked, you can select a cost center from the list of schedulable cost centers. You can add new ones or remove some from the list using the **Remove Selected** or **Add Schedulable CCs** buttons.

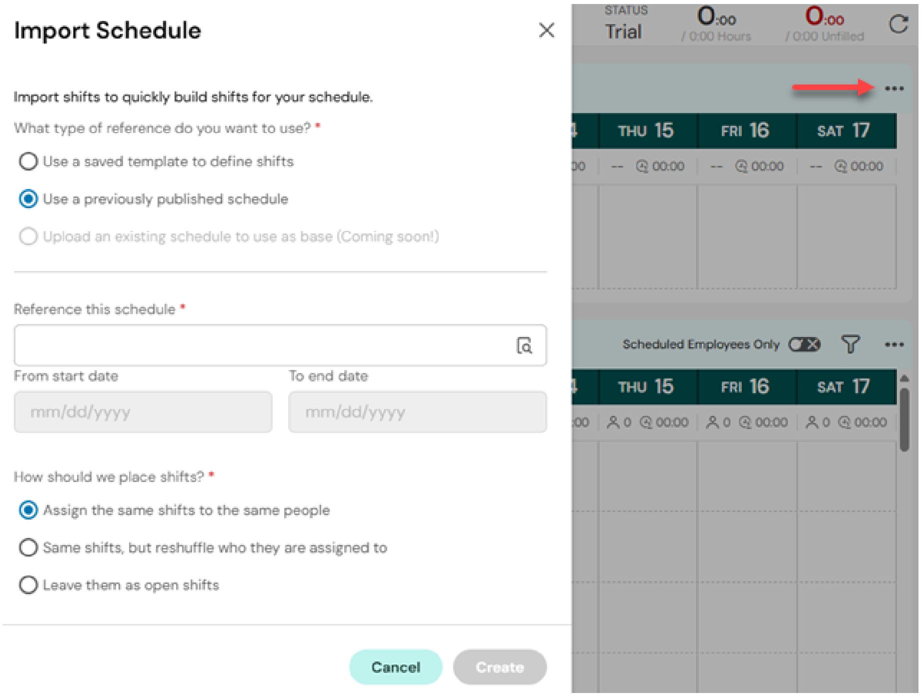
Note: This does not affect existing schedules that enforce the required cost center or skill. The requirement is removed for newly created schedule settings.

Schedule Scrolling

Moving from week to week or day to day while in the Schedules page has been enhanced to allow scrolling. At the top of the page, such as in the Week View, you can navigate to the next or previous week using the arrow next to the date display without leaving the page and starting again.

Import Schedule

From a blank week in the schedule, select the three-dot Actions menu to choose **Import Schedule**. You can import shifts from a saved template or a previously published schedule.



HR

Forms

An Improvement to E-Verify Case Status Monitoring

Details

A new **Sync Case** button helps HR teams track Form I-9 processing progress and address issues faster.

Issue addressed

The Wurk system synced case statuses only through the E-Verify nightly job. This process sometimes created differences between statuses in E-Verify and Wurk, which delayed authorization confirmation. For example, a case may show 'Employment Authorized' in E-Verify while the status in Wurk still shows 'Incomplete' with the message “E-Verify needs more time”.

What we've done

Managers can select the **Sync Case** button to pull the latest case status from E-Verify so the status in Wurk matches federal records.

For example, you may update a case directly in E-Verify during the day. These changes do not appear in Wurk immediately, so the **Sync Case** button helps you have the latest case status reflected.

If managers do not select the **Sync Case** button, the system syncs case statuses overnight. When admins add a case in E-Verify, they can see the updated case status the next day.

Ability to Configure the Form I-9 Submission Deadline in E-Verify

Details

This update adds a new setting that controls how the system calculates when a Form I-9 submission becomes overdue. The E-Verify product configuration page now features an **Include Weekends as Workdays** checkbox.

This setting controls when E-Verify displays the **Overdue Reason** field for a case that you open after an employee's Hire Date.

When the checkbox is selected, the **Overdue Reason** field appears three calendar days after the Hire Date.

When the checkbox is not selected, the day count for displaying the **Overdue Reason** field excludes weekends and company holidays.

In both cases, the system begins counting days on the day after the Hire Date, using the time zone of the company EIN.

Onboarding

A First Day Widget is Now Available in Dashboard Tabs

Details

The list of widgets available for the Onboarding Tab now includes the First day widget. It displays essential information for new hires, including shift details, manager information, and work location.

- Shift details: The section shows shift information based on the employee's schedule.

- If an employee has assigned shifts, the section shows the earliest assigned shift. When the shift ends, the next assigned shift displays. The **View my schedule** link opens the Schedule page under My Info > My Schedule.
- If an employee does not have an assigned shift or has a fixed schedule, they will see their start date only.

If a start date or shift is available, the employee can select the **Add to calendar** link to add the event to Google, Apple, or a generic ICS calendar. Start dates display as full-day events, and shifts display with start and end times.

Manager information: The section shows details about the employee's direct manager: manager name, position or job title, profile picture. If the manager's contact details are available, employees can send them an SMS or email.

Location details: The section displays work location information using the most appropriate available data.

- The section shows the scheduled work location name and full address.
- If the employee does not have a schedule, their cost center address displays.
- If the employee is not assigned a cost center, the primary EIN address displays.
- If no location data is available or the position is remote, the employee will not see this section.

Widget title behavior: The widget title changes based on the employee’s start date and schedule.

- The **First day** title displays before and on the employee’s start date.
- The **First day** title remains for employees without a schedule.
- The **Next shift** title displays starting on the second day of employment for employees with a schedule

Wurk Learning

Already Assigned Courses No Longer Visible for Self-Enrollment

Details

Previously, the **Browse and Select Course** pop-up showed all courses available in the company. This created confusion when multiple training options were available.

When employees self-enroll in trainings, the **Browse and Select Course** lookup list now displays only courses that aren't already assigned to the employee.

Performance Management

Ability to Carry Over Goals Across Review Cycles - UPDATE

We added functionality that enables you to configure the carryover of company and personal goals to following performance review cycles.

Issue addressed

Users encountered unexpected behavior with goals, and inclusion of goals in certain review cycles did not always work as expected:

- **End-date dependency**: Goals only pulled into performance reviews if their end date (due date in performance development) fell within the review period.
- **No goal carry-forward:** Goals could not be carried forward automatically across review cycles, creating gaps in visibility and disrupting continuity in performance discussions.
- **No support for recurring goals**: Goals could not be recreated upon performance review finalization to restart them automatically in the next cycle for recurring use. Users had to manually configure these goals again.

What we added in this release

The update involves changes in several areas in the system:

- The inclusion of company goals in performance review cycles now considers the time span between the start and end date (due date in performance development) of the goal, not just the end (due) date.
- An informational message on the Performance Goal page explains how goals are included in performance reviews:

Company goals appear in performance reviews when the employee has a review profile assigned and the goal is added either to the review profile or directly to the employee through performance development. They will be included in performance reviews where any part of the date range overlaps with the performance review evaluation period (or if no goal dates are set).

- New settings are available on the Goal setup page for configuring company goals.

A new **Goal spans multiple review periods** checkbox displays after you have selected the **Add To Performance Development** and **Add To Performance Review** checkboxes.

Selecting the new checkbox displays additional radio buttons for goal span configuration:

- **Finalize and recreate**: Selecting the setting will automatically finalize the goal and recreate it for future review cycles, up until the Effective To Date in the company goal setup. The new instance of the goal will not carry over notes, goal status, and completion percentage from the goal from the previous review cycle.

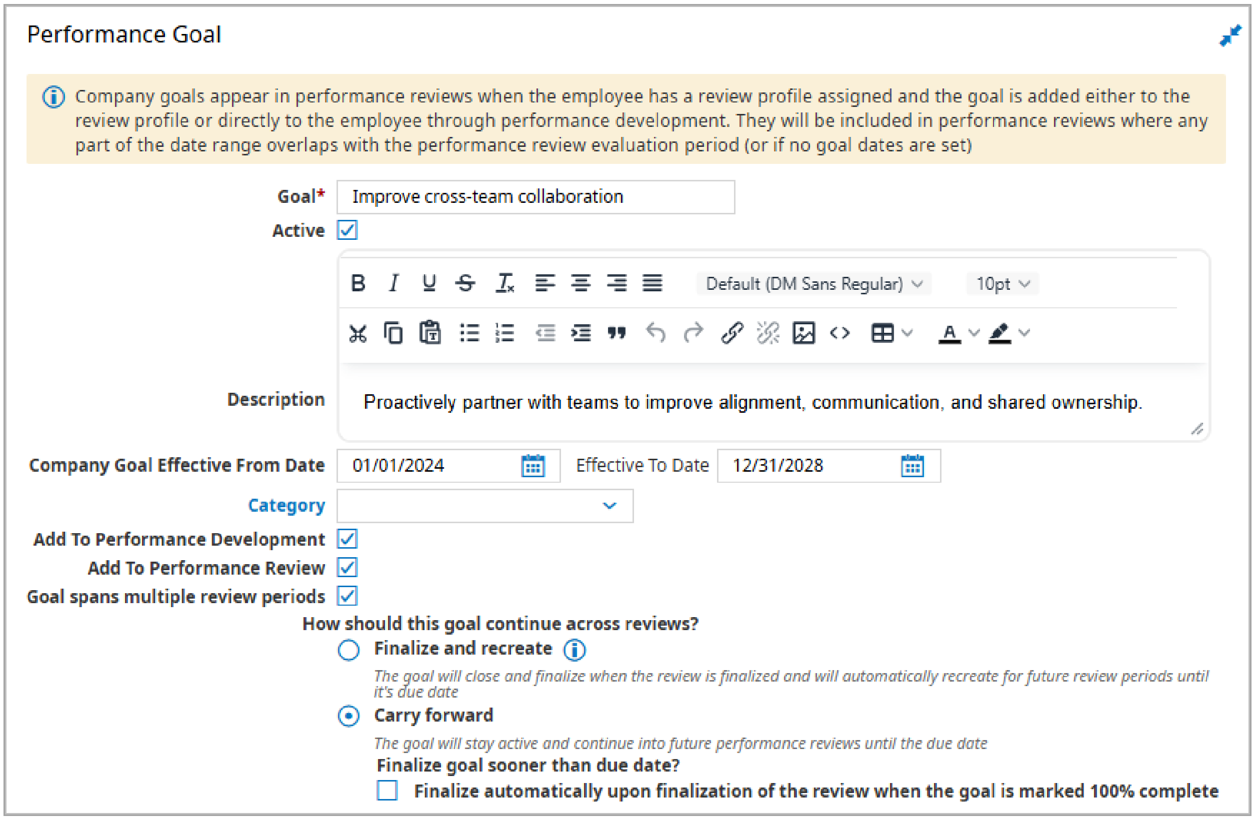
For example, your review cycle is annual based on calendar year. A goal spans from 01/01/2025 to 12/31/2026 and is assigned via the Performance Review Profile. In this case, the system will automatically recreate the goal for the 2026 cycle once the 2025 performance review is finalized with this setting enabled. You will also see the separate goal records for each year on the Performance Development page.

Note: The Finalize and recreate setting applies only to goals that are added directly to a Performance Review profile. The setting does not apply to goals assigned manually in Performance Development.

- **Carry forward**: Selecting the setting will carry the goal across review cycles until its end (due) date. The goal carryover includes carryover of all notes, goal status and completion percentage, and these attributes remain active.

If you select **Carry forward**, an additional setting enables you to configure the automatic finalization of the goal.

- Selecting the **Finalize automatically upon finalization of the review when the goal is marked 100% complete** checkbox will finalize the goal when the performance review is finalized where the goal is 100% complete.
- Leaving the **Finalize automatically upon finalization of the review when the goal is marked 100% complete** checkbox deselected will keep the goal active until its due date, regardless of whether it is marked as complete in the review process.



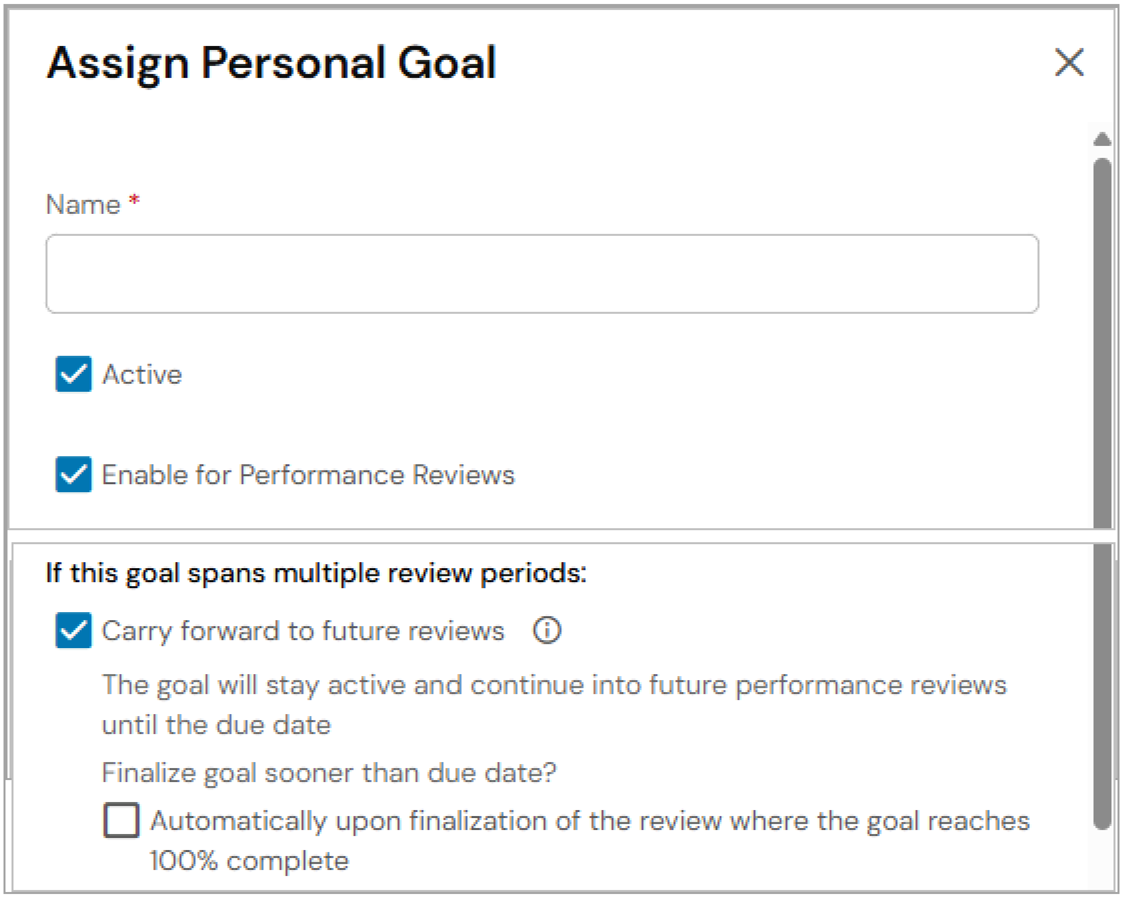
- We have made updates to the Assign Personal Goal pop-up.
  - We have removed the **Effective From** and **Effective To** date fields since goals are included in performance review cycles based on the values in the **Start Date** and **Due Date** fields (prior they were only included based on Due Date).
  - Selecting the new **Enable for Performance Reviews** checkbox enables you to configure the carryover of the personal goal across review cycles.

When the setting is checked, the **Carry forward to future reviews** checkbox displays in the middle of the pop-up. If you select this setting, the goal will carry over until its due date.

As with company goals, you have the option to select the **Automatically upon finalization of the review where the goal reaches 100% complete** checkbox if you want the personal goal to carry over until it is marked as 100% complete.

For example, your review cycle is annual. A certification goal is effective from 01/01/2025 to 12/31/2027. The goal is assigned to an employee for the year 2025. The employee obtains their certificate by the end of 2026. In this case, the system will keep the goal active from 01/01/25 to

12/31/2026, and will then finalize it without carrying it forward to 2027 when the **Automatically upon finalization of the review where the goal reaches 100% complete** checkbox is checked.

- 

Performance Review Fields Relabeled

Details

The User Interface (UI) in Performance Reviews is updated to enhance report Column names.

Areas of Impact	Field Label Before	Field Label After	Result
Mass Edit Review pop-up window from Performance Reviews report page	Due Date	Scheduled Date	Field label matches report column in Performance Reviews report page

Talent > Performance > Performance Reviews			
Mass Edit Review pop-up window from Performance Reviews report page Talent > Performance > Performance Reviews	Start Date	Period Start Date	Field label matches report column in Performance Reviews report page
Mass Edit Review pop-up window from Performance Reviews report page Talent > Performance > Performance Reviews	End Date	Period End Date	Field label matches report column in Performance Reviews report page
Info tab of Performance Reviews	Due Date, Start Date, End Date	Scheduled Date, Period Start Date, Period End Date	Field labels match report column in Performance Reviews report page

Improved Display of Performance Review To Do Items

Details

The system now uses updated logic to determine when the **View Performance Review** link appears within a Performance Review To Do item.

Issue addressed

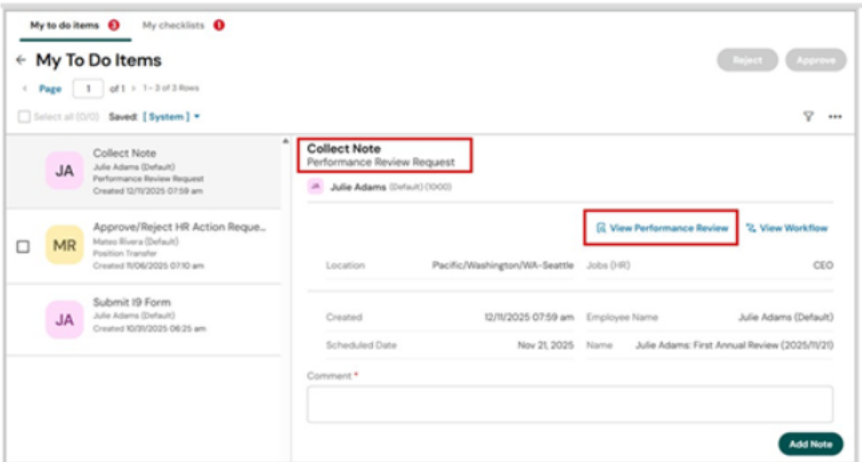
Previously, users selected the **View Performance Review** link expecting to complete actions such as Review. The link opened a read-only version of the performance review, which prevented any actions and created confusion.

What we've done

The **View Performance Review** link now appears only in To Do items from these Performance Review workflow steps:

- **Create Goals**
- **Collect Note**

These steps don’t take you into the performance review itself. The link remains available in the To Do items because you may still need to reference the performance review during these steps.



Recruitment

Job Application Questionnaires: Special Characters Allowed

Details

When a Job Application Questionnaire is used, the **Is List** & **Label** options allow for special characters. However, if the **Type** selected was either **Multi-Checkbox** or **Multi Radio Button**, and special characters were used in the **Name** field and **Answers** (in the Answers Widget), the system produced an error upon saving.

We have corrected this issue and now these fields will support special characters when administrators and managers create the questionnaire. The special characters will also display in the Question Answer column of the Recruitment Questionnaire Answers report.

Applicant Profile Updates & Validations

Details

Applicant Profiles now correctly display required fields, validations, and messages during job applications, and the address format in the **Contact Information** tab has also been updated.

Category	Item	Issue	New Behavior
Resume Tab	Referral	Required but not highlighted when you select Continue	Now highlights if not filled out after selecting Continue
	Salary	Required but not highlighted when you select Continue	Now highlights if not filled out after selecting Continue
Education Tab	Highest Education Completed	Required but not highlighted when you select Continue	Now highlights if not filled out after selecting Continue
	EEO Information	Required but not highlighted when you select Continue	Now highlights if not filled out after selecting Continue
	Ethnicity	Required but not highlighted when you select Continue	Now highlights if not filled out after selecting Continue
	Citizenship	Required but not highlighted when you select Continue	Now highlights if not filled out after selecting Continue
References Tab	Years Known	Required but not highlighted when you select Continue	Now highlights if not filled out after selecting Continue
Work Experience Tab	Starting Pay	Required and highlights but missing an asterisk	Asterisk added to the field
	Ending Pay	Required and highlights but missing an asterisk	Asterisk added to the field
	Entire Tab	Missing required-field indicators before selecting Continue	Required field indicators added
Education Tab	Entire Tab	Missing required-field indicators before selecting Continue	Required field indicators added
Applicant Profile Setup	Visa Number	Shows asterisk but no validation message when left blank	Validation message when required field left blank
	Visa expiration date	Shows asterisk but no validation message when left blank	Validation message when required field left blank

Contact Information Tab	Addresses of contacts listed: City, State, Zip (or City and Postal Code if State is not a valid field for the country)	—	Will now include City, State, Zip/Postal Code in the correct format for the country listed

Improved Pay Amount Display on Job Requisitions in the Applicant Recruitment Portal

Details

Pay amounts in the Applicant Recruitment Portal now display using the company's currency format, matching the Job Requisition configuration page. This update applies to the Job Description and Show All Jobs pages, which previously showed amounts only with decimals.