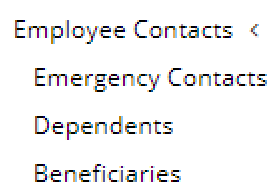
iSolved | HCM v6.0 Features and Development Items

The following new features and development items are included in the iSolved release. This summary is intended to provide you with a basic overview of the changes made to the program with this release. Please refer to the TFS List on the University Library for additional release items.

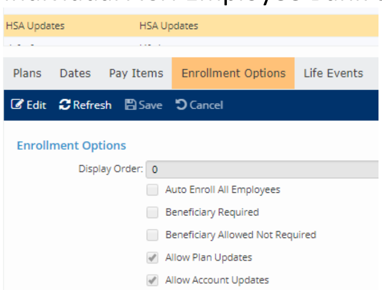
Employee Contacts

Split employee contacts to Emergency Contacts, Dependents and Beneficiaries for Employee Self Service Users. Provides the option to control Managers/Supervisor access to Contacts.



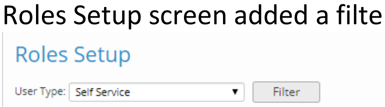
HSA Benefit Enrollment and HSA Updates

Benefit Enrollment and Benefit update option to include HSA account information.
Added a new option for HSA Enrollment options to allow Account information updates.
If the third party payee is Individual ACH the employee can select a bank account. If the third party payee is Individual ACH Employee Bank the employee can select a routing number and bank account.

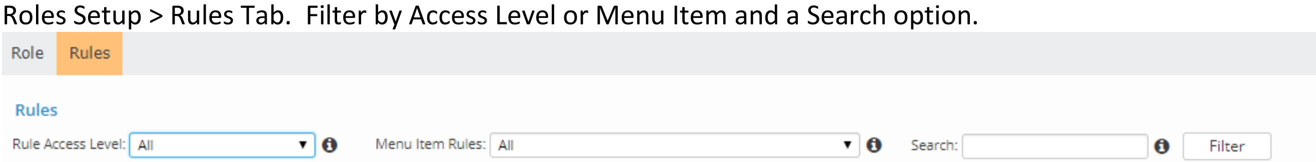


Security

Roles Setup screen added a filter by User Type.

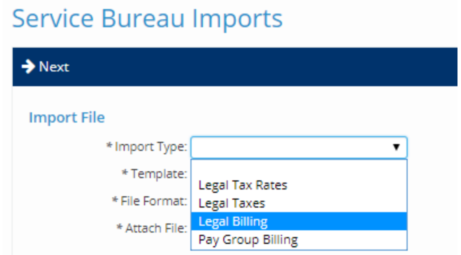


Roles Setup > Rules Tab. Filter by Access Level or Menu Item and a Search option.



New Import Client Level and Pay Group Billing Items

Ability to import billing items by company paygroup. New service bureau import.
Used for new or to update existing billing items. Import will update if name and start date exist.
New data conversion master template with details.



New calculation option for Blended Overtime

Blended Overtime: The current blended overtime calculation uses hours and dollars in the Regular accumulator. The new calculation can be used to include accumulator hours/dollars and support dollars without including the hours. Examples: Piece work dollars need to be included in the blended overtime calculation but not the units that are entered as hours. Employers that have alternate shifts want an overtime calculation that is independent of the first shift regular hours and dollars. A weekend hours or second shift hours accumulator can be used to calculate blended overtime just for those hours.

Workers Compensation Limits by Classification

Workers compensation need the ability to maintain maximum wage limits, based on frequency, for a state / classification. Updated the system State Workers Comp table to store default maximum wage limit and the ability to enter maximum wage limit by classification with a frequency of Weekly or Annual. Updated client Jobs to select a default workers comp classification. Updated employee Jobs to select a workers comp classification and display the default if there is one associated with the selected job

Client Data Transmissions File Name Placeholders

The ability to transmit a report/export that was processed with payroll directly to an FTP site was included in October 2018. There have been many requests to update the file naming values that are available when the file is created.

For **Client Data Transmissions (Scheduled Payroll Reports**), there are (10) placeholders that can be used in the file name. Previous fields **Report Title: {1} Current Date: {2} File Extension: {3}**

Added with this release: **Pay Date: {4}, Period End Date: {5}, Run Number: {6}, Pay Period Number: {7}, Legal Company Code: {8}, Legal Company Name: {9}, Pay Group: {10}**

API

Description	TFS #
Quick Hire School District in API Quick Hire screen Taxable School District: school district isn't being assigned automatically by the REST API	74575
Employee API – Include alternate rate New field for alternate rates added to the Employee API	71941
Employee API – Include employee override address military and international. Add GET/POST for international and military addresses to the New Employee, Employee Data, Onboarding, and Employee Update APIs	50694
Swagger site for API documentation API documentation updates posted	
iSolvedHire - Add organizations to the Onboarding API Add organizations to the Onboarding API for iSolved Hire	73138

Benefits

Description	TFS#
Benefit enrollment setup Inactive Date Add field for inactivation date of the enrollment period instead of using implied stop date. Add new field for inactivation date of enrollment period, update grid, update 'Benefit Start Date' field logic, update field titles and add information icons.	**32533**
Client Benefit Plan Copy Issue: When copying an existing benefit plan, user is able to save the plan using the same plan name as an existing plan name. Resolution: Do not allow user to save plan with same plan name as existing plan. Instead, put in validation to require the user to change the name to a unique plan name.	**73763**
Deferred Compensation re-enrollment options Issue: Employees with non-default elections on Deferred Comp plans are terminated and subsequently rehired. The auto-enroll does not re-enroll the EE in the Deferred Comp plan at the default rate because upon termination the system zeroed out the Deferred Comp override. Resolution: In the payroll process, delete the override instead of setting it to zero for all benefit types.	**68360**

Client

Description	TFS#
Pending Employee Dashboard: Add warning on employee delete Issue: When deleting new hire from Pending Employee Dashboard, there is no warning to verify that the user wants to delete the record. Resolution: Add pop-up message to the Pending Employee Dashboard for delete employees.	**68342**
Allow Reboarding employee with disabled ESS access to reset password Issue: When ESS is disabled prior to reboarding for a rehired EE with a single user account, the user cannot log back in or use the forgot password feature. Resolution: Update reboarding, when a user account is disabled to force the user to activate the account vs logging in to an existing account.	**68362**
General Screen: Add messaging when Date of Hire is changed to verify salary effective date and employment category date Issue: Users can change date of hire and the new hire life event will update with the revised Date of Hire but the employment record, salary record and job record do not. Resolution: To alert users so they can change the other screens, add a popup message when a user changes a hire date or rehire date to display upon save.	**68357**
Workflow: Do not allow edit of name and description in workflow complete-approved or complete-rejected Issue: Workflow routes do not allow edit of the complete approved and complete-rejected step; however, UI allows edits and then tries to validate the step. Resolution: Disable edit for step names and description of Completed-Approved and Completed-Rejected.	**67328**
Workflow pending transaction dashboard: Personal Employee update entries can't be approved Personal EEO update screen if the EE puts in multiple updates on the same transaction, prior to being approved no transactions can be approved on the Pending Transaction dashboard. Resolution: Personal EEO update screen, if a transaction exists that is Pending Approval update the transaction do not create a new transaction.	**66834**
Mobile Notifications: Send when employee message email alerts are configured Issue: Employee Message email alerts do not send mobile notifications. Resolution: Allow mobile notifications to be sent for Employee Message email alerts.	**71222**
Employee Tax Information > Other Taxes tab: Allow block of WA PFL Add the Employee WA PAID FAMILY AND MEDICAL LEAVE EE tax to the Employee Tax information>Other Taxes Tab	**69337**
Copy Employee: update for Classification on the employee Job record If the employee being copied has a value, in the Classification drop-down, on their Job record, that value will be copied to the new employee.	**73302**
Add the 'Classification' drop-down, 'Default Classification' field, and state min/max wage limits to the employee Jobs screen	**69288**

Client Reporting

ACA Large Employer Compliance Test report Issue: ACA Large Employer Compliance Test overstates hours when an EE experiences multiple employment and/or employment category changes within the year. Resolution: Update logic to capture all employment and employment category statuses.	**74614**
Payroll Summary Payroll Summary is displaying a state withholding tax that has no wages and no taxes for the year Payroll Summary: Inactive Deductions display with 0.00 for all accumulations.	**73583** **66842**
Payroll Summary: Add 'Active Employees this Month' count Added 'Active Employees this Month' count to the 'Employee Counts' section. Employees will be counted if they were ever in the 'Active' status during the month.	**66851**
Payroll Summary: Tax display (client responsibility) when taxes are wired or impound blocked Issue: When a company has tax that is the client's responsibility and the tax impound is blocked for any reason, and needs to be wired, the total taxes display in the Amount column. This total includes the amount to be wired and the portion that is the client's responsibility some clients are confused and wiring the full amount and the portion that is their responsibility. Resolution: On the Payroll Summary, add a new row 'Tax Liabilities - Client's Responsibility' beneath the existing 'Tax Liabilities' row. The existing 'Tax Liabilities' row will be updated to only display the taxes that are NOT the client's responsibility. The new row, 'Tax Liabilities - Client's Responsibility' row will display the taxes that are the client's responsibility. This row will only be displayed if there are any current taxes that are the client's responsibility.	**67735**
New report: "Current Labor Allocation Detail (Rates)" Some Clients require the hourly rate, for labor hours by earning, on the Current Labor Allocation Detail report. Example: Employee is paid 10 hours @ $12.50 per hour in Department 100 and 30 hours @ $13.25 per hour in Department 200. The report would display the 10 hours in Department 100 with a rate of 12.50 and 30 hours in Department 200 with a rate of 13.25.	**74593**
Current Labor Allocation Report not allocating a deduction for a 1099 earning Update allocation to allow for full deduction allocation.	**73329**
Report Writer update for Week Number in Time Entry Detail Request: Report Writer: Add the 'Week Number' column to the 'Time Entry Detail' report type. Resolution: Add the 'Week Number' column to the report type 'Time Entry Details' in the 'Time Entry Details' field category.	**67322**
Report Writer: Add '{labor field Title} Labor Description' column to the Timecard Hours field category Report Writer: Currently, the '{labor field Title} Labor Value' column (pulls the code into reports). Resolution: Add '{labor field Title} Labor Description' column to the Timecard Hours field category. NOTE: The 'Timecard Hours' field category is available for Report Type = Time & Attendance Sub Report Types = Timecard Hours Payroll Report and Timecard Hours Date Range Report	**68595**
Report Writer > Add 'Workers Comp Classification' and 'Default Workers Comp Classification' columns to the 'Employee Job' field category Resolution: Added 'Workers Comp Classification' and 'Default Workers Comp Classification' columns to the 'Employee Job' field category. Added 'Workers Comp Classification' to the Job History field category.	**69297**

Tax Integration

PTM Periodic: When a check is voided, for an employee with additional Medicare, the file doesn't include the negative wages/tax if going back under the limit When an employee has a check, that puts them over the $200k, when that check is Voided the PTM codes should include the values for the amount over $200k (PTM codes for wages and PTM codes for tax on additional amount)	**67974**
PTP Quarterly File: Add tax record for Nevada Modified Business ER Medical Contribution Add tax record using coded 'NVBTINS' for employees with QTD Nevada SUI tax. Populate Field = Gross Wages, Subject Wages and Taxable Wages QTD and YTD. Get the amount from the 'Nevada ER Paid Health Care Costs' client accumulator (system Accumulator Type with ID = 36).	**71633**

Service Bureau Banking

System Bank Accounts Option to prevent Client/Partner user from voiding OBC checks Request: There are Partners that want to prevent Client/Partner users from voiding OBC checks. If a company needs to void an OBC check, they would need to contact the SB and the SB user will enter the void check. Resolution: Added the new option 'Do Not Allow Client to Void OBC Checks' to the System Bank Accounts screen (defaulted to False). This option should be enabled if the Official Bank Check Account" is selected. When this option is selected, the checks created on a SB's OBC account will be displayed in the Original Check drop-down. When a Client/Partner user selects an OBC check from this drop-down, display the validation message 'Please contact Customer Service to have this check voided'. Don't allow the user to Save the check. Checks that were NOT created on a SB's OBC account can be voided by a Client/Partner user. NOTE 1: The Client/Partner user will need to contact the SB to void the OBC check. A SB user can log in as a Service User and complete the void of the OBC check.	**28346**

Service Bureau – Reporting

Service Bureau Reports: Client Billing Setup report - update to identify overrides PDF format has columns for Per Unit and Amount: If billing item uses tiered rates: Put an asterisk next to the values in the column if the 'Override Tiered Rates' option is selected (currently the value displays as Tiered Rate or Tiered Amount) Put an asterisk next to the values in the column if the Per Unit Amount or Flat Amount for the record doesn't match the Default Rates of the billing item. Excel format has columns for Per Unit Amount, Flat Amount, and Minimum Amount. Existing tab would display all clients and overrides would be flagged. Add a new tab that would include only clients with overrides If billing item uses tiered rates: Put an asterisk next to the values in the column if the 'Override Tiered Rates' option is selected (currently the value displays as Tiered Rate or Tiered Amount) Put an asterisk next to the values in the column if the Per Unit Amount, Flat Amount, or Minimum Amount for the record doesn't match the Default Rates of the billing item. Add a tab 'Clients With Overrides'. This tab would have the same columns as the existing tab. Would only include billing items that have overrides for the client.	**55276**
Wrap Instructions: Option to remove default values Issue: Request to update the wrap instruction to remove the delivery method that displays on line 1 and line 2. Want to display what is entered on the wrap instructions for the delivery package. Resolution: So as not to impact partners using the standard wrap instructions. Set a config setting to 'suppress wrap instructions default' on the wrap instructions. Default Line 1 and Line 2 of the Wrap instructions will be suppressed and only the wrap instruction lines entered on the wrap instructions for the Company Delivery Package should display on the wrap instructions. Open a NetSuite Case to request the new configuration option	**71842**
Service Bureau Reports: Ability to run reports and have them sent to a reports queue Issue: Service Bureau reports do not generate to the report queue so a user must stay on the screen and wait for the report to complete. Users would like the ability to generate reports and send them to the reports queue. Resolution: Made the following updates to the Service Bureau Reports screen: 1. Added a toolbar with 'Generate Report' and 'Go To My Reports Queue' buttons. 2. Removed the 'Run Report' button from the screen. 3. Added another copy of the 'My Reports Queue' screen to the Production Utilities area for users that don't have access to this screen under Reporting. If a user has access to both screens (under Reporting and Production Utilities) both screens will display all reports generated by the user (client reports and Service Bureau Reports). 4. Service Bureau reports will be sent to 'My Reports Queue' and will be available for 72 hours.	**67874**

Service Bureau

Description	Item #
Employee Import Added 'Preferred Name' to Employee Import Added the new column ‘WCClassification’ to the Employee import.	**65629** **69293**
Job History import Added the new column ‘WCClassification’ to the Job History import.	**69295**
Employee Import: If the 'Include in Next New Hire Report' is set for imported Terminated employees it is never cleared The 'Include In Next New Hire Report' is being set for imported Terminated employees and never cleared. The employees are being included in the 'Total New Hires Reported' billing count on every payroll.	**71978**
Client Jobs import Added new columns 'DefaultWCCode' and ‘DefaultWCClassification’ to the Client Jobs import	**69296**
Auto Imports- Timecard Transactions added Allow Time Card Transactions import type to function with Auto import.	**71812**
Auto Imports Transmission- Failed Transmissions Production Utility Report Create a Tracking Report to display in Production Utilities>Production Dashboard>Status>Alerts and Errors	**64408**
New hire combined file for Florida Created a new hire combined file for Florida. Added the new Legal Service = New Hire Comb. - FL.	**71999**
New Hire Combined file for Nevada Created a new hire combined file for Nevada. Added the new Legal Service = New Hire Comb. - NV.	**72082**
Legal Company Screen Added Business Category to the Legal Company maintenance screen.	**72438**
Regenerate Workers Comp to get the effective Classification Updated Regenerate Workers Comp to get the effective Workers comp Classification for the run being regenerated.	**69304**
New system screen to maintain Workers Comp Classifications Added the new screen system level screen to "Workers Comp Classifications”	**69285**