

TICKET ISSUES AND FIXES - ISOLVED RELEASE 2-15-2019

ACA

Description	Item #
Issue: DOB not pulling on 1095B forms when SSN is missing. Resolution: Check if SSN is null or an empty string and populate DOB if it is.	66628

API

Description	TFS #
Create New API for Client Benefit Plan Create new API for client level benefit plan list that includes the following: Plan Name, Plan Description, Provider, Benefit Type, Plan ID, Group ID, Integration Code, Plan start date, Plan stop date.	65779
Swagger site for API documentation Create online auto-updated documentation for APIs	69685
iSolvedHire – SSO to employee landing page for HR user This change will make the SSO link in the iSolved Hire system to drop the HR user directly on the employee landing page when the user clicks on the link in the context of an employee.	62126
iSolvedHire – New API for posting education Add a new endpoint that will POST employees education history	62565
iSolvedHire – New APIs for posting prior employment history Add a new endpoint that will POST prior employment history	66872

Benefits

Description	TFS#
<p>Benefit Enrollment message Issue: iSolved validates minimum coverage for coverage codes with dependent coverage but user accidentally leaves eligible dependents off the plan. Add pop-up warning message to Benefit Enrollment screen when any eligible dependent types for the coverage code have not been selected for the plan.</p>	<p>62289</p>
<p>Benefit enrollment wizard creates inconsistent start dates for waived benefits Issue: Coverage waive start date varies based on whether the coverage was waived explicitly or just by accessing the enrollment wizard and through auto-enrollment. Resolution: Update the coverage waive start date logic to reference the enrollment period start date or life event date accordingly.</p>	<p>67450</p>
<p>Enrollment Date Logic Update Update Enrollment date logic for manual benefit plan enrollment, auto enroll, benefit enrollment and benefit updates.</p>	<p>66794</p>
<p>Benefit Calculation to calculate the benefit deduction based on the employee's Active benefit plan record Example - client has a 2017 Medical plan setup - there is NO Employee Pay Item associated with the plan. The client assigns the 2017 Medical plan to the employee and then maintains the deduction amount on the Deductions screen. Right before the last payroll of 2017, the client setup a 2018 Medical plan and they attach the Medical deduction to the plan. They did NOT assign this plan to any employee. When they process their last payroll of 2017, the employee Medical deductions are not being taken. This is happening the benefit calculation, gets all pay items associated with all benefit plans for the benefit type and clears the values for those pay items. This process needs to be based on the employee's Active plan to see if there is an Employee Pay Item associated with the plan. Resolution: Update the Benefit Calculation to clear the values for the pay item associated with the employee's Active benefit record for a benefit type</p>	<p>42977</p>
<p>Update Benefit Evaluation Utility to account for new age out field Issue: Current logic for the Benefit Evaluation Utility evaluates EEs who have 'aged out' of coverage based on the 'age out limit for dependent child.' System added an age out limit for FT student which now needs to be included in the logic to determine which dependents should display. Resolution: Update logic for the benefit evaluation utility to account for the new age out field.</p>	<p>64588</p>
<p>Update 'Ins Plans Pending Underwriting Approval' Report Include employees with the 'Pending Late Entrant' Status on the 'Ins Plans Pending Underwriting Approval' Report.</p>	<p>64442</p>
<p>Add deferral modification field to QTB plans Issue: Clients need a way to restrict users from entering monthly QTB changes every pay. Resolution: Apply the deferral modification field (currently used in deferred comp plans) to benefit plans using a benefit type/category of QTB.</p>	<p>65232</p>
<p>"Auto enroll" deferred comp plans immediately Issue: Deferred comp plans are only auto-enrolled after the employee has met all requirements. Resolution: Auto-enroll deferred comp plans immediately when payroll is run.</p>	<p>64592</p>

Client Management

Description	TFS#
<p>Workflow: Ability to have one Client User Group Initiate and another Client User Group Approve Request: Ability to have one Client User Group Initiate an update and another Client User Group Approve the transaction. Previously, if a Client User initiates an update it is immediately committed to the database.</p>	51261
<p>Workflow: Error when setting up client workflows Users are receiving an error and/or seeing nulled out fields when setting up client workflows when adding emails.</p>	64236
<p>Pending Employee Dashboard restrict users with Client User access through workflow setup Issue: Clients want the ability to restrict display of pending employees that do not belong to the client user group the user is in for any NH workflow. Resolution: Restrict client users to only those pending EEs that are part of the NH workflow</p>	67733
<p>iSolved Time pay groups make 'Preview Payroll' screen available iSolved Time pay groups: Make 'Preview Payroll' screen available regardless of legal company status. Currently, we only allow access, for Time pay groups, if the legal company is in the Conversion status. If they haven't committed time, the preview reports will only include auto-paid employees. Display a note on the screen 'Uncommitted time will not be included in the Preview.'. This note will ONLY display if the pay group has the iSolved Time option turned on.</p>	67730
<p>Paystub emails are not always sent Implemented retries for scheduled tasks if the paystub email is not successfully sent. A retry is initiated and repeated three times.</p>	68464
<p>Update Pay History to not display as a Tax Recalc check Issue: Checks are displaying in Pay History with the incorrect Check Type and are displaying in Pay History for user types when they shouldn't.</p> <ol style="list-style-type: none"> 1) When an employee has a Memo earning only calculated, they are listing as Tax Recalc checks. These checks will be hidden from the ESS user types. The check will display as 'Regular' for Client and Service user types. 2) Hide checks in pay history where the only details are memo earnings flagged to hide on the check stub / hide on reports. All user types. 3) Display Regular checks that have hours (even if there are no dollars) 4) If a check has a Memo earning and a tax recalc, display as a Regular check for Client and Service users. ESS user type will not see the check. 5) If a check has a Tax Recalc only, the check will display as a Tax Recalc check for Service users only. The check will be hidden from Client and ESS user types. <p>Payroll Register update: If the only entries are hours (no dollars or taxes) or Memos flagged to display on reports we will display as a Regular check (all user types) on the Payroll Register.</p>	46754

Description	Item #
<p>Accrual Plans > Maximum Hours: Per Hours Worked accrual calculation is applying the maximum to the check instead of the period</p> <p>1.) Updated the existing 'Hours Worked Period' selection of 'Every Pay' to 'Every Check' (because that's how maximum hours is currently used - maximum is applied to each check). 2) Added a new 'Hours Worked Period' selection of 'Every Period'. This new hours worked period will apply the maximum hours to all checks in the pay period (not each check).</p>	49324
<p>Add EE Number to signature page of acknowledged documents</p> <p>User requested another identifying field, EE number, to display on signature page of acknowledged documents.</p>	68212
<p>Employee Document table.</p> <p>Added document upload date to the EE Document table.</p>	65222
<p>Employee Documents automatically downloads instead of opening</p> <p>When selecting View Document from EE Documents UI, do not download the document instead open it and allow the user to download.</p>	65235
<p>Performance Review grid to display ratings scaled to 100</p> <p>Add a display column on the performance review to show ratings scaled to 100.</p>	65233
<p>Performance Review Complete Report</p> <p>Overall Rating does not match overall rating in review history. Update report to reflect overall rating in the same manner as the screen.</p>	65243

Client Reporting

Description	Item #
<p>Create a version of the 'Checks' report that is available for Client users</p> <p>Added a new 'Paystub Report' without the MICR line, for client users.. The report will use the check format currently setup for the Pay Group. Third Party checks are not included in the 'Paystub Report'.</p>	55278
<p>Pay Transactions Labor Audit Export update to standard excel format</p> <p>Pay Transactions Labor Audit Export update to move employee name, employee number and home department to separate columns as opposed to the current format as heading rows.</p>	69863
<p>Employee Labor reports: Employee names to be displayed based on the 'name' sort selected</p> <p>When a user selects the Sort option 'Last Name, First Name', the employee's name will display on the following reports as last name, first name.</p>	58704
<p>Standard Labor Allocation Reports Preview is incorrect</p> <p>The standard labor reports when in preview are allocating non-taxable paid earnings based on where they are charged, once the payroll is processed the report is reflecting correctly and not including those earnings in the allocation.</p>	69443
<p>Report Writer > Report Type = Check File: 'Check Transit Routing #' and 'Check Bank Account #' columns null if OBC check</p> <p>The 'Check Transit Routing #' and 'Check Bank Account #' columns are populated with the transit routing number and bank account number for the OBC bank account of the payroll run.</p>	53092

Description	Item #
<p>Report Writer: General Ledger report - third party checks are combined into 1 line item Third party checks will display as separate line items on report writer reports where the report is setup to display each check. The following updates were made: Updated Voucher/Check # , Check Number, Voucher Number to include 3rd Party Payments. Added new fields to allow Check/Voucher numbers to be displayed for only Credit or only Debit records. - Check/Voucher # (Credit Only), - Check/Voucher # (Debit Only), - Check Number # (Credit Only), - Check Number (Debit Only), - Voucher Number (Credit Only), - Voucher Number (Debit Only) Added PayeeName as a field under the General Ledger category</p>	67311
<p>Report Writer > 'Labor' field category: Add all fields from the Client Labor Field Lookup table Added the following fields to the 'Labor' field category. Is Inactive; Include on Certified Report; Begin Date; End Date; Project Number; Project Location; Address Line 1; Address Line 2; City; State (Abbreviation); State (Name); Zip Code; Zip Code Without Dash.</p>	59224
<p>Report Writer: Employee Data field category new fields Add 'Employment Status Change Reason' and 'Employment Status Change Reason Description' to the Employee Data field category</p>	45886

Integration

Description	Item #
<p>Pending Employee Import-Additional Fields Pending Employee Import SelfServiceEmail, TimeClockID, PayType, Frequency, NormalHours, HourlyRate, FedFilingStatus, FedExemptions, FedBlockTax, FedAddlAmount, StateFilingStatus, StateExemptions, StateBlockTax, StateAddlAmount Also above fields to the Pending Employee API</p>	66861

Tax

Description	Item #
<p>PTM Periodic and Quarterly: Updates needed for Guam and Virgin Islands Updated the wage, tax, and count records, in the PTM Periodic and PTM Quarterly files for employees in Guam and the Virgin Islands.</p>	52362
<p>PTM Periodic: Add tax records for Washington Family Leave Added tax records, for Washington Family Leave - Employer (PTM code WAFLI-ER) and Washington Family Leave - Employee (PTM code WAFLI-EE), to the PTM Periodic file.</p>	68420
<p>RTS file Q4 616 record missing PA local withholding PSD code Q4 Only RTS file 616 for PA Local withholding the PSD code is required in position 93 (see appendix D for the 616 record). The PSD code is appearing in position 93 for some of the PA local withholding records but not others.</p>	68442

Service Bureau

Description	Item #
<p>Billing - New invoice group options Payroll Invoice report update supports new invoice group options on the client billing items screen. Exclude from Invoice Group - Billing item should be listed separately on the Invoice and not bundled with the Invoice Group Override Invoice Group - Billing item should be included with the override invoice group and excluded from the default invoice group.</p>	68409
<p>States Billing Count that will only reflect Active SIT withholding States Add a new Billing Count "Active SIT Withholding States" that will count SIT withholding states in an 'Active' status. If Status is any other status, the State is considered Inactive and will not be counted.</p>	58721
<p>Packing List report - the Voucher count should exclude electronic vouchers Packing List report - the 'Voucher' count should exclude electronic vouchers. The 'Total Checks and Vouchers' count should include checks, third party checks, and printed vouchers.</p>	69486
<p>1099 New Hire File CA Update to support the 1099 CA NEW HIRE file only</p>	66758
<p>New Client Wizard and Add Legal Company Wizard added a description field Updates to support future Hartford integration for sales lead tracking Add a drop-down menu on the New Client/Company Wizard that will provide the user with a list of business descriptions for their business. The description will be visible/selectable by the user. The drop-down menu will provide a type ahead feature that will show the user a list of options and refine that list as the user continues to type. The user's selection will populate the NAICS code</p>	61272
<p>Service Bureau Reports: Add additional fields to the Client Export Add the following columns to the Client Export: NAICS code, Suppress \$100K Notification, Suppress ACH Credit Limit Notification, ACH Credit Limit Override, and Ignore 1099 Minimum Values.</p>	55282
<p>SB report > Client Billing Setup Report - add column for billing item notes Added a 'Notes' column to the Client Billing Setup Report. This column will display any Notes added on the client Billing Items or Pay Group Billing screens.</p>	60962