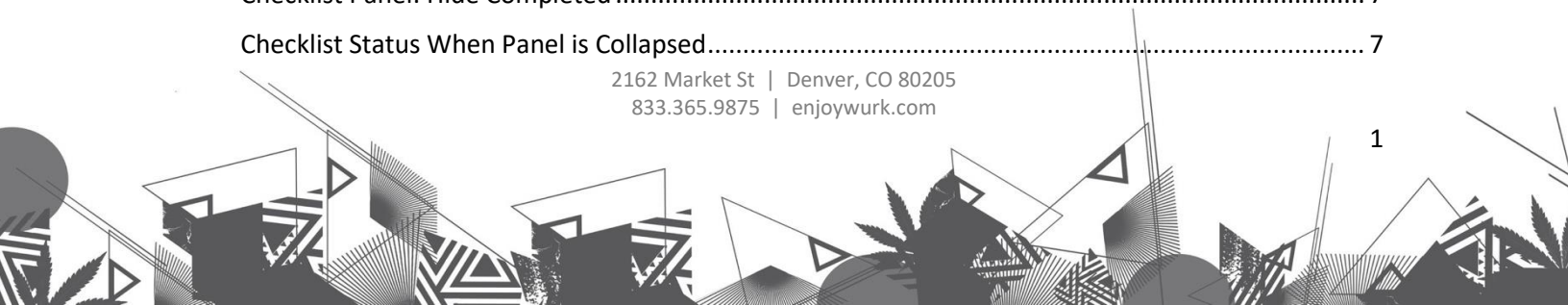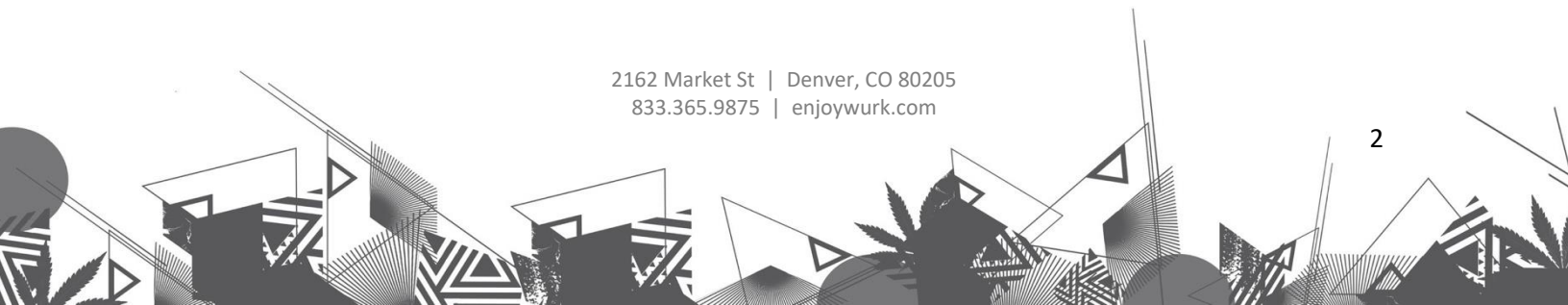# Release 79, February 2022

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.

Table of Contents

Payroll

Notifications

Notification to Employees that Year End Forms Are Available

The system now includes a notification option named **Payroll Year End Forms Available** (at **Company Settings > Global Setup > Notifications**). This notification can be configured to send an email to employees when their payroll year end forms (such as W-2 and 1099) are available to view.

ARPA, FFCRA, and CARES Retention Earning Types Expired for 2022

For payrolls with pay dates on or after January 1, 2022, the ARPA, FFCRA, and CARES Retention federal programs have expired. Therefore, the following earning types can no longer be used in 2022 payrolls:

- FFCRA Family Leave 10 Days
- FFCRA FMLA 10 Weeks
- FFCRA Sick Leave 10 Days
- ARPA Family Leave 10 Days
- ARPA FMLA 10 Weeks
- ARPA Sick Leave 10 Days
- CARES EE Retention

If users try to add these earning types to a payroll, the system now provides a message to explain why the earnings can't be used:

FFCRA earnings, ARPA earnings, and CARES EE Retention earnings cannot be used as of pay date 1/1/2022.

Pay Statements

Print Pay Statements Without Downloading

Previously, when employees printed their pay statement from the application, a copy of the pay statement was also saved to the Downloads folder of the computer. If the employee printed from a shared computer, this created the possibility that another employee could see the first employee's sensitive data in the computer's Downloads folder.

With this release, the Employee **Pay Statement Preview** now includes a **Print** button so that employees can print their pay statement without leaving any trace of it on the computer. The **Download PDF** button is still available for times when employees do want to download a copy of a pay statement.

Government Forms: Gender Inclusion

Gender-inclusive options y have been added to government forms. Please keep in mind that your state or other integrations may require genders.

For example, Vermont requires Male or Female for tax filings.

Reports

View Sync Time Report Link is Renamed

On the **Payroll Prep** page, the **View Sync Time Report** link is now renamed to **Sync Time**. The new link name is meant to clarify that users need to click this link in order to sync the time.

TLM

Manager Replacement Enhancements

- ❖ This will not work on HR To do items
- ❖ This has been set to 3 months as the default contact support if you would like more months

Managers Replacement Report

A new **Manager Replacements** report is now available under **Team > HR > Reports > Employee Maintenance >Manager Replacements**. This report shows the status of the manager To-Do items that are being transferred. This report contains the date of the transfer, who initiated the transfer, the number of To-Dos that were completed or are pending, as well as identify any failures that occurred in the process.

Manager Replacement Using Mass Edit Profiles

Users can now mass edit profiles under **Mass Edit > Mass Edit Profiles** when a new manager is assigned throughManager Replacement. This will automatically move the To-Do items from the old manager to the new manager. When the process has started, the following message and link will display: **The change of Manager has initiated the transfer of To Do items. Check Progress with Manager Replacements Report.**

The replacement job moves To-Do items related to a change in manager for the followingworkflows:

- Timesheet
- Timesheet Change Request
- Time Off Request
- Overtime Request

HR

Employee Documents

Important: The Employee Document Download features may not be available immediately following the release. These new features will be steadily rolled out to companies after the initial release date for eachPOD. The functionality will be made available via a gradual rollout across the 3-4 weeks following the February 2022 release.

Employee/Supporting Documents Download By

Previously, to view a document, it required the user to download the document, which inturn put the document into Downloads/Cache, leaving documents on the computer/device. This could cause security concerns for those using shared computers and/or concerns about storing sensitive information.

Users can now see/preview a document(s) without the preview remaining on the user's system after closing it and with nothing downloaded, cached or left on the system/device.

In **Document Types**, a new setting for **Download By** is now included and is much like the **Visible By** setting in each document type. For the **Download By** option, **All Accounts** is selected by default. A filter can be added to restrict downloading. For example, Security Profile is an option and the appropriate security profiles can be selected to have Download Access.

The **Visible By** settings in **Document Type** are also considered. For example, if it is not Visible, a user cannot see it to download regardless of their download permissions.

Important: For Evidence of Insurability (EOI) documents, a tooltip has been added to the new company level setting for the EOI document type that explains: **Any filter added to the "Download By" settings in this document type will be followed. Any filter added in the "Visible By" settings in this document type will be handled in a future release**.

Companies can require users to pick a Document Type upon uploading a document. The option for **Document TypeRequired** can be enabled within HR Settings under **Company Settings > Global Setup > Company Setup**.

Recruitment

Job Requisition Templates: Job Requisition Workflow Field Added

In the December 2021 (R78) system release, we introduced the ability to add a Job Requisition Workflow within Job Requisitions. We also updated the Job Requisition field within the Configuration page and renamed it to Default Job Requisition. In this release, we are expanding this functionality to include the ability to add default workflows to Job Requisition Templates. Adding a workflow in the template will populate a Job Requisition when this template is applied.

If a default workflow is set in the Applicant Tracking/Recruitment Configuration widget of the Configuration page (Admin

> Settings > HR Setup > Applicant Tracking/Recruitment Configuration) that workflow will auto-populate the template field. If you do not want to use that workflow you may select another one.

Reports

Turnover Rates (View by Summary): Ability to Filter by Employee Type

The Turnover Rate (View by Summary) report will now allow for filtering by Employee Type. This addition will allow this report to function the same as the Turnover Rate (View by EIN) and the Turnover Rates (View by Cost Center) does and include/exclude employees according to their Employee Type.

Employee Headcount Report: More Columns Added

Multiple columns have been added to the Employee Headcount Report. They can be added to the report and will contain hyperlinked numbers that, when clicked, presents a pop-up showing the employees that make up the numbers.

The following can now be added and are not effective-dated or date driven. The values will reflect what is showing in the employee record as of the system date.

- Demographics: EEO Classification
- Demographics: EEO-4 Classification
- Demographics: Ethnicity
- Demographics: Ethnicity (UK)
- Demographics: Gender
- Demographics: Disability
- Demographics: Is Veteran
- Demographics: Primary Language
- Demographics: Worker Type
- Emp. Default: Cost Center (all levels set up)
- Emp. Default: Jobs (HR)
- Employee: Is Primary EIN (only available in Multi EIN companies)
- Employee: Type

The fields below are either effective-dated or date driven and reflect the **As of Date** selected in the report.

- Employee: Age

- Employee: Years of Service
- Primary Position Name (if using Position Management)

Important: The numbers presented in the Employee Headcount report are not adjusted based on what is selected in the Employees pop-up. For example, if a user clicks on a value of 100 on the Employee Headcount report, they are taken to the Employees pop-up. If the user then adds fields and filters based on a specific value, such as **Employee: Is Primary EIN**, they may only see 50 employees in the pop-up based on the selected criteria. When the user closes this pop-up, the Employee Headcount report will continue to show 100.

Bug Fixes

Security: User Locked Out, Could Not Reset Password

When a user entered the incorrect password and became locked out of their account, waited for the standard 30 minute interval, and clicked **Forgot Your Password**, the system sometimes required them to re-enter their incorrect password before they could reset their password. This is fixed, and in this situation, the system now takes these users throughthe correct steps to reset their password.

Employee & Applicant Checklists

Checklist Panel: Hide Completed

Users can now hide all Checklist Items that have already been completed so they can see a quick view of theitems that are still open. A **Hide Completed** option is now available, and when enabled, the Checklist refreshes and all completed Checklist Items are not shown. When disabled, the Checklist refreshes and all Checklist Items display.

If all Checklist Items within a group are completed and Hide Completed is enabled, the group name does not appear. If aChecklist is 100% complete, the **Hide Completed** option is inactive (grayed out).

Checklist Status When Panel is Collapsed

The status of a user's Checklist is available when it's closed so all Checklist functionality (Auto-Progression, Pop-ups, etc.) is provided when the panel is collapsed. Collapse simply hides the panel, and all logic related to the Checklist runs behind the scenes when the panel is collapsed.

Active Checkbox for Checklists

Admins may have historical checklists that they no longer assign to employees but cannot delete due to the historical data assigned to them. To keep a record of these checklists they no longer plan to assign to employees, users cannow hide them from the available checklists in the Assign Checklist page.

A new checkbox labeled **Active** has been added to the View/Edit Checklist page for Employee and Applicant Checklists. Thecheckbox is enabled by default. If checked, the Checklist appears as an available option in **Assign New Checklist** under:

- HR > Checklists > Checklists

- Employee Profile > Checklist Widget

If **Active** is unchecked, the Checklist does not appear as an available option.

An **Active** column has been added to the Checklists report. If **Active** is enabled, the column displays a Y. If the checkbox is notenabled, the column displays a N.

Upload Documents Checklist Item

A new Checklist Item, **Upload Documents**, is now available for use in Employee Checklists. The following features can be configured for **Upload Documents**:

- Group (the group the item appears in)
- To Be Completed By
- Budget Hours
- Confirmation Required
- Send Reminder Notification
- Name (name that appears in the Checklist panel)
- Rich Text Editor
- Add Document option

The Checklist panel remains open when the **Upload Documents** item is selected, and the panel can be collapsed afterward. AnUpload Documents page loads to the right of the panel where users can select an Upload Documents option, and then receivea pop-up prompting them to upload the appropriate document(s) and input the desired information.

Once a document is uploaded, the document link is visible in the intermediary page and the document icon in the checklist also reflects that a document has been uploaded (with a red dot and a number). If a document is added via the Upload Document action in the panel, it is also reflected in the **Upload Documents** Checklist Item. The document is also present in theEmployee Documents page/widget.

Users can upload multiple documents, and this checklist item is only supported in the New Look checklist.

Upload Document Checklist Item Notification

Users can now receive a reminder notification when the Upload Document Checklist Item is assigned to them ifthe **Send Reminder Notification** option is enabled within the Upload Documents Checklist Item. The notification is sent via email and/or their Mailbox (**My Notification** tab) based on the configuration of the **Notifications Through** option for the company (**Company Information > Company Information** widget, Notification).

Automated Role Change

Employees are now offered a new Role Profile when they are new in the system or their profile is updated. Anyuser is prompted with the option of a new Role when one of the events below happen, the

user's Role Profile is not empty, and the user becomes eligible for a new Role with a higher priority due to a permissions change:

- The user has been added or updated via the Employees Import (XLS, XLSX, XML).
- The user has been assigned as a Manager in an Employee Profile (XLS, XLSX, XML).
- The user has been manually hired (**My Team > Employee Information > Hire**) with any Security Profile.
- The user has been hired via Hire HR Action with any Security Profile or the user has been re-hired via the Re-Hire HRAction.
- The user has been added or updated via API.
- The user has been assigned as a Manager in an Employee Profile via API.

Automated Role Change for Security Profile Permissions Changed

Users are now prompted with the option of a new Role when one of the events below occurs andthe permission change qualifies them into a new role:

- The permissions of a user's Security Profile are changed (in the company and on the Admin level)
- The permissions of a user's Security Profile are changed via Mass Edit (on the Admin level)
- The user's Security Profile is changed via the Employee Profile, Mass Edit, Regular HR Action, Custom Forms, or theEmployees Import (XLS, XLSX, XML).

If any of the following changes are made via a public API:

- A user is added to a company.
- A user's Security Profile is changed.
- A user's Security Profile permissions are changed.
- A user is assigned as a Manager.

When any of the following changes are made to manager assignments:

- A user is assigned as a Manager in someone's Employee Profile.
- A user is assigned as a Manager via **Mass Edit > Mass Edit Profiles**.
- A user is assigned as a Manager in someone's Employee Profile via a Regular/Hire/Re-Hire/EIN Transfer HRAction.
- A user is assigned as a Manager in someone's Employee Profile via a Custom Form (in an HR Action or in aChecklist or via a standalone Custom Form).
- A user is assigned as a Manager in someone's Employee Profile via Import (Employees (XLS), Employees (XLSX),Employees (XML)).
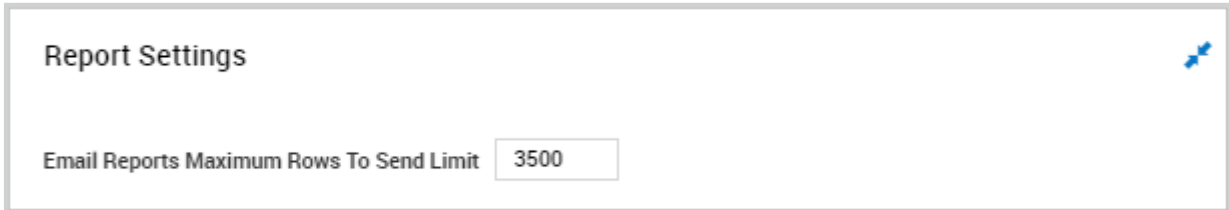
Cross Product

Reports & Charts

- ❖ Please Contact Support to enable this

Maximum Rows Limit Increased for Emailed Reports

A new **Report Settings** widget is available at the Admin level when editing the company under **Maintenance > Companies > All System Companies**. This widget allows a send limit to be set on the maximum number of rows to send whenscheduling reports in the application to be sent via email.

The widget defaults to the maximum of 3500 rows, but this number can be set to a higher amount, up to 999999.

The limit set here will display as the maximum when setting email schedules for reports.