



## March 2026 Release Notes

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# Cross-Suite

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## 1. Checklist Experience Updates

**i** To continue modernizing the Checklist experience, new visual and structural changes will be introduced based on customer feedback. Once applied, the changes will be reflected in the following areas:

- The Checklist Landing screen will now have Mark as Complete and Reset options in the Manager Self-Service (MSS) view for all checklist items.
- Admins and managers can now mark all incomplete checklist items as complete with a single click directly from the Checklist Landing screen.
- Within the Checklist setup, Checklist Item details, including Item Name and Item Description will be visible.
- In the mobile view, Edit Checklist, Upload Documents, Download Checklist, and Mark all as complete will be moved under the Actions ellipses.

Feature Delivered: ON

**h** Who's Impacted: Administrators, Managers, & Employees

## 2. Drag and Drop Columns

**i** The option to drag and drop one or more columns within any responsive report in the desktop experience, including in pop ups and Dashboard Widgets, will be available.

Feature Delivered: ON

**h** Who's Impacted: Administrators

## 3. Employee Status in Global Search

**i** In the Global Search, the employee search result will now show a clear visual indication of their employment status using a Terminated tag alongside their name and role.

Feature Delivered: ON

**h** Who's Impacted: Administrators & Managers

## 4. External Benchmarks: Updated Tenure Benchmark Filter

**i** More detailed insights across EINs, regions, and verticals are now available for the Tenure external benchmark. In the External Benchmarks pop-up window, the Tenure benchmark now includes additional filters to refine the data view:

- Country
- State (for the United States, located under the Region filter)
- Subverticals (located under the Vertical filter)

For multi-EIN companies, a new Select EIN drop-down lets you choose the EIN whose data you want to view.

### Tenure Benchmark Report

In the Tenure Benchmark report, under the Global tab in the Filters panel, you can now filter by:

- State
- SubVertical
- EIN Name

 Who's Impacted: Administrators & Managers

## 5. Reports Removed from Mobile App

**i** Because the following reports are not designed to be mobile responsive, they have been removed from the Mobile App. They will no longer be available via search, saved links, bookmarks, favorites, dashboards, or recently viewed items.

- Anniversary Calendar by Week
- Anniversary Calendar by Year
- Birthday Calendar by Month
- Birthday Calendar by Week
- Birthday Calendar by Year
- Employee Holidays Calendar

 Who's Impacted: Administrators

# Workforce Management

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## 1. Accruals: Weekly Accruals

- i** As part of the Basic Scheduling functionality, a new week-based Accrual category will be available to support weekly calculations in work time regulations, reporting, and counters. Admins will also have more visibility when managing Weekly Time Regulation calculations and be able to manually trigger recalculations and receive clear completion messages.

Feature Delivered: OFF – Contact your Support Pod if you would like to utilize this feature!

- 👉** Who's Impacted: Administrators & Managers

## 2. Leave of Absence Capability Enhancements

- i** When a Leave profile is assigned to an employee, entitlement balances are not automatically updated. Balances are only displayed after entitlements are manually run, either during case creation or from the employee profile.

What's New: The leave engine automatically runs to calculate and display entitlement balances. These balances are visible for all employees assigned a profile, not just those with an active Leave case, in the Entitlements and Balances report.

Feature Delivered: ON

- 👉** Who's Impacted: Administrators & Managers

## 3. Group Punch Select Improvement

- i** You can select up to 30 employees at a time when viewing the group punch list. The Select option at the top of the report now also contains an option for “Clear All Selected”. When chosen, all selected employees are removed, resetting the selection state.

Feature Delivered: ON

- 👉** Who's Impacted: Administrators & Managers

# Scheduler

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## 1. Daily Schedule Hours & Budget Amounts

- i** A new option to display daily and forecasted volumes, budgets, and cost comparisons on the Weekly Scheduling view will be available. Schedule admins and managers will also be able to manually input and edit budget values from the schedule.

Feature Delivered: ON

- 👉** Who's Impacted: Administrators & Managers

## 2. Hide Schedule Details

- i** A new security permission that allows admins to hide shift details from other schedules. When turned off, managers will only see that an employee is scheduled for a time range without showing the schedule name, skill, or cost center details. The permission will be defaulted as on to align with current behavior.

Feature Delivered: OFF – Contact your Support Pod if you would like to utilize this feature!

- 👉** Who's Impacted: Administrators & Managers

# Payroll

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## 1. Secure 2.0: Super Roth Catch-Up Update

- i** Super Catch-Up contributions are now available to high-wage earners ages 60–63. To qualify as a high-wage earner, you must have Medicare-subject wages of \$150,000 or higher in the prior calendar year.

- 👉** Who's Impacted: Administrators, Managers, & Employees

## 2. Tipped Occupational Codes

**i** To align with the IRS requirement to report Tipped Occupational Codes (TTOC) for employees in tipped occupations and support the One Big Beautiful Bill legislation, a new option to assign TTOCs to Cost Centers and Jobs will be available. This functionality will drive default behavior based on Cost Center or Jobs (HR) configuration, or be applied to accounts individually, and populate Box 14b on the Form W-2.

Feature Delivered: ON

 Who's Impacted: Administrators

## 3. 2026 1099 MISC & 1099 NEC Forms Update

**i** One Big Beautiful Bill (OBBB) federal legislation updated the print threshold for employers to ease the administrative burden of printing and filing 2026 1099 NEC and 2026 1099 MISC forms. The \$600 annual print threshold increased to \$2,000 effective 1/1/26 for the 2026 tax year.

 Who's Impacted: Administrators

## 4. Withholding Forms Updated

**i** The following withholding forms have been updated in the system:

• Arkansas AR4EC	• Arizona A-4
• California DE-4	• Connecticut CT-W4
• Iowa IA W-4	• Minnesota W-4MN
• Montana MW-4	• New York IT-2104
• New York IT-2104-E	• North Carolina NC-4
• Rhode Island RI W-4	• South Carolina SC W-4

 Who's Impacted: Administrators, Managers, & Employees

## 5. 2026 W2 Form Updated

**i** The W2 form was updated for 2026 and is now available.

 Who's Impacted: Administrators, Managers, & Employees

## 6. Form I-9 SSN Column Added

**i** A new Form I-9: SSN column has been added to the Form I-9 report page. This column will display the employee's Social Security Number (SSN) as populated on the I-9 form. This is not a default column and must be added.

- If the user's security profile is configured to allow the viewing of social security numbers as masked (i.e., the Social Security setting has Unmasked unchecked), the column will show the SSN number with masking applied.
- If the user's security profile is set to Unmasked (i.e., the Social Security setting has Unmasked checked), the full number will display.
- If the I-9 form does not contain a social security number, the column will be blank.

Feature Delivered: ON

 Who's Impacted: Administrators & Managers

## HR

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### 1. Emergency Contact Notification Tracking

**i** New enhancements to the Emergency Contacts will allow users to manage if their contacts are to be notified in the event their company needs to contact them. These new enhancements align with California's Workplace Know Your Rights Act (SB 294).

A new Emergency Contact Notification field to allow or decline the contact from receiving notifications will be introduced. The field will be controlled by a security permission to give the option to view and edit it. The new field will also be available in the Employee Contacts and Employee Information reports.

Feature Delivered: OFF – Contact your Support Pod if you would like to utilize this feature!

 Who's Impacted: Administrators, Managers, & Employees

## 2. Deactivate Account Contacts

-  Users will have the option to deactivate and reactivate existing Account Contacts from their profile. This new feature will control which contacts appear in look up lists throughout the system. Additionally, a new Active column will be added to the *Employee Contacts* report.

Feature Delivered: OFF – Contact your Support Pod if you would like to utilize this feature!

-  Who's Impacted: Administrators

## 3. Intermittent Employment Classification

-  To align with new California Pay Data Reporting requirements, a new Intermittent Employment Classification setting has been created to allow admins to select whether a specific Employee Status option can be flagged as Intermittent in the reporting.

Feature Delivered: OFF – Contact your Support Pod if you would like to utilize this feature!

-  Who's Impacted: Administrators

## 4. Benefit Change Only Report

-  A new audit report that will show only changes to the benefit elections will be available. This Benefit Change Only report includes adding new benefits, changes to current elections, and termination of active benefits.

Feature Delivered: OFF

-  Who's Impacted: Administrators

# Talent

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## 1. Visibility in Performance Reviews

-  New visibility settings to clearly define when employees and managers/finalizers can access performance ratings, comments, and final scores within the Performance Reviews. Admins can choose between Basic or Advanced visibility settings to support both Sequential and Parallel

Reviews.

**Basic Visibility** – Admins who opt to use the Basic setting will choose when employees and managers/finalizers see the results and comments directly within the Performance Review Profile. When this option is chosen, the settings chosen will override any settings built within the Performance Review Workflow.

**Advanced Visibility** – When an Admin opts to use the Advanced settings, the settings that will be overridden by the Performance Review Workflow will be clearly indicated with a warning icon within the Performance Review Profile Visibility settings.

Feature Delivered: ON

 Who's Impacted: Administrators & Managers