



UltiPro 2016 Fall/Year-End Release Highlights

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Ultimate Software is pleased to provide you with this high-level overview of the UltiPro 2016 Fall/Year-End Release (v12.1.2).

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INTRODUCTION

Ultimate Software continues to help you drive your company's organizational health and culture forward with the UltiPro® 2016 Fall/Year-End Release (v12.1.2). New and enhanced UltiPro features improve usability, expand configurability, and simplify administration, making it easier than ever for you to engage your employees and manage important people information. In addition, updates in this release ensure accurate 2016 tax reporting and 2017 payroll tax compliance for the U.S. and Canada. This is the release you'll use to close out your year.

RELEASE SCHEDULE

You will be upgraded to the Fall/Year-End Release between October 17 and December 12, 2016. Your SaaS focal contact will receive an email with your specific upgrade date. If you're not sure who your focal contact is, go to the [Customer Success Portal](#) to verify this information and change or update any other account details.

RELEASE NOTES

For complete details on the new features, enhancements, and functionality changes included in this release, Ultimate recommends you review the Release Notes, available September 29, 2016.

USER EXPERIENCE

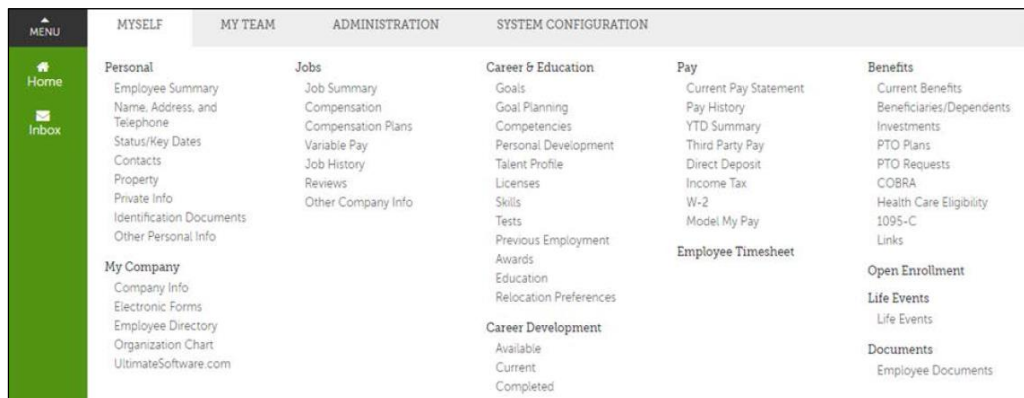
The Fall/Year-End Release simplifies and improves the way you and your employees experience UltiPro. See for yourself! Check out the [Enhanced UltiPro User Experience recorded webcast](#) to learn more.

UltiPro becomes more intuitive and customizable with:

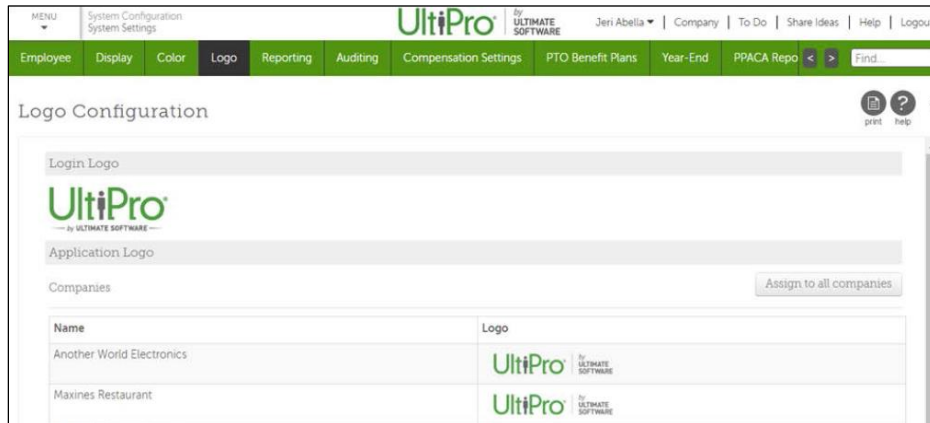
- **Enhanced Navigation.** UltiPro's new menu structure is modern and smartly designed to help you find what you're looking for faster. For example:
 - The header has a clean, simple look with a new, collapsible 'Menu' that displays navigation on your command. Plus, once you move around the portal, the left corner of the header displays your location (navigation path) so you know exactly where you are and how to get there again.



- Select the collapsible 'Menu' and you see:
 - Horizontal navigation has been consolidated into four tabs (categories based on tasks): Myself, My Team, Administration, and System Configuration – so it's intuitive to move around UltiPro.
 - New vertical navigation for quick access to areas you frequent often: Home and Inbox.



- **Easy-to-use Branding Tools.** Want UltiPro to reflect the look and feel of your organization? Take advantage of easily accessible configuration capabilities (under: *System Configuration > System Settings > Logo and Color*) that allow you to personalize the portal to mirror your corporate branding. Administrators can quickly update the:
 - Primary color scheme
 - Page accent color
 - Logos and even display a unique logo for each of your component companies



- **Consistency for UltiPro Time Management.** For your added convenience, the new look and feel of UltiPro has been extended to Time Management. The solution:
 - Features the new navigational menu structure.
 - Automatically applies the company branding (logo and colors) you've established in UltiPro.
 - Launches within the same frame as UltiPro, rather than in a separate browser window. Should you choose to use Time Management separately while you have UltiPro open, a new pop-up option makes it easy for administrators to use Time Management and UltiPro at the same time.

Ready to learn more? Review our [Enhanced UltiPro User Experience Resources](#) for detailed information on the navigation and usability updates, and leverage a customizable [employee email template](#) to educate your own people about the user experience enhancements coming with the Fall/Year-End Release.

HUMAN RESOURCES ADMINISTRATION

The Fall/Year-End Release expands UltiPro configuration and drives employee engagement with:

- **Predictive Analytics on the Employee Summary Page.** Quickly and easily get the workforce insight you need to make smarter decisions regarding your talent with UltiPro predictive analytics, leveraging existing employee data and actions to provide a clearer view of future behavior.

UltiPro predictive analytics are now available to all customers on an individual's *Employee Summary* (under: *My Team > My Employees > Find Employee > Employee Summary*), which displays his/her:

- **Retention Score.** See the likelihood an employee will stay with your organization for the next year based on algorithms and analysis of demographics, benefits, job history, compensation, employment, and education data.

Predictive Analytics

Retention Score ?
99.5% as of 08/01/2016

High Performer Probability ?
14% since 03/01/2016

- **High-Performer Probability.** Identify the individuals who have consistently been in the top 8-15% of all performers in your company or who have the potential to become a high-performer based on compensation actions and quantitative analysis.

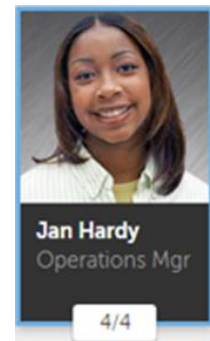
In addition, to help you proactively manage your talent, take advantage of all our UltiPro Business Intelligence predictive analytics reporting under: *Public Folders > UltiPro BI Content > UltiPro BI for Core HR and Payroll > _UltiPro Delivered Packages and _UltiPro Delivered Reports.*

To enable predictive analytics if you haven't already, go to *System Configuration > System Settings > Predictive Analytics*, and turn on the predictive analytic score functionality.

- **Enhanced Organization Chart Features.** UltiPro's *Organization Chart* gives you greater insight and information about your people and company structure with new tools that support:
 - **Actions.** Enjoy the added convenience of updating your employees' job and/or supervisor/organization information directly from the *Organization Chart*. Instead of taking the time to navigate to the *Change Job* work event, for example, administrators and managers can quickly select the change job action on their employees' detail card to easily update a person's position.
 - **Configuration.** New settings (under: *Menu > System Configuration > System Settings > Organization Chart Settings*) give administrators the ability quickly customize employee visuals and information to reflect your organization.

For the person card, you can:

- Choose to display an employee photo, a grey screen, or no image at all
- Select a different naming format such as, 'Last Name, First Name'
- Control the information - job, work phone, location, etc. - displayed for an employee and the order it is presented
- Hide the indirect report count number (the default is on)



For the detail card, you're able to

- Disable the cards so they are not visible (the default is on)
- Control the information - job, work phone, location, etc. - displayed for an employee and the order it is presented

To enable *Organization Chart Settings*, administrators go to *System Configuration > Role Administration > select role > Add/Change Roles > Web Access Rights*, expand *System Configuration* and *System Settings*, and select all *Organization Chart Settings* checkboxes.

- **Multi-Supervisors.** To ensure our organization charts cater to many types of company structures – including the most complex, the *Organization Chart* can now display multiple supervisors for one employee.

- **Configurable Add Employee Work Event Pages.** Full configuration capabilities provide you with greater opportunity to personalize UltiPro to reflect your business. Now, you can modify the layout, fields, field-level security policies and/or validations on all pages associated with the *Add Employee (Hire/Rehire)* work event (under: *My Team > My Employees > Things I Can Do*).
- **Expanded Language Support.** UltiPro has expanded its language portfolio to include Danish or Swedish as a preferred language when logging in to UltiPro or establishing your Preferences.

ACA TOOLKIT

After a successful first year of ACA reporting - with 3.7 million 1095-Cs generated within the UltiPro ACA Toolkit, 1.6 million ACA forms printed by Ultimate's print services, and 1,500 customers leveraging our ACA Employer Services - we've heard your feedback and are rolling out new features to make it even easier to comply and report on your employees' healthcare coverage.

The Fall/Year-End Release expands UltiPro ACA Toolkit capabilities to give you greater access to data and simplify administration. Enhancements include:

- **The Form 1095-C Auto-Population Summary.** For visibility into Form 1095-C auto-population and to reduce manual auditing, a new *Auto-Populated 1095-C Form Summary* (under: *Administration > Reporting > PPACA*) is available. This page gets created automatically when you generate employee 1095-Cs per Applicable Large Employer (ALE) and provides insight into where auto-populated information and codes are derived from in UltiPro – for each employee per month for an entire reporting year.

Auto-Populated 1095-C Form Summary																			
The summary below is automatically populated when Forms 1095-C are created by generating Applicable Large Employers (ALEs) with Auto-Population enabled for Part II.																			
Reporting Year: 2015																			
Find by: ALE Name starts with Ni [Clear Filters] [Search] Displaying 1-11																			
Actions: [OK] [Refresh]																			
Form 1095-C Part II						Plan Information			HCE Eligibility			Employee Information							
Employee Name	ALE Name	Month	Line 14	Line 15	Line 16	Plan Start Month	Offered Plans	Enrolled Plans	Deduction/Benefit group	Hours Worked	HCE Group	Coverage Stability Start	Coverage Stability End	HCE Status	Employee status	Employee number	Company	Benefits seniority date	Date of last hire
Ada IPEDS-Newman	Nile Amalgamated Inc	Jan	1A	2C	03		Human Resources US Def Comp Human Resources US Dental Human Resources US Medical Human Resources US Prescription Human Resources US Vision	Human Resources US Def Comp Human Resources US Dental Human Resources US Medical Human Resources US Prescription Human Resources US Vision	HR US Dedl	140.00				Active	098098099	HUC03-CalenHR - US Comp 3	02/01/2011	02/01/2011	
Ada IPEDS-Newman	Nile Amalgamated Inc	Feb	1A	2C	03		Human Resources US Def Comp Human Resources US Dental Human Resources US Medical Human Resources US Prescription Human Resources	Human Resources US Def Comp Human Resources US Dental Human Resources US Medical Human Resources US Prescription Human Resources	HR US Dedl	140.00				Active	098098099	HUC03-CalenHR - US Comp 3	02/01/2011	02/01/2011	

For more detailed information, you can search by a person's name to see:

- General employee information such as employee number, benefits seniority date, etc.
- 1095 C Part II details, including the exact data elements and fields used auto-populate codes for Line 14, 15, 16.
- Healthcare eligibility dates and status.
- Plan information. Simply select the link provided in the 'Offered Plans' column to see comprehensive benefit plan details.

To take advantage of the *Auto-Populated 1095-C Form Summary*, administrators need to make sure Form 1095-C Part II auto-population is enabled under: *System Configuration > System Settings > PPACA Reporting Settings > Use Auto-Populated Codes*.

- **Updated Healthcare Enrollment Effective Date Criteria.** Form 1095-C auto-population processes now use the last day of the month, instead of first day, as the healthcare enrollment effective date. This way, when an employee's healthcare enrollment start date is mid-June, for example, he/she will accurately be reported as being offered coverage in June.

- **Deduction/Benefit Group Assignment Overrides.** To help you ensure Form 1095-C, Line 14 coverage codes are correct for your people, you can now view and update employees' deduction/benefit group assignment dates via *Change Deduction Group* (under: *My Team > My Employees > select employee > Pay > Deductions > Things I Can Do*). It's easy. Simply adjust offer of coverage information for an employee whose healthcare coverage started before he/she was assigned to a deduction/benefit group.



- **Hire/Rehire Healthcare Measurement and Deduction/Benefit Group Assignment.** To save time and streamline administration during new hire, rehire, and/or company transfer processes, you can now quickly:
 - Assign a healthcare measurement group.
 - Select a deduction/benefit group assignment date.

Built directly into the *Add Employee (Hire/Rehire)* work event (under: *My Team > My Employees > Things I Can Do*), you are now able to select the appropriate healthcare measurement group information and/or deduction group assignment date from the new drop-down menus available within the *Job/Payroll* step for each individual.

Remember!

- Make sure to take advantage of our:
 - [ACA Resources](#), which include Ultimate's recorded ACA preparation webcasts, UltiPro ACA Toolkit QuickTips, and IRS publications.
 - [Process and Tasks Guide](#) that outlines mandatory and optional ACA-related steps to take, in a specified order with access to detailed instructions, to ensure your compliance.

- ***ACA Employer Services Customers:*** Depending on your service selection, you may not need to leverage certain ACA Toolkit features because Ultimate is handling the required ACA-related activities for you. As a reminder, if you're using our:
 - ACA Distribution Services, we handle the printing and distribution of required forms, as well as 1094-C and 1095-C electronic filing to the IRS on your behalf.
 - ACA Management Services, we help you monitor the alerts and communications with the Healthcare Exchanges as well as provide all services included in ACA Distribution Services.

TAX

The Fall/Year-End Release delivers the functionality you need to close out your year and comply with government and tax reporting requirements. In addition, this release offers features that make compliance more convenient:

- **Additional Smart Tax Search Configuration.** To ensure Smart Tax Search is being used in a manner that best meets the needs of your organization, administrators have the added flexibility to enable or disable the following Smart Tax Search features (under *System Configuration > Tax > Smart Tax Search*):
 - Quick Address Search (default is off). Enabling Quick Address Search with type-ahead functionality as your primary method of address entry saves time and increases the precision of address data for locations, business rules, and the following work events:
 - New Hire
 - Transfer Employee
 - Change Name, Address, or Phone (for administrators and employees)
 - Map display (default is on). If you find that your organization doesn't take advantage of the Smart Tax Search map to pinpoint locations, you can simply turn it off for a simplified page view.
- **New Withholding Forms Solution for U.S. Employees.** We heard you! As a result of your ideas, new federal and state withholding form capabilities (under: *Myself > Pay > Income Tax > Add/Change Withholding Forms (W-4)*) streamline administration and make it fast and easy for your employees to complete their W-4 tax filing documents.

Even more important, the new W-4 forms are compatible with all current web browser versions. This means there are no issues with your people being able to access their documents.

For U.S. employees:

- It's easy. UltiPro guides your people through a series of questions and populates their withholding form(s) for them.
- It's fast. Employees no longer need to complete both federal and state forms (if applicable); changes automatically apply to both documents.
- Online guidance is provided. Automated, onscreen notifications remind employees to update W-4 withholding information when necessary, for example, when changing dependents and/or updating marital status within other areas of UltiPro.
- There's added support for the:
 - Pennsylvania Residency Certification Form
 - Puerto Rico Form 499 R-4.1 (Withholding Exemption Certificate)

Form administration is much easier because administrators have the flexibility to:

- Configure additional options to:
 - Display withholding forms to employees.
 - Inform employees when their exemption status for federal and state filing is about to expire so they can take action, with 'Exemption Expiration' notifications (under: *System Configuration > Taxes > Employee Withholding Forms (W-4)*).
 - Create workflow approval processes (under: *System Configuration > Business Rules > Employee Change W-4*) so it's easy to oversee and approve employees' allowances per state and/or employer-defined requirements.
- Upload a paper version of Forms W-4 for audit purposes when manually updating employees' federal and state withholding elections.

Federal Tax Form W-4

*** Filing Status W-4 Box 3**
If married, but legally separated, or spouse is a nonresident alien, select the "Single" option.

Single
 Married
 Married, but withhold at higher Single rate

Last Name W-4 Box 4

Your last name differs from that shown on your Social Security card.

*** Allowances W-4 Box 5**
See [Full Instructions](#) for details.

Total number of allowances you are claiming.

Additional Withholdings W-4 Box 6
Additional amount, if any, to be withheld from each paycheck.

\$

Exemption from Taxes W-4 Box 7

I claim exemption from withholding. I certify that I meet **both** of the following conditions for exemption:

- Last year I had a right to a refund of **all** federal income tax withheld because I had **no** tax liability, **and**
- This year I expect a refund of **all** federal income tax withheld because I expect to have **no** tax liability.

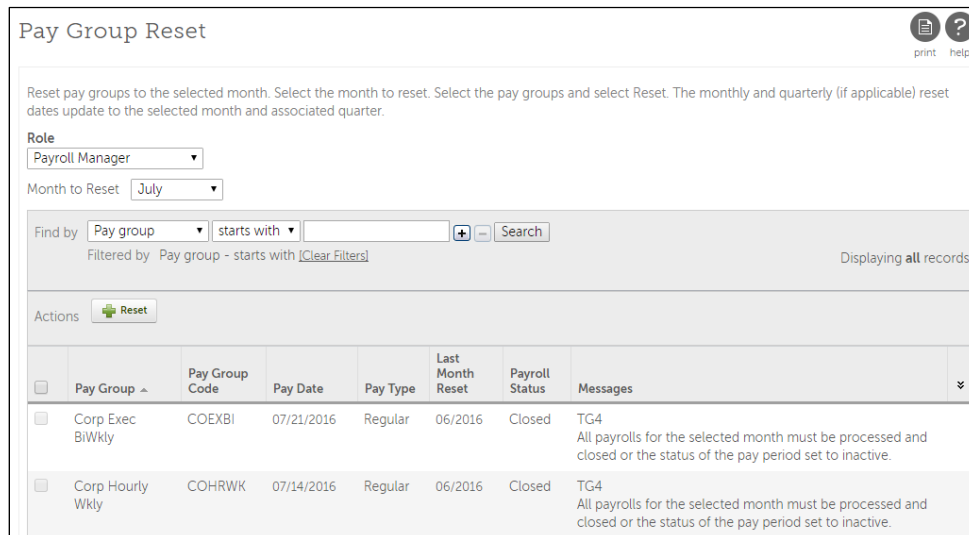
Note:

- To review all tax compliance details and any late-breaking UltiPro updates delivered with this release, please read the Release Notes available September 29, 2016 on the Customer Success Portal Library under *Ultimate Software and UltiPro > UltiPro Releases > UltiPro 2016 Fall/Year-End Release (v12.1.2) – Release Notes and Supporting Information*.
- Many payroll tax changes for the upcoming year are finalized by government tax authorities in late November and December with effective dates of January 1. Because of this time frame, Ultimate will issue:
 - A Fourth Quarter Compliance Service Pack in December.
 - A Tax Reporting Service Pack in January to support 2016 reporting and prepare for 2017 payrolls.
 - Additional tax updates as necessary when new requirements from tax jurisdictions become available.

PAYROLL

Expanded payroll capabilities with the Fall/Year-End Release deliver:

- **Portal-based Pay Group Reset Functionality.** Conveniently reset your organization’s pay groups in the UltiPro portal, instead of having to go to the backoffice. A new *Pay Group Reset* feature (under: *Administration > Payroll Admin > Payroll Utilities > Pay Group Reset*) lets administrators quickly resolve out-of-date pay groups so you don’t have to pause your payroll. Simply select the *Reset* button:
 - If there’s a pay group that’s no longer used by your company.
 - As directed by a message that appears on the *Payroll Overview* page when your payroll cannot be processed because it meets certain conditions and needs to be reset.



Pay statement enhancements give your employees greater clarity on their earnings with:

- **Language Preferences.** For added personalization, choose the language featured on an employee's online pay statement via their *Private Info* page. Administrators and managers can make the selection for employees on an individual basis and employees themselves can also pick their language. The current preference dictates the online pay statement language.
- **Total Hours Worked Values.** To provide employees with additional insight into the hours they are get paid, administrators have the ability to separate and display an employee's:
 - Worked hours – the number of actual hours the employee worked during a pay period, and
 - Excluded earnings hours – The time the employee did not work, for example, to account for paid time off leave, shift premiums and more.

To enable Total Hours Worked, administrators:

1. Go to *System Configuration > Business Rules > Earnings* > select *earnings*, and under the *Detail* step, select the *Total Hours Worked* checkbox. Then, click *Next* and *Save*.
 2. Afterwards, go to the backoffice, select the *Banks Setup Table*. From the *Check* tab, select the *Total Hours Worked* checkbox and click *Save*.
- **Rest and Recovery Rates.** Designed for piecework employees who receive fixed wages for each unit produced or task performed, and to support the state of California's AB 1513 legislation, administrators can now automatically compensate their people separately for rest/recovery periods and include 'Rest & Recovery' wages and hours on employees' pay statements.

To enable Rest and Recovery, administrators go to:

1. *System Configuration > Business Rules > Earnings* > select *earnings*, and:
 - Under the *Main* step, select *Piece Rate & Recovery* from the 'Pay Rate For Payout' drop-down.
 - Under the *Detail* step, select the *Rest & Recovery Wages* and *Rest & Recovery Hours* checkboxes.
 - Click *Next* and *Save*.
 2. *Menu > System Configuration > Business Rules > Locations > Local Minimum Wage Jurisdiction > Jurisdiction*, and make sure local minimum wages are assigned to your locations.
- **Pay Group Options.** A new *Pay Groups Option* page (under: *Administration > Payroll Admin > Pay Statement Options*) makes it easy for administrators to update pay statement display settings for improved readability. With the 'Shift/OT Settings' drop-down menu, you can select:
 - *Check Format Options* – for the default pay statement display.
 - *Details Shifts* – to show work hours, amount, and pay rate for each shift in an itemized format. This way, employees with different pay rates and complex shifts can quickly see how much they make.
 - *Detailed Shifts & OT Rate of Pay* – to display the calculated coefficient overtime and hours worked so your people have visibility into their shifts and the overtime attributed to each.

To enable the *Pay Group Option* page for specific use roles, administrators go to *System Configuration > Role Administration > select role > Web Access Rights > Payroll Admin > Pay Statement Options*, and select all *Pay Group Options* checkboxes.

- **Earnings Configuration.** Administrators can specify the order earnings (pay type) are displayed on employee pay statements using the new *Earnings Configuration* page (under: *Administration > Payroll Admin > Pay Statement Options*). For example, you may choose to show hourly wages before overtime and bonus amounts.

To enable the *Earnings Configuration* page for specific user roles, administrators go to *System Configuration > Role Administration > select role > Web Access Rights > Payroll Administration > Pay Statement Options*, and select all *Earnings Configuration* checkboxes.

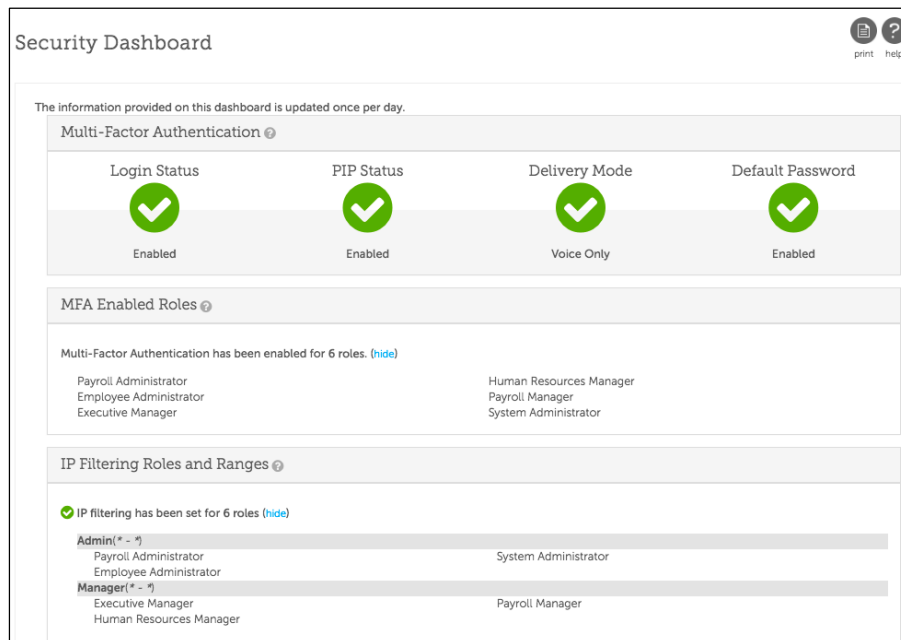
SYSTEM MANAGEMENT

The Fall/Year-End Release further enhances UltiPro by delivering new features that include:

SECURITY INSIGHT AND ADDED PROTECTION

Implementing sound security measures and best practices is critical to protecting your important people information. Now, it's even easier to do this with:

- **The UltiPro Security Dashboard.** Want valuable insight into your organization's UltiPro security settings? The new *Security Dashboard* (under: *System Configuration > Security > Security Dashboard*) paints a visual picture of the UltiPro security tools you can utilize to further safeguard your data – such as multi-factor authentication, password policies, IP filtering, session timeout settings, etc.



The screenshot shows the 'Security Dashboard' interface. At the top right, there are 'print' and 'help' icons. Below the title, a note states: 'The information provided on this dashboard is updated once per day.' The dashboard is divided into several sections:

- Multi-Factor Authentication:** This section contains four status cards:
 - Login Status:** Enabled (indicated by a green checkmark icon).
 - PIP Status:** Enabled (indicated by a green checkmark icon).
 - Delivery Mode:** Voice Only (indicated by a green checkmark icon).
 - Default Password:** Enabled (indicated by a green checkmark icon).
- MFA Enabled Roles:** A list of roles where MFA is enabled: Payroll Administrator, Employee Administrator, Executive Manager, Human Resources Manager, Payroll Manager, and System Administrator.
- IP Filtering Roles and Ranges:** A list of roles where IP filtering is set: Admin(* -), Payroll Administrator, Employee Administrator, System Administrator, Manager(* -), Executive Manager, Human Resources Manager, and Payroll Manager.

The *Security Dashboard* lets you monitor and measure the actions you take to protect your people data because it:

- Shows you the security features you've enabled and how you've configured them.
- Explains the purpose of each security feature and offers guidance on the best way to use it.
- Gives detailed instructions for enabling and adjusting features to meet the unique needs of your organization.

With insight into your system's security health, it's easier to identify necessary changes to ensure you are protected.

The *Security Dashboard* is available for system administrators by default. To enable the Security Dashboard for additional user roles, administrators go to *System Configuration > Role Administration > select role > Add/Change Roles > Web Access Rights*, expand *Security* and select the *Security Dashboard* checkbox.

- **Multi-Factor Authentication for Site Administrators.** Multi-factor authentication is the most effective way to safeguard your peoples' private data as it prompts users to verify their identity at login with a security access code, which deters hackers and significantly reduces fraud risks. The Fall/Year-End Release extends required security protocols by enforcing multi-factor authentication at UltiPro log in for your organization's site administrator(s) - the first account(s) created for UltiPro.

If you haven't already enabled multi-factor authentication for site administrators, once the release is applied, users assigned to this role will be prompted to choose an identity verification method to use at log in, from options the system administrator allows. Options include:

- A YubiKey™ USB device. The YubiKey is the new, preferred verification method that's available to site administrators only. Similar in appearance to a flash drive, it allows a user to verify his/her identity with a fingerprint. For more information on YubiKey devices, go to the Yubico® [website](#). All keys are compatible for use with UltiPro authentication except FIDO tokens.
- A phone call to a 10-digit phone number (no extensions).
- A text message to mobile device.
- An email to the user's primary email address.

Important! We cannot stress enough how strongly we encourage you to use multi-factor authentication within your organization. Unique login credentials and password resets alone are no longer enough to fully prevent unauthorized access to your UltiPro data.

There's no better time than now to enable multi-factor authentication for your organization. It's easy to configure in UltiPro for specific roles and pages. To learn more:

- [Watch a short video](#) about how to proactively protect your data.
- [Read our Frequently Asked Questions document](#) for detailed information on UltiPro multi-factor authentication.
- [Review our resources](#), which include instructions on how to enable multi-factor authentication.

BROWSER COMPATIBILITY

To ensure optimum UltiPro performance using the latest web browsers, the Fall/Year-End Release:

- Expands support for:
 - Google Chrome™ 52
 - Mozilla® Firefox® 47
- Does not support 'Compatibility Mode' when running Internet Explorer® (IE) 11

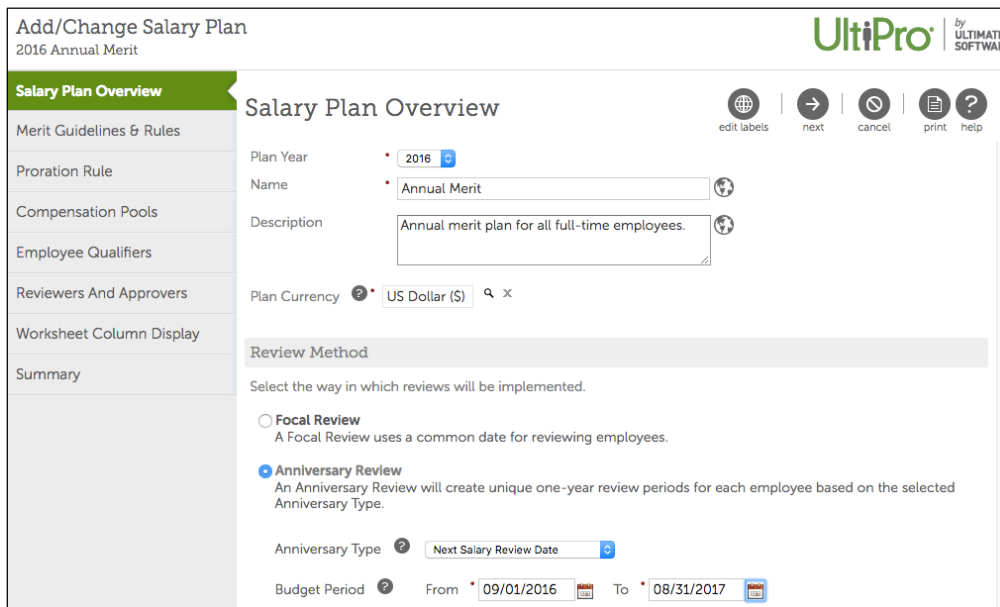
For complete details on UltiPro browser and version support, review the current [Browser Compatibility Guide](#). An updated version will be posted on the Customer Success Portal Library the week of October 10, 2016.

TALENT

New talent features enhance salary planning and performance processes with:

COMPENSATION MANAGEMENT

- **Anniversary-based Salary Reviews.** To ensure salary/performance reviews align with the structure of your organization, administrators have the added flexibility to create salary review periods for their employees based on work anniversary date.



The screenshot shows the 'Add/Change Salary Plan' interface for '2016 Annual Merit'. The page title is 'Add/Change Salary Plan' with a subtitle '2016 Annual Merit'. The UltiPro logo is in the top right corner. A sidebar on the left contains a menu with items: 'Salary Plan Overview' (highlighted), 'Merit Guidelines & Rules', 'Proration Rule', 'Compensation Pools', 'Employee Qualifiers', 'Reviewers And Approvers', 'Worksheet Column Display', and 'Summary'. The main content area is titled 'Salary Plan Overview' and includes several fields: 'Plan Year' (2016), 'Name' (Annual Merit), 'Description' (Annual merit plan for all full-time employees.), and 'Plan Currency' (US Dollar (\$)). Below these is a 'Review Method' section with two radio button options: 'Focal Review' (unselected) and 'Anniversary Review' (selected). The 'Anniversary Review' option is described as creating unique one-year review periods based on the selected anniversary type. Below this, there is an 'Anniversary Type' dropdown set to 'Next Salary Review Date' and a 'Budget Period' section with 'From' date '09/01/2016' and 'To' date '08/31/2017'. Utility icons for 'edit labels', 'next', 'cancel', 'print', and 'help' are located in the top right of the main content area.

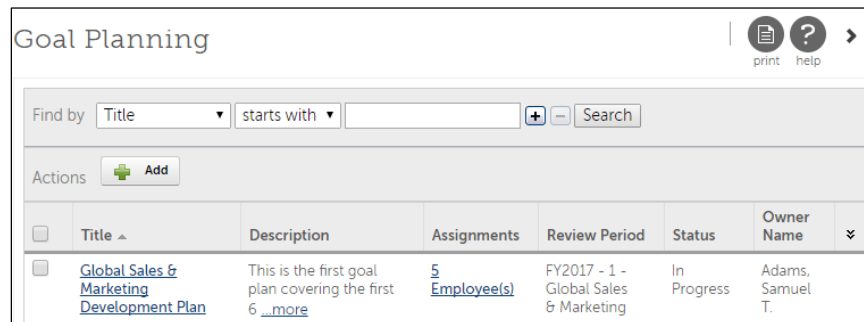
An enhanced *Salary Plan Overview* page (under: *My Team > Compensation Management > Salary Planning*) now displays two ‘Review Method’ options to select from:

- Focal Review – A date you review all employees, or
- Anniversary Review – Based on the employee’s anniversary date.

Once you choose ‘Anniversary Review,’ simply define if the review is driven by the next salary review or performance review date and set the time period for the salary plan’s budget calculations. It’s that simple!

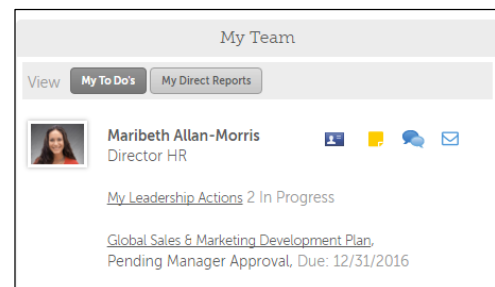
PERFORMANCE MANAGEMENT


- **Collaborative Goal Planning.** New *Goal Planning* features streamline administrative activities and facilitate teamwork – making it simple for managers and employees to work together to develop and approve employee performance plans.



Goal Planning						
Find by Title starts with <input type="text"/> + - Search						
Actions + Add						
<input type="checkbox"/>	Title ^	Description	Assignments	Review Period	Status	Owner Name
<input type="checkbox"/>	Global Sales & Marketing Development Plan	This is the first goal plan covering the first 6 more	5 Employee(s)	FY2017 - 1 - Global Sales & Marketing	In Progress	Adams, Samuel T.

Each employee’s goals are created and displayed in one view (under: *Myself* (or *My Team > My Employees > find employee*) > *Career & Education > Goal Planning*), which makes it easier to collaborate across multiple goals during the goal plan creation and approval process. Then, once an employee submits his/her goal plan, it can be accessed via the *Talent Dashboard* from within an employee’s ‘To Do’ view for added convenience (under: *My Team > My Employees > find employee > Career & Education > Goal Planning*).



My Team	
View	My Direct Reports
	Maribeth Allan-Morris Director HR My Leadership Actions 2 In Progress Global Sales & Marketing Development Plan Pending Manager Approval, Due: 12/31/2016

More importantly, new *Goal Planning* functionality:

- Automatically connects goals to a specific review period.
- Allows managers to create and approve employees’ goals in bulk to save time and effort.
- Enables managers to modify goals and send back to the employee for review quickly.
- Provides e-mail notifications and reminders.
- Supports the export of goal planning information.
- Simplifies attachment of goals and selection of employees for review distribution.

To enable *Goal Planning*, administrators:

1. Go to *System Configuration > Role Administration > select role > Add/Change Roles > Business Rules Access Rights*, and select all *Review Period* checkboxes.
 2. Then, grant page access to:
 - Performance management administrators by selecting all *Goal Planning* and *Review Period* checkboxes (under: *System Configuration > Role Administration > select role > Add/Change Roles > Web Access Rights > Talent Management > Goal Planning*).
 - Managers by selecting all *Goal Planning* checkboxes (under: *System Configuration > Role Administration > select role > Add/Change Roles > Web Access Rights > My Team > My Employees List > My Team > Career & Education > Goal Planning*).
 - Employees by selecting all *Goal Planning* checkboxes (under: *System Configuration > Role Administration > select role > Add/Change Roles > Web Access Rights > Myself > Career & Education > Goal Planning*).
- **Enhanced Leadership Actions.** To help managers improve their leadership skills and develop direct reports into future leaders, new rich-text formatting is available for Leadership Actions descriptions (under: *System Configuration > Business Rules > search > Leadership Actions*). When assigning leadership actions (practical suggestions) to themselves, managers can format text and link to content such as external training courses and video presentations. An enhanced 'Description' text box now supports different fonts, text sizes, styling, bullets, indents, and HTML links.

TIME AND LABOR

The Fall/Year-End Release improves your timekeeping experience by delivering usability enhancements that include:

TIME MANAGEMENT

- **Synchronized Pay Rates.** Ensure your employees' payroll data in Time Management is always up-to-date by taking advantage of new Pay Rate Synchronization in UltiPro. You can import:
 - Employees' base pay rates (hourly and salaried amounts) to populate:
 - Employees' timesheet 'Summary.'
 - Labor Costing reports. This way, you can report on your peoples' current pay rates and determine, for example, how much a specific department is paying employees over a certain period of time.
 - Minimum wage tables.

To enable Pay Rate Synchronization:

1. Administrators go to *UltiPro > System Configuration > Time Management Setup > Integration Configuration*, and select the *Import Employee Pay Rate* checkbox.
 2. Additional configuration is necessary to make imported pay rates visible in UltiPro Time Management. Please open a support case via the Customer Success Portal for assistance.
- **Consistency for UltiPro Time Management.** For your added convenience, Time Management reflects the new look and feel of UltiPro and:
 - Features the new navigational menu structure.
 - Automatically applies the company branding (logo and colors) you've established in UltiPro.
 - Launches within the same frame as UltiPro, rather than in a separate browser window. Should you choose to use Time Management separately while you have UltiPro open, a new pop-up option makes it easy for administrators to use Time Management and UltiPro at the same time.

REPORTING

The Fall/Year-End Release significantly expands predictive analytics availability within UltiPro to give you actionable insight to help proactively manage your talent. UltiPro's predictive analytics leverage existing employee data and actions to provide a clearer view of future behavior. Previously only available within UltiPro Talent solutions and Talent Business Intelligence reporting, predictive analytics reporting is now available to all customers. These predictors display an employee's:

- **Retention Score.** See the likelihood an employee will stay with your organization for the next year based on algorithms and analysis of demographics, benefits, job history, compensation, employment, and education data.
- **High-Performer Probability.** Identify the individuals who have consistently been in the top 8-15% of all performers in your company or who have the potential to become a high-performer based on compensation actions and quantitative analysis.
- **Engagement Measure.** See how engaged your employees are within your organization so you can focus on ways to drive employee engagement and increase overall business performance.

To take advantage of Engagement Measure reporting, Retention Predictor and High Performer analytics must be turned on. If you haven't already done this, go to *System Configuration > System Settings > Predictive Analytics*, and turn on the predictive analytic score functionality.

To help you make smarter decisions regarding your talent, take advantage of all of our predictive analytics reporting under: *Public Folders > UltiPro BI Content > UltiPro BI for Core HR and Payroll > _UltiPro Delivered Packages* and *_UltiPro Delivered Reports*.