

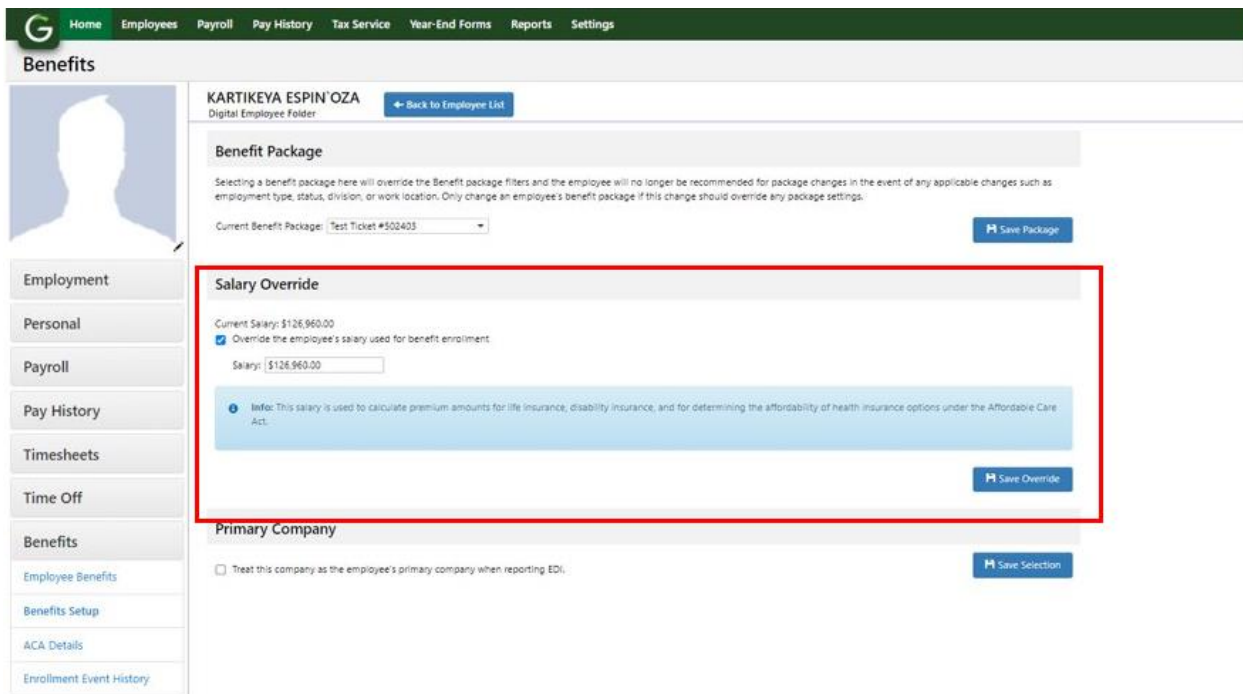
Greenshades Online Release Notes

Anticipated Release - 6/2/2022

GREENSHADES ONLINE EMPLOYEE SERVICES

Enhanced Feature (ONLY clients that are on the Greenshades Platform):

The Salary override section has been temporarily removed from the employee's benefits setup for clients that process payroll on the Greenshades Platform. This section will be restored later in the year. All calculations associated with the salary override will be applied retroactively should it be enabled after the section is restored.



Navigation:

Greenshadesonline.com > Employees > Employee Card > Benefit Setup

Enhanced Feature

The Greenshades Online reports section has a new look and feel! Along with the visual improvements, administrators are now able to search the reports to find the report they are looking for.

Reports
 Customize reports to include or exclude information; share with anyone directly from the report; mark report as a favorite for quick retrieval.

66
 Total Employees

\$2,110.00
 Payroll cost

Check Date: Mar 5, 2018

Position	Count
Pos 2 Dep A Non exempt ...	25
Pos 1 Dep A Non exempt ...	18
Pos 2 Dep B Non Exempt ...	12
Pos 1 Dep B Non exempt ...	11

Category	Amount
Employee Net Pay:	\$2,000.00
Benefits:	\$0.00
Employer Taxes:	\$110.00
Employee Taxes:	\$0.00
Deductions:	\$0.00

Greenshades Reports | Customized Reports | Workspace Logs | Workspace Data Exports

Filter reports:

Favorite Reports

- ★ Benefit and Deduction Details Report: Shows your payroll benefits and deductions for a given date range.
- ★ Code Assignments Report: The Code Assignments report shows all payroll codes currently assigned to employees.
- ★ Employee Arrears Summary Report: Provides an aggregated list of employee arrears per code.
- ★ Employee Dis. Distribution Preference Report: Report of employee distribution preferences.

Navigation:

Greenshadesonline.com > Reports

Anticipated Release - 5/11/2022

GREENSHADES ONLINE EMPLOYEE SERVICES

Enhanced Feature (ONLY clients that are on the Greenshades Platform):

Administrators are now able to select additional gender on an employee's profile. The additional gender selections are: prefer not to answer, non-binary. Administrators are also able to filter by these additional genders wherever gender is a reporting option.

Navigation:

Greenshadesonline.com > Employees > Employee Card > Personal Information

Anticipated Release - 3/30/2022

GREENSHADES ONLINE EMPLOYEE SERVICES

Enhanced Feature (ONLY clients that are on the Greenshades Platform):

Administrators are now able to select additional HR statuses on an employee's profile. The additional statuses are—long term disability, short term disability, FMLA, state-FMLA, workers compensation, medical leave. Administrators are also able to filter by these additional statuses wherever HR status is a reporting option.

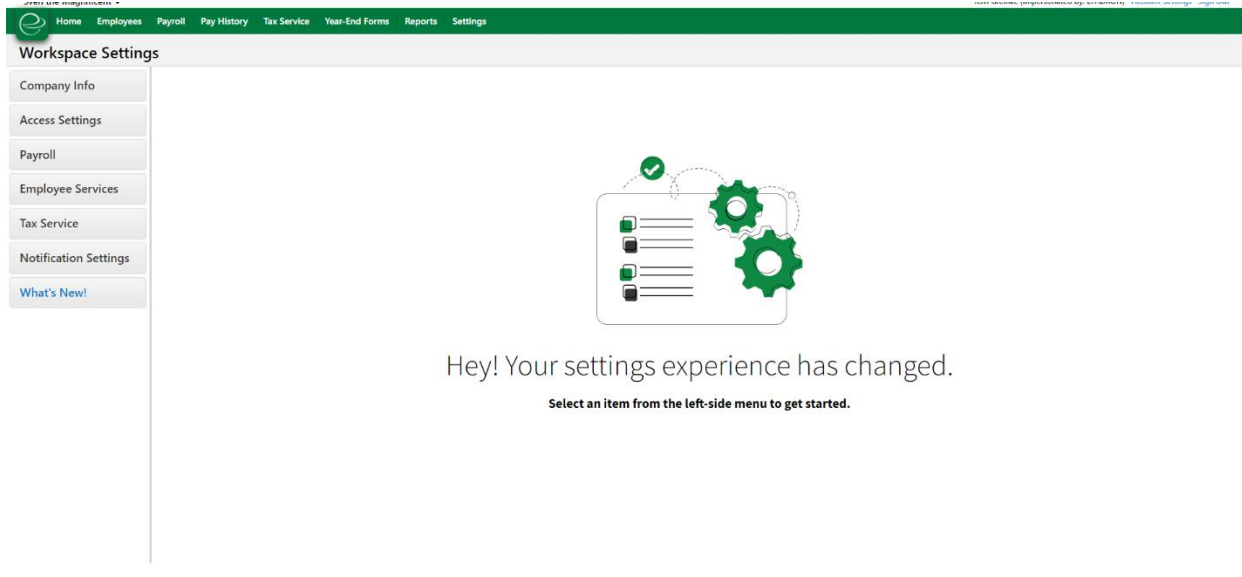
Navigation:

Greenshadesonline.com > Employees > Employee Card > Employment Information

Anticipated Release - 3/9/2022

GREENSHADES ONLINE EMPLOYEE SERVICES

New Feature:



Greenshades Online now has a new settings page! This page acts as a landing page for administrators so that they can choose what page they would like to access in their settings without directly displaying the company information.

Navigation:

Greenshadesonline.com > Settings

Anticipated Release - 2/16/2022

GREENSHADES ONLINE EMPLOYEE SERVICES

Navigation:

Greenshadesonline.com > Employees > Employee List > Employment

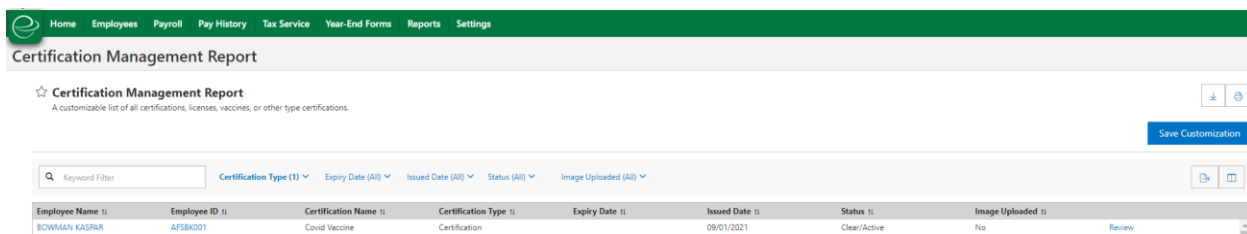
Updated Feature:

Under the employee address, administrators can view/edit the country setting for employees, denoting which country they reside. Previously, there were two options for United States. The redundancy has been removed so only one option for the United States is available.

Navigation:

Greenshadesonline.com > Employees > Certifications Management Dashboard > Certification Management Report

Updated Feature:



The screenshot shows the 'Certification Management Report' interface. It includes a navigation bar with links like Home, Employees, Payroll, etc. Below the title, there's a description: 'A customizable list of all certifications, licenses, vaccines, or other type certifications.' There are filter options for Certification Type, Expiry Date, Issued Date, Status, and Image Uploaded. A table below displays one record for an employee named BOWMAN KAIRAR with a Covid Vaccine certification issued on 09/01/2021, with the 'Image Uploaded' field set to 'No'.

Employee Name	Employee ID	Certification Name	Certification Type	Expiry Date	Issued Date	Status	Image Uploaded
BOWMAN KAIRAR	AFS8K001	Covid Vaccine	Certification		09/01/2021	Clear/Active	No

Administrators are now able to view the column/add the column to view whether or not a certification of any type has an image uploaded to its record. This field will display a value of 'yes' if an image does exist or 'no' if it does not.

Navigation:

Greenshadesonline.com > Employees > Certifications Management Dashboard

New Feature:

System Dashboard - CA Onboarding User (impersonated by AMCORPNS) Account Settings Sign Out

Home Employees Payroll Pay History Tax Service Year-End Forms Reports Settings

Certification Management

Employees

Profile 17

Timesheets

Time Off

Benefits 256

Documents 23

Expense Reports 1

Evaluations 466

Onboarding 15

Certifications

Certification Management Dashboard

Numbers at a Glance

24 Expired certifications	12 Certifications expiring in < 30 days	56 Active/Clear certifications
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Certifications requiring administrator approval

Employee Name	Employee ID	Position	Certification Name	Certification Type	Manager approval needed?
HEINRICH, CHRISTOPH	ANVH4001	Assistant Operations Manager	Flu Vaccine	vaccination	No

Export to PDF Export Selected Show Columns

▼ [Certification Name] Equals 'Flu Vaccine'

Reports

Incomplete Report All Certifications All Vaccinations All Licenses All Other

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Certifications has now been added as a feature that can be enabled for Limited Access administrators. Should the Limited Access administrator be permitted to view certifications, they will only see the employees' data that they have access to.

Anticipated Release - 12/22/2021

GREENSHADES ONLINE EMPLOYEE SERVICES

Navigation:

Greenshadesonline.com > Settings > Employee Services > Certifications Management

Greenshadesonline.com > Employees > Employee List > Certifications

Updated Feature:

Administrators now have the ability to choose whether or not an employee can decline a vaccination. When creating a vaccination template, the administrator can select whether or not the employee is allowed a decline option. If the administrator is adding a single vaccination to a given employee, they can also enable this option directly from the employee card.

The image contains two screenshots of the GreenshadesOnline interface. The top screenshot shows the 'Add vaccination' dialog box. The 'Enter details' tab is active, showing a dropdown menu for 'Choose vaccination' set to 'TDAP'. Below this are radio buttons for 'Is it required?' (Yes is selected), a checked checkbox for 'Employee can choose to decline vaccine', and radio buttons for 'Who will enter details?' (Admin is selected). Under the 'Employee' section, there are radio buttons for 'Accepts vaccine' and 'Declines vaccine' (which is selected). 'Cancel' and 'Next' buttons are at the bottom. The bottom screenshot shows the 'Edit vaccination' dialog box. The 'Name vaccination template' tab is active, with a text input for 'Name' containing 'COVID-19 Vaccine'. It includes the same 'Is it required?' and 'Employee can choose to decline vaccine' options. Under 'Who will enter details?', 'Admin' is selected. The 'Required information' section includes 'Date given'. The 'Optional information' section includes 'Manufacturer', 'Future booster date', and 'Attach an image of vaccination'. 'Cancel' and 'Next' buttons are at the bottom.

If this setting is enabled, then either the administrator or the employee (who ever completes the vaccine details) will be able to select that the employee declines the vaccine. Once the vaccine is then submitted, the card will

go into a new “green” status called Decline. This new status will display for the employee card and can be pulled in reports as well. The employee will not be able to edit anything in a Declined status.

Employee Can Deny-1

Status: **Declined** ✓

Manufacturer:

Date given:

Future booster date:

View details

DELETE

Navigation:

Greenshadesonline.com > Employees > Certifications Management Dashboard

New Feature:

Employee Name (s)	Employee ID (s)	Certification Name (s)	Certification Type (s)	Issued Date (s)	Renewed Date (s)	Previous Expiry Date (s)	Current Expiry Date (s)	
DYANI SQUIER	ANH455001	AAA Template	Certification	09/08/2021	11/05/2021	08/08/2023	09/28/2023	Review
Doogie Howser	DRM40001	Doctor's License	Certification	07/01/2021	11/12/2021	10/31/2022	10/23/2022	Review
DYANI SQUIER	ANH455001	CPR	Certification	10/01/2021	10/22/2021	10/22/2021	10/25/2024	Review
BOWMAN KASPAR	AF580001	113032-1	Certification	12/01/2000	10/25/2021	10/22/2021	10/26/2021	Review
Lennie zLester	ZZTES10111	New DL	License	02/14/2013	11/04/2021		11/30/2021	Review
ZERO ROBICHAUX	ANH429001	This is not required,just for fun	Certification	09/02/2021	10/18/2021	11/18/2021	10/25/2021	Review
ZERO ROBICHAUX	ANH429001	This is required,notfor fun2	Certification	10/01/2021	10/18/2021	10/18/2021	10/12/2021	Review
Gotest1 Gotest1	JMBM001	CPP	Certification	10/01/2021	11/10/2021	10/31/2021	12/31/2021	Review
Lennie zLester	ZZTES10111	EXTREEEEEEEEEELY LOOOOOOOOOONG NAME	Other	08/01/2021	10/13/2021	10/18/2021	10/17/2021	Review
DYANI SQUIER	ANH455001	send test please	Certification	10/04/2021	10/15/2021	10/18/2021	10/12/2021	Review
DYANI SQUIER	ANH455001	Squid Game	Certification	10/04/2021	10/18/2021	10/20/2021	10/11/2021	Review
ZERO ROBICHAUX	ANH429001	CLM Sprint 6 certification	Certification	10/01/2021	10/18/2021	10/31/2021	10/12/2021	Review
Lennie zLester	ZZTES10111	New License fr testing testing	License	10/01/2021	11/10/2021	11/30/2021	11/29/2021	Review
Lennie zLester	ZZTES10111	New Cert for testing test	Certification	11/08/2021	11/09/2021		04/13/2022	Review
DYANI SQUIER	ANH455001	test james demo 4	Certification	10/06/2021	10/18/2021	10/15/2021	05/18/2022	Review
Lennie zLester	ZZTES10111	Dont send expired notif	Certification	06/01/2000	10/18/2021		10/21/2021	Review
Lee zLester	TES104	Update test	Certification	10/05/2021	10/19/2021		10/31/2021	Review
Lennie zLester	ZZTES10111	Pre-Unsubscribe test	Certification	11/01/2018	11/04/2021		11/17/2027	Review
BOWMAN KASPAR	AF580001	Test notification edits	Certification	10/01/2021	10/25/2021		10/31/2021	Review
KARTIKVA ESPINOZA	AFH80001	aaa	Certification	10/02/2021	11/02/2021	10/14/2022	10/31/2022	Review
KARTIKVA ESPINOZA	AFH80001	J - Phantom	Certification	11/01/2021	11/02/2021	11/30/2021	11/30/2027	Review

A new report is available on the Certification Management Dashboard called the “Date Renewed Report”. This report gives administrators visibility into any updated expiry dates (and when they were updated) for any certifications in the system. This report includes the following details:

- Employee Name and ID
- Certification Name
- Certification Type (certification, vaccine, license, other)
- Issued Date

- Renewed Date (this is the date that the expiry date was updated by either the administrator or the employee)
- Previous Expiry Date
- Current Expiry Date

The administrator can also add additional demographic details to the report such as department, position, location, or class information and filter by these fields. Like many of the new Greenshades reports, administrators are also able to customize and save these reports.

Anticipated Release - 12/22/2021

GREENSHADES ONLINE EMPLOYEE SERVICES

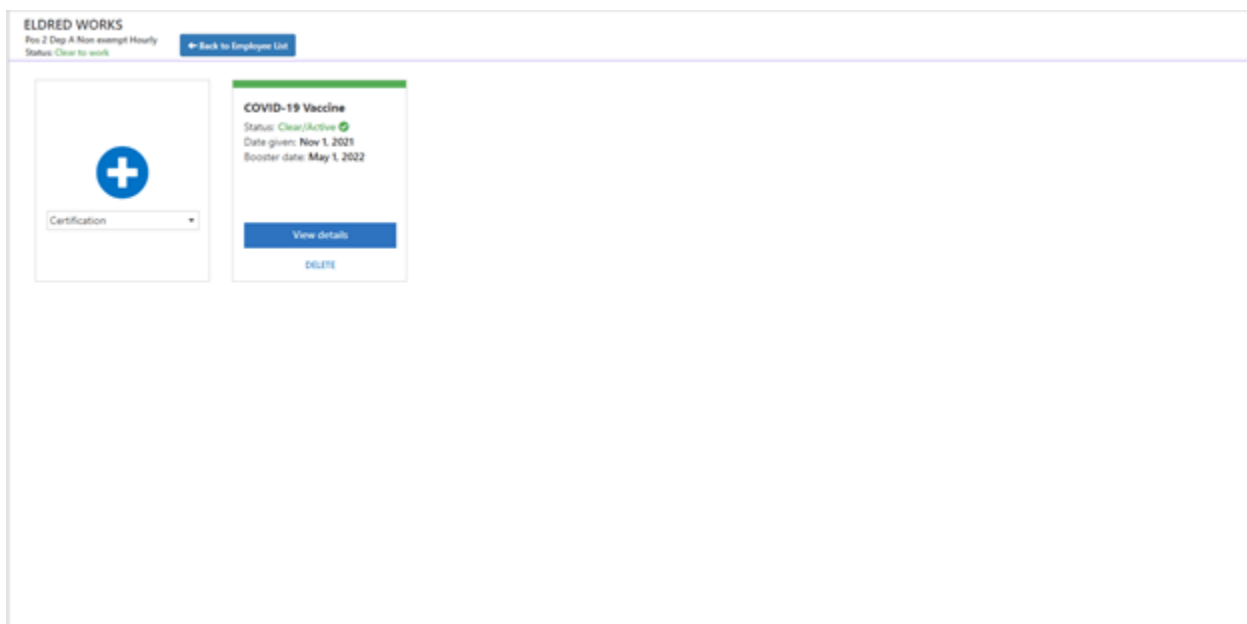
Welcome to the new certification management module! Here, administrators can add, manage, and maintain employee's certifications, licenses, vaccinations, and other expiry documentation. Administrators can upload templates for these types of documents so that they can be auto-assigned to employees based on rules they set up, upload single certifications to a given employee, allow employees to upload their credentials and supporting documentation, and report and track on their certification compliance through an in-app dashboard.

Navigation:

Greenshadesonline.com > Employees > Employee List > Select Employees > Certifications

New Feature:

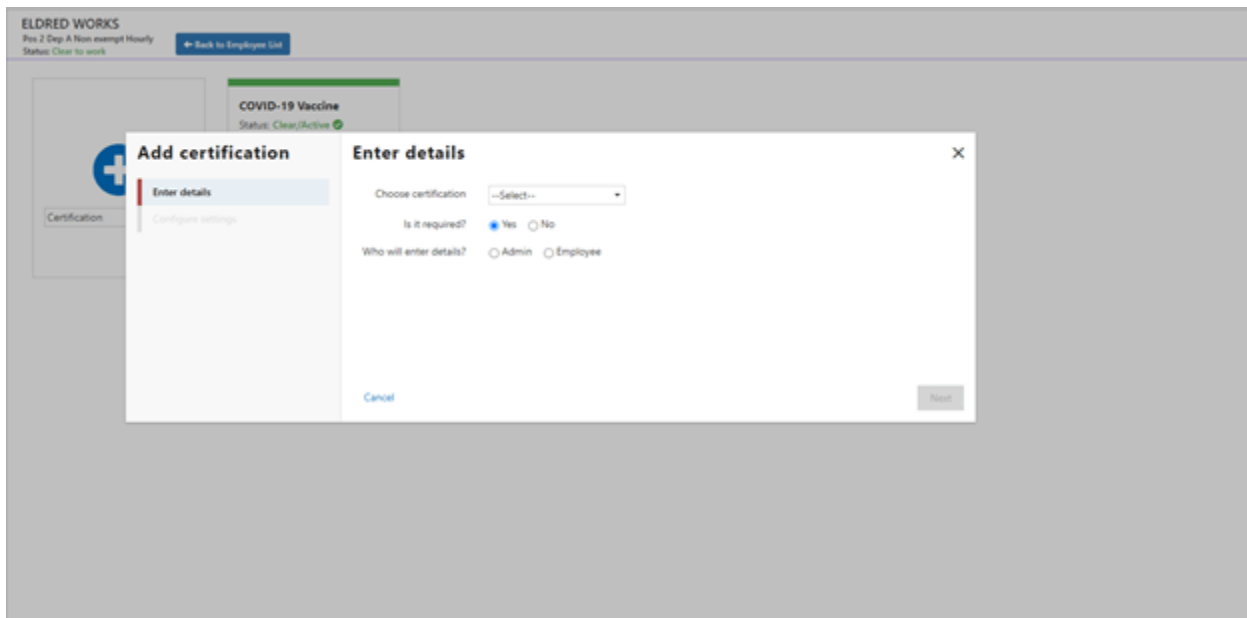
Under the employee card, administrators can view a given employee's certifications associated to their profile. Each document will display a status based on its issue and expiry date:



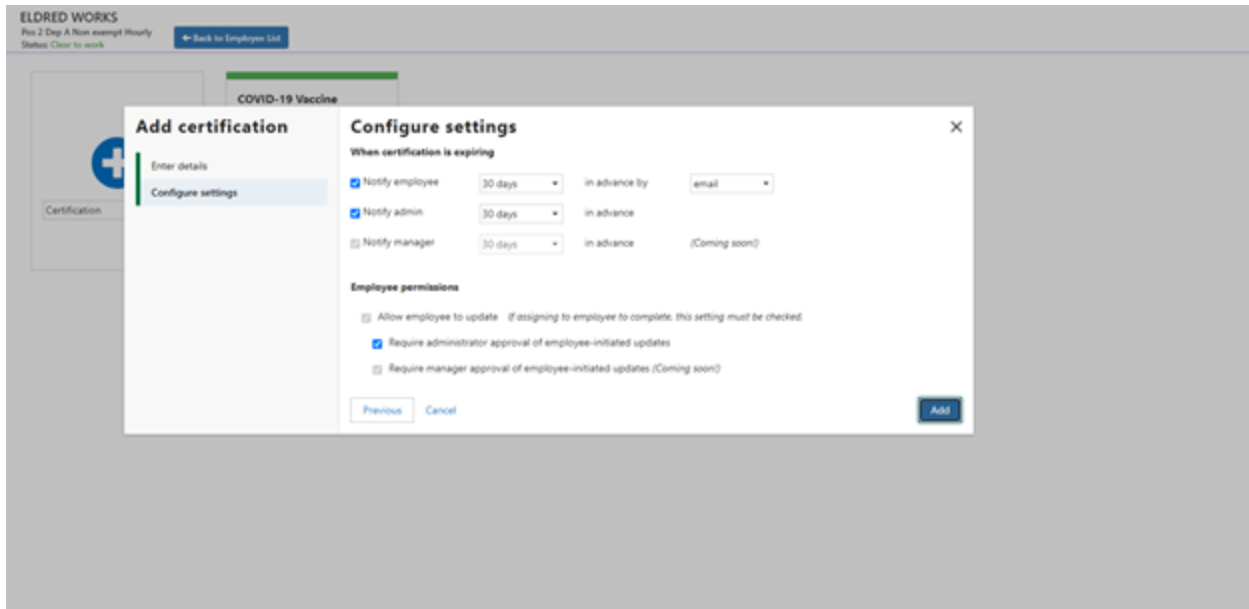
- **Clear/Active** - the document has an active issue date and is not expired
- **Expiring Soon** - based on the notification settings, the document is set to expire in a certain amount of days. This number is based off the administrator notification settings
- **Incomplete** - the document is awaiting details
- **Needs Approval** - the document details have been submitted by the employee and is awaiting administrator review
- **Denied/Update Now** - the administrator has denied the employee entered credentials and the employee needs to update
- **Expired/Update Now** - the document's expiry date has passed. The employee must update this document as it is required for their employment

- **Expired** - the document's expiry date has passed, although it is not required

Statuses are generated by the system automatically. Administrators are able to view and edit details of an employee's certification of any type at any time. Should an administrator adjust any detail of the employee's certification, the system will recalculate the status as well as log the action in a history section displayed on the certificate details. Administrators can add a new certificate to an employee's profile via the "+" card. Here, they can add a certification of any type either from a template or brand new. To add a new certification, administrators must enter the following:



- **Certification Name**- the name of the certification
- **Is it required?** - administrator can mark whether or not the document is required for the employee to complete
- **Who will enter the details** - the administrator can choose to enter the details for the document themselves, or they can request the employee to enter the details on their Green Employee
- **Required/optional information** - this will display the required and optional information needed for the certificate. This will be based on the certification type. If the administrator chooses to complete, then these form fields will be entered. If the administrator chooses for the employee to complete, then the form fields will display for the admin to see.

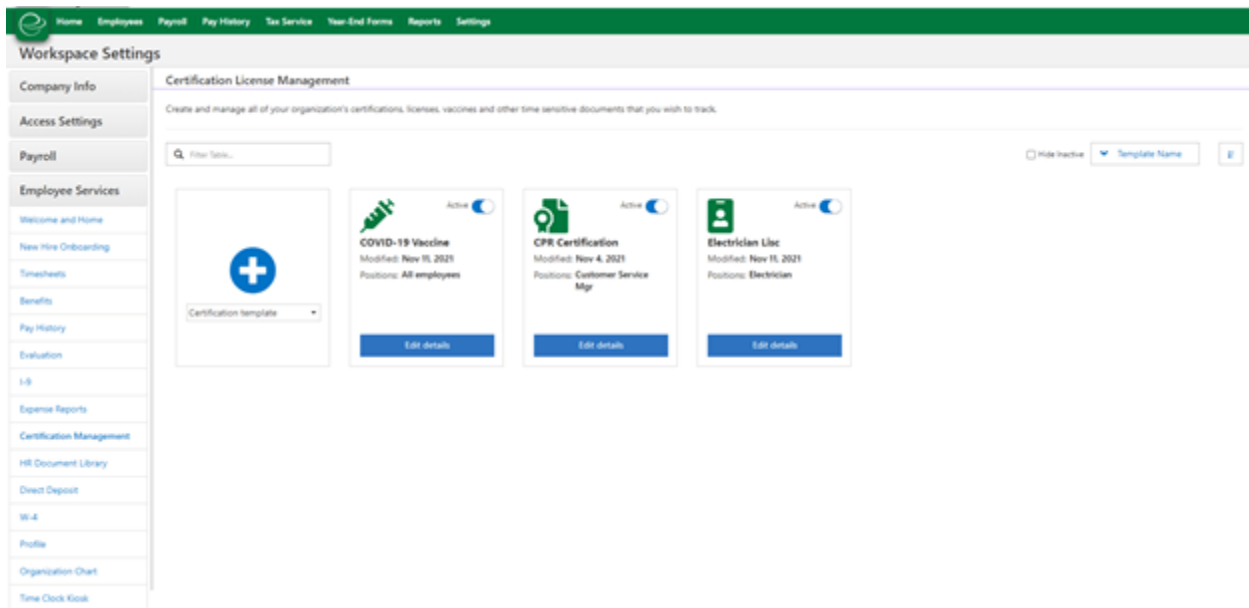


- **Configure notification settings**- the administrator is able to set notification settings for the administrators (email) and the employees (text or email). The days prior to expiry is configurable
- **Configure employee permissions**- administrators can allow the employee to update the documents via their Green Employee account. If they choose to turn this functionality off, then employees will not be able to update expired or expiring soon documentation. If administrators choose to leave this functionality on, they can also choose to turn on approvals prior to the document being clear/active.

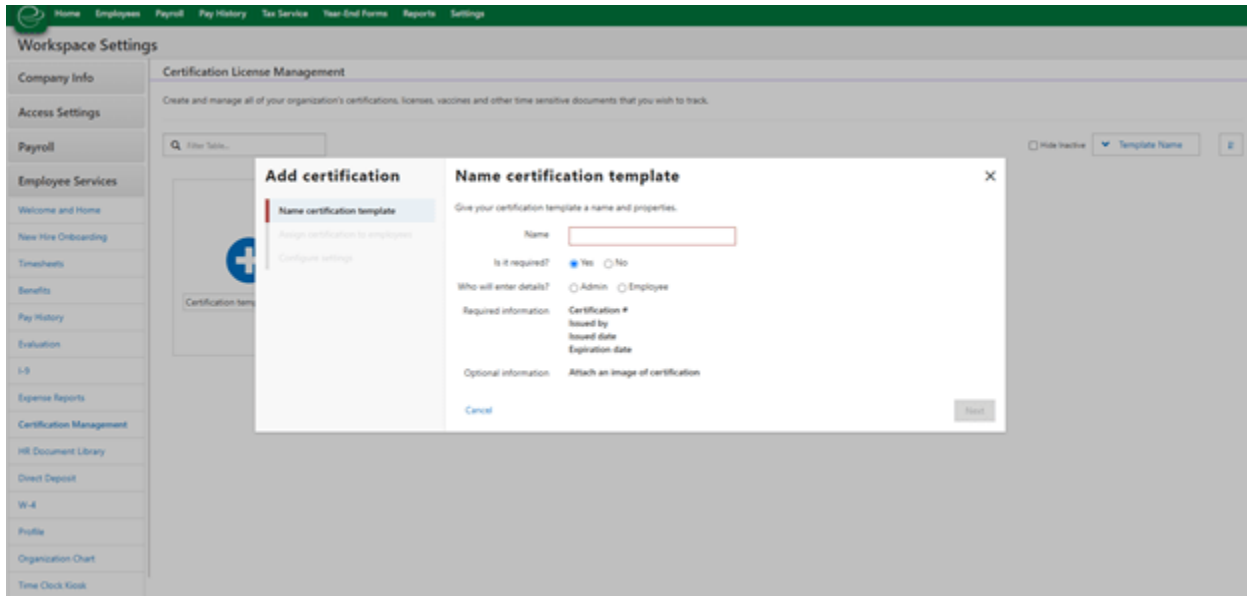
Navigation:

Greenshadesonline.com > Settings > Employee Services > Certification Management

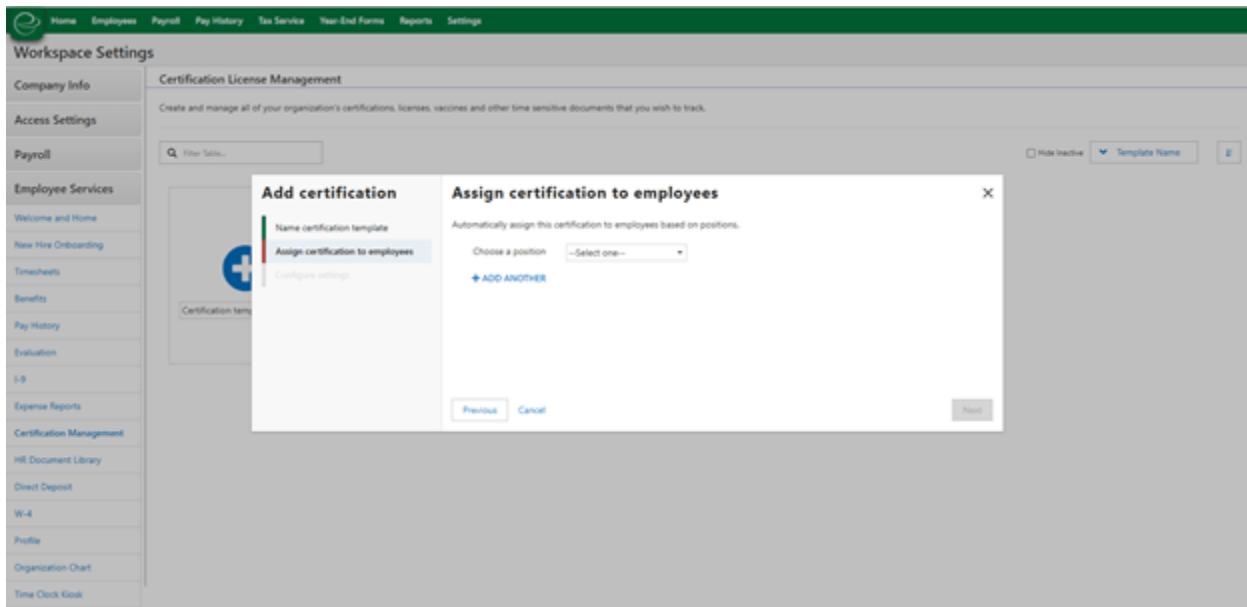
New Feature:



Should administrators choose to have the system automatically assign certifications to employees, they can do so via the template library. Here any template can be assigned to a given position(s) so that any current or future employees with that position will be assigned that certification. Administrators can choose to create a template of any certification type via the “+” button. Administrators will be asked to enter the following:



- **Certification Name-** the name of the certification
- **Is it required?-** administrator can mark whether or not the document is required for the employee to complete
- **Who will enter the details-** the administrator can choose to enter the details for the document themselves, or they can request the employee to enter the details on their Green Employee. Should they choose the employee, the employee will be notified via text or email that a new certification is available on Green Employee
- **Required/optional information-** this will display the required and optional information needed for the certificate.



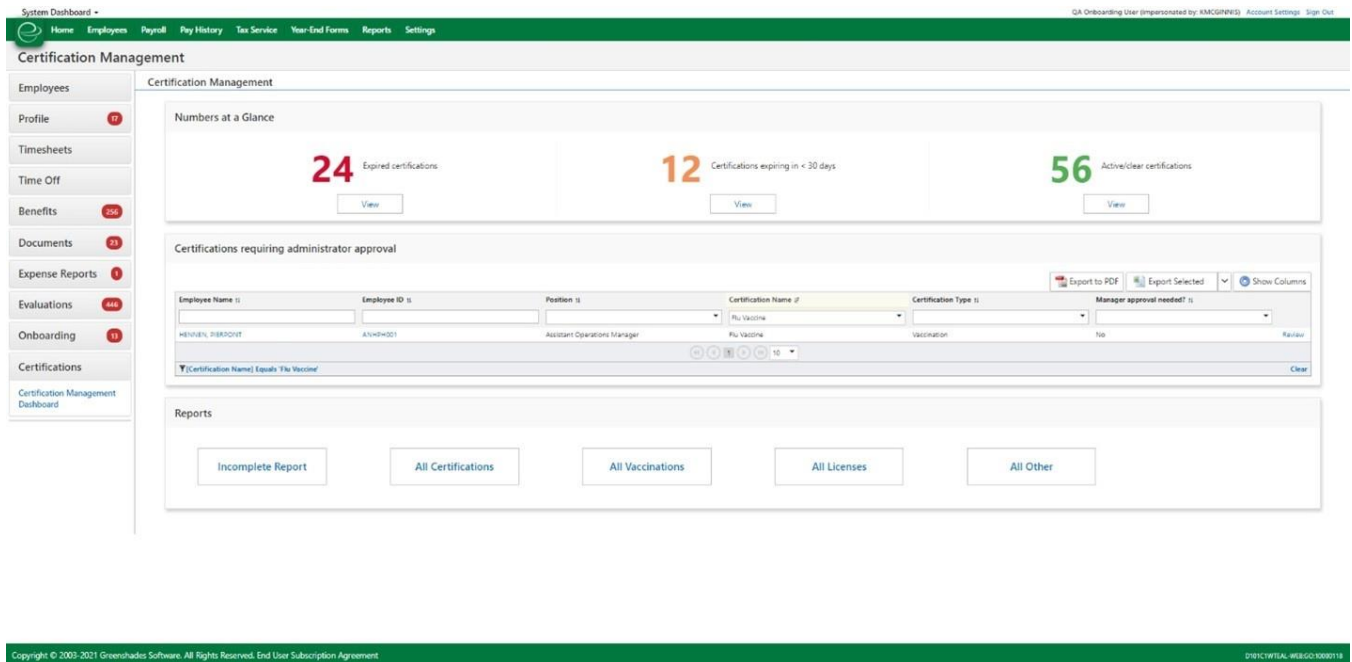
- **Choose a position**- any position chosen by the administrator will be automatically assigned the certification. The administrator can also choose 'all employees'.
- **Configure notification settings**- the administrator is able to set notification settings for the administrators (email) and the employees (text or email). The days prior to expiry is configurable
- **Configure employee permissions**- administrators can allow the employee to update the documents via their Green Employee account. If they choose to turn this functionality off, then employees will not be able to update expired or expiring soon documentation. If administrators choose to leave this functionality on, they can also choose to turn on approvals prior to the document being clear/active

Once the administrator saves the template, the system will automatically apply the template to any employee that meets the criteria.

Navigation:

Greenshadesonline.com > Employees > Certifications > Certification Dashboard

New Feature:



For a 360 degree view of their employee’s certification compliance, they can view the Certification Management Dashboard. At the top of the page displays high level insights into certification compliance. First, the administrator can see how many documents are currently expired. Second shows the number of documents that will expiry in the next 30 days, and third displays all active/clear documents in the Greenshades system. The administrator can select the view button to view a more detailed list of these documents. Administrators can see all documents that require their approval. Administrators can select view to be redirected to that document to review and either approve or deny. Administrator can open any report from the reports menu. This will open a report to show all certifications of all types in an incomplete status, all certifications (in any status), all vaccinations (in any status), all licenses (in any status), all other type (in any status). These report can be filtered, customized, and saved for future use.

Anticipated Release: 04-16-21

GREENSHADES ONLINE EMPLOYEE SERVICES

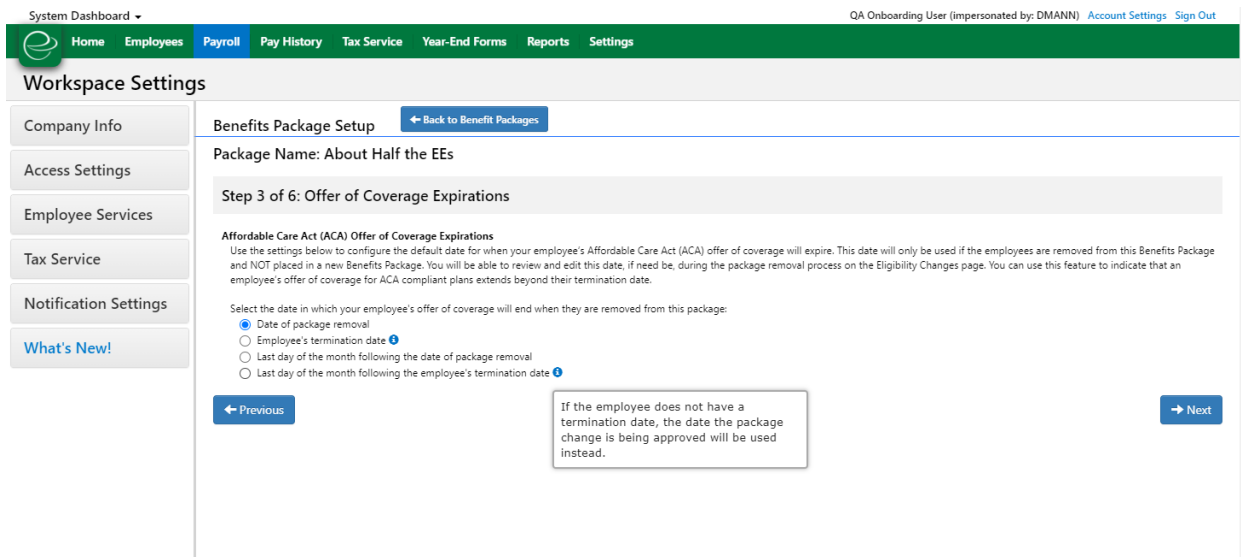
Navigation:

Greenshadesonline.com > Employees > Benefits > Eligibility Changes

Greenshadesonline.com > Settings > Benefits > Select a Benefit

Enhanced Feature:

Administrators are now able to select ACA coverage expiration dates for terminated employees that will be used to generate correct Line 14 and Line 16 codes on the employee's 1095-C. Previously, the ACA coverage expiration date was set by the system as the date the employee was removed from their benefit package during the termination process. This enhancement allows for configuration and administrator control over this date.



At an overarching level, the administrator can set the offer of coverage expiration date at the package level for any ACA eligible benefits in the package. The administrator can choose the date to be one of the following:

- Date of package removal
- Termination date
- Last day of month following package removal
- Last day of the month following termination date

Note: if termination date is not entered yet, the system will default to the date of package removal.

The screenshot displays the 'Employee Management' section of the GreenshadesOnline system. A modal window titled 'Affordable Care Act (ACA) Offer of Coverage Expirations' is open, providing instructions on how to adjust the ACA eligibility end date for employees. The modal includes a table with the following data:

Employee Name	Termination Date	Current Package	ACA Offer of Coverage End Date
NELIA	3/30/2017	About Half the EEs	3/31/2017
NELIA NICKEL	7/7/2020	About Half the EEs	7/31/2020

The modal also features 'Back' and 'Continue' buttons. In the background, a table lists pending benefit package changes for various employees, including TRION LANISTER, BOWMAN KASPAR, GUIDO MARCUS, and comma TEST.

The administrator will also be able to see and reset this date during the termination process. If they select a package change suggestion for an employee is being removed from a package due to termination, then they will be presented with a second page of the approval modal in which they will be able to see and/or edit the offer of coverage end date.

Anticipated Release: 03-30-21

Greenshades Online Workspace Exports













Overview

The Greenshades Payroll & HR Platform provides robust employee self-service capabilities that capture an employee’s vital tax and benefit information the moment they join the company. Through this, the platform captures key employee HR data that can be viewed and manipulated at a high level to reference your organization’s HR health. However, we understand that sometimes organizations desire a more detailed and analytical view of this information, especially against data that is not directly related to human resources—such as inventory and revenue—so that a total view of overall company health can be managed and understood. Therefore, we have created the ability to export workspace data in formats that can be manually imported into reporting and analytics software at both an on demand and recurring basis to give you and your organization a more wholistic view of its overall health and performance.

Reports in GreenshadesOnline

Workspace Data Exports

Generate workspace data files to export your employee’s information from Greenshades. Due to the size of these files, they may take a few minutes to generate. Files ready to download will be marked download.

Status	File Name	Created By	Available Until
 Ready for download.	Test 18 .csv 31 KB Generated: 03/26/2021 at 1:32 PM	QA Onboarding User	04/26/2021 at 1:32 PM 
 Ready for download.	Test 1 .xlsx 32 KB Generated: 03/26/2021 at 1:29 PM	QA Onboarding User	04/26/2021 at 1:29 PM 
 Ready for download.	Test 22 - Switch Up Test .xlsx 32 KB Generated: 03/26/2021 at 11:35 AM	QA Onboarding User	04/26/2021 at 11:35 AM 
 Ready for download.	Date + Time Picker Test .xlsx 14 KB Generated: 03/26/2021 at 11:32 AM	QA Onboarding User	04/26/2021 at 11:32 AM 
 Ready for download.	Test 22 - Switch Up Test .xlsx 32 KB Generated: 03/26/2021 at 11:25 AM	QA Onboarding User	04/26/2021 at 11:25 AM 
 Ready for download.	Date + Time Picker Test .xlsx 14 KB Generated: 03/26/2021 at 11:24 AM	QA Onboarding User	04/26/2021 at 11:24 AM 

GreenshadesOnline has introduced the ability to export large quantities of active employee demographic, employment, and paystub details from a workspace so that administrators have the ability to run additional analytics via excel or an analytics platform. On the Reports page, navigate to the new tab labeled “Workspace Data Exports”. Here, all of your downloadable data files will be available. The grid contains the following columns:

- **Status**- This will show the user that the data file is ready for download, or if it is about to expire. Files are available in Greenshades for one month after they are ready for download. However, the report can be refreshed via the Report Schedules tab on the page as well.
- **File Name**- This will be the name that the user manually inputs to name their file, the size of the file, the date it was generated, and the file type.
- **Created By**- The user that requested the file.
- **Available Until**- Due to the size of the files, an expiration date has been set to one month in the future. On this date, the file will no longer be available for download.

To download the file, the user can select the “download” icon on the far left of the grid. To delete the file, the user can select the trashcan button at the far right of the grid.

Creating a Workspace Export

Users can create a new data export schedule via the “Create New Data Export” button. This will open a modal for them to do the following:

Name Data File Details

The screenshot shows a modal window titled "Schedule New Data File" with a sidebar on the left and a main content area on the right. The sidebar contains four menu items: "Data File Details" (highlighted), "Choose Data File Content", "Set Permissions", and "Scheduling Options". The main content area is titled "Data File Details" and contains the following fields:

- File Name:** A text input field containing "Test 23 File".
- File type:** Two radio button options: "Excel file (.xlsx)" (selected) and "Comma Separated Value (.csv)".
- Date range:** A text label followed by the instruction: "Select the date range of the employee data you would like to include on your data file. Only employees with active status are included." Below this are five radio button options: "Last 7 Days" (selected), "Last 14 Days", "Last 30 Days", "Quarter to Date", and "Year to Date".

At the bottom of the modal, there are two buttons: "Cancel" on the left and "Next" on the right.

The user will first be asked to name their file, select their file type, and select the date range of data they wish to exist on the file. The data selected will pull any data employees that were active during any period of that timeframe.

Choose the Content of the File

Schedule New Data File

Data File Details

Choose Data File Content

Set Permissions

Scheduling Options

Choose Data File Content X

What content would you like to include?

- Personal Information**
Personal information includes things like employee gender, age, address, phone number, and SSN. A list of all available fields can be found on the employee's personal information card within GreenshadesOnline
- Employment Information**
Employment information includes things like employee hire date, position, department, and supervisor. A list of all available fields can be found on the employee's employment information card in GreenshadesOnline
- Pay Statement Details**
Employee pay statement details include things like net wages, gross wages, federal taxes, benefits, and deductions. This would include anything that would typically display on the employee's pay statement

Previous Cancel Next

The user will be able to include the following data sets to be included in their file:

- **Personal Information-** This is the information currently located on the employee personal information card. This includes the following fields:
 - SSN
 - Birth date
 - Gender
 - Phone 1
 - Phone 1 ext.
 - Phone 2
 - Phone 2 ext.
 - Phone 3
 - Phone 3 ext.
 - Marital status
 - Address 1
 - Address 2
 - Address 3
 - Military address
 - City
 - State
 - Zip
 - Country
- **Employment Information-** This is the information currently located on the employee employment information card. This includes the following fields:
 - Hire date
 - Rehire date
 - Term date
 - Email
 - Work location
 - Supervisor

- Department
- Position
- Division
- Class
- Employment status
- HR status
- Employment type
- Work hours per year
- User defined 1
- User defined 2
- ACA Full Time Status
- Pay Statement Details- This is the information available on the employee's pay statement. This includes the following fields:
 - Total hours/min
 - Hours/min per pay code
 - Gross pay
 - Earnings per pay code
 - Benefits total
 - Deductions total
 - Deductions per code
 - Benefits per code
 - Employee taxes
 - Employee taxes broken down by jurisdiction
 - SS employee taxes
 - MED employee taxes
 - Net pay
 - YTD net pay
 - Employer taxes
 - MED employer
 - SS employer
 - PR_sick change
 - PR_sick balance
 - PR_VAC change
 - PR_VAC balance

No matter what options the user chooses, the employee's first and last name, as well as the employee ID, will always be included.

Set Permissions

The screenshot shows a dialog box titled "Schedule New Data File" with a sidebar on the left containing three items: "Data File Details", "Choose Data File Content", and "Set Permissions" (which is highlighted). The main area is titled "Set Permissions" and contains the following text and options:

Who would you like to have access to this data file?

- Only me
- All super administrators in this workspace

Notify users when export is ready for download
Note: The notification will be sent to the email address of all users with access to this export

At the bottom, there are three buttons: "Previous", "Cancel", and "Next".

The user can either choose to have the export be available for only themselves, or for all super administrators within their workspace. They can also select if they would like an email notification to be generated once this file is available for download. This email will go out to all users that have access to the data file, so either you or all super administrators within your Greenshades system, depending on your permission selection.

Set Recurrence

The screenshot shows a dialog box titled "Schedule New Data File" with a sidebar on the left containing four items: "Data File Details", "Choose Data File Content", "Set Permissions", and "Scheduling Options" (which is highlighted). The main area is titled "Scheduling Options" and contains the following text and options:

Tell us when and how often you would like to receive this export.

How often would you like to receive this export?

- One time only
- Recurring
 - Daily
 - Weekly
 - Monthly
 - Yearly

Recur every week(s) on:

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Range of Recurrence

Start Date:

Report Time:

- End Date:
- End After occurrences
- No End Date

At the bottom, there are three buttons: "Previous", "Cancel", and "Generate Data Export".

The user will then have the ability to choose whether they want this file to be generated once, or generated on a recurring schedule. If they only want the report once, they can select {}. If they wish for this report to be automatically queued for them on a recurring schedule, they can select {}.

From there, the user can set the recurrence pattern (either Daily, Weekly, Monthly, or Yearly), when this report will start generating, and if/when it will end. Note, any report start times selected in the past will not generate. Instead, the report will generate on the next occurrence in the series.

Once the user selects the type of report they are looking for (one time, recurring), they can select “Generate Data Export” to generate their file and/or save their schedule.

Saved Data Export Schedules

Scheduled Exports
Data File Queue

Scheduled Exports

The below grid displays all of your scheduled and one-time workspace data exports. Select an export name to view the settings for that export. Once a data file is queued for download, it will appear in the data file queue tab, and then appear in the grid above when the file is ready for download.

+ Schedule New Data Export
Created By (All) ▼
Permissions (All) ▼
File Type (All) ▼
🔍

Export Name	Recurrence	Created On	Created By	Permissions	File Type	🗑️
Test 22 - Switch Up Test	Monthly, Day 26 Ends 12/31/2021	03/26/2021 10:54 AM	QA Onboarding User	Only Me	xlsx	🗑️
Date + Time Picker Test	One Time Only	03/25/2021 11:41 AM	QA Onboarding User	Only Me	xlsx	🗑️
Test 21 - Super Admins	Daily, Every Day 1 Occurrence	03/25/2021 4:30 PM	QA Onboarding User	Super Admins	xlsx	🗑️
Test 19 - Super Admins	One Time Only	03/25/2021 1:21 PM	QA Onboarding User	Super Admins	xlsx	🗑️
Test 20 Super admins	Weekly, Thursdays 1 Occurrence	03/25/2021 3:25 PM	QA Onboarding User	Super Admins	csv	🗑️
Test 18	Daily, Every Day 3 Occurrences	03/25/2021 12:37 PM	QA Onboarding User	Only Me	csv	🗑️
Test 1	Daily, Every Day No End Date	03/22/2021 11:18 AM	QA Onboarding User	Super Admins	xlsx	🗑️
Test 17 Quarter Date Range	Every 10 Months, Day 25 9 Occurrences	03/25/2021 10:34 AM	QA Onboarding User	Only Me	xlsx	🗑️
Test 16 Custom	Every 5 Years, On March 25 4 Occurrences	03/25/2021 10:32 AM	QA Onboarding User	Only Me	xlsx	🗑️
Test 15 Last 7 days	Daily, Every Day No End Date	03/25/2021 10:30 AM	QA Onboarding User	Only Me	xlsx	🗑️
Test 14 Every Weekday	Daily, Every Weekday 23 Occurrences	03/25/2021 10:26 AM	QA Onboarding User	Only Me	xlsx	🗑️
Test 13 Monthly	Weekly, Sundays, Mondays, Tuesdays, Wednesdays, Thursdays, Fridays, Saturdays Ends 04/02/2021	03/25/2021 10:25 AM	QA Onboarding User	Only Me	xlsx	🗑️
Test 12 Yearly	Every 2 Years, On March 25 0 Occurrences	03/25/2021 10:08 AM	QA Onboarding User	Super Admins	xlsx	🗑️

Any export that the user has created (or has been granted permission to) can be seen under the “Scheduled Exports” tab. This will include both one time and recurring exports. The user can search the grid for any report via the keyword filter, or they can filter via the filters at the top of the grid.

In the grid, the following information is available:

- **Export Name:** The name the user gave the report upon its creation
- **Recurrence:** Denotes whether this was a one time data file creation, or if it is recurring
- **Created On:** The date the user created the export schedule
- **Created By:** The user that created the export
- **Permissions:** The user or users that have access to the export
- **File Type:** The type of file requested. This will either be by .xlsx or .csv

At the far right of the grid, there is a refresh icon. The user can select the refresh icon at any time to automatically generate a new data file from that export. The file generated will be available in the data file grid, and will contain all the information based on the requirements for that export. To the far right of the grid, a user can delete a schedule at any time via the trashcan icon.

Data File Queue

Scheduled Exports | **Data File Queue**

Data File Queue

Once you have scheduled your data exports, they will appear here in your queue as they begin processing. You'll be able to see all queued exports here until they are ready for download, where they will appear above.

Status	File Name	Created By	Permissions	File Type
Errored	Scheduled test 1	Default Contact Name for Old Croc Environment Reports	Only Me	xlsx
Errored	Notif Test 2	Default Contact Name for Old Croc Environment Reports	Super Admins	xlsx
Errored	Notification Testing All Super Admins	Default Contact Name for Old Croc Environment Reports	Super Admins	xlsx

Once a data file is either manually or automatically queued for download, it will appear in the “Data File Queue” with a process of “Pending” or “Queued”. Once the file is fully processed and ready for download, it will be moved to the files grid at the top of the page.

If a file errors for any reason, it will remain in this grid with a status of “Errored”. A user can requeue the report by selecting the refresh icon to the far left of the line, or they can remove the error from the grid via the “X” icon.

Downloading Your Report for Analytics

Workspace Data Exports

Generate workspace data files to export your employee's information from Greenshades. Due to the size of these files, they may take a few minutes to generate. Files ready to download will be marked download.

Status	File Name	Created By	Available Until
Ready for download.	Test 18 .csv 31 KB Generated: 03/26/2021 at 1:32 PM	QA Onboarding User	04/26/2021 at 1:32 PM
Ready for download.	Test 1 .xlsx 32 KB Generated: 03/26/2021 at 1:29 PM	QA Onboarding User	04/26/2021 at 1:29 PM
Ready for download.	Test 22 - Switch Up Test .xlsx 32 KB Generated: 03/26/2021 at 11:35 AM	QA Onboarding User	04/26/2021 at 11:35 AM
Ready for download.	Date + Time Picker Test .xlsx 14 KB Generated: 03/26/2021 at 11:32 AM	QA Onboarding User	04/26/2021 at 11:32 AM
Ready for download.	Test 22 - Switch Up Test .xlsx 32 KB Generated: 03/26/2021 at 11:25 AM	QA Onboarding User	04/26/2021 at 11:25 AM
Ready for download.	Date + Time Picker Test .xlsx 14 KB Generated: 03/26/2021 at 11:24 AM	QA Onboarding User	04/26/2021 at 11:24 AM

All downloadable files are available in the top grid on the page. These files can be downloaded and stored locally to generate analytics dashboards.

For more information on how to hook up your data files to PowerBI, read:

<https://docs.microsoft.com/en-us/power-bi/connect-data/service-excel-workbook-files>

For more information on how to hook up your data files to SolverBI, read:

<https://www.solverglobal.com/data-integration/csv/>

Anticipated Release: 02-01-21

GREENSHADES ONLINE EMPLOYEE SERVICES

Navigation:

Greenshadesonline.com > Settings > Evaluations

New Feature:

Name	Description
Filter	Filter
Edit Download test	test
Edit Download test	test
Edit Download save Test	test
Edit Download Final Dev Test	Making sure it all works
Edit Download Another eval applicability test	Eval applicability test
Edit Download Add New Eval	Test App filter
Edit Download Eval Testing applicability filter	Testing applicability filter
Edit Download Sprint 13 Test	Ticket #569335 test
Edit Download testing save	test
Edit Download 2021 Sprint Testing	Take I

Administrators are now able to download evaluation responses as an excel file from Greenshades Online. Users can select the new “download” button next to the evaluation template name, and this will download an excel file of all the completed evaluations for that template. On the excel file, each tab represents a version of the evaluation that was completed for the employees. Versions are created when an administrator edits and saves a template. If no responses were found for a given version, then that version will not be included in the download.

Anticipated Release: 01-19-21

GREENSHADES ONLINE EMPLOYEE SERVICES

Navigation:

Greenshadesonline.com > Reports

New Feature:

The screenshot shows the 'Reports' section of the GreenshadesOnline interface. It features a navigation bar at the top with options like Home, Employees, Payroll, Pay History, Tax Filing Center, Year-End Forms, Reports, and Settings. The main content area includes a 'Reports' overview with a circular chart showing 123 Total Employees and a 'Payroll cost' of \$9,888.44. Below this, there are two detailed charts: 'Employees by position' and 'Payroll cost breakdown'. The 'Employees by position' chart shows: No Position (29), Pos 1 Dep A Non exempt Salary (27), Pos 2 Dep A Non exempt Hourly (20), Pos 2 Dep B Non Exempt Hourly (13), Pos 1 Dep B Non exempt Salary (13), and Other (21). The 'Payroll cost breakdown' shows: Employee Net Pay (\$5,702.81), Benefits (\$709.00), Employer Taxes (\$640.98), Employee Taxes (\$2,007.91), and Deductions (\$767.74). At the bottom, there is a 'Workspace Data Exports' section with a 'Create New Data Export' button and a table of available export files.

Download Status	File Name	Created Time	Expiration Time	Accessible by	File Type	File Size
Errored	All Employees	01/15/2021	02/15/2021	Only Me	xlsx	0 B
Download	Only Me	01/15/2021	02/15/2021	Only Me	xlsx	19 KB
Download	Super admins	01/15/2021	02/15/2021	Super Admins	xlsx	28 KB
Download	Super admins 2	01/15/2021	02/15/2021	Super Admins	xlsx	28 KB
Errored	Date range 2016-2021	01/15/2021	02/15/2021	Super Admins	xlsx	183 KB
Download	EE report only me	01/15/2021	02/15/2021	Only Me	xlsx	27 KB
Download	Only for Arvin	01/15/2021	02/15/2021	Only Me	xlsx	28 KB
Download	Test refresh of page 1	01/15/2021	02/15/2021	Only Me	xlsx	85 KB
Download	All data	01/18/2021	02/18/2021	Super Admins	xlsx	81 KB
Download	All data report	01/18/2021	02/18/2021	Super Admins	xlsx	58 KB
Download	All data - date range 2016-2021	01/18/2021	02/18/2021	Only Me	xlsx	183 KB
Download	Comma delimited all data	01/18/2021	02/18/2021	Only Me	xlsx	183 KB
Download	comma delimited test	01/18/2021	02/18/2021	Super Admins	csv	23 KB

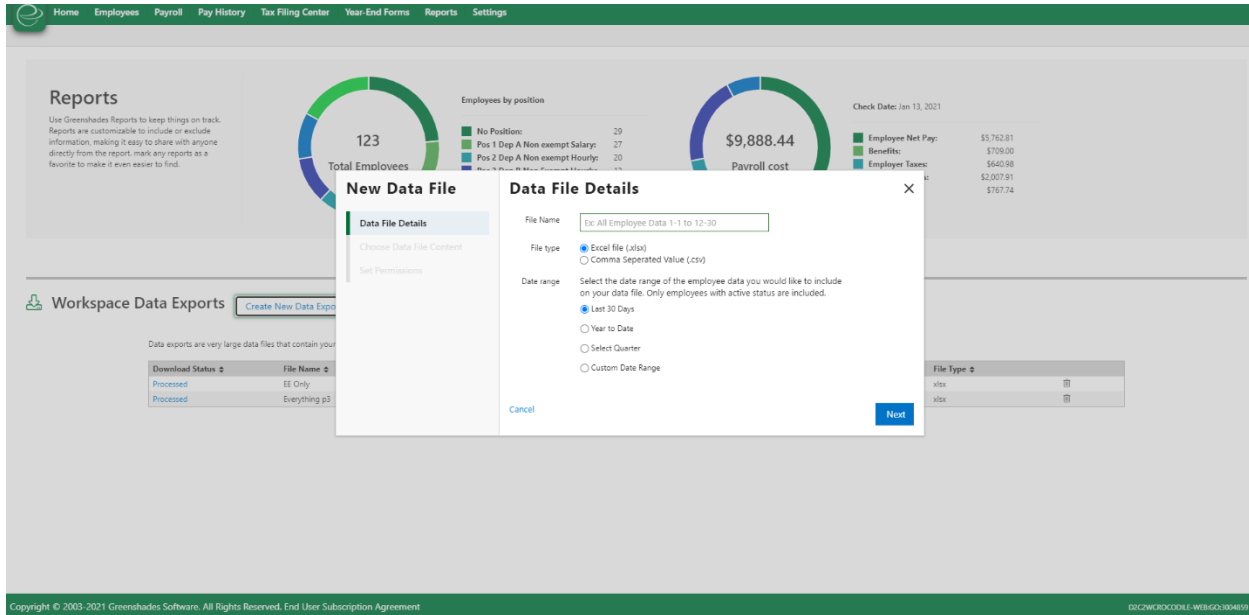
GreenshadesOnline has introduced the ability to export large quantities of active employee demographic, employment, and paystub details from a workspace so that administrators have the ability to run additional analytics via excel or an analytics platform. On the Reports page, navigate to the new tab labeled “Workspace Data Exports”. Here, all of your accessible data exports will be available for download. The grid contains the following columns:

- **Download Status**- Any file that has been requested, but the system is still processing the file will be a status of ‘Queued’. Any file available for download will be in a status of “Download”, and users can select “Download” to download their file. If a file was unable to process for any reason, the status of “Error” will appear.
- **File Name**- This will be the name that the user manually inputs to name their file.
- **Created Time**- The date the file was created.
- **Expiration Time**- Due to the size of the files, an expiration date has been set to one year in the future. On this date, the file will no longer be available for download.
- **Accessible By**- Users can choose to make a file available for just themselves or for all administrators within their organization. If they chose to just have the file available for themselves, this column will display “only me”. If they would like all super administrators to have access to the file, this will read “Super Admins”.
- **File Type**- The file type of the file. This will either be .xlsx or .csv.

- **File Size-** The size of the file

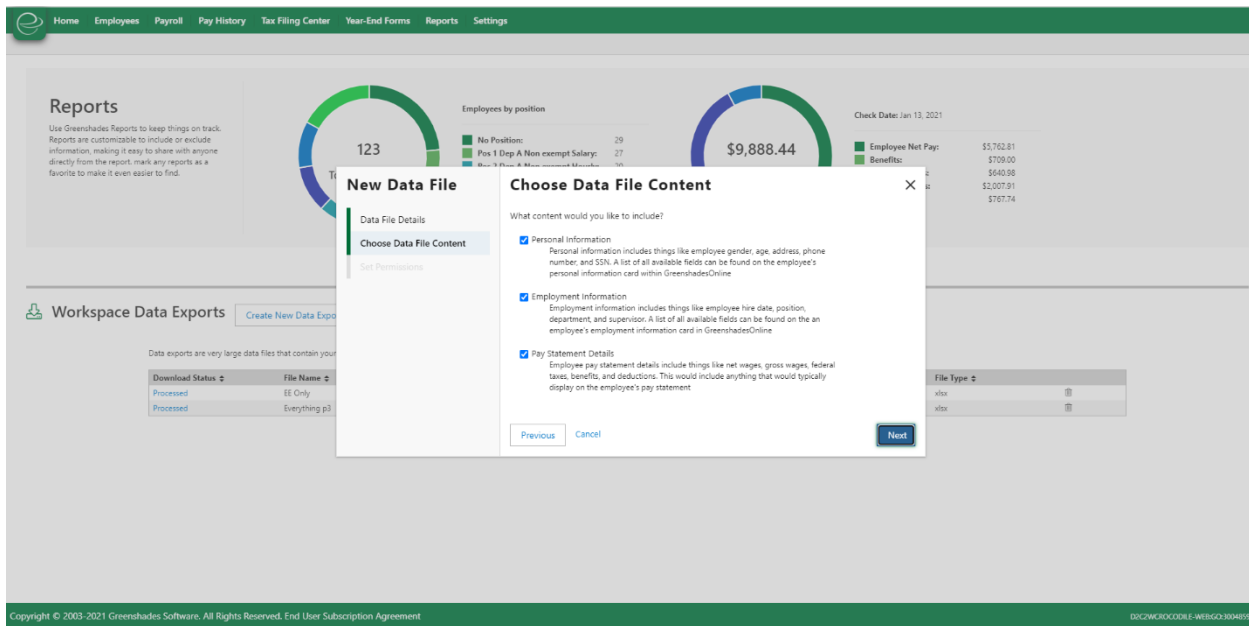
Users can create new data exports via the “Create New Data Export” button. This will open a modal for them to do the following:

Name Data File Details



The user will first be asked to name their file, select their file type, and select the date range of data they wish to exist on the file. The data selected will pull any data employees that were active during any period of that timeframe.

Choose the Content of the File



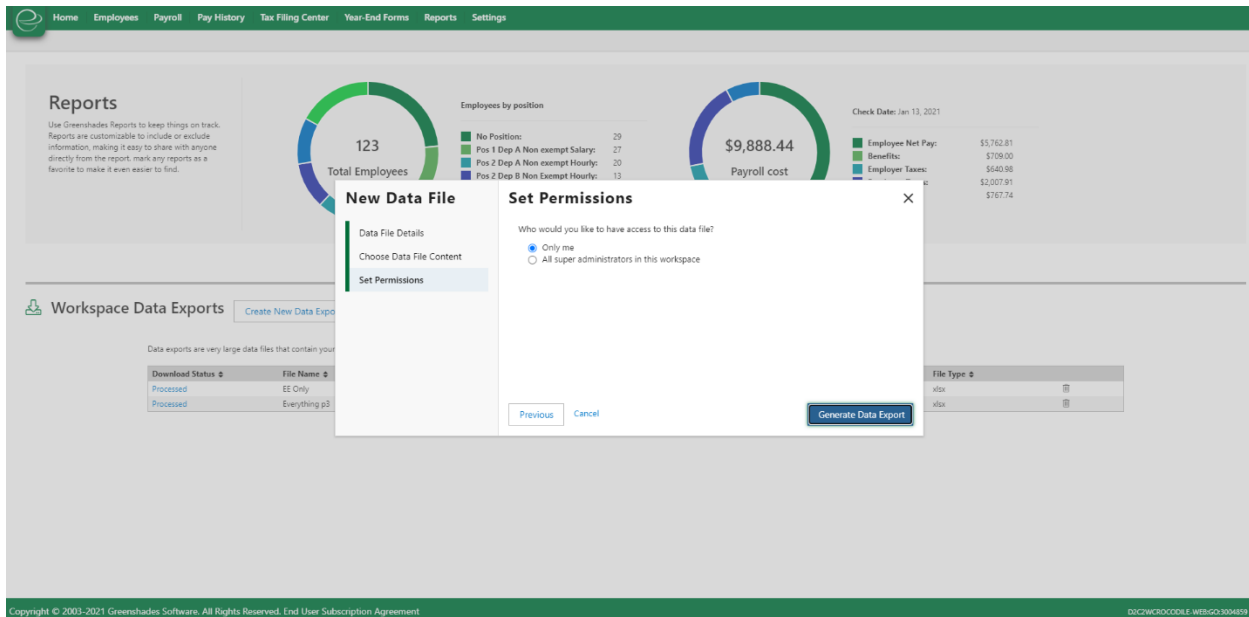
The user will be able to include the following data sets to be included in their file:

- **Personal Information-** This is the information currently located on the employee personal information card. This includes the following fields:
 - SSN
 - Birth date
 - Gender
 - Phone 1
 - Phone 1 ext.
 - Phone 2
 - Phone 2 ext.
 - Phone 3
 - Phone 3 ext.
 - Marital status
 - Address 1
 - Address 2
 - Address 3
 - Military address
 - City
 - State
 - Zip
 - Country
- **Employment Information-** This is the information currently located on the employee employment information card. This includes the following fields:
 - Hire date
 - Rehire date
 - Term date
 - Email
 - Work location
 - Supervisor

- Department
- Position
- Division
- Class
- Employment status
- HR status
- Employment type
- Work hours per year
- User defined 1
- User defined 2
- ACA Full Time Status
- Pay Statement Details- This is the information available on the employee's pay statement. This includes the following fields:
 - Total hours/min
 - Hours/min per pay code
 - Gross pay
 - Earnings per pay code
 - Benefits total
 - Deductions total
 - Deductions per code
 - Benefits per code
 - Employee taxes
 - Employee taxes broken down by jurisdiction
 - SS employee taxes
 - MED employee taxes
 - Net pay
 - YTD net pay
 - Employer taxes
 - MED employer
 - SS employer
 - PR_sick change
 - PR_sick balance
 - PR_VAC change
 - PR_VAC balance

No matter what options the user chooses, the employee's first and last name, as well as the employee ID, will always be included.

Set Permissions



The user can either choose to have the export be available for only themselves, or for all super administrators within their workspace.

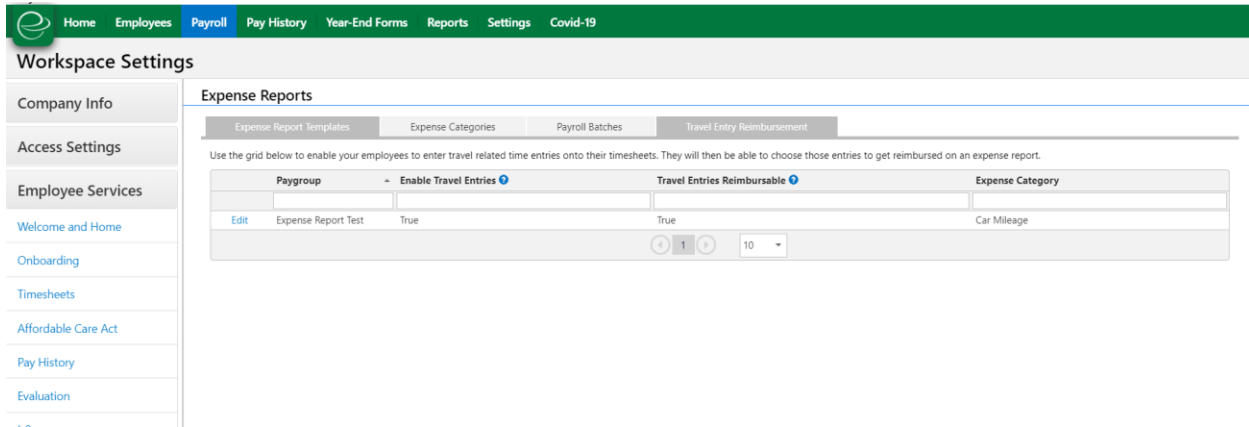
Once the user has set all of their details for the data export, they can select “Generate Data Export”. This will queue the export for download. Once the file is ready, the file status will be changed from “Queued” to “Download”.

Anticipated Release: 11-03-20

GREENSHADES ONLINE EMPLOYEE SERVICES

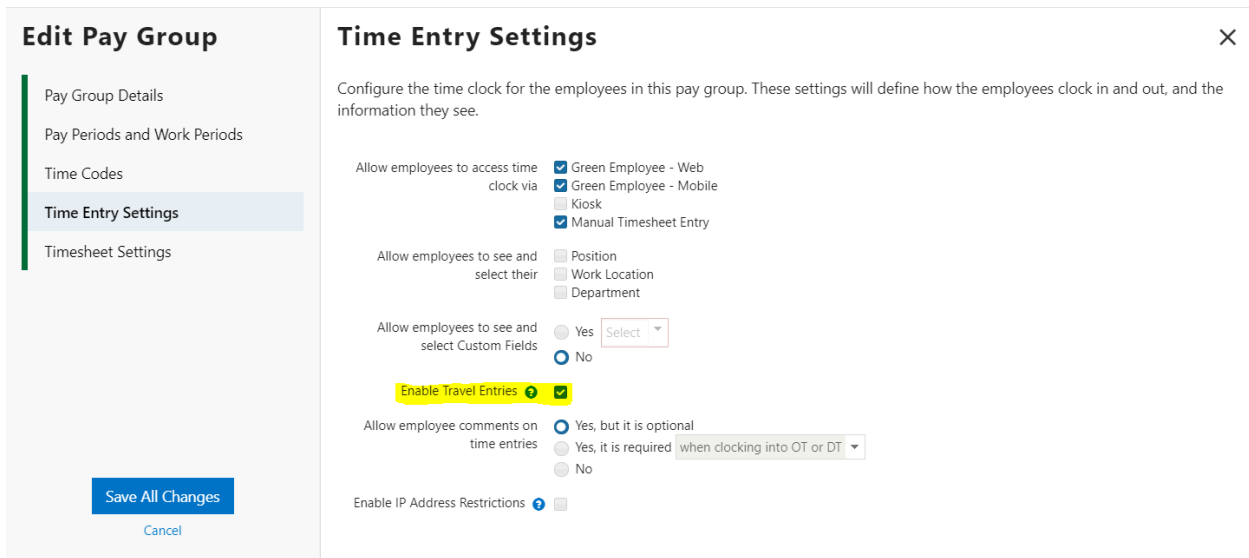
Navigation:

Greenshadesonline.com > Settings > Employee Services > Expense Reports



New Feature

Administrators are now able to set up travel time entries as reimbursable through expense reports. A few months ago, the concept of travel time entries was introduced to GreenshadesOnline and GreenEmployee. Travel entries are entries on an employee’s timesheet that includes any mileage traveled during that time entry. This is done during the Pay Group set up for Timesheets.



Administrators can view all Pay Group travel entry set up on the new “Travel Entry Reimbursement” tab under the Expense Report settings. Administrators can edit each Pay Group to enable employees to see and enter travel entries in timesheets, enable travel entries to be reimbursed through expense reports, and set up an expense category for those travel entries. The expense category that is chosen will account for what business expense pay code the reimbursement will be paid out on. If the administrator enables travel entries for a pay

group, then the employees in that pay group will be able to enter travel mileage with their time entry. If the administrator also enables travel entries to be reimbursable for that pay group, then employees in that pay group will be able to add those travel entries onto an expense report for reimbursement.

The screenshot displays the 'Workspace Settings' interface. The top navigation bar includes 'Home', 'Employees', 'Payroll', 'Pay History', 'Year-End Forms', 'Reports', 'Settings', and 'Covid-19'. The left sidebar lists various settings categories: 'Company Info', 'Access Settings', and 'Employee Services'. The main content area is titled 'Expense Reports' and features sub-tabs for 'Expense Report Templates', 'Expense Categories', 'Payroll Batches', and 'Travel Entry Reimbursement'. Below the tabs, a text instruction reads: 'Use the grid below to enable your employees to enter travel related time entries onto their timesheets. They will then be able to choose those entries to get reimbursed on an expense report.' The grid has the following structure:

	Paygroup	Enable Travel Entries	Travel Entries Reimbursable	Expense Category
Update Cancel	Expense Report Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Car Mileage

At the bottom of the grid, there are pagination controls showing '1' and '10'.

Anticipated Release: 11-03-20

GREENSHADES ONLINE EMPLOYEE SERVICES

Navigation:

Greenshadesonline.com > Reports > HR Management Reports

The screenshot shows the 'Terminated Employee Report' page. At the top, there is a navigation bar with links: Home, Employees, Payroll, Pay History, Tax Filing Center, Year-End Forms, Reports, and Settings. Below the navigation bar, the page title is 'Terminated Employee Report'. On the left, there is a section titled 'List of terminated employees and their related information' with a sub-section 'Select the date range you would like to view' containing radio buttons for 'Last 30 Days', 'Year to Date' (selected), 'Select Quarter', and 'Custom Date Range'. To the right of this is a search and filter area with a 'Keyword Filter' input field and dropdown menus for 'Position (All)', 'Location (All)', and 'Department (All)'. Below this is a table of terminated employees with columns: Employee Name, Employee ID, Hire Date, Termination Date, Position, Location, and Department. The table contains three rows of data.

Employee Name	Employee ID	Hire Date	Termination Date	Position	Location	Department
KIMMY GEBURSKI	AFSJ0301	03/05/2014	03/02/2020	POS14	PRIMARY	DESA
ZERO ROBINCHALUK	ANHC0001	03/14/2017	03/02/2020	POS26	SECONDARY	DESB
Jack Pettigrew	AFSJ0001	08/23/2018	10/30/2020	POS1A	PRIMARY	2500
John Snow	123456	12/04/2018	10/30/2020	POS1A	PRIMARY	2500

New Feature

Administrators are now able to see and download a Terminated Employee Report from Greenshades Online. This report allows administrators to view all terminated employees within a given timeframe.

GREENSHADES ONLINE BENEFITS

Navigation:

Greenshadesonline.com > Employees > ACA Dashboard

New Feature

Administrators are now able to download their 2020 1095-C information from Greenshades Online. This template includes the additional fields to support the Health Reimbursement Arrangement (HRA) enhancements added to the 2020 1095-C. For more information on the new fields for the 1095-C, visit <https://www.irs.gov/instructions/i109495c>.

Anticipated Release: 10-20-20

GREENSHADES ONLINE EMPLOYEE SERVICES

Navigation:

GreenshadesOnline.com > Reports

Enhanced Feature

Welcome to the new and improved Reports page! Here, you can browse all the available Greenshades reports and logs based on category, view high level metrics, favorite your most used reports, and even customized some canned reports so they contain only the relevant information you are looking for.

Reports

Use Greenshades Reports to keep things on track. Reports are customizable to include or exclude information, making it easy to share with anyone directly from the report, mark any reports as a favorite to make it even easier to find.



66
Total Employees

Employees by position

- Pos 2 Dep A Non exempt Hourly: 25
- Pos 1 Dep A Non exempt Salary: 18
- Pos 2 Dep B Non Exempt Hourly: 12
- Pos 1 Dep B Non exempt Salary: 11



\$2,000.00
Payroll cost

Check Date: Mar 4, 2018

Employee Net Pay:	\$2,000.00
Benefits:	\$0.00
Employer Taxes:	\$0.00
Employee Taxes:	\$0.00
Deductions:	\$0.00

Greenshades Reports Customized Reports Workspace Logs

- ### Favorite Reports
- ★ **All Statements Report** Summary of all checkstubs and direct deposit earnings statement data.
 - ★ **Benefit and Deduction Report** Shows your payroll benefits and deductions for a given date range.
 - ★ **Code Assignments Report** The Code Assignments report shows all payroll codes currently assigned to employees.
 - ★ **Employee Arrears Report** Provides a list of employee arrears during a specific pay run.
 - ★ **Garnishment Post Pay Run Report** Provides a list of employee garnishments during a specific pay run.
 - ★ **Timesheet Transaction Report** A list of all edits made to employee time entries.

- 📄 **Payroll**
- 👤 **HR Management**
- 🕒 **Time & Attendance**

Benefits

- ☆ **Beneficiary Changes Log** Provides a list of all beneficiary changes made by employees during enrollment.
- ☆ **Benefit Synchronization Log** Provides a list of benefit information that have or will be synced to your accounting package.
- ☆ **Current Benefit Synchronization Log** This report lists the employees' elections that are queued to be synced to your payroll package.
- ☆ **Election History Report** A historical report of employee election Benefit Effective and Payroll dates, Employee and Employer Rates as of 2020.
- ☆ **Eligibility and Enrollment Report** Dynamic Report builder of employee benefit eligibility and enrollment.
- ☆ **Employee ACA Affordability Change Log** Includes information about the health insurance cost which were adjusted to be considered Affordable under the Affordable Care Act.
- ☆ **Employee ACA Full-Time Determination Report** Each employee's latest full-time determination, measurement period, and stability period.
- ☆ **Employee Benefit Package Log** Provides a list of the current benefit package for each employee.
- ☆ **Historical Benefit Synchronization Log (Excel Download)** A report of historical selections sent to your payroll package.
- ☆ **New Hire Event Log** A list of all new hire events, their dates, and their status.
- ☆ **Removed Benefit Synchronization Log (Excel Download)** A report of historical selections that were removed from this grid instead of being sent to your payroll package.

👤 **Benefits At-A-Glance**

\$0.00
YTD Employer Benefit Cost

49.21%
Open Enrollment Participation Rate



At the top of the page, you can view two graphical metrics for your organization and the employees you have access to. The first metric displays an employee headcount per position, while the second report displays your payroll cost for your most recent pay period.

Greenshades Reports

The reports page is now broken up into three tabs—Greenshades reports, Customized Reports, and Workspace Logs. Greenshades reports lists out all available ‘canned’ reports that Greenshades offers our clients. These reports are separated out into the following sections: Payroll, HR Management, Time and Attendance, and Benefits. If you and your organization do not own any of the above modules for Greenshades, then you may not have access to one or more of these sections.

The following high level metrics are provided for each section in the ‘At-A-Glance’ section:

- **YTD Payroll Cost-** This number is the total cost of your pay runs for the current calendar year
- **Total Employer Tax Liabilities-** Total amount of employer tax liabilities for the current calendar year
- **Employee Headcount-** The total number of active employees in your organization
- **YTD Turnover Rate-** The total number of employees that have terminated during this calendar year divided by the average number of employees this year
- **YTD Overtime Cost-** Total cost of overtime pay codes for the current calendar year
- **Hours Logged per Employee this Week-** Total hours that have been submitted through time entries by your employee’s for this week starting Monday
- **YTD Employer Benefit Cost-** Total cost associated with benefit codes for this current calendar year
- **Open Enrollment Participation Rate-** Amount of employees that have participated (waived or submitted) in open enrollment during the enrollment time frame for the most active Open Enrollment in Greenshades

Favoriting Reports

The screenshot shows the 'Reports' section of the Greenshades Online interface. At the top, there is a navigation bar with 'Home', 'Employees', 'Payroll', 'Pay History', 'Year-End Forms', 'Reports', and 'Settings'. A notification banner states 'Code Assignments Report has been added to your favorites!'. Below the navigation bar, the 'Reports' section features two circular gauges: 'Total Employees' (66) and 'Payroll cost' (\$2000). The 'Employees by position' table is as follows:

Position	Count
Pos 2 Dep A Non exempt Hourly	25
Pos 1 Dep A Non exempt Salary	18
Pos 2 Dep B Non Exempt Hourly	12
Pos 1 Dep B Non exempt Salary	11

The 'Payroll cost' table is as follows:

Category	Amount
Employee Net Pay	\$2,000.00
Benefits	\$0.00
Employer Taxes	\$0.00
Employee Taxes	\$0.00
Deductions	\$0.00

Below the gauges, there are tabs for 'Greenshades Reports', 'Customized Reports', and 'Workspace Logs'. The 'Favorite Reports' section lists three reports with green star icons:

- All Statements Report: Summary of all checkstubs and direct deposit earnings statement data.
- Benefit and Deduction Report: Shows your payroll benefits and deductions for a given date range.
- Code Assignments Report: The Code Assignments report shows all payroll codes currently assigned to employees.

The 'Payroll' section also lists the first two reports and includes a 'Payroll At-A-Glance' widget showing a total payroll cost of \$0.00 YTD.

Users are now able to favorite their most recent or most used reports. On the reports home page, simply select the green star next to any report to add it to your favorites list. You can also favorite a report on the report itself by opening up any report and selecting the green star next to the report name. To remove a report from this list, simply deselect a green star and the report will be removed from the favorites section.

Customized Reports

For some of the newer Greenshades reports where users can apply filters and add columns to reports, any customizations can now be saved for that user. Once the user applies the customization, they will see a new button labeled "Save Customization". This will allow the user to name the report and add a custom description. The report will then be saved to that user's custom reports section with all the filters and columns applied.

Hours Breakdown Report

This report shows your wage breakdown for any given date range. Select the range you would like to see or filter the table as needed.

Hours Breakdown Report

Date Range: 01/01/2020 - 10/13/2020



Save Customization

Select the date range or check date you would like to view

- Last 30 Days
- Year to Date
- Select Quarter
- Custom Date Range
- Select Check Date

Keyword Filter

Employee ID	Employee Name	Regular Pay	OT	DT	Vacation	Sick	Holiday	Other	Total Hours
AFSHF001	FEKETE HOLDA	240.00	48.68	68.30	67.30	0.00	0.00	0.00	424.28
INHGM001	MARCUS GUIDO	160.00	26.56	0.00	3.86	0.00	0.00	0.00	190.42
AFSAE001	STATS ARTHUR	160.00	0.00	77.25	43.31	0.00	0.00	0.00	280.56
ANHH001	DEMOS HASIM	160.00	36.00	69.99	30.74	0.00	0.00	0.00	296.73
ANHF001	KIKER FINLAY	160.00	7.80	0.00	0.00	0.00	0.00	0.00	167.80
INHBB001	BASKIN BIDDY	160.00	0.00	63.37	0.00	0.00	0.00	0.00	223.37
AFSKS001	STEFFEY KEMBLE	160.00	54.63	12.63	46.34	0.00	0.00	0.00	273.60
ANHHM001	MESSICK HEDWIG	160.00	2.97	71.57	0.00	0.00	0.00	0.00	234.54
INRR001	RUMBAUGH RUFUS	160.00	48.10	0.00	79.57	0.00	0.00	0.00	287.67
AFSEG001	GARRETT DELWOOD	160.00	71.88	26.18	0.00	0.00	0.00	0.00	258.06
AFSM001	PATNODE MAC	160.00	57.16	53.14	8.42	0.00	0.00	0.00	278.72
AFHKE001	ESPINOZA KARTIKEYA	240.00	70.96	12.16	97.18	0.00	0.00	0.00	420.30
INHVA001	AKER VERGES	160.00	41.04	52.19	8.74	0.00	0.00	0.00	261.97
INHAT001	TALLMAN ABHA	160.00	64.13	23.26	65.63	0.00	0.00	0.00	313.02
JMJM002	Test Jeff	160.00	0.00	74.29	0.00	0.00	0.00	0.00	234.29
LUFFY001	Luffy Monkey D.	160.00	0.00	64.87	74.23	0.00	0.00	0.00	299.10
TEST.01	Test comma	160.00	0.00	35.53	0.00	0.00	0.00	0.00	195.53
ANHRK001	KROPF RENEE	210.00	97.83	59.16	35.67	0.00	0.00	0.00	402.66
AFSJA001	APPEL JOCK	160.00	40.42	76.26	0.00	0.00	0.00	0.00	276.68
IFSHL001	LUCAS HARLEIGH	160.00	43.26	7.23	67.51	0.00	0.00	0.00	278.00
ANHEK001	KIKER ERNESTINE	160.00	25.38	60.60	43.95	0.00	0.00	0.00	289.93
ANHC001	BROGAN CRAIG	160.00	0.00	78.45	16.03	0.00	0.00	0.00	254.48

Hours Breakdown Report

This report shows your wage breakdown for any given date range. Select the range you would like to see or filter the table as needed.

Hours Breakdown Report

Date Range: 01/01/2020 - 10/13/2020



Save Customization

Select the date range or check date you would like to view

- Last 30 Days
- Year to Date
- Select Quarter
- Custom Date Range
- Select Check Date

Keyword Filter

Save Customized Report

Save your customizations to this report for future use. Each time you visit this report, your filters and columns will be automatically applied. You will be able to make additional customizations once this report is saved, or you can save a different customization of this report.

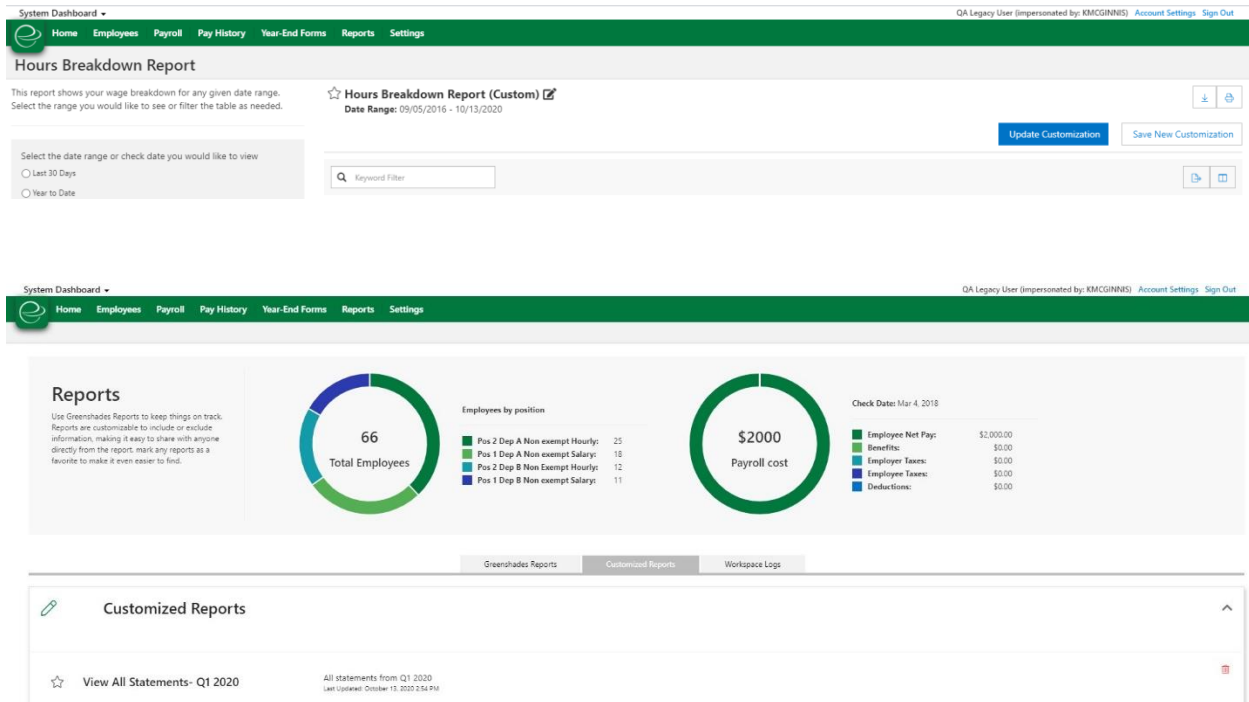
Name:

Notes:

Employee ID	Employee Name	Regular Pay	OT	DT	Vacation	Sick	Holiday	Other	Total Hours
JMJM002	Test Jeff	160.00	0.00	74.29	0.00	0.00	0.00	0.00	234.29
LUFFY001	Luffy Monkey D.	160.00	0.00	64.87	74.23	0.00	0.00	0.00	299.10
TEST.01	Test comma	160.00	0.00	35.53	0.00	0.00	0.00	0.00	195.53
ANHRK001	KROPF RENEE	210.00	97.83	59.16	35.67	0.00	0.00	0.00	402.66
AFSJA001	APPEL JOCK	160.00	40.42	76.26	0.00	0.00	0.00	0.00	276.68
IFSHL001	LUCAS HARLEIGH	160.00	43.26	7.23	67.51	0.00	0.00	0.00	278.00
ANHEK001	KIKER ERNESTINE	160.00	25.38	60.60	43.95	0.00	0.00	0.00	289.93
ANHC001	BROGAN CRAIG	160.00	0.00	78.45	16.03	0.00	0.00	0.00	254.48



Users can access any of these saved reports from their Reports homepage. They can update the name at any time via the edit icon next to the report name. They can also update the information shown for that report, or save a new customization that will create a new report for them to access at a later date.



Users are also able to delete any custom reports that they no longer need by selecting the trashcan icon. This will remove the report from their list.

Customization is available for the following reports at this time:

- Hours Breakdown Report
- Wage Breakdown Report
- Liabilities per Employee Report
- Employee Demographic Report (Platform clients only)
- Tax and Wage Summary Report
- All Statements Report
- Benefit and Deduction Report
- Liability Report

Workspace Logs

This section displays all administrator and employee access and account log for the workspace. No new reports were added to this section, however a few report names were updated to better reflect the information they represent.

Anticipated Release: 09-29-20

GREENSHADES ONLINE EMPLOYEE SERVICES

Navigation:

GreenshadesOnline.com > Employees > Personal Information

Enhanced Feature

Information	Gender	Male
Login	Cell Phone	0000000000
Pay Settings	Cell Phone Extension	
Notes	Home Phone	0000000000
Personal	Home Phone Extension	
Information	Fax Number	0000000000
Dependents	Fax Number Extension	
Contacts	Marital Status	N/A
Pay History	Address Line 1	4843 MIDDLE FREEWAY
Timesheets	Address Line 2	
Time Off	Address Line 3	
Benefits	Military Address	<input checked="" type="checkbox"/>
Documents	City	APO - Air/Army Post Office
Evaluations	State	AA - Armed Forces of the Americas
	Zip Code	19942
	Country	United States

Employees and administrators are now able to enter military addresses within GreenshadesOnline and GreenEmployee. Administrators are able to mark any given address as a military address and be able to select the appropriate military state. Should an administrator enable a military address indicator within Profile settings, an Employee will also be able to mark their address as a military address to then select the military state.

Anticipated Release: 09-15-20

Greenshades Online Employee Services

Navigation:

Greenshadesonline.com > Pay History > Wage Breakdown Report

Greenshadesonline.com > Pay History > Hours Breakdown Report

Greenshadesonline.com > Pay History > Pay Run Register Report

Greenshadesonline.com > Pay History > Liabilities per Employee Report

New Feature

The screenshot shows the 'Hours Breakdown Report' page in the Greenshades Online system. The top navigation bar includes Home, Employees, Payroll, Pay History, Tax Filing Center, Year-End Forms, Reports, and Settings. The main heading is 'Hours Breakdown Report'. Below the heading, there is a description: 'This report shows your wage breakdown for any given date range. Select the range you would like to see or filter the table as needed.' To the left, there are radio button options for date range selection: 'Last 30 Days' (selected), 'Year to Date', 'Select Quarter', 'Custom Date Range', and 'Select Check Date'. The main content area features a 'Keyword Filter' search box and a table with columns: Employee ID, Employee Name, Regular Pay, OT, DT, Vacation, Sick, Holiday, Other, and Total Hours. The table lists various employees with their respective pay and hours data.

Employee ID	Employee Name	Regular Pay	OT	DT	Vacation	Sick	Holiday	Other	Total Hours
EMP005		0.00	14.25	0.00	0.00	0.00	0.00	0.00	14.25
EMP013		158.00	14.25	0.00	0.00	0.00	0.00	0.00	172.25
EMP001		0.00	26.25	0.00	0.00	0.00	0.00	0.00	26.25
EMP011		160.00	28.50	0.00	0.00	0.00	0.00	0.00	188.50
EMP006		0.00	19.50	0.00	0.00	0.00	0.00	0.00	19.50
AFHEW001	WORKS, ELDRED	173.37	0.00	0.00	0.00	0.00	0.00	0.00	173.37
AFHKE001	ESPIN OZA, KARTIKEYA	86.68	0.00	0.00	0.00	0.00	0.00	0.00	86.68
AFSAE001	ESTATUS, ARTHUR	173.37	0.00	0.00	0.00	0.00	0.00	0.00	173.37
AFSBA001	ACEVES, BURDONELL	86.68	0.00	0.00	0.00	0.00	0.00	0.00	86.68
AFSBD001	ABCDEF, BOWMANE	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
AFSDK001	KROPF, DANAE	86.68	0.00	0.00	0.00	0.00	0.00	0.00	86.68
AFSDM001	MCSWEENEY, DOREEN	86.68	0.00	0.00	0.00	0.00	0.00	0.00	86.68
AFSDG001	GARRETT, DELWOOD	166.68	0.00	0.00	0.00	0.00	0.00	0.00	166.68
AFSER001	HALDERMAN, KARNSA	166.68	0.00	0.00	0.00	0.00	0.00	0.00	166.68
AFSES001	STURDIVANT, Potaeo	166.68	0.00	0.00	0.00	0.00	0.00	0.00	166.68
AFSFM001	MESSICK, FALLON	126.68	0.00	0.00	0.00	0.00	0.00	0.00	126.68
AFSGF001	FONT, GIUSEPPINA	80.00	0.00	0.00	0.00	0.00	0.00	0.00	80.00
AFSH001	SPOPHN, HARLEIGH	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Administrators are now able to print and download a download-friendly version of the Greenshades report. Downloading will download a PDF version of the report to the user's browser, and printing will open the browser print preview so the user can print the report.

Navigation:

Greenshadesonline.com > Employees > Benefits > Open Enrollment > Review

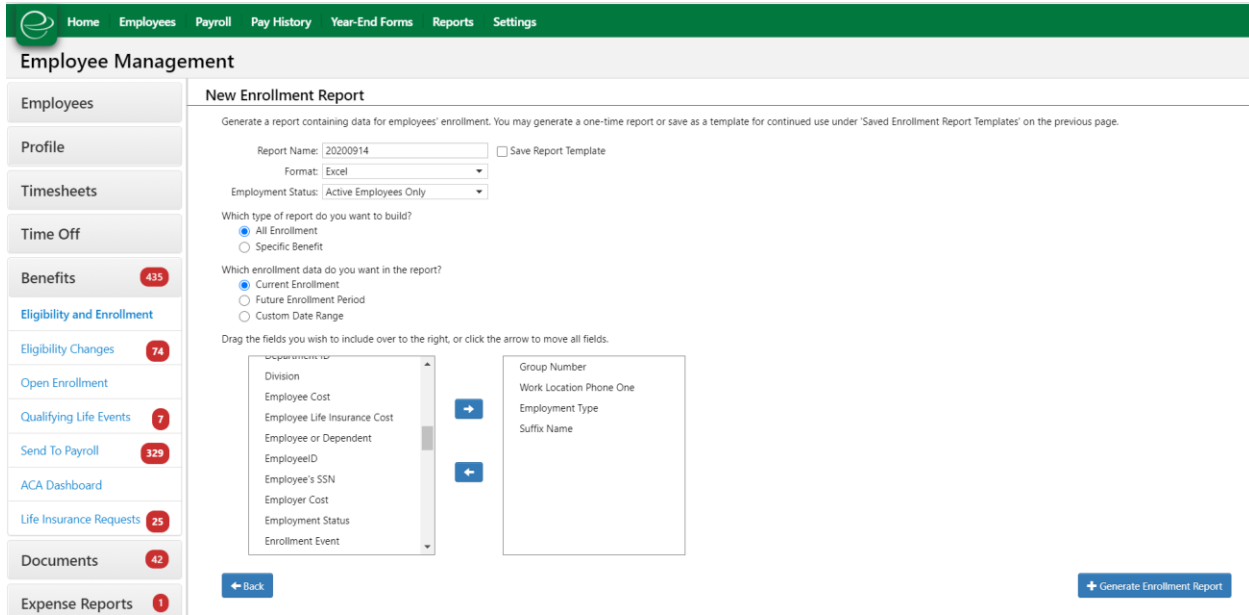
Enhanced Feature

Administrators are now able to see a 'dependent type' listed next to a dependent's name should they have been enrolled into a benefit during Open Enrollment. This will allow for better visibility for administrator during the Open Enrollment review process.

Navigation:

Greenshadesonline.com > Employees > Benefits > Eligibility and Enrollment > Enrollment Report

Enhanced Feature



Administrators are now able to pull the following fields onto an enrollment report: Group Number, Work Location Phone, Employment Type, Suffix Name.

Navigation:

Greenshadesonline.com > Reports > Employee Demographic Report

New Report

Employee Demographic Report
Date Range: 08/15/2020 - 09/14/2020

Select the date range you would like to view

- Last 30 Days
- Year to Date
- Select Quarter
- Custom Date Range

Keyword Filter: _____ Age (All) Ethnic Origin (All) Gender (All)

First Name	Last Name	Employee ID	Age	Ethnic Origin	Gender
BOWMANE	ABCDEF	AFSBK001	29	Mix Races	Male
KARZNSA	HALDERMAN	AFSER001	35	N/A	Male
HARLEIGH	SPOPHN	AFSH001	75	N/A	Male
HOLDA	FEKETE	AFSHF001		N/A	N/A
HARTWIN	TERRONES	AFSHT001	35	N/A	Male
JOCK	APPEL	AFSJA001	70	N/A	Male
Zoro	Roronoa	ZORO001	22	N/A	N/A
Onboarding4	zzTester	ZZTESTONBOARD4	29	N/A	Male
Agent0001	zzTester	ZZZ0001	49	N/A	Male
New Hire Enrollment	Tester	NHETEST001	19	N/A	N/A
JC	zzTester	ZZTEST221	34	N/A	N/A
Monkey D.	Luffy	LUFFY001	26	N/A	N/A
Chopper	Tony Tony	CHOP001	19	N/A	N/A
George	Tuber	AFSGT001	29	N/A	N/A
Kim	Morris	AFSKM001	19	N/A	N/A
Willie	Obern	AFSWO001	20	N/A	Male
JAMES	APPLE	APPLE	27	N/A	Male

Platform administrators are now able to see and download an Employee Demographic Report. This report will display demographic information about any active employees during a given time period. This includes information about employee age, race, job classification, position, and marital status. Administrators can filter this information based on date and a plethora of other filter fields depending on the information they choose to display in the report. This report will only be available for clients who run payroll using the Greenshades Platform.

Anticipated Release: 09-01-20

Greenshades Online Employee Services

Navigation:

Greenshadesonline.com > Settings > Employee Services > I-9

Enhanced Feature

When setting up an E-verify account, administrators are now able to submit a PDF document of the signature page of the Memorandum of Understanding.

Anticipated Release: 08-31-20

Timesheet Settings Refresh, Pay Group Updates, Custom Fields, and Travel Time Entries

Timesheet Settings Refresh

We have updated Timesheet Settings with a new look and feel:

Timesheets

Pay Groups Time Codes IP Filters Holiday Schedules Custom Fields

Pay Group Management

Pay Groups are a grouping of employees with similar settings and other characteristics related to timesheets and time entry.

Filter Table... [+ Create Pay Group](#)

Pay Group Name	Pay Frequency	Default Time Code	
Boston Staff	Bi-Weekly	Salary	Manage Employees
New York Staff	Bi-Weekly	Hourly	Manage Employees
Miami Staff	Monthly	Hourly	Manage Employees
Denver Staff	Weekly	Lunch	Manage Employees

Time Code Management

Edit, add, or remove time codes using the tools below.

Filter Table... [+ Create Time Code](#) [Show Columns](#)

Title	Code Type	Pay Code	Overtime Code	Time Clock
Holiday	Holiday	HOLI		false
Hourly	Hourly	HOUR	OT	true
Lunch	Other	HOUR		false

IP Filters

These settings allow you to restrict your employees' use of the Time Clock widget to only certain IP addresses, or to block certain IP addresses. The most common use of this is to add your company Wi-Fi to the Whitelist, which prevents employees from clocking in unless they are connected to that Wi-Fi network. Please note that this only applies to the Time Clock function on the GreenEmployee.com homepage; it does not restrict employees from creating manual timesheet entries.

Whitelist (Your Current IP:192.169.10.239)

Filter Table... [+ Add IP Filter](#)

IP	Added By	Notes
1.1.1.1		test

Holiday Schedules

Select a Holiday Schedule from the dropdown to view associated holidays

Schedule: Standard [+ Create New Schedule](#)

Filter Table... [+ Add Holiday](#)

Name	Start Date - End Date	Date Created
New Year's Day	1/1/2020 - 1/1/2020	9/12/2018
Martin Luther King Jr Day	1/20/2020 - 1/20/2020	9/12/2018
President's Day	2/17/2020 - 2/17/2020	9/12/2018

Custom Fields

Custom Fields can be utilized to create unique fields associated to pay groups and time entries.

Filter Table... [+ Add Custom Field](#)

Name	Field Type	Status
Acct ID	Text	Active

All grids throughout Timesheet Settings can be further filtered using the search bar provided. To edit any item on a grid, click the name of the item.

Pay Group Updates

Pay Group Creation Wizard

There is a new flow for creating and editing Pay Groups. We have reorganized the settings so your options are better arranged. Administrators will also use the new Pay Group modal for employee assignment.

The screenshot shows the 'Create Pay Group' modal with the 'Pay Group Details' step selected. The modal title is 'Create Pay Group' and the sub-header is 'Pay Group Details'. A sidebar on the left lists the steps: 'Pay Group Details', 'Pay Periods and Work Periods', 'Time Codes', 'Time Entry Settings', and 'Timesheet Settings'. The main content area is titled 'Pay Group Details' and contains the instruction: 'In order to create this new pay group, please provide us with some basic information.' Below this are four fields: 'Pay Group Name' (text input with 'Atlanta Staff'), 'Pay Schedule' (dropdown menu with 'Weekly'), 'Holiday Schedule' (dropdown menu with 'System'), and 'Time Off Policy' (dropdown menu with 'Default Policy'). At the bottom left is a 'Cancel' button and at the bottom right is a 'Next' button. The modal is set against a background showing a calendar grid with 'weekly', 'Bi-Weekly', and 'Hourly' labels.

Clients using Greenshades Payroll will select a Pay Schedule from the dropdown. This will bring over the relevant Pay Schedule details automatically.

The screenshot shows the 'Create Pay Group' modal with the 'Pay Periods and Work Periods' step selected. The modal title is 'Create Pay Group' and the sub-header is 'Pay Periods and Work Periods'. A sidebar on the left lists the steps: 'Pay Group Details', 'Pay Periods and Work Periods', 'Time Codes', 'Time Entry Settings', and 'Timesheet Settings'. The main content area is titled 'Pay Periods and Work Periods' and contains the instruction: 'Tell us how your pay periods and work periods are currently set up for this pay group.' Below this is a note: 'Note: These settings cannot be changed once the pay group has been created.' The settings include: 'Pay Schedule' (Weekly), 'Pay Frequency' (Weekly dropdown), 'Next Pay Period Start' (Date: 04/10/2020, Time: 12:00 AM), 'Work Period Start' (Day: Monday, Time: 05:20 AM), and 'OT/DT Threshold' (radio buttons for 'FLSA Normal Work Period', 'FLSA Special Circumstances', 'FLSA Normal Work Period w/ Custom Threshold', and a checkbox for 'Email Users When Threshold Exceeded?'). On the right side, there is a 'Pay Period Calculation Checker' section with the question 'Do these pay periods look correct?' and a list of six pay periods: 04/10/2020 12:00 AM to 04/16/2020 11:59 PM, 04/17/2020 12:00 AM to 04/23/2020 11:59 PM, 04/24/2020 12:00 AM to 04/30/2020 11:59 PM, 05/01/2020 12:00 AM to 05/07/2020 11:59 PM, 05/08/2020 12:00 AM to 05/14/2020 11:59 PM, 05/15/2020 12:00 AM to 05/21/2020 11:59 PM, and 05/22/2020 12:00 AM to 05/28/2020 11:59 PM. At the bottom left are 'Previous' and 'Cancel' buttons, and at the bottom right is a 'Next' button.

For clients using a different accounting package, simply enter the relevant information.

Create Pay Group

Pay Group Details
Pay Periods and Work Periods
Time Codes
Time Entry Settings
Timesheet Settings

Time Codes

Tell us which time codes apply to this pay group. Set the default time codes and shift durations for regular and holiday shifts, including lunch breaks, if applicable.

Time Codes: 4 Time Codes selected
Holiday, Hourly, Lunch, OT
 Employees will only see codes assigned to them

Default Time Code: Regular: Hourly, Holiday: Holiday

Default Shift Duration: Regular: 8 Hours, Start Time: 05:20 AM, Holiday: 8 Hours

Include lunch breaks and display "Lunch" button on time clock
Time Code: Lunch
Lunch Duration: 1 hrs, 0 mins
 Show warning on timesheet when duration exceeded
 Show warning on time clock for missed lunch breaks for shifts over 0 hrs and 0 mins

Previous Cancel Next

Administrators will be able to determine all Time Code related settings on this screen. Additional lunch options are available if "Include lunch breaks and display 'Lunch' button on time clock" is enabled.

Create Pay Group

Pay Group Details
Pay Periods and Work Periods
Time Codes
Time Entry Settings
Timesheet Settings

Time Entry Settings

Configure the time clock for the employees in this pay group. These settings will define how the employees clock in and out, and the information they see.

Allow employees to access time clock via:
 Green Employee - Web
 Green Employee - Mobile
 Kiosk
 Manual Timesheet Entry

Allow employees to see and select their:
 Position
 Work Location
 Department

Allow employees to select multiple:
 Work Locations

Allow employees to see and select Custom Fields:
 Yes Acct ID
 No

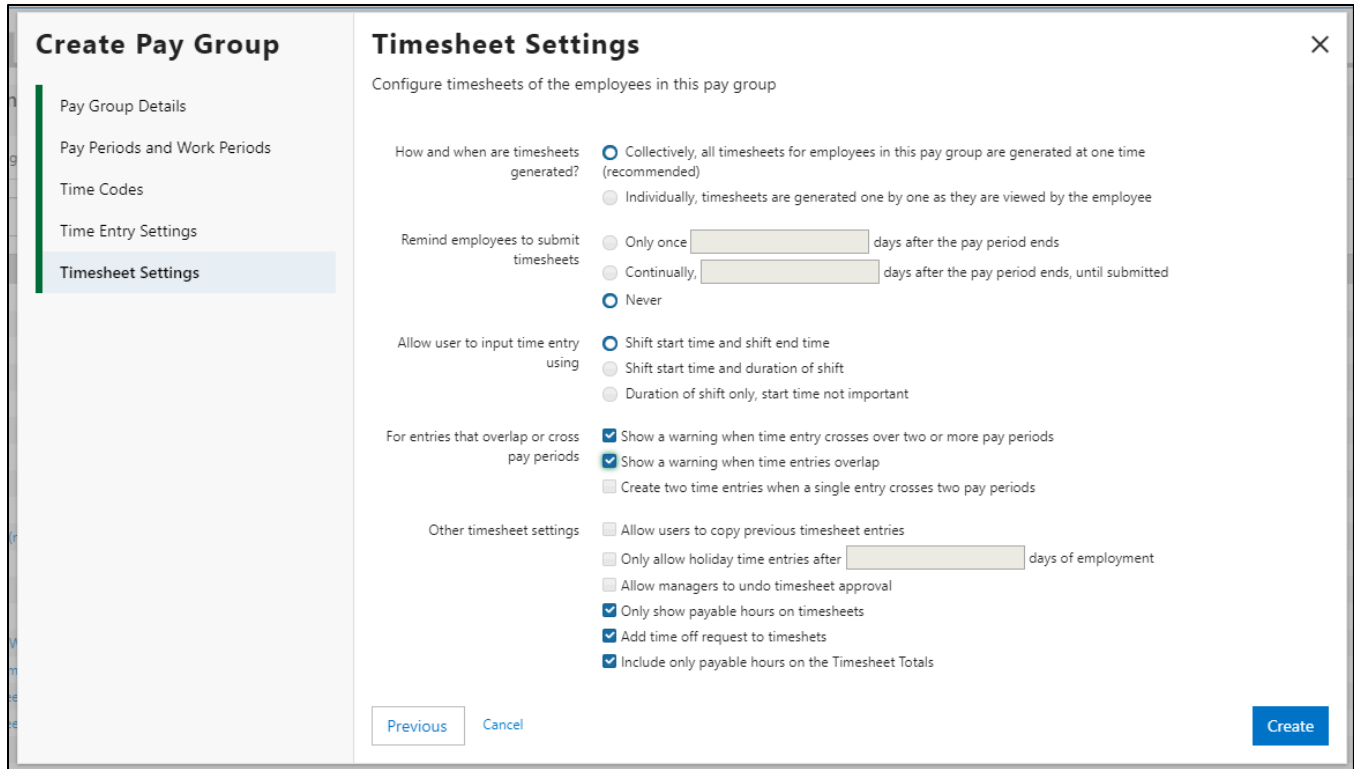
Enable Travel Entries:

Allow employee comments on time entries:
 Yes, but it is optional
 Yes, it is required when clocking into OT or DT
 No

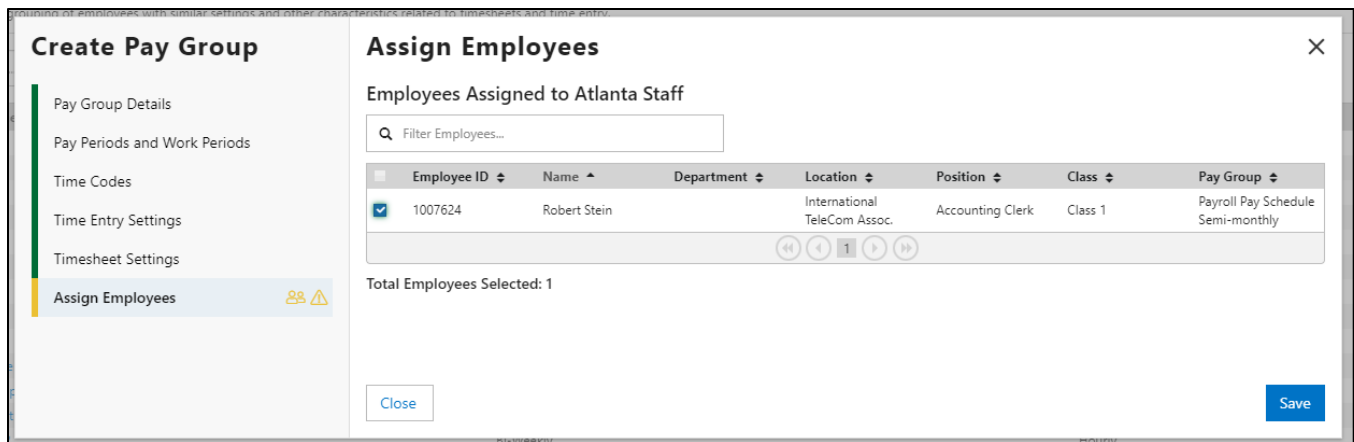
Enable IP Address Restrictions:

Previous Cancel Next

All time entry settings are now grouped to make the options easier to understand. The settings for the newly added Custom Fields and Travel Entries features are on the Time Entry Settings screen.



Similarly, we have also grouped the timesheet-related settings so they're easier to understand as well.



When creating a Pay Group for the first time, administrators will see the Assign Employees screen. This will allow them to add employees to the newly added Pay Group but is not a necessary step for Pay Group creation.

After a Pay Group exists, administrators can assign employees using the Manage Employees link.

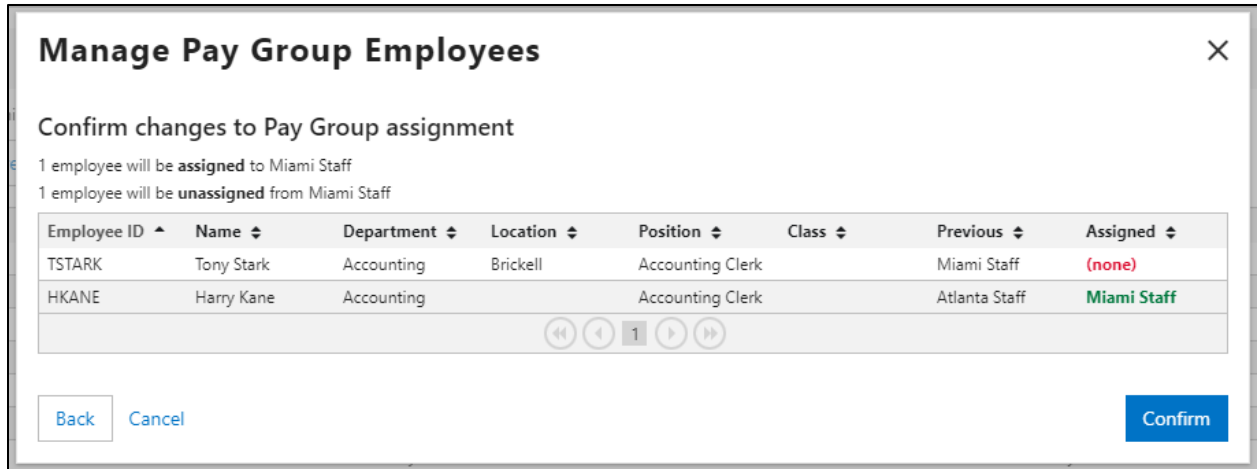
Employee Management

Administrators can now assign or unassign employees from a Pay Group using the new Manage Pay Group Employees screen.

<input type="checkbox"/>	Employee ID	Name	Department	Location	Position	Class	Pay Group
<input type="checkbox"/>	RSMITH	Rebecca Smith	Accounting	Home Office	Administrative Assistant		Atlanta Staff
<input checked="" type="checkbox"/>	TSTARK	Tony Stark	Accounting	Brickell	Accounting Clerk		Miami Staff
<input checked="" type="checkbox"/>	RBARATHEON	Robert Baratheon	Sales	Brickell	Inside Sales Representative		Miami Staff
<input type="checkbox"/>	SSMITH	Sam Smith	Accounting		Accounting Clerk		Atlanta Staff
<input type="checkbox"/>	HKANE	Harry Kane	Accounting		Accounting Clerk		Atlanta Staff
<input checked="" type="checkbox"/>	EFONER	Eric Foner	Accounting	Brickell	Field Sales Representative		Miami Staff
<input type="checkbox"/>	DPOTTER	David Porter			Accounting Clerk		New York Staff
<input type="checkbox"/>	NARMSTRONG	Neil Armstrong	Developer		Senior Developer		Boston Staff

This grid will display any applicable employees who could be assigned to the Pay Group. For users of Greenshades Payroll, this grid will be automatically filtered based on the Pay Schedule tied to the Pay Group.

Before making anything final, administrators will have a chance to review the changes they have made. Administrators will be able to see how many employees have been assigned or unassigned from the Pay Group. They will also see more details about the updated employees, including their previous and new Pay Group.

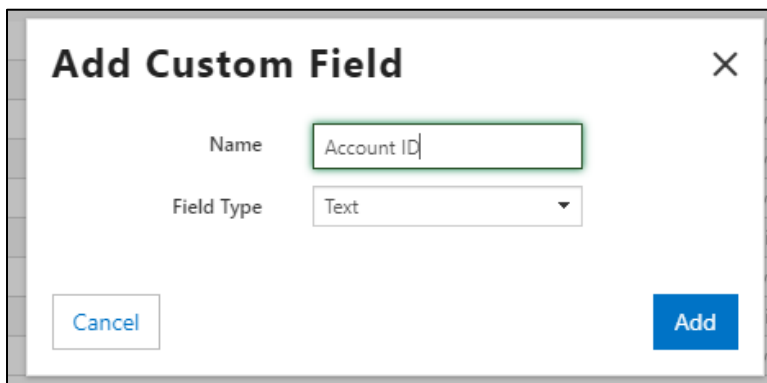


Custom Fields

Administrators can now create Custom Fields for use with Timesheets.



After clicking the Add Custom Field button, administrators will be able to enter a Custom Field name and type. Currently, "Text" is the only option.



Administrators can create as many Custom Fields as they would like. However, only one Custom Field can be associated with a Pay Group at a time. Custom Fields are set on the Time Entry Settings page of the Create and Edit Pay Group modals.

Time Entry Settings

Configure the time clock for the employees in this pay group. These settings will define how the employees clock in and out, and the information they see.

Allow employees to access time clock via Green Employee - Web Green Employee - Mobile Kiosk Manual Timesheet Entry

Allow employees to see and select their Position Work Location Department

Allow employees to select multiple Work Locations Departments

Allow employees to see and select Custom Fields Yes No Select

Enable Travel Entries

Allow employee comments on time entries Yes, No

Enable IP Address Restrictions

Account ID Patient ID

Employees will be able to input a value for Custom Fields whether they are clocking in, using the mobile apps, or creating manual entries. These values are visible on entries in the grid on the Timesheet Details page.

Rebecca Smith
Digital Employee Folder [← Back to Employee List](#)

View: 8/21/2020 - 8/27/2020

Timesheet Entries

Click on the expand button next to the entry to display it's history of edits.

Comments

Date	Source	Begin - End	Time Code	Time	Department	Work Location	Position	Custom Field	Travel
Fri 8/21/2020		5:20 AM - 12:00 PM	Hourly	6h 40m	Accounting	Work From Home	Administrative Assistant	Account ID - 14215	50 Miles

There is a new column option on the Entries grid that will allow administrators to bring Custom Fields into the view.

Travel Time Entries

Travel Time Entries are a new kind of Time Entry that will let employees mark an entry as "Travel" related without using a Travel-specific Time Code. This is also managed on the Time Entry Settings screen of either the Create or Edit Pay Group screen.

Time Entry Settings ✕

Configure the time clock for the employees in this pay group. These settings will define how the employees clock in and out, and the information they see.

Allow employees to access time clock via Green Employee - Web
 Green Employee - Mobile
 Kiosk
 Manual Timesheet Entry

Allow employees to see and select their Position
 Work Location
 Department

Allow employees to select multiple Work Locations

Allow employees to see and select Custom Fields Yes
 No

Enable Travel Entries

Allow employee comments on time entries Yes, but it is optional
 Yes, it is required
 No

Enable IP Address Restrictions

When clocking in using the mobile apps or when creating a manual entry, a new Travel option will be shown. If checked, the employee will input an Odometer Start value (This value can be 0). Once an employee has clocked into a Travel Time Entry, they can clock out on the mobile app or the Web Time Clock. At clock out, employees will enter an Odometer End value. We will use these values to determine the mileage associated with the entry.

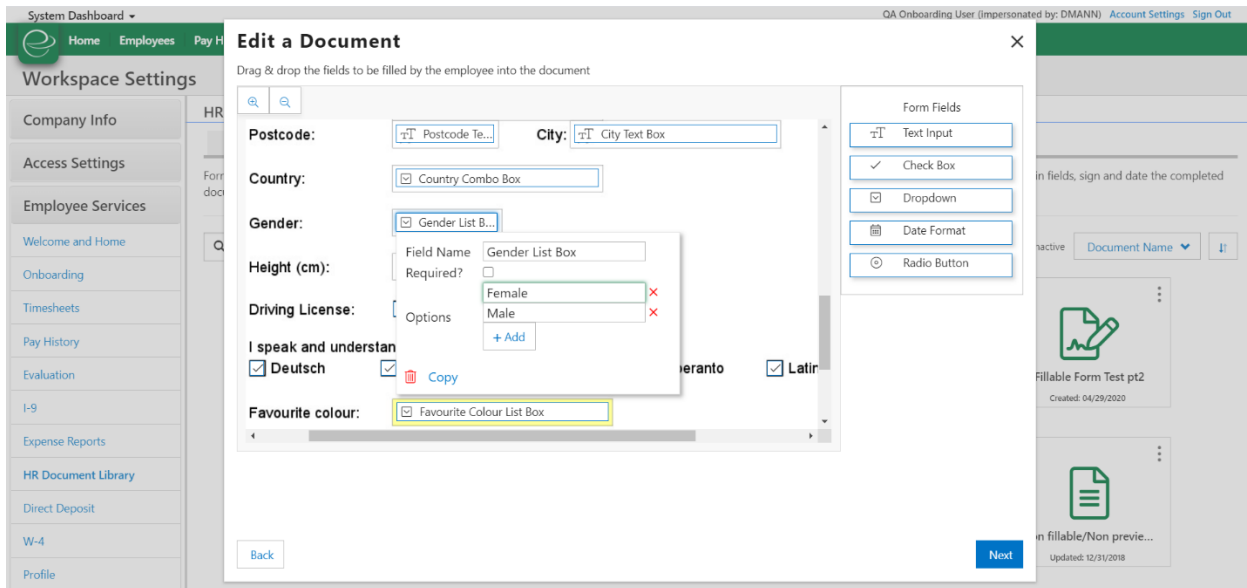
Anticipated Release: 08-18-20

GREENSHADES ONLINE EMPLOYEE SERVICES

Navigation:

Greenshadesonline.com > Settings > Employee Services > HR Document Library > Forms

Enhanced Feature

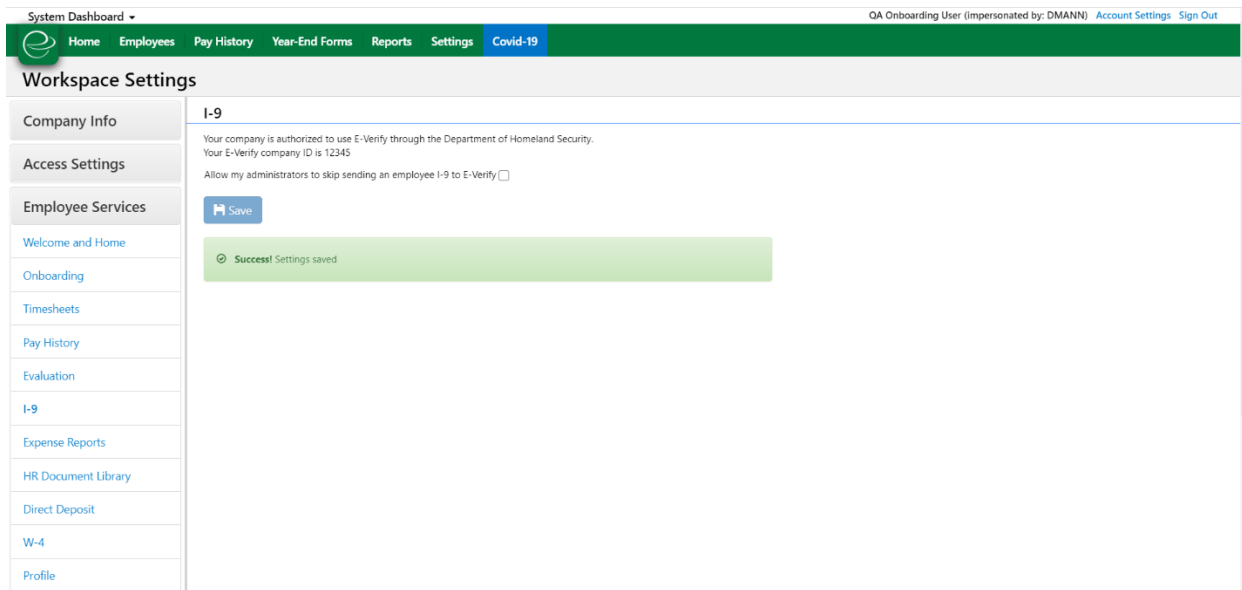


Users are now able to copy and paste fillable fields that they have created in their fillable documents. Once a fillable field has been created, the user will see a “Copy” hyperlink at the bottom of that field when its selected. If the user selects that button, the field will be copied and pasted onto their fillable form with the same set up as the original field.

Navigation:

Greenshadesonline.com > Settings > Employee Services > I-9

Enhanced Feature



Administrators now have the ability to enable or disable the option to skip the E-Verify process during the administrator completion of the I-9 wizard. Once a company has successfully set up their I-9, they will by default have the ability to skip the I-9 during the Part 2 completion. However, in the settings they will have the option to turn this functionality off, requiring all I-9 forms to be sent to E-Verify.

Release Notes for 3/31/2020

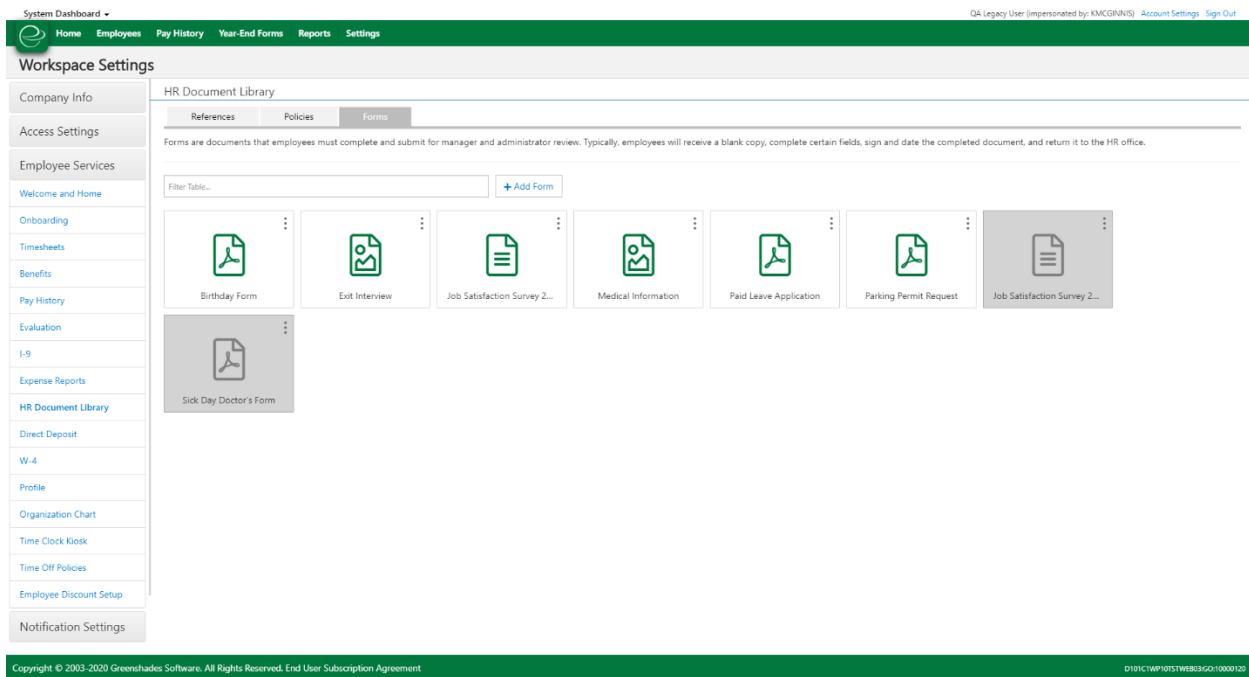
Greenshades Online: Employee Services

Navigation:

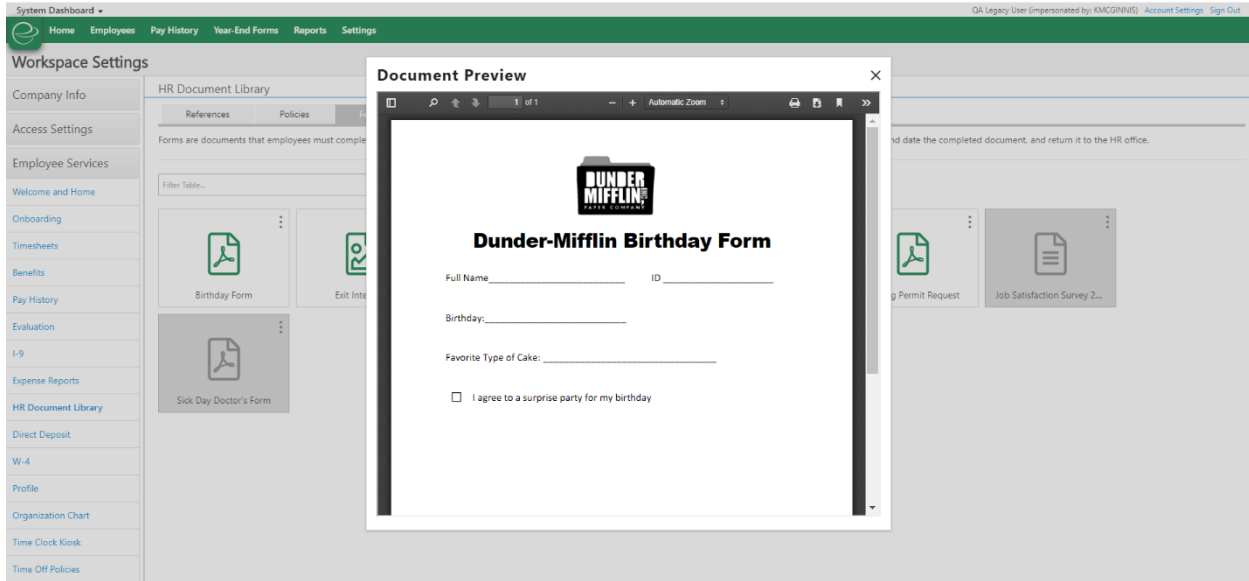
Greenshadesonline.com > Settings > HR Document Library

Updated Screen

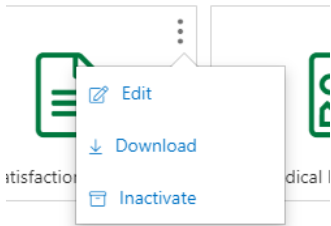
Welcome to the new Documents Settings page! We have made so more modern “look and feel” enhancements, including:



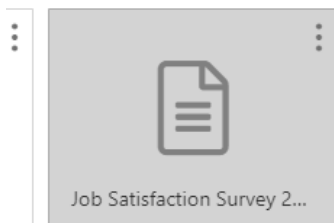
Removing the small document tile preview and expanding it to be a large modal preview on click



Adding a hamburger menu on each document tile that allows the administrator to edit, download, and deactivate the document



Greying out inactive documents to make it more apparent they are inactive

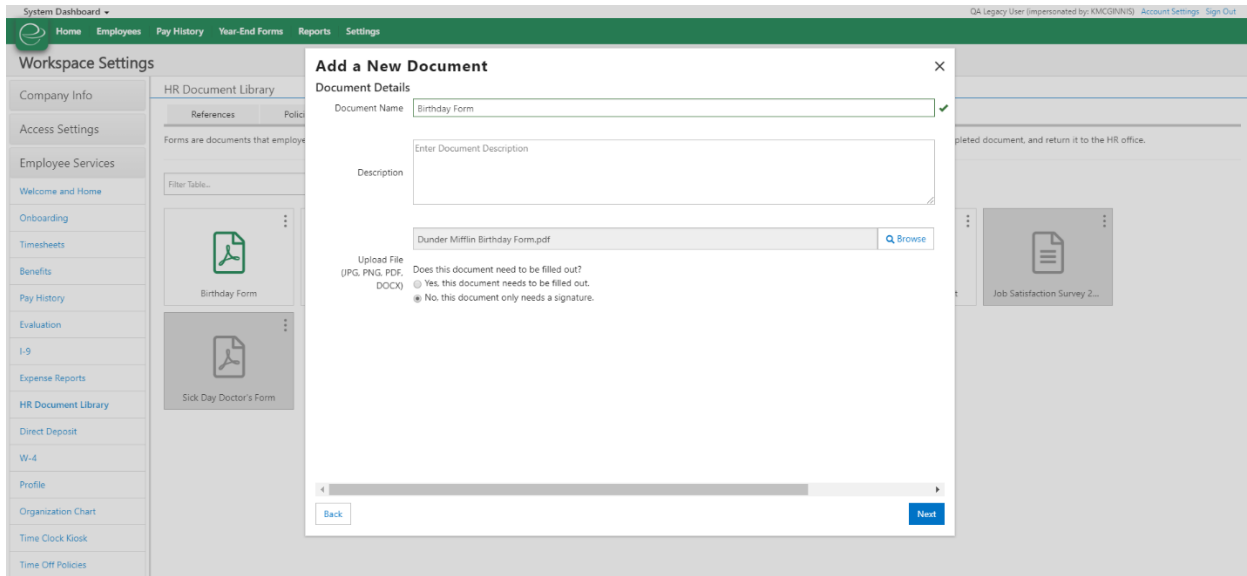


Navigation:

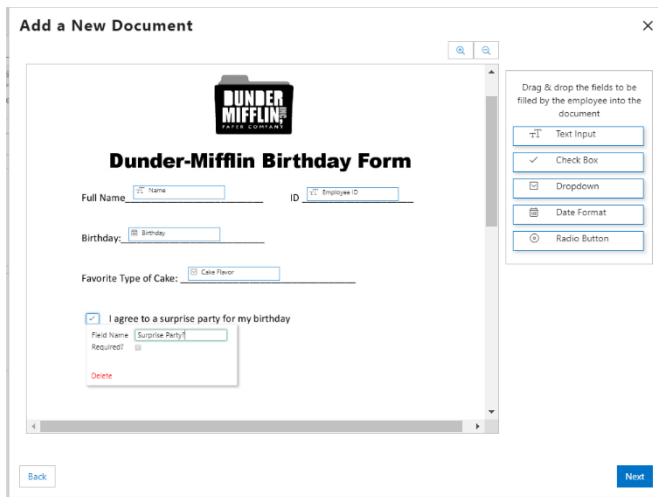
Greenshadesonline.com > Settings > HR Document Library > Add Form

New Feature

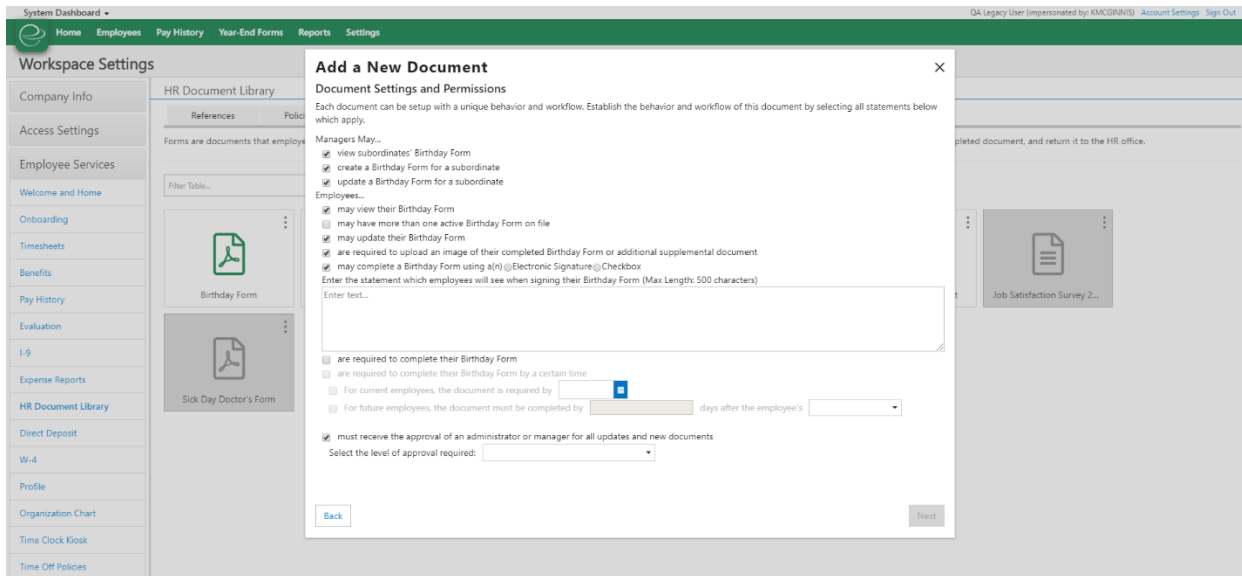
You asked, we answered! Now, when an administrator uploads a PDF document form, they can have this form be completed by the employee directly within Green Employee.



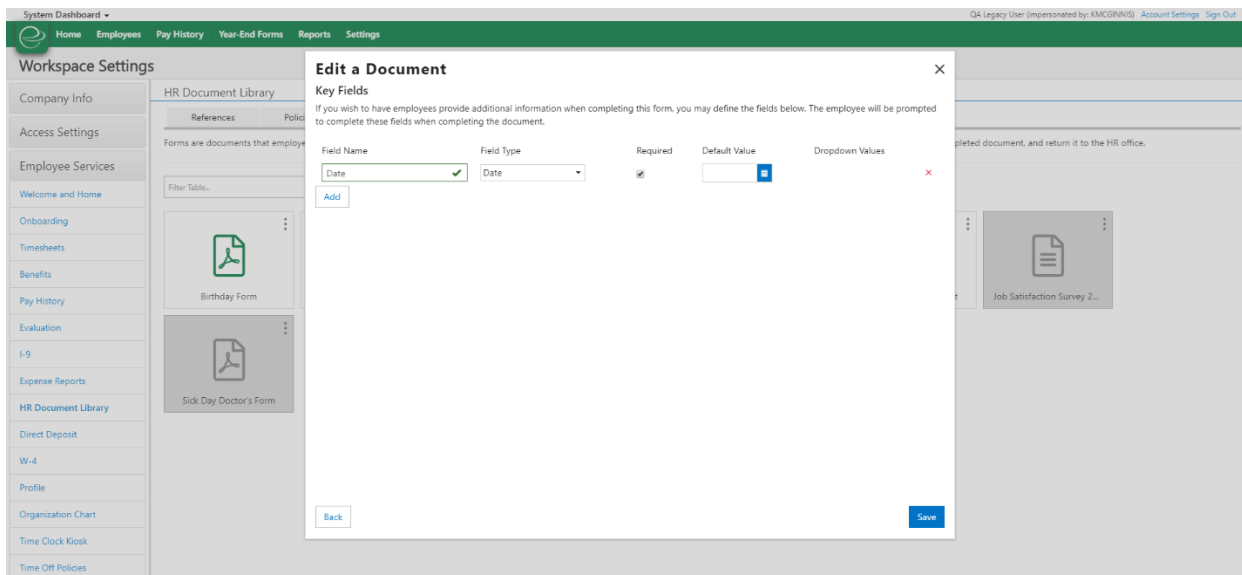
Once a PDF form is uploaded and marked that it needs to be completed, an administrator is directed to the fillable form creator. If a fillable PDF was uploaded, the fillable fields will be populated on the document. Administrators can add new fillable fields to the document, delete fields, and manage locations of fields before continuing.



Administrators can manage the manager and employee settings of the form (note: these are the same settings that previously existed, just with a new look and feel).



Lastly, administrators can set and manage key fields for the document. These key fields are meant to be any additional information the administrator wishes to collect outside of what is collected on the document.



Release Notes for 3/24/2020

Employee Services Module: Onboarding

Started but incomplete Onboarding workflows are now visible to Administrators in Greenshades Online.

Onboarding Requests Pending Review			
	Employee ID	Employee Name	Status
View	00000006	Creola Paquette	In Progress
View	00000061	Eloy Hafley	In Progress
View	00000067	Frances Husk	In Progress
View	00000069	Michael Brooks	In Progress
View	00000071	Kevin Manning	In Progress
View	00000081	Odell Waren	In Progress
View	00000084	Antonetta Gobble	In Progress
View	00000090	Zelda Laine	In Progress
View	7EXSY8ZQQ2Z58VKYP2DT	Jenny Stone	In Progress
View	DKLZ1K140EQ205T9RY27	Stephanie Johnson	In Progress

These In Progress workflows are visible in the Onboarding Requests Pending Review grid. A new column, Status, will allow users to sort between In Progress and Pending Onboarding workflows.

Administrators will be able to cancel In Progress workflows if their employees have an issue. These In Progress workflows are not editable until they are completed.

Onboarding Requests	
Onboarding Request	
First Name	Eloy
Last Name	Hafley
Employee ID	00000061
Workflow Type	Profile Only
Review Address	
Address 1	1655 Makaloa St.
Address 2	#2502
City	Honolulu
State	Hawaii
Zip Code	96814
Review Additional Details	
Step 1	Basic Employee Information
Step 2	Notification Options
Cancel Request	

Employee Services Module: Expense Reports

Navigation

Greenshadesonline.com > Employees > Expense Reports > Track Trends

New Feature

Administrators are now able to add three new columns to the grid on the Track Trends page— Document ID (the native and unique identifier of the employee’s expense report), Submitted Time, and Status (submitted, approved).

Documents/Onboarding: 2020 Federal W-4

Navigation

Greenshadesonline.com > Home

The screenshot shows the 'Employee Management' section. On the left is a sidebar with options like 'Employee List', 'Organization Chart', and 'Messages & Bulletins'. The main content area is titled 'Employee W-4'. A yellow warning box states: 'Warning! For step 4a-other income, there is no field in your accounting package to enter Extra Income to calculate taxes on. If an employee has other income, use the IRS Tax Withholding Estimator to figure out any additional tax that is owed and put that in the Additional Withholding field to take out "extra" tax each pay period.' Below the warning, the status is 'Pending - Submitted on Mar 3, 2020'. A 'Proposed Form:' section shows a preview of the 'Employee's Withholding Certificate' (Form W-4) for the year 2020. The form includes instructions: 'Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Give Form W-4 to your employer. Your withholding is subject to review by the IRS.' The OMB No. 1545-0074 is also visible.

New Feature

For any client that uses Greenshades with a payroll software integration, and allows their employees to complete the Federal 2020 W-4 through Green Employee, there is an existing limitation in the down syncing abilities of steps 4a and 4b of the new federal withholdings form. Due to this limitation, Greenshades is unable to down sync these two values to an external payroll software. Should an employee choose to fill out either of these two fields, an alert will be sent to the workspace administrator notifying them that these values will not be sent down through the integration, along with additional steps that can be taken if the employee would like to take these fields into consideration on their additional withholdings.

Employee Services Module: Onboarding

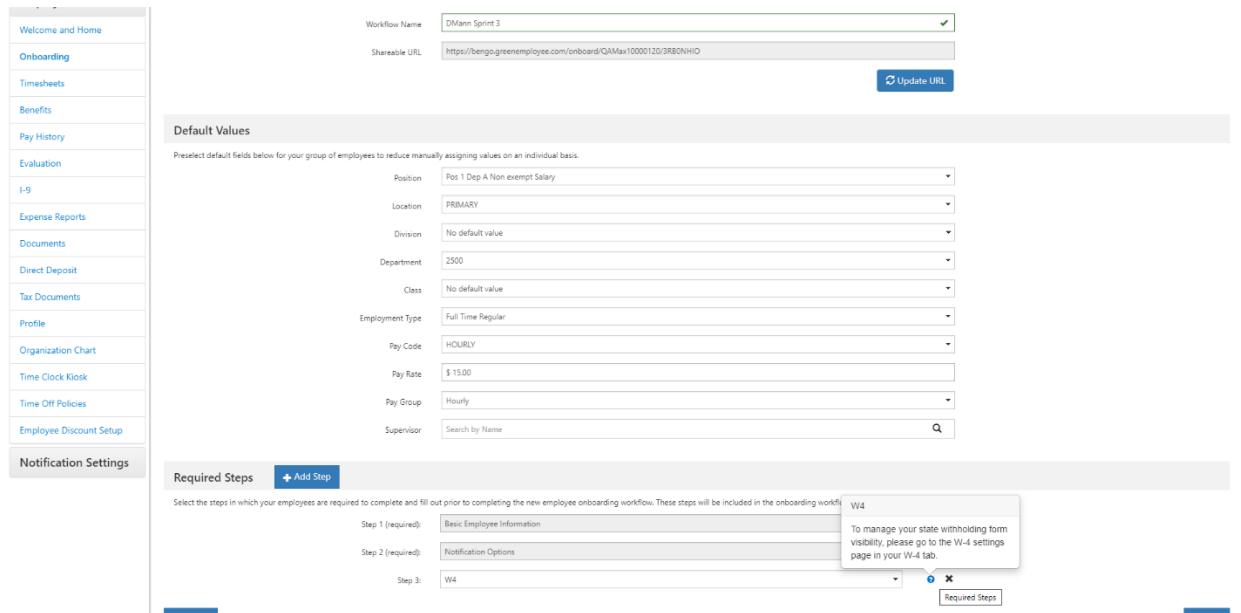
Navigation

Greenshadesonline.com > Settings > Tax Documents > W-4

The screenshot shows the 'Workspace Settings' page. The left sidebar lists various settings categories like 'Company Info', 'Access Settings', 'Payroll', and 'Employee Services'. The main content area is titled 'Tax Documents' and has tabs for 'W-4 Forms' and 'DL RCF'. Under 'W-4 Forms', there are three sections:

- 'The settings below affect how W-4 Forms are completed and approved.' with a checkbox for 'Automatically approve employee changes without requiring any review'.
- 'HR/Payroll Admins will always be allowed to approve W-4 change requests.' with a checked checkbox for 'Also allow managers to approve changes'.
- 'State withholding form display during onboarding.' with two radio button options: 'Allow all state withholding forms to be visible during employee onboarding.' and 'Allow only the suggested state withholding form to be available during onboarding. This form will be suggested based on the employee's work location.' (which is selected).

 A 'Save' button is located at the bottom right of the settings area.



New Feature

Administrators are now able to set up whether or not an onboarding employee is able to see the list of additional state withholding forms along with the one suggested form for that employee. Administrators can enable or disable the additional forms sections within their W-4 settings. An added information icon will exist in the onboarding settings as well to remind administrators where this settings lives.

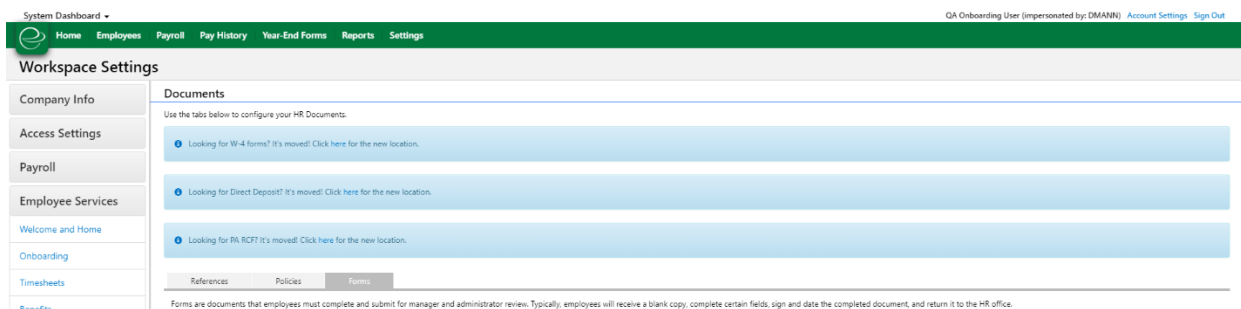
Employee Services Module: Settings

Old Navigation

Greenshadesonline.com > Settings > Documents > W-4/Direct Deposit

Greenshadesonline.com > Settings > W-4

Greenshadesonline.com > Settings > Direct Deposit



New Feature

The settings for the onboarding tax forms of the W-4 and PA-RCF have been moved to their own side navigation submenu item. Informational banners also exist on the Documents page to remind administrators that these pages have been moved.

Employee Services Module: Benefits

Navigation

Greenshadesonline.com > Settings > Benefits > Enrollment Events

New Feature

Due to some trending issues we saw after this last Open Enrollment event period, we have enhanced the logic around the setup for an Open Enrollment event. Now, after administrators set the plan year for an enrollment event, they will only be able to choose healthcare benefits corresponding to that plan year. This will include medical, dental and vision benefits that have been previously added to Greenshades. Any other health benefit with benefit dates not corresponding to the dates of the plan year will not be displayed.

Navigation

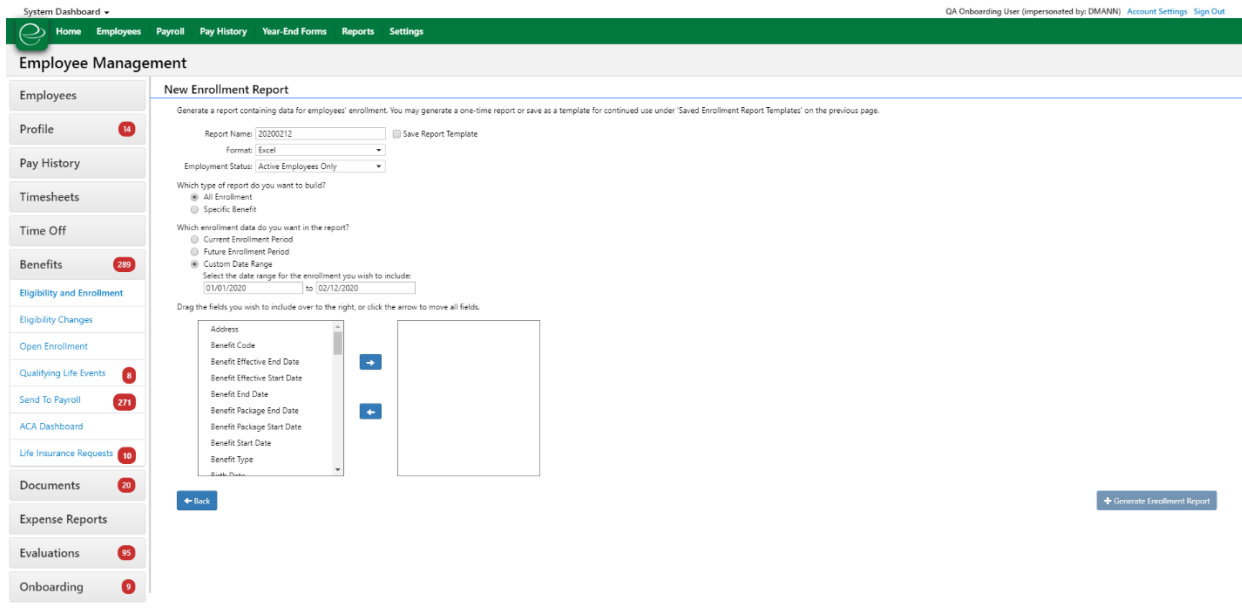
Greenshadesonline.com > Settings > Benefits > Healthcare Benefits

New Feature

Due to some trending issues we saw after this last Open Enrollment event period, we have enhanced the logic around the setup for a healthcare benefit. Now, all health benefits will require a benefit end date to be added upon editing or adding a medical, dental, or vision benefit.

Navigation

Greenshadesonline.com > Employees > Benefits > Eligibility and Enrollment Report



New Feature

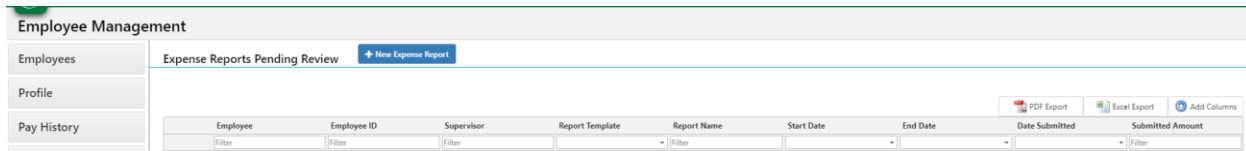
Administrators are now able to generate enrollment reports for a given date range. This includes dates in the past, current, and future.

GOES Anticipated Release 11/18/19

Navigation

Greenshadesonline.com > Employees > Expense Reports > Pending Review

New Feature

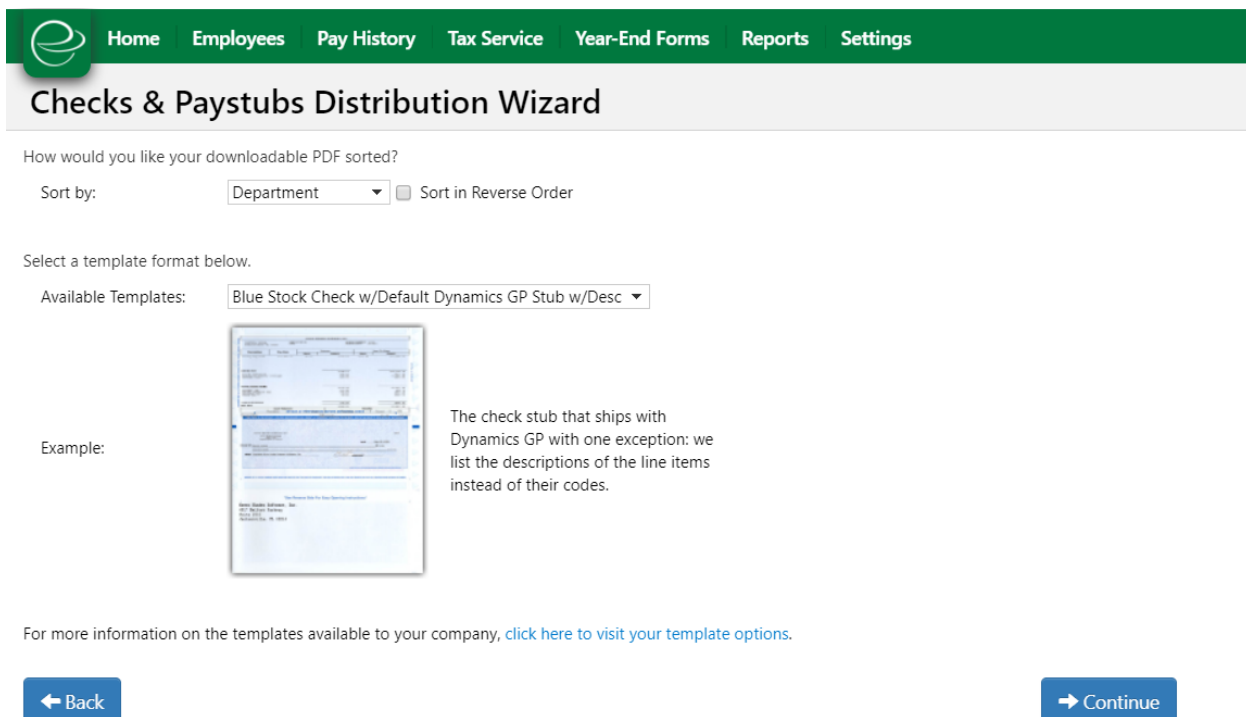


Addition of Date Submitted column to the expense report grid for reports that have been submitted but pending administrator review.

Navigation

Greenshadesonline.com > Pay History > Distribute Statements > Ask Greenshades to Print and Mail your Checks and Paystubs

New Feature



As an administrator, if I would like Greenshades to print and mail my checks or paystubs, I will now be able to sort those prior to sending them off to be printed.

Navigation (92774)

Greenshadesonline.com > Employees > Select Employee > Dependents

Greenemployee.com > HR Profile > Dependents

Old Screen

New Screen

An employee/administrator is no longer allowed to enter in a duplicate Social Security Number for any dependent. If the employee or administrator does not have access to a dependent's SSN (i.e. a newborn baby), then the user is able to mark via checkbox that they do not have a dependent's SSN, but that they acknowledge the risks in doing so

GOES Anticipated Release 11/05/19

Employee Services Module

Navigation

Greenemployee.com > Documents > HR Documents > W-4 Create

New Feature

As an employee, I will be able to fill out a 2020 Federal W-4 Form. This feature will be available after January 1, 2020.

Navigation

Greenshadesonline.com > Settings > Employee Services > Documents > Policies > New Policy > Add Name/Doc > Next > Document Settings

New Feature

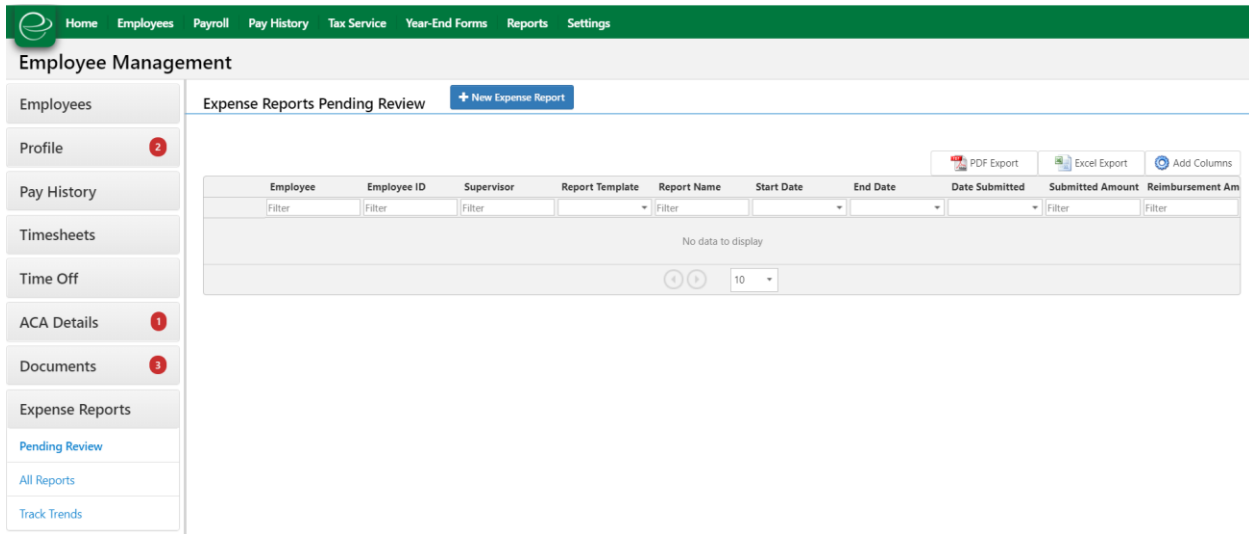
The screenshot shows the 'Document Setup - Settings' interface. It includes fields for Name, Description, Document, and Applicability. A dropdown menu is open, listing various attributes such as Adjusted Hire Date, Birth Date, Company ID, Days Employed, Department, Division, Employee Class, Employee ID, Employment Status, Employment Type, Hire Date, Home Address State, Hours Worked Per Year, HR Status, Pay Group, Position, User Defined 1, User Defined 2, and Work Location. The 'Adjusted Hire Date' option is highlighted. Below the dropdown, there are 'Operator' and 'Value' fields. At the bottom, there are 'Cancel' and 'Next' buttons.

As an administrator, I can now assign forms to be provided to my rehired or moved employees based on their adjusted hire date.

Navigation

Greenshadesonline.com > Employees > Expense Reports > Pending Review

New Feature

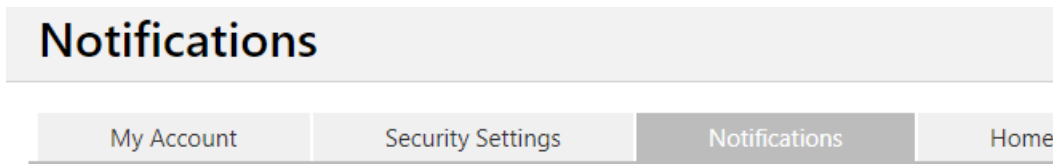


As an administrator, I can now filter expense reports pending approval by the date in which the employee submitted the report.

Navigation

Greenemployee.com > Account Settings > Notifications

Old Screen

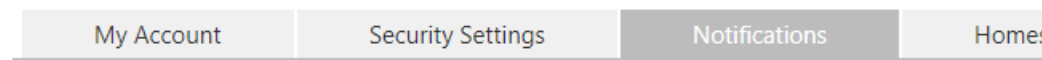


Email Addresses:

Notification Email Address:

Corporate Email Address on file with Green Shades Software, LLC:

New Screen



Email Addresses:

Notification Email Address:

Company Email Address on file with Fabrikam, Inc.:

Updated screen and button navigation for employee's on the settings page

Navigation

Greenshadesonline.com > Settings > Employee Services > Profile

Old Screen

Profile

- General
- Personal Info
- Address Info
- Dependents
- Contacts
- Work Location

The settings outlined below control how employees will interact with the HR Profile page on GreenEmployee. Use these settings to control what your employees will see and what they may change. The "General" tab contains Approval Settings that dictate the approval workflow for any requested changes.

Fields

Below are a list of fields that are available for display on the GreenEmployee HR Profile page. You may choose how employees will interact with these fields.

Field	Display
Employee ID	View Only
First Name	View and Edit (value required)*
Middle Name	View and Edit (value optional)
Last Name	View and Edit (value required)*
SSN	View and Edit (value required)*
Hire Date	View Only
Gender	View and Edit (value optional)
Birth Date	View and Edit (value required)
Ethnic Origin	View and Edit (value optional)

The following display options are available for most fields (some options are restricted on some fields):

- Hidden: Your employee will not see this field.
- View Only: Your employee may see this field but may not make any edits.
- View and Edit (value optional): Your employee may view and edit this field, a value is not required.
- View and Edit (value required): Your employee may view and edit this field, a value must be provided (blank entries are not allowed).

New Screen

Profile

- General
- Personal Info
- Address Info
- Dependents
- Contacts
- Work Location

The settings outlined below control how employees will interact with the HR Profile page on GreenEmployee. Use these settings to control what your employees will see and what they may change. The "General" tab contains Approval Settings that dictate the approval workflow for any requested changes.

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Field	Display
Employee ID	View Only
First Name	View and Edit (value optional)
Middle Name	View and Edit (value optional)
Last Name	View and Edit (value optional)
SSN	View and Edit (value optional)
Hire Date	View Only
Gender	View and Edit (value optional)
Birth Date	View and Edit (value optional)
Ethnic Origin	View and Edit (value optional)
Marital Status	View and Edit (value optional)

The following display options are available for most fields (some options are restricted on some fields):

- Hidden: Your employee will not see this field.
- View Only: Your employee may see this field but may not make any edits.
- View and Edit (value optional): Your employee may view and edit this field, a value is not required.
- View and Edit (value required): Your employee may view and edit this field, a value must be provided (blank entries are not allowed).

As an administrator, I can now configure settings for an employee's profile to 'view only' that were previously 'view and required'.

GOES Release Notes 8/28/19

I-9 Module

As an administrator, I can now submit an I-9 to eVerify after 3 business days along with a valid reason for the late submission.

Navigation (85973)

Greenshadesonline.com -> Employees -> Documents -> Pending Review -> Document Filter for I-9

New Feature

The screenshots show the 'I-9 Form Wizard' interface. The top screenshot shows the 'Review Pending I-9 Changes' screen with a 'New Document' button and a 'Back' button. The bottom screenshot shows the same screen but with a 'Complete' button instead of 'Back'. Both screenshots show a sidebar with navigation options like Profile, Pay History, Documents, etc.

Suzette Suz Reagen Account Settings Sign Out

Home Employees Pay History Tax Service Year-End Forms Reports Settings

Employee Management

Review Pending I-9 Changes [+ New Document](#)

I-9 Form Wizard

[I-9 Instructions](#) [View I-9 review for Take Three](#)

Employee Info and Verification → Examine Documents → Certify I-9 → **E-Verify Option**

E-Verify is powered by the US Department of Homeland Security and is voluntary for most employers.

Yes. I want to use E-Verify to confirm the employment eligibility for this employee.

No. I do not want to use E-Verify at this time.

This employee appears to have already been employed for more than 3 days (hire date 8/14/2019). You must provide a reason to the IRS that this I-9 is being submitted outside a 3-day window:

Other

Other Reason (Specify):

[← Back](#) [→ Complete](#)

- Employees
- Profile **4**
- Pay History
- Timesheets
- Time Off **1**
- Benefits **1**
- Documents **36**
- Pending Review **36**
- Employee Documents
- Batch Downloads
- Reference Documents
- E-Verify Cases
- Expense Reports
- Evaluations **100**
- Onboarding **4**

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Anticipated Release for 07/23/2019

I-9 Module

Navigation

Greenshadesonline.com -> Employees -> Documents -> Pending Review -> I-9

Current screen

Review Pending I-9 Changes

[+ New Document](#)



I-9 Form Wizard

[I-9 Instructions](#) [View I-9 preview for ThirtyFour](#)

[Employee Info and Verification](#) → [Examine Documents](#) → [Certify I-9](#) → [E-Verify Option](#)

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers **CA** has a future expiration date may also constitute illegal discrimination

Employers or their authorized representative must complete and sign Section 2 within 3 business days of ThirtyFour and one document from List C as listed on the "Lists of Acceptable Documents" in the I-9 instructions ([click here](#) to and expiration date, if any).


	List A	OR	List B
Document Title	<input type="text"/>		<input type="text"/>
Issuing Authority	<input type="text"/>		<input type="text"/>
Document #	<input type="text"/>		<input type="text"/>
Expiration Date (if any)	<input type="text"/>		<input type="text"/>
Passport Image	<input type="text" value="Browse"/>		<input type="text"/>

Supported file types: .jpg, .pdf, .gif, .png

[← Back](#) [Deny](#)

New screen

Review Pending I-9 Changes [+ New Document](#)

 **I-9 Form Wizard** [I-9 Instructions](#) [View I-9 preview for ThirtyFour Test](#)


Employee Info and Verification → **Examine Documents** → Certify I-9 → E-Verify Option

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) they will accept from an employee. The refusal to hire an individual constitute illegal discrimination.

Employers or their authorized representative must complete and sign Section 2 within 3 business days of ThirtyFour Test's first day of employment. You must physically examine one document from List A OR examine on the "Lists of Acceptable Documents" in the I-9 instructions ([click here](#) to view the full instructions). For each document you review, record the following information: document title, issuing authority, document number

	List A	OR	List B	AND	List C
Document Title	<input type="text"/>		<input type="text"/>		<input type="text"/>
Issuing Authority	<input type="text"/>		<input type="text"/>		<input type="text"/>
Document #	<input type="text"/>		<input type="text"/>		<input type="text"/>
Expiration Date (if any)	<input type="text"/>		<input type="text"/>		<input type="text"/>

I-9 images

In the event an employee submits a Form I-551, Form I-766, a U.S. passport or a passport card, a copy of that document is required for validation. Only one image can be uploaded. Please merge all images into one image file.
Supported file types: .jpg, .pdf, .gif, .png 

[← Back](#) [🚫 Deny](#) [→ Continue](#)

Uploading an image is no longer restricted for just passports. Only one image is supported at this time, text is provided for clarity.

Direct Deposit Module

Navigation

Greenshadesonline.com -> Employees -> Employee List -> select an employee -> Direct Deposit Account

New Feature

Suzette ▾



Employee Management



Pilar Ackerman
Digital Employee Folder

[← Back to Employee List](#)

This page displays information about how the employee is currently being paid. If you wish to make a

[+ New Account](#)

Account 1 [Remove](#)

Routing Number ?
Account Number
Type
How much?
 Add direct deposit account as a 'prenote'

Account 2 [Remove](#)

Routing Number ?
Account Number
Type
How much?
 Add direct deposit account as a 'prenote'

Account 3 [Remove](#)

Routing Number ?
Account Number
Type
How much?
 Add direct deposit account as a 'prenote'

By clicking save, this employer is authorizing the initiation of credit entries and adjustment debit entries to the acc above.

[Save](#)

- Employment
- Information
- Login
- Direct Deposit Account Info
- Notes
- Personal
- Timesheets
- Time Off
- Benefits
- Documents
- Evaluations

An administrator can configure an employee's direct deposit information from the Employee Maintenance card, rather than through impersonation or from the accounting package.

Release Notes for 06/26/2019

GreenshadesOnline Home Page Update

Release Notes for 06/26/2019

Greenshades Online Home Page

There have been substantial visual changes to the Greenshades Online Home Page. Presently, these changes are only visible to Administrators with access to Greenshades Online. GreenEmployee users will not see an update to their home page.

Previous Version of the Greenshades Online Home Page

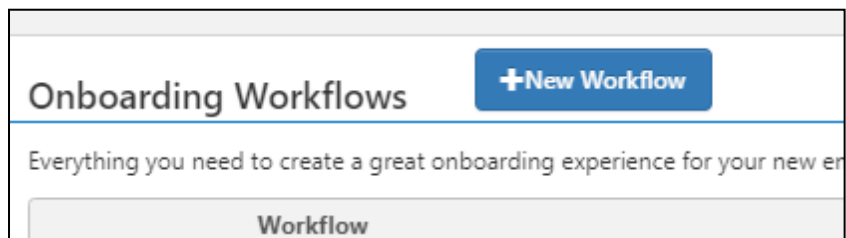
Updated Version of the Greenshades Online Home Page

Release Notes for 06/21/2019

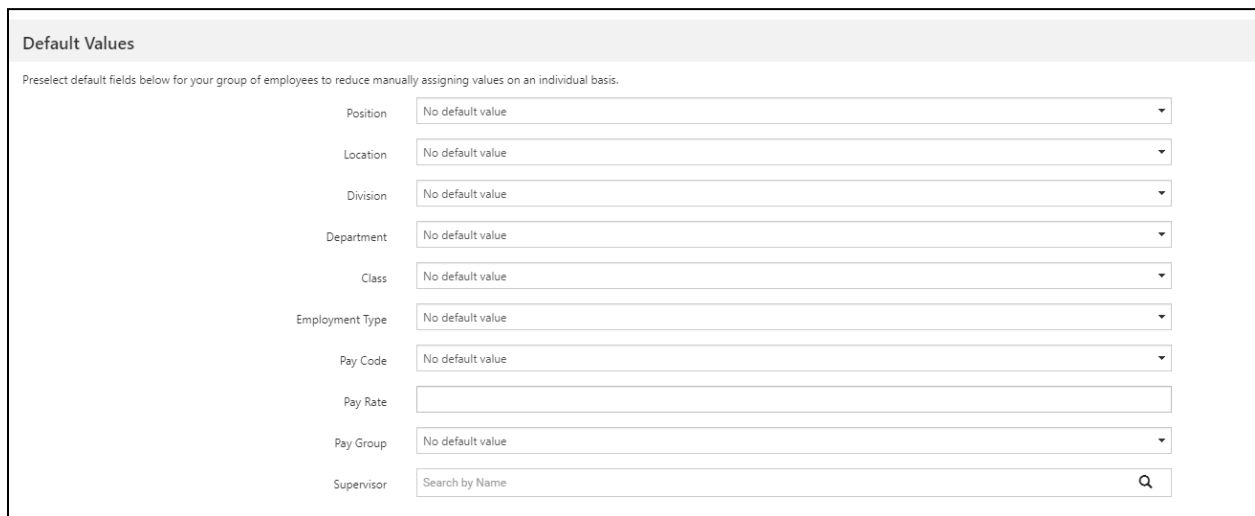
Onboarding Workflow Update

Creating an Onboarding Workflow for a new employee or an existing employee is the same process, though there are crucial differences in the approval and assignment processes.

To create a new Onboarding Workflow, users begin accessing the Onboarding settings within the Employee Services section of the Settings tab. They then start by clicking the "New Workflow" button on the Onboarding page.



Once users have named a Workflow, they can select default values for the default fields.

A screenshot of the 'Default Values' configuration form. The form has a title 'Default Values' and a subtitle 'Preselect default fields below for your group of employees to reduce manually assigning values on an individual basis.' The form contains several fields, each with a label and a value: Position (No default value), Location (No default value), Division (No default value), Department (No default value), Class (No default value), Employment Type (No default value), Pay Code (No default value), Pay Rate (blank), Pay Group (No default value), and Supervisor (Search by Name). Each field is represented by a dropdown menu or a search box.

Note: if a Workflow is assigned to an existing employee, the default values will override whatever currently exists in that employee record. If no Default Values are selected, then those fields will be blank on the existing employee's Profile.

Users are not required to select Default Values when creating a Workflow.

Determining Required Steps is the final part of the Workflow creation process.

Required Steps Add Step

Select the steps in which your employees are required to complete and fill out prior to completing the new employee onboarding workflow. These steps will be included in the onboarding workflow link.

Step 1 (required): Basic Employee Information

Step 2 (required): Notification Options

Step 3:

Step 1 (Basic Employee Information) and Step 2 (Notification Options) are required by default and cannot be changed.

Users can create additional steps by clicking the "Add Step" button and selecting an option from the now-visible dropdown.

The dropdown options include Profile, I-9, Direct Deposit, W4, Custom Documents, and W-2 and 1095-C Distribution Preferences. Once a user clicks "Save" in the bottom right corner, the Workflow is created.

New employees can click the New Workflow Link generated when the Workflow is created to get started.

Workflow Name: Seasonal Support

Shareable URL: <https://jbabcock.greenemployee.com/onboard/3F4EHQ4Y>

Update URL

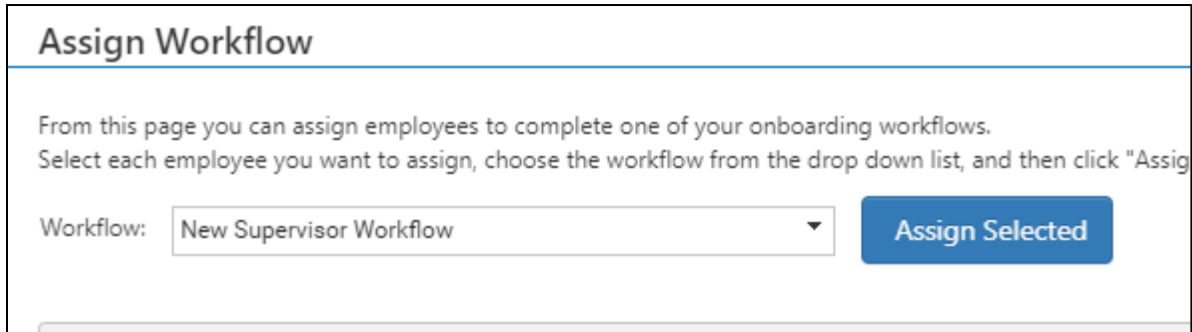
For brand new employees without an Employee Record, it is recommended that users share this link to employees so they can begin creating their record and going through the Onboarding Workflow.

For existing employees with Employee Records, it is recommended that users notify them that upon their next login to GreenEmployee, they will be prompted to complete their Onboarding Required Steps before proceeding to the Home Page.

Users will need to assign the Workflow to existing employees or rehires in the "Assign Workflow" section found within the Onboarding module.

- Onboarding 35
- Onboarding Requests 35
- Onboarding Request Conflicts
- Assign Workflow

Users will select a Workflow from the dropdown, check the box next to the correct employee(s), and then press the "Assign Selected" button.



****The employee will not receive an email notification about the Workflow assignment, but they will be required to complete it before doing anything else the next time they access Greenshades EE.**

However, only employees with an "Active" Employee Status will be available for Workflow assignment.

For users with access to the Payroll module, the Employee Status can be updated in the Employee Profile. For users without the Payroll module, this change needs to be made in their accounting package.

**** If the rehired employee was terminated, users will have to clear their Termination Date as well.**

When an Onboarding is completed, either by a new employee or an existing employee, it is visible in the "Onboarding Requests" section of the Onboarding module. The badge indicates how many new employees have completed an Onboarding and are awaiting approval.

The screenshot shows a table titled "Onboarding Requests" with an "Excel Export" button. The table has four columns: Employee ID, Employee Name, Workflow Name, and Request Date. There are three rows of data, each with a "View" link on the left.

	Employee ID	Employee Name	Workflow Name	Request Date
View	DJ9F4JV0556KU53YIUJ	Barb Tommy	Onboarding Test	06/11/2019 12:44 pm
View	KOZGLZVPLJ6F93CU63DA	Jess Bab	New EE	05/15/2019 03:51 pm
View	RRQBMK9VT6WP94WN4RJK	Jessica Meagan	Testing W4	02/28/2019 12:26 pm

Users will be able to view the Employee ID, Employee Name, Workflow Name, and the date and time the Onboarding was completed.

By clicking the "View" link, users are able to view the data that the new employee has entered. They will also be able to edit the data the employee has entered from this view, including making changes to the Default Values selected when creating the Workflow.

Onboarding Requests

Onboarding Request

First Name	<input type="text" value="Barb"/>	
Last Name	<input type="text" value="Tommy"/>	
Employee ID	<input type="text"/>	
Workflow Type	<input type="text" value="Onboarding Test"/>	

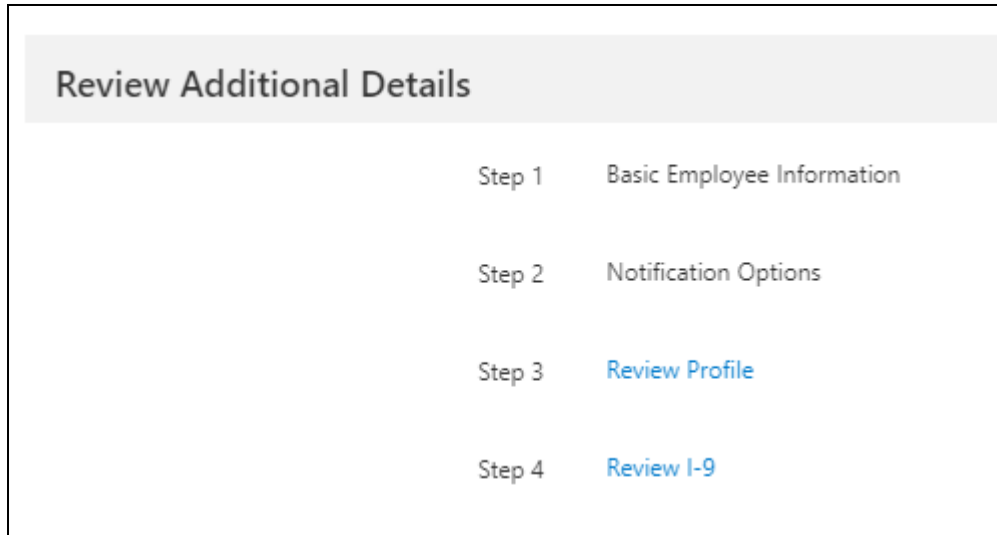
Review Address

Address 1	<input type="text" value="123 MAIN ST."/>
Address 2	<input type="text"/>
City	<input type="text" value="JACKSONVILLE"/>
State	<input type="text" value="Select a State"/>
Zip Code	<input type="text" value="32256"/>

Employee Details

Date of Birth	<input type="text" value="01/01/1987"/>	
SSN	<input type="text" value="900001111"/>	
Position	<input type="text" value="Dev Manager"/>	
Location	<input type="text" value="HOME"/>	
Division	<input type="text" value="MAIN"/>	
Department	<input type="text" value="Administration"/>	

Once the employee details are approved, users have the ability to review employee responses to the "Additional Steps" set when the Workflow was created.



However, when an existing or rehired employee completes the new Onboarding Workflow, the workflow is automatically approved. These Onboardings are visible in the Past Onboarding Requests section.

Past Onboarding Requests				
	Employee Name	Status	Workflow Name	Review Date
View	Ruben Wilkons	Cancelled	W4 Workflow	04/23/2019 11:42 am
View	Ruben Wilkons	Cancelled	Profile 123	06/19/2019 11:53 am
View	Ruben Wilkons	Approved	SC Employees	06/19/2019 12:09 pm
View	Jeffry Phoenix	Approved	Azure Testing	05/29/2019 02:03 pm

Though users will not be able to make any changes to the Onboarding Request or the Address submitted by the employee, they can still review documents and profile changes.

When an existing employee completes a Workflow, the rehire date on the Employee Profile is not automatically updated. Further, there is no change to their original Hire Date. These dates can be updated directly within that employee's Profile, which can be found in the Employee List.

The automatic approval of Workflows for existing or rehired employees is to ensure employees can maintain access to Greenshades Employee.

The assigning user receives no notification that the Workflow has been completed.

This data will be synced to the accounting package based on each account's sync settings. Once approved, the change is queued inclusion with the next sync -- regardless of whether it is an automatic sync, scheduled sync, or manual sync.

Release Notes for 05/31/2019

GreenshadesOnline Update

Existing Employees will show as approved when submitting an onboarding workflow. Administrators are able to view Employee in past workflow grid to approve or deny Onboarding workflow steps

The screenshot displays the 'Employee Management' section of the GreenshadesOnline application. The left sidebar contains navigation links for Employees, Profile (47), Pay History, Timesheets, Time Off (173), Benefits (442), Documents (90), Expense Reports (4), Onboarding (35), Onboarding Requests (35), Onboarding Request Conflicts, and Assign Workflow. The main content area is divided into two sections: 'Onboarding Requests' and 'Past Onboarding Requests'. Both sections include an 'Excel Export' button and a table of request details.

Onboarding Requests Table:

	Employee ID	Employee Name	Workflow Name	Request Date
View	YDKTHK3TEXXUVVNGPARGD	test tester	Profile	02/19/2019 08:56 am
View	QFUMGYSPKR3ZKHK2THR	je leeeee	Profile	02/19/2019 01:57 pm
View	XOIA1FFZGQ1VFD5T1D3Q	test tester	Profile	02/19/2019 05:10 pm
View	2KGB804692EBLSA7SP9E	Sam Wise	Profile	02/21/2019 09:32 am
View	KTFQ1ZPA6TQR3C2U51YQ	Sam Wise2	Profile	02/21/2019 09:38 am
View	D2FLUGN7FGCLM2WVKPNKZ	test tester	Profile	02/21/2019 10:40 am
View	HRQAN70T2HT33FRC12Q	Steve McQueen	Profile	02/25/2019 12:41 pm
View	RRQBMK9V76WP94W4RUX	Jessica Meagan	Testing W4	02/28/2019 12:26 pm
View	I0WILZMQN68QOUN1GLB1	test tester	Docs test	03/06/2019 12:18 pm
View	H8MQ5QOV1GIZN4A82H7	test tester	Docs test	03/06/2019 12:23 pm

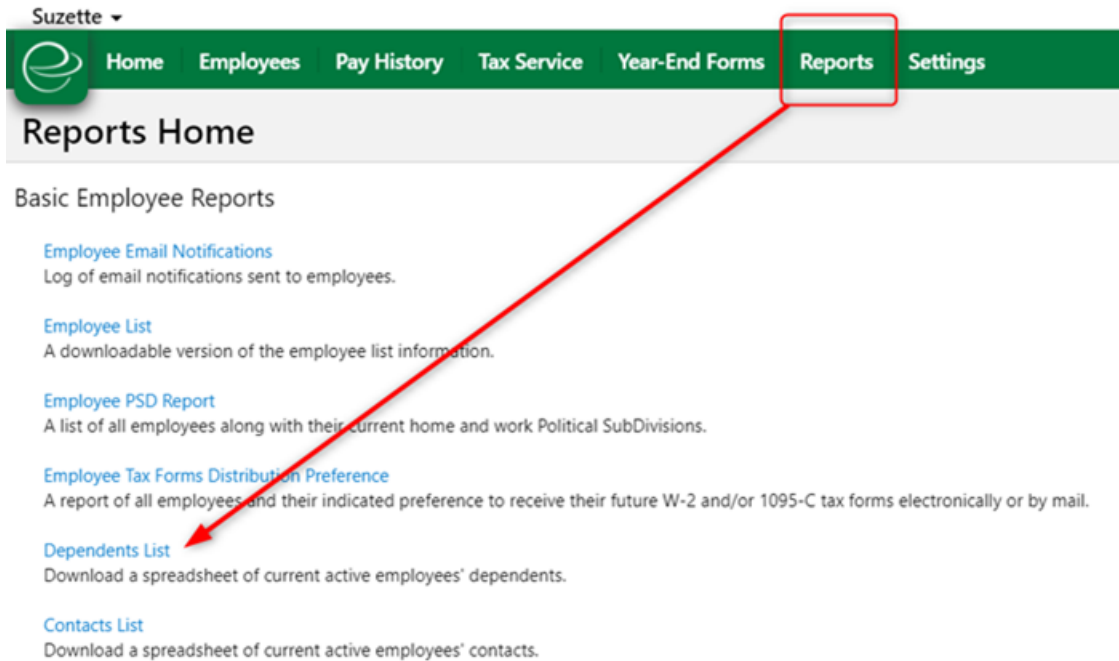
Past Onboarding Requests Table:

	Employee Name	Status	Workflow Name	Review Date
View	Ruben Wilkons	Cancelled	W4 Workflow	04/23/2019 11:42 am
View	Ocala Chesnut	Approved	Docs test	04/19/2019 12:30 pm
View	Abraham Spades	Cancelled	Docs test	04/18/2019 03:51 pm
View	Abraham Spades	Cancelled	Docs test	04/18/2019 03:54 pm
View	Abraham Spades	Rejected	Docs test	04/18/2019 03:56 pm
View	Abraham Spades	Rejected	Docs test	04/18/2019 04:03 pm
View	Abraham Spades	Rejected	Docs test	04/18/2019 05:11 pm
View	Abraham Spades	Approved	Profile	05/16/2019 10:30 am
View	Abraham Spades	Cancelled	Docs test	04/23/2019 11:49 am
View	Abraham Spades	Cancelled	Docs test	04/23/2019 01:09 pm

Release Notes for 03/25/2019

GreenshadesOnline Update

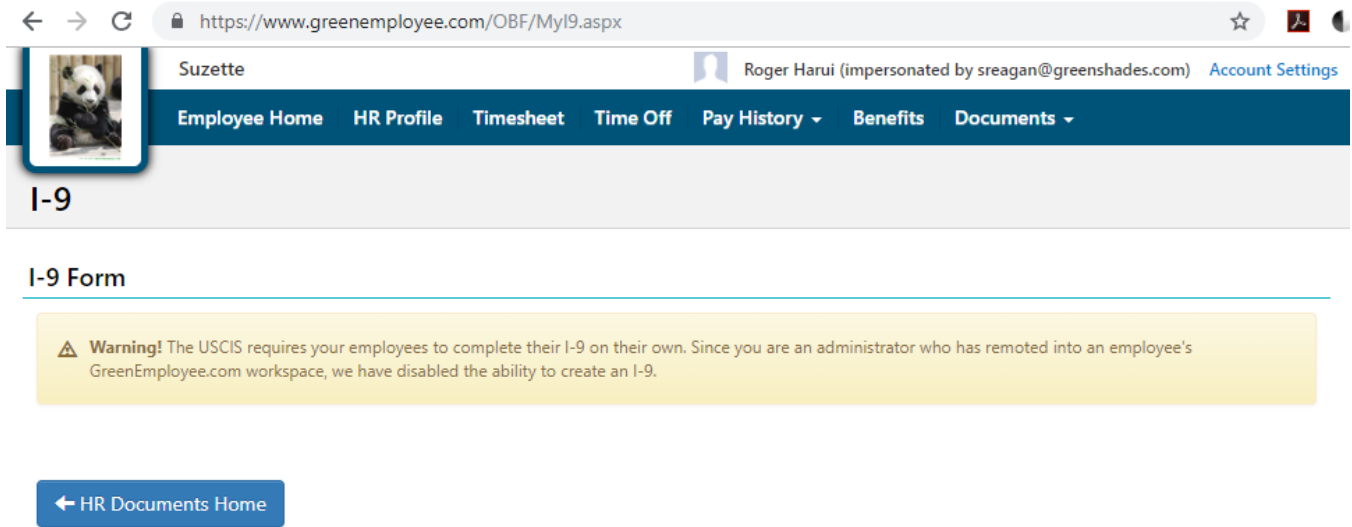
We have released two new reports for the Profile Module: Dependents List and Contacts List.



Release Notes for 02/12/2019

I-9 Administration Update

Today, Greenshades updated our I-9 module to restrict Administrators from impersonating employees and completing the Part 1 of the I-9. As directed by our Compliance Department, Part 1 of the I-9 must be completed by the employee only. Administrators attempting to create an I-9 on behalf of an employee will now receive this warning:



Release Notes for 12/19/2018

State Withholding Certificates

Applicable to Administrators who have purchased the Onboarding Module.

The following State Withholding Certificates have been released. The forms will become available for use beginning January 1, 2019.

- Indiana (2019)
- Oregon (2019)
- Maine (2019)
- Iowa (2019)
- Kansas (2019)

Release Notes for 10/31/2018

Time Off

Applicable to Administrators who have purchased the Time Off or Enhanced HR package.

- When reviewing pending time off requests, additional details are now available. Per client feedback and requests, 'Pay Group', 'Department', and 'Supervisor' have been added to the 'Pending Time Off Requests' page on Greenshades Online. This should help employers ensure that all time off requests have been addressed prior to timesheets being approved and submitted for payroll.

Release Notes for 10/01/2018

Time Off

- On the Time Off home screen, administrators have the option to add a column that displays the employee comments tied to the time off request.
- The interface of the Time Off Policy settings screen is consistent with the rest of the website by moving the Make Default checkbox to the top of the form.
- Administrators can add the Hire Date column in the time off balances table so that they can review when the employee might receive a new allotment of paid time off.
- When a time off request is attempted to be deleted by a manager, a warning will appear stating that the request cannot be deleted because it is batched for payroll and advise the manager to contact their human resources or payroll administrator for assistance.

Request Details

Employee: [Lenita Piekarski](#)
 Date: 7/30/2018
 Type: Vacation
 Total Hours: 8.00

Approved Request

Warning! This approved time off request cannot be deleted because it is batched for payroll. Please contact your HR or Payroll Administrator for assistance.

Proposed Timesheet Entries:

Date Worked	Time Code	Hours
Mon 07/30/2018	Vacation	8.00

Review Comments (optional):

This request was Approved on 9/19/2018. The timesheet entries may have been updated on the individual timesheet.

[← Back](#)

All PTO Balances

All Balances as of 9/18/2018:

Name	Current Balance	Upcoming Usage	Available Balance
Vacation	64.00	0.00	64.00

Other Employees' Time Off Close to This Request

Requests within 7 Days Just the Requester's Department

Just the Requester's Location Just My Reports

Employee	Department	Location	Time Range	Review Status
Jeffry Phoenix	Support	HOME	07/23/2018 - 07/23/2018	Approved
Kenton Henrich	Support	HOME	07/23/2018 - 07/23/2018	Approved
Lenita Piekarski	Support	HOME	07/31/2018 - 07/31/2018	Approved

Pay Group Filter by 'None'

- Administrators can filter the Pay Group column by the 'None' criteria. This allows administrators to search for all employees that are not assigned to a pay group.

Resolution for Module Counts Load Time Hindering GreenshadesOnline Action

- Administrators don't have to wait for the module notification counts to load before they can do anything on GreenshadesOnline.

Release Notes for 09/18/2018

Time Off

- There will be a new setting in the PTO module to automatically append the WSID to the end of PTO batch names in that workspace. That way, clients have the option of having their batches having different names.
- In the advanced settings of the time off module, there are grouping options for the PTO batches that are sent down to the accounting package. We're making this setting available to all PTO clients and adding an additional grouping option, 'Pay Period'.
- There will be an additional PTO applicability filter for 'days of service' to allow for additional filters on days of employment.
- The suggested timesheet entries will be shown on approved time off requests in addition to pending time off requests.

Timesheets Settings

- On the Holiday Schedules tab, when creating a new schedule, there is now an option to base it off an existing one.
- Additional warning prompts will be displayed when administrators click to delete a holiday.
- We've added a setting to prevent holidays from being added to timesheets until an employee has reached a specified number of days of employment.
- We completed simple, user interface clean-up of the pay groups settings tab.

Reports

- Pay group assignment changes are now included in the Administrator Action Event Log report.

Release Notes for 08/21/2018

Documents

- Updated the Memorandum of Understanding to the U.S. Citizenship and Immigration Services' latest version.

Employee Management

- Admins now can edit their employees' middle name in the Employee Personal Information card. Edit fields are now the same size.

The screenshot shows a web browser window with the URL <https://bengo.greenshadesonline.com/GOESAdmin/Employee/PersonalInformation.aspx?EDID=1>. The page title is "Employee Management" and the user is logged in as "Suzette". The navigation menu includes Home, Employees, Pay History, Tax Service, Year-End Forms, Reports, and Settings. The main content area displays the "Employee Management" page for "Pilar Ackerman" (Digital Employee Folder). A "Back to Employee List" button is visible. The "Personal Information" card is the active tab, showing the following fields: First Name: Pilar; Middle Name: Middle Name; Last Name: Ackerman; Suffix: Suffix; SSN: 918239834; Birth Date: 11/24/1988; Gender: Female; Phone Number: 3125550115; Phone Extension: ; Marital Status: Married; Address Line 1: 882 Willow Ave; Address Line 2: ; Address Line 3: ; City: Pittsburgh; State: Pennsylvania; Zip Code: 15212; Country: ; Political Subdivision: Yough School District / Sutersville Boro (West). A note indicates "Political SubDivision was set by Suz at Aug 1 2018 7:55PM." and a link "GeoCode this SubDivision from Address" is provided. The "Cancel" and "Save" buttons are at the bottom.

Release Notes for 07/23/2018

Kiosk

- In the kiosk settings, administrators will see what version they're on, and if they're out-of-date, per kiosk.
- Admins will also get a workspace warning for when a kiosk is out-of-date.

Time Off

- The ability to delete time off requests that have been approved and already batched as been removed.
 - Managers can no longer delete time off requests in this state. A warning will be displayed at the top of the time off request stating the request cannot be deleted and why.
- The time off policy assignments now work properly.
 - Previously, correcting the conflict in the Time Off Policy Applicability Settings of the specific time off policy (instead of resolving it in the Manage Conflicts section), the Manage Conflicts page would still show the issue as needing to be resolved.

Time Codes

- On the time code setup page, the user interface of the warning and an icon color have been made consistent with the user interface look elsewhere on the site.

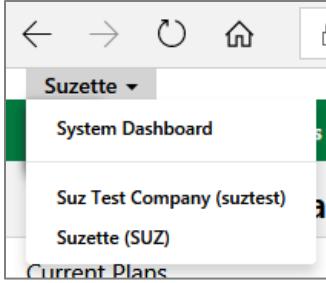
Manage Employees

- In Settings → Employee Access → Manage Employees, this table has export options available.

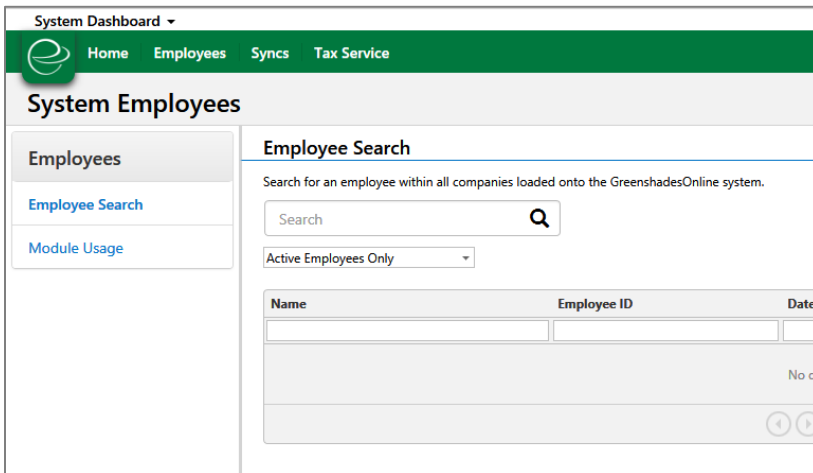
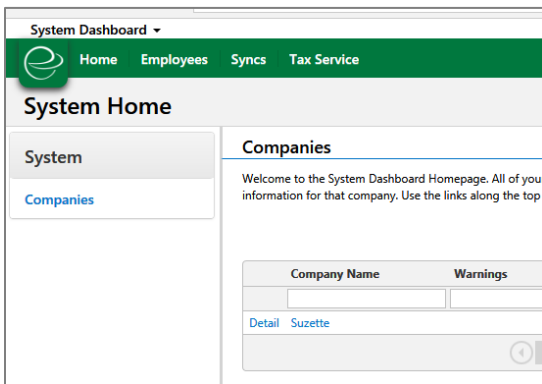
Release Notes for 07/10/2018

System Dashboard

- Company Dashboard has been renamed as System Dashboard.



- Selecting System Dashboard now presents organized modules (Employees, Syncs, and Tax Service) as top-bar menus with applicable side-bar navigation menus. These updates are only cosmetic.



System Dashboard ▾

Home Employees Syncs Tax Service

System Employees

Employees

Employee Search

Module Usage

Module Usage

The numbers of employees using each module is found below, sorted by company or module. Links open a grid of the users.

Show by: Company Module

Timesheets Suzette: 29	Benefits Suzette: 30	Direct Deposit Suzette: 59	Documents Suzette: 2	Evaluations Suzette: 2	Expense Report Suzette: 0	I-9 Suzette: 59
W-4 Suzette: 59						

System Dashboard ▾

Home Employees Syncs Tax Service

Suz Account Settings Sign Out

System Syncs

Sync Reports

Past Syncs

Sync History

Use the grid below to view your Synchronization History.

PDF Export Excel Export

Company Name	Sync ID	Status	Finished Time	Computer	Connector Version
Suzette	700124054	Removed	5/31/2018 9:45:16 PM	sreagan on QAGP2015	2018.312.0.0
Suzette	700123980	Removed	5/31/2018 6:27:51 PM	sreagan on QAGP2015	2018.312.0.0
Suzette	700123964	Removed	5/31/2018 5:15:15 PM	sreagan on QAGP2015	2018.312.0.0

System Dashboard ▾

Home Employees Syncs Tax Service

System Payroll Tax Service

Reports

Upcoming Deadlines

Upcoming Deadlines

View upcoming payroll tax service deadlines for all companies loaded onto the GreenshadesOnline system.

PDF Export

Drag a column header here to group by that column

Jurisdiction	Payments>Returns	Due
All		All

Release Notes for 07/09/2018

Time Off

- On the Time Off Request review page, administrators and managers will see the correct unit of days or hours displayed correctly according to the policy settings.

Time & Pay Code Settings

- The column, 'Time Code Name' has been added to the Time Code table.

- Warnings will appear when a holiday time code has not been assigned to a paygroup.

Onboarding

- The Welcome Wizard will not be presented to Onboarding employees.

Security

- When viewing the Employee Access Attempts table, Administrators will see the full history for an employee, even if the employee is disconnected from their account. (Impersonations will not show in this listing.)

Release Notes for 5/14/2018

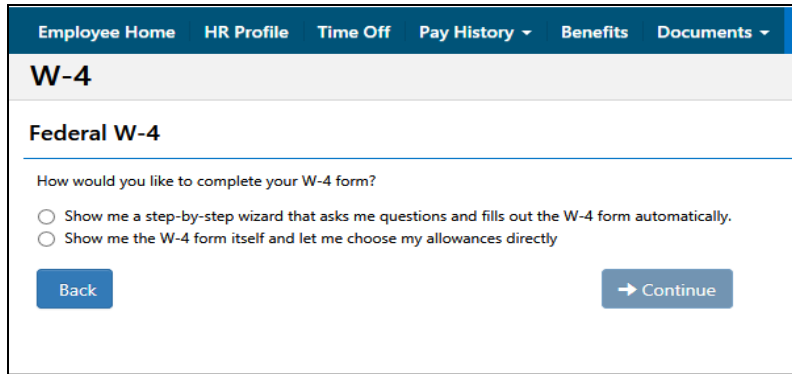
Time Off Policy

- When filters are updated to select different employees, previous employees assigned to a Time Off Policy will update to the Default policy.
 - Previously, when an employee was assigned to a Time Off Policy by the filters in the policy, and the filters are updated to exclude that employee, going to Employee Card > Time Off Policy, that employee would still be retained in the policy they were removed from according to the policy filters.

Release Notes for 4/26/2018

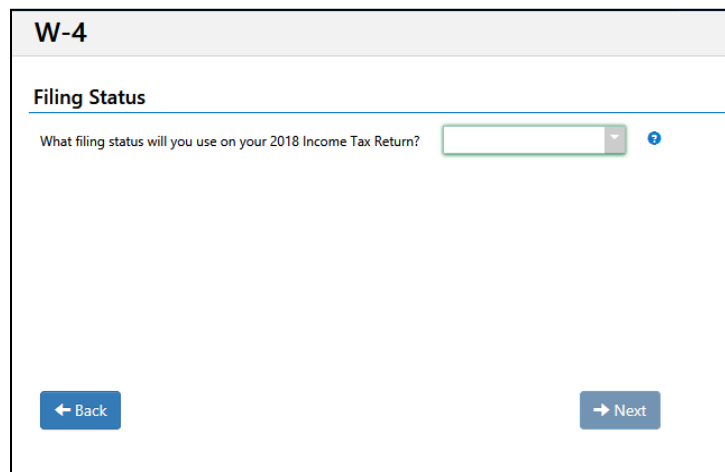
HR Docs – W-4 Form

- Overhauled back-end architecture changes to the Federal W-4 module to support the new State W-4 module. Some changes will be visible to the employee.
 - When starting a new W-4, employees will choose between step-by-step wizard or going directly to the form itself. Due to Compliance, the option of selecting which year to complete is no longer available.



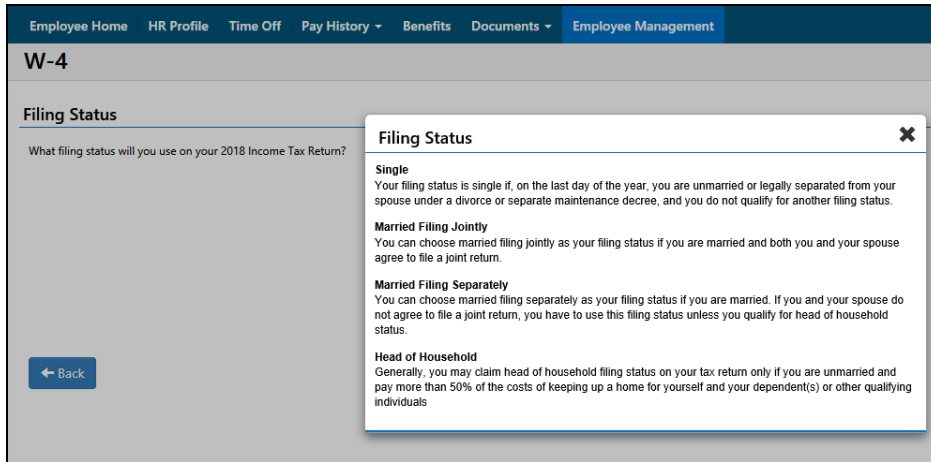
The screenshot shows a web interface for completing a W-4 form. At the top, there is a navigation bar with links: Employee Home, HR Profile, Time Off, Pay History, Benefits, and Documents. Below the navigation bar, the page title is "W-4". Underneath, it says "Federal W-4". The main content area asks, "How would you like to complete your W-4 form?". There are two radio button options: "Show me a step-by-step wizard that asks me questions and fills out the W-4 form automatically." and "Show me the W-4 form itself and let me choose my allowances directly". At the bottom, there are two buttons: "Back" and "Continue".

- The wizard is simplified and will only show screens based on responses. For example, if an employee does not have dependents, we will not ask how many dependents an employee has.

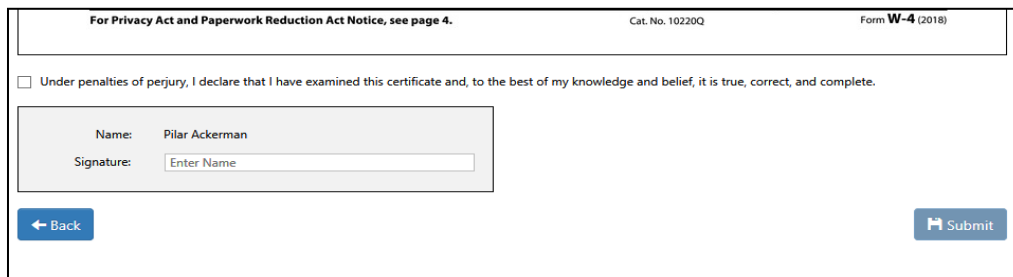


The screenshot shows a web interface for selecting a filing status. At the top, there is a navigation bar with links: Employee Home, HR Profile, Time Off, Pay History, Benefits, and Documents. Below the navigation bar, the page title is "W-4". Underneath, it says "Filing Status". The main content area asks, "What filing status will you use on your 2018 Income Tax Return?". There is a dropdown menu with a blue question mark icon to its right. At the bottom, there are two buttons: "Back" and "Next".

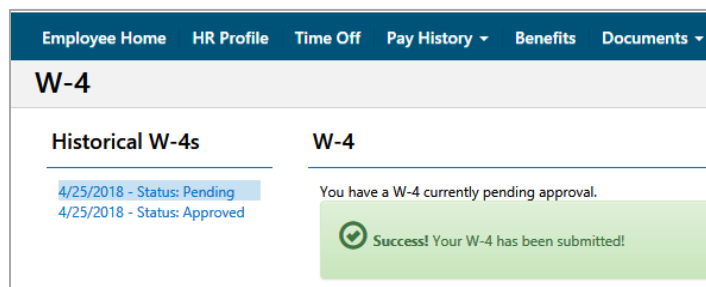
- Help text boxes will pop out to provide IRS-based definitions or links to the IRS publications for more information.



- The employee signature box has been newly added. Until the jurat is checked and the signature box properly filled out, the employee will not be able to submit their form.



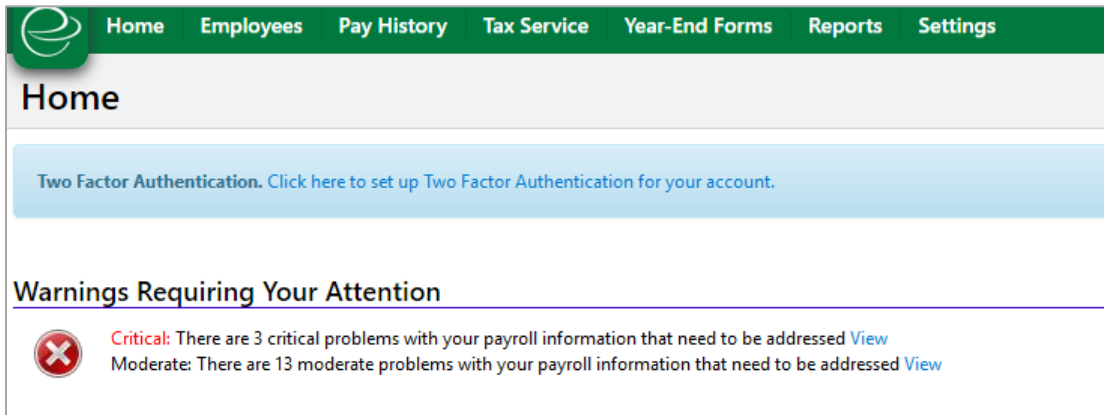
- Once complete, the employee will receive a notification of their successful submission.



Release Notes for 4/12/2018

Duplicate Employee SSN

- The warnings that inform Admins that duplicate SSNs existed no longer were showing.



- While identifying the error with this first issue, a secondary issue was discovered. Terminated and inactive employees were not included in the duplicate SSN reporting.
- Admins will now see duplicate SSN reporting which includes terminated/inactive employee IDs

The screenshot shows the 'Warnings Home' page. It has a green navigation bar with links: Home, Employees, Pay History, Tax Service, Year-End Forms, Reports, and Settings. Below the navigation bar is a 'Warnings Home' header. There are 'PDF Export' and 'Excel Export' buttons. A table displays the following data:

Employee ID	EmployeeName	Message	Importance
AFHEW001	WORKS, ELDRED	SSN '305406440' duplicated for 2 employees (example: ELDRED WORKS (AFHEW001), KARTIKEYA ESPINOZA (AFHKE001))	Critical
AFSH001	SPOPHN, HARLEIGH	SSN '468731859' duplicated for 2 employees (example: HARLEIGH SPOPHN (AFSH001), HOLDA FEKETE (AFSHF001))	Critical

At the bottom of the table, it says 'Page 1 of 1 (2 items)' and 'Page size: 100'.

- Actions the Admin will need to take: Contact Support (888-255-3815 x1 or support@greenshades.com) to have the duplicate SSN's employee ID removed.

Release Notes for 2/2/2018

E-Verify

- Deadline warning for E-Verify is changed to 3 business days (not weekends) so that e-Verifying employees is easier and takes Federal holidays into consideration.

Release Notes for 11/22/2017

Release Notes

- Any significant updates to this product are now available in the form of release notes.

Release Notes for 09/14/2017

Message and Bulletins

Small UI update when selecting only 1 employee

Timesheets

- Updated a column in Timesheet Settings to match the column name to the column it represents.
- Added Export to Excel option in Timesheet IP Filters settings.

Time Off

- Added the ability to allow employees to submit two un-overlapping time off requests in the same day.

Release Notes for 08/9/2017

Admin Account Management

- Admins who use 2FA will be prompted to provide 2FA login information when they switch device or IP address.
- General UI updates for the admin account creation process

Account Management

- Employees who use 2FA will be prompted to provide 2FA login information when they switch device or IP address.
- Employees can now manage their saved devices for their 2FA enabled account in account settings.
- The employee login process underwent general UI updates.

Timesheets

- When an employee has OT that is deferred, we're adding an explanation to the timesheet affected.

Release Notes for 07/19/2017

Administrator Access Control Settings Redesign

- GreenshadesOnline.com → Settings → Access Settings → Administrator Access → Access Control tab
 - While accessible through GreenshadesOnline.com rather than the Year-End Forms portal, the Access Control setup indicates which administrators within your company has access to and may work with formsets and their data.
 - The UI was updated to a grid for at-a-glance view of your company's administrators and their role (super or limited). From the grid you may choose to Edit an existing administrator's permissions or add a new administrator.

Name	Greenshades Online Role	Employee Group Access	Formsets Administered	Last Login
Edit Remove GreenshadesQA (formerly ChrisV)	Super Administrator	None	34	2017/10/30 10:32:14 AM
Edit Remove David Test	Super Administrator	None	13	2015/10/21 04:02:29 PM
Edit Remove NewUserAdminD	Limited Administrator	None	16	
Edit Remove New User 7	Limited Administrator	None	0	2015/10/01 12:52:41 PM

- When editing or adding a new administrator, you may limit access by each tax year and indicate within each year which formset types the administrator has access to, as well as granularly give access to a specific group(s) of employees/vendors.

Administrator Access Details

Year-End Forms Access

You can use this section to view and configure access to various formsets for your company.

Showing formsets for tax year: 2016

Formsets You Administer

You are a super administrator on the following formsets and may therefore configure access for other users. Check the box next to the formsets that Mike Peterman may administer.

Limit Access to Formsets

- 1099-K Forms
- 1099-MISC Forms
- 1095-B Forms
- 1095-C Forms
- W-2 Forms

Limit W-2 Formset Access

- Super Administrator
- Limited Administrator with Access to All Employees
- Limited Administrator with Access to Groups of Employees

Access will be restricted by UserDef1. [Change](#)

- (Blank)
- PMB

Employee List

- Employment type has been added as a reporting option on the home page's employee list.

Release Notes for 06/28/2017

Employee Access Settings

- Added warning text describing nearly every Employee Access Setting, additional audit logging for employee account changes, and new employee management tools under Settings → Access Settings → Employee Access.

Admin Access Settings

- Added a link in the header for admins to manage their own access settings easier, enhanced some basic security features for admin log in.

'Employee Tax Distribution Preference' Report

- The employee Work Location was added to this report for more granular reporting. Reports → Basic Employee Reports → Employee Tax Distribution Preference

Release Notes for 06/6/2017

Timesheet Review Center

- Continued to increase performance in the Timesheet Review Center when loading the main page, sub-pages and grids. This is a continued effort and users should expect to see incremental improvements over time.

Messages and Bulletins

- Design changes made to simplify the settings in this section. All functionality remains the same, but here are some key changes:
 - Messages now appears above Bulletins and the Message Status column can now be used to show inactive messages so the "Show Inactive" checkbox has been removed.

The screenshot displays the 'Employee Management' interface. On the left is a navigation sidebar with options like 'Employees', 'Profile', 'Pay History', 'Timesheets', 'Time Off', 'Benefits', 'Documents', 'Expense Reports', and 'Evaluations'. The main content area is divided into two sections: 'Message Manager' and 'Bulletin Manager'. Each section includes a table of items with columns for 'Message Status', 'Start Date', 'End Date', 'Created By', and 'Visible To'. The 'Message Manager' table shows 19 items, and the 'Bulletin Manager' table shows 33 items. Both tables have filters for 'All' and 'Filter' and include 'PDF Export' and 'Excel Export' buttons. The interface also features a top navigation bar with 'Home', 'Employees', 'Pay History', 'Tax Service', 'Year-End Forms', 'Reports', and 'Settings'.

- Filtering options are simplified – use “Specific Employees” to filter to one employee or many employees.

Make this message available to:

- All Employees
- All Active Employees
- Send to: Class ▼
- Specific Employees

- End Date and Time are combined into 1 dropdown

Notification Options

Start Date:

End Date:

Send a copy of this message to employees via email

- Bulletin attachments look different – you can select more than one by clicking on the “Browse” button and using your ‘Shift’ or ‘Ctrl’ keys to select multiple files. The files are uploaded once you save the bulletin.

Attachments

Upload multiple files at once by using your Shift or Ctrl keys. The selected files will be uploaded when you save the bulletin below.

Supported file types (max size 8 Mb per file):
jpg, jpeg, jpe, .gif, .pdf, .doc, .xls, .txt, .docx, .xlsx, .pptx, .ppt, .png, .one, .rtf

Release Notes for 05/18/2017

Limited Administrator Access Settings

- Design changes made to simplify the setting. Functionality has remained the same, but the filtering is now based off all access, no access, or some access.
 - You can limit Access to employees can be filtered by selecting “Groups of Employees”.

Greenshades Online Limited Settings

Limit Access to Modules
Select the modules this administrator has access to:

All Modules
 No Modules
 Specific Modules

- Benefits
- Direct Deposit
- Documents
- Evaluations
- Expense Reports
- I-9
- PA Residency Certification Form
- Pay History
- Payroll Tax Service
- Profile
- Time Off
- Timesheets
- W-11

Limit Access to Employees
Select the employees this administrator has access to:

All Employees
 No Employees
 Groups of Employees

Access will be restricted by employee class. [Change](#)

Limit Access to Impersonate Employees
 This administrator may impersonate employees.

- You can change how you restrict access by clicking the blue “Change” hyperlink. A popup will appear and allow selecting what filter you would like to use to limit employee access. Reminder this will be the filter for all the admins.

Limit Access to Employees ✕

Filter your administrators' employee access based on:

Please note, this will remove ALL current employee filters for ALL administrators.

[Save](#)

Release Notes for 05/15/2017

Employee Access Settings

- When a new module is enabled for a workspace, employee access will now default to “Off” so employees do not have access until the admin grants it
 - No change for existing modules.

Manager Emails

- When a manager becomes inactive or is terminated, they will no longer receive emails about any subordinates, but will continue to receive emails about their own accounts (paystub availability or their password has been reset).

Release Notes for 4/27/2017

Timesheet Review Center

- Increased performance in the Timesheet Review Center (TRC) when generating timesheet warnings.
 - You may see a warning at the top of the TRC if timesheets are still being processed to check for warnings/errors.

Release Notes for 4/6/2017

Employee Notifications

- Employees of clients using pass-through authentication will no longer get links to GreenEmployee in their auto-generated emails

Employee List

- Added HR status to allow for more granular detail tracking of employment status.

Release Notes for 4/3/2017

I-9

- When an administrator completes an I-9 and includes details for the Doc A portion (passport or passport ID card), Greenshades now requires a copy of the employee photo on the document.
 - All other information may be obscured as necessary.

Employee Notifications

- Employees of clients using pass-through authentication will no longer get links to GreenEmployee in their auto-generated emails. (Pending future release on 4/6/2017)

Employee List

- Small, low impact design updates.

Organization Chart

- Small, low impact design updates.

Release Notes for 11/4/2016

Employee Notifications

- Employees are notified via email and homepage notification when certain security related changes are made to their account.
 - Direct deposit information is add/removed/updated
 - Profile information is added/changed/removed
 - Employee account has been disconnected from their user ID and password
 - Dependent information is added/updated/removed
 - Contacts have been added/updated/removed

Admin Notifications

- Admins are notified and the action is logged in the Admin Action log when certain actions happen.

- The admin affected and super admins are notified when a change is made to the admin's access settings
- Super Admins notified when a new admin is added to the workspace
- Super Admins notified when an employee's permission level has changed
- Super Admins notified when a manager's settings have been changed
- There is a new setting in Greenshades Online to toggle the email notifications.

Reports

- Update the 'Employees Who Have Used GreenEmployee report.'
 - Include fields from the new SSO including Account Created, User Name, Password Created At, and Last Signed In IP.

Employee Profile

- Details of an employee's password change
 - Below the user name for each employee, we've added the date and time when the employee's password has last been changed.

GreenEmployee → My Account

- The employee can now see a grid of their access attempts, like the one that admins can see on the employee profile.

Manual Account Approval

- There are additional fields in the modal that opens when admins review a manual approval request

Miscellaneous

- Employees experience an improved flow when their account is no longer attached to an active employee or company.

Release Notes for 8/17/2016

Pay History

- Add setting to show/hide \$0 earnings lines on pay statements

Security

- Add 2nd Factor Authentication via text option for admins

Release Notes for 07/26/2016

Profile

- Added a setting to allow administrators to choose the way tenure is calculated.
 - Admins can choose to calculate tenure based on original hire date or adjusted hire date.

Organizational Chart

- Employee ID has been added to the Organizational Chart
 - This is optional and is defaulted to Off.

Various Fixes

- Corrected error messages in several places
 - Direct deposit settings, confirmation message on employee evaluation deletion, block modules from sending emails to employees who don't have access, checkbox selector functionality in reports, and footer content updates.

Release Notes for 7/14/2016

Profile

- Expanded the admin control for the Profile module fields.
 - Admins may now choose to make each field Visible, Editable, and/or Required by employees for their Personal, Address, Dependents, Contact, and Work Location information.
- Auto-approvals are now broken down to turn on per Profile section.
 - Additionally, Dependent and Contact auto approvals for Adds, Edits, and Removals are further broken down.
- Admins now can approve/deny each submitted Profile change, rather than all or nothing.
 - They may also edit a submitted requested change if necessary. Employees will be notified accordingly through email and on their GreenEmployee home screen.

Release Notes for 06/17/2016

Reports

- Created a report that shows admins a summary view of timesheet entries (after overtime calculations) for a given time period.
 - This report summarizes timesheets into one line per day per employee per pay code.

Various Fixes

- Corrected the way timesheet comments were displaying
 - Removed unnecessary HTML tags, standardizing menu items across GreenshadesOnline and Green Employee, updating popup modals to have multiple ways to close the window.

Release Notes for 05/26/2016

Password/Security

- Expanded the admin security settings to restrict admins from reusing old passwords.
 - This is defaulted to the last 4 passwords and can be raised to include the last 8 passwords. This will go into effect for future passwords and will not include any passwords used prior to this setting existing. This is an internal setting; please contact the Support Team to change these setting for your admins.
- Admins can also force all administrators to periodically reset their passwords after a certain amount of time.
 - This is currently set at 90 days for all administrators, and can be overridden. This is an internal setting; please contact the Support Team to change these setting for your admins.

Expense Reports

- Admins can now allow employees to mark an expense as non-reimbursable.
 - This expense will not down-sync into the accounting package but will be saved for reporting purposes.

Release Notes for 12/8/2015

Tax Documents

- Updated reference to employee W-2 consent settings to include the 1095-C, as any electronic consents given will be counted for the W-2 and 1095-C forms

Release Notes for 7/14/2015

Pay History: Module

- Added the ability for admins to disable the pay history module on an individual employee basis.
 - This can be done through the 'Employee Login' page within the individual's profile.
 - This will restrict the employee from viewing their paystubs, tax forms, and pay details.

Pay History: Distributing Statements

- Added an option for the admin to hide the red notification alert for distributing paychecks and paystubs.
 - Option available to disable/enable through Settings → Admin Notifications.
- The batch ID for print & mail submissions is now listed within the order grid for client reference.

Tax Documents

- W-4 exemption/status information will now display historical on corresponding paystubs.

Release Notes for 5/27/2015

Pay History

- The Pay History Dashboard page is now separated into two different pages:
 - Distribute Statements:
 - Ask Greenshades to Print & Mail your paychecks, check stubs, and direct deposit slips, or download and print yourself.
 - There is a quick link to the Distribution page accessible from the home page payroll summary widget.
 - The Checks & Paystubs Distribution Wizard has been given a more user friendly look and workflow.
 - Pay History Details
 - This page gives you expanded payroll details on each of your employees by pay codes, hours, and wages.

Reports

- A new report, 'Pay Distribution Status' available
 - It's located within the Reports tab and on the Pay History Details page.
 - This report will show the status of each employee's distribution preference, whether by paper check or direct deposit.

Release Notes for 4/24/2015

W-4 Updates

- The W-4 module was updated to match the income brackets changes for 2015.

Widget Location

- The widgets on the homepage were updated to ensure that they save the user's location preferences.

New Password Restriction Options

- Admins can now restrict users from re-using old passwords when setting a new one.
 - The number blocked is variable up to six. This feature can only block passwords that are set after its release, since they were not tracked before.
 - This is done in Settings → Access Settings → Employee Access → Security Policy. All password restrictions are found there.

Password/Security

- Introducing security questions as an option for password resets.
 - First-time users will set up two security questions or provide an email address specifically for resets. They must do at least one, but may do both.
 - These are set on initial login and can be changed (or set, for current users) in the user's Account Settings.
 - If a current user doesn't set up either of these and resets their password, the reset email will go to one of their emails in GreenEmployee.com.
 - Users can be locked out by answering the questions wrong too many times. The number of times is the same as the incorrect password attempts setting, set by the admin.

HR Profile

- Mask SSN in HR Profile
 - User's Social Security Numbers will appear as ***-**-1234 in the GreenEmployee.com view of the HR Profile.
 - Selecting *Edit* will allow them to see the whole number and make changes.

Release Notes for 6/6/2014

Expense Reports

- Employees are now able to add mileage to their expense reports.
 - These settings are controlled by their administrators in the Expense Reports Settings page. Designate a Category or Subcategory as a mileage expense and then setup the reimbursement rate in the Expense Report Template (this allows flexibility in rates per report template). When the employee selects that Category or Subcategory in their expense report, they can input mileage reimbursement information. We will automatically calculate the reimbursement amount for the employees and they will be able to edit like all other expenses (the Total Reimbursement field will always have the technical calculation for reference).
- Expense Reports settings pages received an update on the way several pages look and feel to better address their functionality workflows
- Administrators can send expense report transactions to their accounting package by either individual line items (this is current functionality) or by pay code (per report, all transactions will be grouped to similar pay codes and synced in those groupings)
- Administrators can now set a line item limit per expense report template. This can be accomplished in the Expense Report Template Settings area. Therefore, there are now two report limits an administrator can set: Per Line Item (an individual expense limit) and a Report Limit (current functionality for the limit for the entire expense report)
- The following grids had the following columns added to them:
 - Expense Reports Pending Review grid:
 - Supervisor
 - Submitted Amount
 - Reimbursement Amount
 - All Expense Reports grid:
 - Supervisor
 - Submitted Amount
 - Reimbursement Amount
- The Supervisor name was added to each expense report

- The Employee name was added to each expense report
- Administrators are now able to designate who is allowed to edit their employee's expense report fields, including categories and amounts. This setting can be found in the Expense Report Template settings pages
- Our robust Employee Applicability was added to Expense Reports so Administrators have more granular control over who can use each expense report template
- A "Send Back to Employee" button was added to the approval workflow of Expense Reports along with a notification so that the manager and/or administrator may send an expense report back for the employee to make changes and re-submit. Due to the improved workflow, the sign box has been removed.

Release Notes for 4/23/2014

Documents: Employees

- When in the Documents section of Employees (note: Not the Employee Folder), we made several general changes:
 - We changed the sub-title name of "All Documents" to "Employee Documents"
 - We changed the sub-title name of "Download Documents" to "Batch Downloads"
 - We added a new sub-title area to view just reference documents that Administrators have assigned to employees: "Reference Documents" which will show you which reference-only documents have been made available for employees to view/read
 - We've added a column called "Tag" to the Pending Review and Employee Documents grids where Administrators and Managers can search the key fields of their employees' documents. When a search is performed, we will show the first key field and its value by default. If there are no key fields in the document, that area will be blank.

Employees

- We added several columns to the Add Columns functionality of the Employee List:
 - "User Defined 1" and "User Defined 2"
 - "Phone Number 2" and "Phone Number 3"
 - "Termination Date"
 - "Supervisor"
 - "Company Name"

- When inside an Employee's Folder, there are a few additions:
 - Under Personal Information, we added "Termination Date" (as well as the related Manager Access Settings necessary to control this setting)
 - In the Documents section of the Employee Folder, we added a column called "Tag" where Administrators and Managers can search the key fields of their employee's documents. Unless a search is performed, we will show the first key field and its value by default. If there are no key fields in the document, that area will be blank
 - In the Organization Chart area of the Employee Folder, there is a link to the Organization Chart based on the employee. Clicking on it will take the Administrator or Manager outside of the Employee Folder and provide full Organization Chart functionality
 - We are now making Supervisor and Subordinate information more visible within the Employee Folder. When under Employment Information, if the employee being viewed has any supervisors or subordinates they will appear in a photo list format underneath the Organizational Chart information. Clicking on the names of a supervisor or subordinate (if access is allowed) will bring the Administrator or Manager to that employee's folder
- We've added the ability to change the number of rows/results shown in many grids

Documents: Admin

- When editing a document as an Administrator or Manager, you can preview the attachment in a new window by clicking on the preview of the document or by clicking "Open in New Window" just above the document preview
- Document history has been added to respective documents for Administrators and Managers.

Release Notes for 3/11/2014

Evaluations

- Managers and Admins are now able to create a 'Printer Friendly' version of their employees' evaluations.
 - This feature can be found in the area called "Relevant Links" when the manager or admin is inside an employee's evaluation.
 - Clicking on this link will open a new tab and populate the printer friendly version of the employee's evaluation.

Grids/Column Improvements

- Columns added to grids and column name changes:
 - Time Off / Pending Time Off Requests grid: Employee Class, Time Off (Date Range), Period is now called Time Off (by Date), Request Date is now called Request Submission Date, Day of Week
 - Time Off / All Time Off Requests grid: Date of Approval/Denial, Time Off (Date Range), Request Date is now called Request Submission Date, Day of Week
 - Evaluations / Completed Employee Evaluations grid: Position, Supervisor Name
 - Evaluations / Upcoming Evaluations grid: Supervisor Name

Profile Change

- Profile Change List grid now remember your filters after viewing an employee and going back to the grid.
 - Some browsers will delete this data when you exit the browser.

Employee Directory

- The directory now supports viewing 20/50/100/All in the dropdown list in the bottom right hand corner of the grid

Employee List

- This list now supports viewing 20/50/100/All in the dropdown list in the bottom right hand corner of the grid.
- 'Employees Logged In' report has been enhancement.
 - There is now the ability to filter Active and Inactive in the column called 'Active'.

HR Docs

- For any documents created from this date forward, all notifications posted in the My Messages portion of Green Employee will be deleted when the related document is deleted.
 - Documents created from 3/10/2014 and earlier will not have this function, therefore those related notifications will remain in the My Messages area unless the employee deletes them manually.

Profile

- “Address Same as Mine” text has been changed to “Fill in my Address” and has been changed to a button rather than being a checkbox.
 - This is to better imply the function of this feature. If the button is available to the employee, and when clicked, it will take the most recently approved employee address and fill in the Dependent or Contact’s data with the employees.
 - It will not continuously update the Dependent and/or Contact’s data for all time, simply update the address as it is at the time the button was clicked.

Release Notes for 12/30/2013

- Greenshades Online received a new navigation system and other look and feel changes to enhance its usability and appearance.
- Changed the top navigation buttons to a new full width navigation bar. Your current company moved to the left and the sign out option is underneath your name. Otherwise, the menu options remained the same. This navigation bar will remain visible at all times.
- Widened GreenshadesOnline to use the full browser width and thereby display more content at once.
- Modified the navigation and look and feel under the Employees area of Greenshades Online.
- Changed the module navigation to utilize a side menu for more intuitive navigation. Each module will have a number next to it if there are items which need attention in that module. Your currently selected module will be highlighted to always indicate which module you are in.
- Added “breadcrumbs” to show exact location within employee service navigation and allow easy backtracking.
- Added a module menu for easier access to the full feature set of each module.
- Enhanced the Employee Details view to also use a side menu.
- For employee supervisors, the Green Employee manager center will now have many subordinate-management features that were already present for Administrators on GreenshadesOnline. This includes the ability for them to see their employees’ employment and personal information.
- Added many new administrator controls to customize the level of information and authority given to employee supervisors through the Green Employee Manager Center. This allows you to limit the information that supervisors can see about their employees.
- Added the ability for Greenshades Online administrators to restrict which modules supervisors can manage on Green Employee.

- Added the ability for Greenshades Online administrators to restrict which modules supervisors can manage their indirect subordinates in or use the Manager Delegation feature.
- Added a Manager Delegation report to Greenshades Online to allow administrators to view which employee supervisors are currently delegating to another employee.

Release Notes for 9/17/2013

- Fixed an issue in the HR Documents module to deactivate older (grandfathered) documents when the latest version of the document is replaced.
- Addressed an issue which was showing some employee birthdates off by one day.
- Adding Dynamics User Defined fields to the employee information cards on GreenshadesOnline.
- Updated the Employee Profile module to default the employee address to US when the employee is submitting a profile change.

Release Notes for 7/9/2013

- Updated the required document setting in the HR Documents module to exclude inactive employees.
- Addressed an issue in the HR Documents module which was duplicating employee notification messages when a current document was updated.
- Addressed an issue in the document upload for the HR Documents module which was causing the page to not respond when an unsupported document type was uploaded.
- The Green Employee Portal Profile Module was enhanced to provide a cleaner, more user-friendly interface for employees. This includes dedicated view and edit modes, clearer indications when a change has been submitted for approval, and more exact error messages for missing/incorrect fields.
- Employees will now be able to change their Green Employee account picture in the profile module.
- The employee dependent and contacts sections were enhanced to include new required fields.
- The employee address suggestions will now auto-populate when enabled and the employee is entering a change of address.

Release Notes for 6/12/2013

- Updated the HR Documents employee notification message to be more appropriate when documents are updated as opposed to created.
- Updated the Green Employee homepage to disallow inactive employees the ability to view a co-worker's PTO request.
- Removed administrator and manager ability to create manual time entries using any time code. They are now limited to the time codes which are enabled for pay group of the employee whose time entry they are creating.
- Addressed an issue where paystub batches were not appearing correctly for admins because of administrator access restrictions.

Release Notes for 5/16/2013

- The Employee Services I-9 module was updated to conform to the latest form from the Department of Homeland Security U.S. Citizenship and Immigration Services.
- The User Defined 1, User Defined 2, and Birthdate fields are now available to the employee directory and organizational charts.
- The employee directory views with profile pictures now includes a search field which will search for a part of an employee's name and return those results to the list.
- Each evaluation started will now be auto-saved automatically each time a manager or administrator makes a change to the evaluation. The timestamp for the last save is shown at the bottom of the evaluation. Save As Draft will continue to work as before but managers and administrators can now be assured their latest changes are not lost when navigating away from the page or being logged out.
- The email notification sent to managers for an upcoming evaluation was enhanced to include more information.
- The site notification alerting managers to an upcoming evaluation due date was updated to include the employee's name.
- Each evaluation now includes a 'Duration Since' line which will help managers and administrators identify which evaluation this is for an employee.
- Each evaluation now includes a Relevant Links section which will allow managers and administrators the ability to locate previous evaluations for employees and review the company's evaluation policy if attached to the evaluation template.
- The evaluation setup now allows administrators to determine the date they wish for evaluations to begin. This is helpful when first using the evaluation module and allows you the flexibility to begin using the module when it is most convenient.

Release Notes for 4/16/2013

HR Documents

- The document completion page was updated to provide more intuitive language and interaction when managers and employees are completing policies and uploading forms.

Release Notes for 3/19/2013

GreenshadesOnline

- Made large improvements to the Administrator Access functionality of GreenshadesOnline.com to facilitate more granular access control restrictions. The new feature allows Super Administrators to control which employee groups and which product modules other administrators have access to. A new 'Limited Access' designation for administrator privileges was added to support this. This change impacted multiple pages on GreenshadesOnline.com. To modify these settings, go to Settings (top menu) -> Admin Access (link) -> Access Control (tab).
- Support for more granular notification settings was added. Administrators now have more specific options when registering for email notifications.
- Updated the W-4 module to be consistent with the latest 2013 changes to the W-4 form.
- Added a new Employee Directory to GreenEmployee.com to compliment the Employee Organization Chart. The Employee Directory allows employees to view their peers in a list, business card, or picture view.
- A new Available Balance column was incorporated to various time-off views to allow for administrators and employees to see the current balance minus upcoming usage.
- Added new functionality to allow administrators and managers the ability to submit time-off requests on behalf of employees.

HR Documents

- Various links and instructions were updated to make terminology and concepts more clear within the module.
- The settings pages were enhanced to improve usability. This includes the creation of a unique tab for each document type to make them easier to find and edit.
- The employee Company Documents page was enhanced into a Document Library. Employees can now find any document. From this new Document Library, employees are provided links to take the appropriate actions based on the type and status of the document.

- The New HR Document wizard has been updated to be more intuitive for the type of document being created. There were changes made to the page structure and instructions but no functionality was added or removed.

Release Notes for 2/19/2013

- Updated the Employee Portal expense report and HR document interface to provide a more intuitive method to complete a new expense report or HR document.
- Added a new option for administrators to automatically approve employee profile changes made through the Employee Portal.
- Added a new option for administrators to automatically approve employee direct-deposit changes made through the Employee Portal.
- Addressed an issue which was continuing to show Company Documents to employees when it was disabled by an administrator.
- Added employee Date of Birth to the employee information displayed to administrators.

Evaluation

- Added options to see upcoming employee evaluations as much as 6 and 12 months in to the future.
- Added Excel and PDF export options to the upcoming employee evaluations view.
- Provided a new confirmation window when completing an employee review to prevent unintentional finalization of the review.
- Added the option for administrators to customize additional instructions to managers on the employee evaluation.
- Addressed an issue which was causing the next evaluation due date to not always appear correctly for managers.
- Added the option to adjust the minimum numerical score given when using word lists to score employees' performance.
- Deactivated the mouse wheel control of the employee evaluation slider to prevent unintentional changes to an employee's score.
- Added an additional Upcoming Evaluation notification for 30 days prior to an evaluation being due.

Release Notes for 12/18/2012

- Updated the Direct Deposit module and Greenshades Online Connector to now update Dynamics when an employee switches their pay delivery selection from Direct Deposit to Paper Check.
- Addressed an issue with the Employee Catalog where adding the State column into the table was causing an error.
- Updated a link of Green Employee which was incorrectly taking managers to the incorrect Document Library page.
- Updated the Supervisor column filter in the Timesheet Review Center to now display supervisor names in alphabetical order.
- Addressed an issue in the HR Document module which was causing the document type filter on the HR Document history page to not work correctly.
- Addressed an issue in the Employee Evaluations module which was causing some evaluations to not load properly.

Release Notes for 11/8/2012

HR Documents

- Updated the Employee Catalog to allow for all HR Documents to be displayed in the administrators' HR Documents tab of the employee card
- Fixed an issue where employees and managers were receiving emails from the Green Employee HR Documents and Employee Evaluations modules when employee access was disabled for those modules.

Release Notes for 10/2/2012

- Some additional work has been done to improve overall load times on the GreenEmployee.com homepage and fix some small problems that arose as a result of the prior performance updates.

Release Notes for 9/21/2012

- Faster calculation of upcoming payment liabilities and faster overall load times on the Payroll Tax Service homepage
- A small banner at the top of GreenEmployee.com alerting users when their payroll administrators are uploading a large batch of information which may delay the load speed of several pages.

- Faster loading of the “currently open invoices” widget on the GreenshadesOnline.com homepage.
- Employee messages, bulletins, and warnings load much faster on the GreenEmployee.com homepage.
- Administrator warnings load much faster on the GreenshadesOnline.com homepage.
- Overall performance improvement to GreenEmployee.com pages across the entire site.
- Performance improvement to the display of employee paystubs.
- Much faster performance on the overall totals and breakdown sections of the employee timesheet pages.
- Faster loading of the timesheet reporting pages.
- The employee time kiosk (remote application that allows clock-in/clock-out from a mobile kiosk) processes employee logins and clock-ins more quickly.
- Faster performance on the GreenEmployee.com Sign-In page.

Release Notes for 8/30/2012

- Updated the Greenshades Online and Green Employee maintenance notifications to properly display upcoming maintenance windows and provide an ‘Under Maintenance’ page during the maintenance period window.
- Addressed an issue where administrators were sometimes unable to see an employee’s latest W-4 on Greenshades Online if it was first entered into Dynamics GP.
- Fixed an issue where administrators were unable to view the details of an employee submitted work location for approval.
- Addressed an issue which was sometimes preventing the Timesheet Entry Viewer group by preference from staying the same between visits.
- Updated the employee Direct Deposit form to correct an issue which was not allowing some employees to create a completely new Direct Deposit form if one already existed.
- Fixed a recently caused issue which impacted how the spellchecker worked when creating messages on Greenshades Online.

Release Notes for 8/8/2012

- Fixed an issue that was causing some employees to be unable to complete the Direct Deposit form in the employee welcome wizard.
- Modified the Employee Portal address suggestion to display the state abbreviation before the zip-code.

- Fixed an issue with the Greenshades Online timesheet entries table that was preventing it from saving the sorting and filtering preferences between visits.
- Updated the Green Employee contacts and dependents page to properly save changes for some employees who were unable to save updates.

Release Notes for 7/3/2012

- The Greenshades Software End User License Agreement is now available on the bottom of each Greenshades Online page.
- A few of the HR Documents management pages on Greenshades Online and Green Employee have been updated to prepare for future expansion of the HR Documents module. These are minor cosmetic changes and do not affect current functionality.
- Addressed an issue where the 941 editor would have difficulty rendering properly when a blank EIN was provided.
- Addressed an issue on the timesheet entry viewer which was occasionally causing the list to not find specific employees.
- Updated Employee Services manager delegation to not include inactive employees in the list of possible delegate employees.
- Included the timesheet's date range in the screen that employees use to submit their timesheet for approval.
- Added the week number to the Microsoft Excel report that may be produced from the timesheet review center.
- Addressed an issue on the timesheets where the approval time was being provided in UTC instead of the local time zone. It is now provided in the local time zone.

Release Notes for 5/22/2012

- A new notification option has been added for workspace administrators to receive email announcements when this change list is updated. Administrators will need to opt in for this notification.
- Greenshades E-Verify feature has been updated to the latest standards from the Department of Homeland Security. With this update, the E-Verify enrollment and I-9 approval wizard will continue to offer clients the ability to enroll in and submit new employees for eligibility verification.
- The Greenshades Online time off request search was modified to exclude inactive requests in its results.

- The layout of the Manager Delegation screen on Green Employee was modified to provide a cleaner distinction of the delegated roles.

Release Notes for 4/25/2012

- The Greenshades Online Reports page has been organized to group available reports by category. Categories include Basic Employee Reports, Administrator Reports, Pay History Reports, and Technical Reports.
- The Administrator Action Event Log now includes employee profile changes made by workspace administrators. Changes are recorded under the Employee Profile module.
- The W-2 Summary widget on the Greenshades Online homepage was updated to allow for the selection of W-2s from 2007 and 2008 for companies who have paid to have these forms archived and available.
- An issue was fixed which was possibly causing paystub notification emails to not send correctly when the employees' names included punctuation.
- The Recent Payroll Synchronization report was updated to show time details in the local time code instead of UTC.
- Changed the "last filed" date on various New Hire setup screens to display the date by itself instead of including the date and time of the report.
- Greenshades Online now provides the ability for administrators of multiple companies to switch between companies and stay on the same page in the new company when possible. Additionally, switching companies is now possible via a new drop down menu on the upper right of each Greenshades Online page.
- The Pay History Reporting Dashboard now provides the ability for administrators to view the payroll totals by pay code using hours as well as wages.
- The Pay History Reporting Dashboard has been updated to display the status of the download and mail order batches for the selected check date(s) directly on the dashboard.
- The pay documents download feature now allows administrators to select a method for sorting the pay documents in the download. Administrators can now sort by employee ID, department, employee first name, and employee last name.

Release Notes for 3/27/2012

- Greenshades Online now provides a designation of super administrator for each workspace. This designation provides these users greater access to sensitive security features and reports.

- Added a new reporting feature for super administrators that logs the administrator access to the workspace. This includes the administrator username, sign-in time, IP address, and number of pages loaded.
- Add a new reporting feature for super administrators which provides the log of workspace settings changes made by administrators.
- An employee auto-redirect option has been added to Greenemployee.com which will redirect employees to the login screen when their inactivity timeout has elapsed.
- A public computer security reminder option has been added for Greenemployee.com which can be configured by workspace administrators. This reminder will appear to each employee after successful login and is designed to remind them of the most secure way to access sensitive information on a public computer.
- The employee Remember Me feature is now optional and can be disabled by a workspace administrator.
- The administrator Remember Me feature is now optional and can be disabled by a workspace administrator.
- Addressed an issue which was allowing the submission of “blank” employee profile changes.
- Added an email notification report for Greenshades Online administrators that provides a log of all employee related emails sent to employees and administrators. This report includes the status of the email (pending, sent, errored).

Release Notes for 2/14/2012

- A new reporting feature has been added to GreenshadesOnline to report the W-2 delivery preference selected by your employees.
- The Show Notes option on the Managing IP Addresses settings page on GreenshadesOnline has been fixed to expand and display notes properly.

Release Notes for 1/23/2012

- Performance improvement when returning to GreenshadesOnline.com or GreenEmployee.com pages after a forced sign-out.
- Fixed an intermittent issue where the employee information page on GreenshadesOnline.com would not load properly after a redirect that also required the administrator to sign-into the website again because their session had timed out.
- Immediately disabled many of the ‘Submit’ and ‘Save’ buttons after they are clicked on the timesheet entry and management pages across both GreenshadesOnline.com and

GreenEmployee.com. This makes it much more difficult for administrators or employees to double-click the button and generate duplicate line items within a timesheet.

- Increased performance when changing workspaces on GreenshadesOnline.com for companies that have both paystub and W-2 workspaces online.
- Fixed an issue that allowed employees to edit their work location within the GreenEmployee.com profile pages even if the administrators had indicated that work location should not be an editable field.

Release Notes for 1/17/2012

- Fixed an issue where the GreenEmployee.com W-4 wizard caused popup windows to not appear as popups.
- Fixed an issue where the GreenshadesOnline.com employee card would not an employee's address field correctly if the employee was missing that address field and it was set as the login password.

Release Notes for 1/10/2012

- Fixed typos and added a user-readable explanation for the recommendations made on custom warnings pages for missing and invalid local tax code.
- The GreenshadesOnline.com W-4 wizard and form were updated to reflect 2012 updates.
- The Employee Card is now editable on GreenshadesOnline.com for all customers. This was previously restricted to only those customers who purchased the Profile module.
- Addressed an issue that was not properly applying the Admin Access Filter Rules on GreenshadesOnline.com.
- Fixed a display issue on GreenEmployee.com which was causing the "loading" message to continue to display for a few moments after the employee's form was completely loaded.

Release Notes for 1/3/2012

- Fixed an issue which was causing the time entry start and stop time from recognizing the default shift duration set in the Pay Group Setup Wizard.
- Updated the profile change submitted language to more clearly indicate that the profile change was successfully submitted by an employee.

- Removed the ability to employee managers to view all forms of their employees. This feature was added in the latest enhancements to the HR Documents module but has been removed for the time being until a new setting is added on GreenshadesOnline.com to control what forms managers can view.
- Updated the employee managers Employee Services Home to hide the HR Documents review pane when the manager is not permitted to review any forms.
- Modified the Pay History document select drop down to show the employee's net wages instead of gross amount of direct deposit slips and check stubs.
- GreenshadesOnline.com Employee Services tables now store the sort and column preferences per company. This allows for users with multiple companies to maintain the preferences for each of their companies.
- Changes to the look and feel of the administrator sign-on page. More closely matches the color scheme and design theme of the GreenshadesOnline.com website.
- Clarified text and added additional links to the 'forgot password' and 'security question' pages of the administrator sign-in process.

Release Notes for 12/20/2011

- GreenshadesOnline.com employee management has been improved to allow a more efficient and powerful interaction with employee information and cards. Users will find that the new employee management utilizes an employee catalog which contains a folder for each employee and tabs for each employee service module. Users are able to see and interact with the entire employee's information all from one interactive display.
- Using the Greenshades Online Profile module, employees' assigned work locations can now be edited through GreenshadesOnline.com and GreenEmployee.com and synchronized back with supported Microsoft accounting packages.
- Added a password lockout notification for users who are accessing GreenEmployee.com through the mobile application.
- Modified the GO Administrator Notifications Settings page to only list contacts with email addresses as potential notification recipients.
- Removed the ability for employees to incorrectly submit duplicate timesheets when double clicking the time submit button on GreenEmployee.com.
- GreenshadesOnline.com and GreenEmployee.com users who utilize the HR Documents module will find that both the employer and employee interfaces have been updated to provide more streamlined management of their HR documents.
 - Employers will now manage all their employee's HR documents with two tabs accessible from the Employee Service Home. The first tab will provide the ability to review any HR document submitted by employees. The second tab will

provide a comprehensive list of all documents with the ability to see the status and view each document.

- In addition to being able to manage documents from the HR Documents Center, the HR Document module now incorporates an HR Documents tab in each employee folder to allow for employee-specific HR document management.
- Employees will now manage their HR documents on GreenEmployee.com using a unified document interface, providing employees direct access to each of their forms and a top-level HR center to receive the latest notifications and view their past form activity.

Release Notes for 11/29/2011

- Fixed an issue with the GreenshadesOnline.com Connector where some customers were not being alerted when synchronization failed due to a lack of memory allocation. Corrective measures were added to properly alert users to errors with the synchronization.
- Made minor color and language clarification changes to the employee manager center subordinates pay info page.
- Corrected an issue that hid subordinate paystubs from being shown to a delegated manager on GreenEmployee.com.
- Greenshades was not properly displaying paystub information in some unusual circumstances when a payroll administrator used a local tax code to represent a special state level non-tax withholding and then mapped it as a special withholding in the GreenshadesOnline.com Connector. This issue has been resolved so that paystub information is now correct.
- Fixed an issue that occasionally disallowed monthly withholding returns to be filed earlier than expected on GreenshadesOnline's Payroll Tax Service.
- Fixed a problem that led to delayed 'paystubs synchronized successfully' email notifications for administrators using the latest version of the GreenshadesOnline.com connector. This did not impact actual paystub synchronization, simply the synchronization report email.

Release Notes for 11/8/2011

- If employees used the profile pages of GreenEmployee.com to change their Ethnic Origin to "Two or more races" then the Greenshades Online connector was incorrectly marking the ethnicity as "N/A" within Dynamics GP. This issue has been fixed so that the Dynamics GP ethnicity is properly updated to "Two or more races".

- Some clients who customized the Bank Transaction Entry screen within Dynamics GP were experiencing a problem that stopped some of their payroll history from being synchronized to GreenshadesOnline.com and GreenEmployee.com. This issue was fixed to ensure all payroll records are now synchronized for those clients.
- Some GreenshadesOnline.com administrators have saved bookmarks within their browsers to an out-of-date version of the “Change Company” page. We added an auto-redirect from the old version of the ‘change company’ screen that will automatically redirect users to the current ‘change company’ screen so that administrators can keep using their bookmarks.
- The GreenshadesOnline.com help article “Missing a Pay Run?” now contains a link that will check to ensure the GreenshadesOnline Connector is installed and running properly.
- When an administrator on GreenshadesOnline.com changed the logo that should be used for their company it was made live on the employee site (GreenEmployee.com) once there was a lull in GreenEmployee’s usage activity for the company in question. We have changed this functionality so that all logo changes will be forced to GreenEmployee.com within 15 minutes of being changed by the administrator.
- Fixed an issue that led to vacation/sick balances being imported incorrectly from Dynamics GP for some clients.

Release Notes for 10/11/2011

- Fixed a minor issue when displaying/saving employee pay-history notification options on GreenEmployee.com
- Released a handful of custom paystub templates on GreenEmployee.com to better match modified layouts that were in use by some employers
- Slight change to the functionality and explanation text of the “Allow Remote Assistance” button on GreenshadesOnline.com. Using this feature now allows Greenshades personnel to access your web portal (along with any loaded payroll data) for 3 business days to help troubleshoot issues or answer questions.
- Added a screen to the Greenshades Online connector for Dynamics GP that allows all clients to choose local codes that are being used to represent disability insurance, employer-withheld unemployment, or other non-local withholdings. This had previously been available only to Greenshades Payroll Tax Service clients but is now being released to all Payroll History clients as well.

Release Notes for 9/27/2011

- Changed the general appearance of the administrator sign-in page

Release Notes for 9/20/2011

- Under some unusual conditions an employee's web browser bookmark to specific pages GreenEmployee.com would end up taking them to the GreenEmployee.com homepage instead. This has been fixed.
- Fixed a problem that caused some Dynamics SL clients to see a 0 for the gross wages on certain checks.
- Cleaned up and improved the webpages that allow administrators to upload images to include with employee bulletins.
- Eliminated a blank line that appeared underneath the Greenshades Online banner when viewing the GreenshadesOnline.com homepage using some web browsers.
- A "back" button was added to the page where administrators and supervisors viewed the history of employee time-off requests. This button returns to the available time-off balance and active request page.
- There is a link "Change Companies" that appears at the top right of GreenshadesOnline.com workspaces for administrators who have multiple companies loaded online. The text of this link was changed from "Change Companies" to "Change Company".
- Cleaned up the appearance of the pop-up windows that allow employees or administrators to edit employee contacts and dependents.
- Updated many grids throughout both GreenEmployee.com and also GreenshadesOnline.com to remember the last page-size setting that was selected.
- When an administrator clicked the "Pay History" button on the top bar of GreenshadesOnline.com the resulting pay history list would be filtered to only show paychecks and direct deposit slips from the most recent payrun. This has been corrected so that all pay documents will be shown without filtering. Administrators may still view a listing of pay documents from only the most recent payrun by clicking 'View All' in the homepage's "Recent Payroll Summary" widget.
- Fixed a problem that caused some mobile users to be unable to log into GreenEmployee.com from their smartphones.
- Added horizontal and vertical scrollbars to employee bulletins on GreenEmployee.com if the content of the bulletins exceeded the size of the window.

Release Notes for 9/6/2011

- Increased the maximum number of characters allowed for messages and bulletins

Release Notes for 8/30/2011

- Added a “week 1” and “week 2” timesheet totals summary when using the pay frequency of bi-weekly.
- Updated the GreenshadesOnline admin filter drop down menu (located at Settings > Admin Access > under Filtering Rules). Now, the drop down menu will not list administrators who are no longer employed by that company.
- Fixed an issue with the W-4 form, which was causing certain fields to not be saved properly.

Release Notes for 7/26/2011

- Fixed an issue where, occasionally, the column names on the Requested Profile Change grid were not being displayed properly.

Release Notes for 7/19/2011

- Fixed the pending changes grid, located at Employees > Profile and HR Documents on GreenshadesOnline, to filter an employee by using either first or last name. Previously, the filter only respected the employee’s first name.
- Adjusted the blue title bar for Profile and HR Documents to conform to site standards.
- Fixed an issue on GreenEmployee where, when an employee had an employee ID change, the old ID was still selectable even if inactive in GP.

Release Notes for 7/12/2011

- Added a new widget, ‘Thank you for Going Green!’ to the administrator home page, which displays a summary at-a-glance of cost savings and green footprint reductions from using GreenshadesOnline and GreenEmployee.
- Added ‘Thank you for Going Green’ detail page (viewable by clicking ‘View’ on the Going Green widget), which displays the in depth details of company cost savings and green footprint reductions from using GreenshadesOnline and GreenEmployee.
- Updated the text on the Employee Email Notification screen (located at Greenshades Online -> Settings -> Employee Pay History -> Email Notifications Tab) to clarify the differences between the various notification options.

- Enhanced the pay stub summary notification email for employees. Summary now includes gross pay, deductions, benefits, and year-to-date totals in addition to the net pay. Rich HTML email also made available.
- Fixed an issue where, when using the Administrator Access filters in Settings with multiple filter rules established for an administrator, only the first rule was being respected.

Release Notes for 7/5/2011

- Added Company Code identification for employees. All employees can now locate their company's specific GreenEmployee Company Code at the bottom of their My Account tab, under Edit Account.
- The "Thank you for Going Green" widget on the administrator home page now reads "Loading" as the totals are being loaded.
- Added support for SSN masks greater than 9 characters.
- Fixed an issue which was preventing the update of employee dependents to GP when submitted from the website if there were more than 21 characters in the comments field.
- Fixed an issue for clients who use SL where blank email address fields in SL were overwriting employee email addresses on the website.
- Corrected typos which were discovered on the administrator welcome wizard page.
- Corrected an issue where workspaces uploaded from SL used the first company location uploaded across all subsequent workspaces. Now, each workspace created will use the company location in accordance to the company database uploaded.

Release Notes for 6/28/2011

- Corrected an issue that was requiring employees to upload a digital version of their check when configuring their direct deposit information even if their Administrators had waived this requirement.
- Increased performance when retrieving weather from some cities for display on employee's GreenEmployee.com homepage.
- Fixed a problem that disallowed some employees using Internet Explorer 9.0 from rearranging the widgets on the GreenEmployee.com homepage the way they wanted.
- Increased performance to the administrator home page resulting in decreased load times.
- Corrected a typo in the automatically generated invoices for GreenshadesOnline billable services.
- Fixed an issue with the form I-9 where the labels 'A lawful permanent resident (Alien #)' and

- ‘An alien authorized to work (Alien # or Admission #)’ were swapped.
- Fixed an issue where scheduled syncs would fail to connect to the GP server when running under the SYSTEM account.
- Corrected an issue with the SSN mask on paystubs where the mask was 1 character off, so an SSN of 123456789 and a mask of XXXXX would show up with only four X's, or XXXX56789 instead of XXXXX6789.

Release Notes for 6/11/2011

- Fixed an issue on GreenEmployee where, when a supervisor signed and submitted an employee's timesheet, the View link for the employee to view the timesheet wasn't working correctly.
- Changed the fonts on the Reports page to conform to site theming. Adjusted line spacing for easier reading. Reduced overall vertical height of the individual reports to minimize the amount of scrolling necessary to view the report.

Release Notes for 6/14/2011

- Updated the look of the administrator Profile Change Request screen. Also added a description beneath the approval button which reads: "If approved, these changes will be imported back into Dynamics."
- Added a new option for administrators who use GreenshadesOnline to print direct deposit slips and/or check stubs, which when selected gives the ability for an employee to request to stop receiving paper copies of those stubs.
- On the employee notifications tab on GreenEmployee: Changed the description of the employee email address which is stored in Microsoft GP from "Email Address on file with [your company name]" to "Corporate Email Address on file with [your company name]" to correspond with the dropdown menu option "corporate email address" under Email Notifications.
- Improved the search function and increased the number of matches displayed when using Supervisor Delegation feature.

Release Notes for 6/7/2011

- Added public visibility to the GreenshadesOnline Release Notes, under Reports.
- Fixed an issue with the I-9 wizard which occurred when attempting to approve a form for an employee that was hired more than 3 days past.

- Fixed an issue where Add/Edit dependents pop up was not displayed completely at smaller screen resolutions. Added a scroll bar in the dependents and contacts popup on GreenEmployee to allow scrolling within the popup.
- Fixed typo under Workspace Settings: Employee Access > Employee Sessions. Changed "sessions" to "sessions".