FEATURE LISTS

ProWork
BY PROFIT BUILDERS

Platform Features

yourprofitbuilders.com

Introduction

This centralized resource shows how the different features across ProWork® fit together within a cohesive, unified platform. You can quickly look through to see the full scope of what ProWork can do and learn about specific features within the product's modules.

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Talent acquisition

Talent Acquisition*

- Embeddable and customizable online careers portal
- Internal and external job requisitions
- Free and/or premium job board integration
- Social media integration
- Configurable online applications
- HTML-based design/editing tool
- Candidate self-service
- Pre-screening questions
- Knockout questions
- Resume parsing
- Applicant/interview notifications and tracking
- Background screening
- Work Opportunity Tax Credit (WOTC) service
- Recruiting insights* (trends and visual metrics based on current workforce data)

Talent management

Compensation Management*

- Job/position/cost center history
- Salary history
- Employee self-service: benefit statements
- Pay grades/steps
- Total compensation analysis
- Comprehensive add-on module available:
  - Compensation cycles with budget data
  - Worksheets for managers to model increases
  - Staff increases modeled and proposed by managers are routed and approved via configurable workflows
  - Merit Matrix links performance ratings to compensation
- Multi-currency

Performance Management*

- Performance development (continuous feedback and goals tracking)
- Configurable performance appraisals
- Definition and measurement of competencies, goals, core values
- Prior and current performance reporting
- Employee self-assessment
- Multiple manager assessment
- Workflow review

Succession Planning

- Succession planning profiles
- Configurable talent matrix dashboard
- Succession plans reporting

Learning Management

- Skills tracking
- Certifications tracking
- Course catalog creation/registration management
- Manual and automatic learning plan assignment to individuals or groups
- Compliance and mandatory training notification, tracking, and scheduling
- Learning activities scheduling and tracking
- Assessment management

Incident Tracking

- Case tracking/reporting and workflow
- Incident-based email notifications
- Supporting document storage
- Points tracking and escalation

Attendance Management

- Requests and approvals for time off

** Requires additional module(s)*

ProWork HR (cont.)

Attendance Management

- Attendance tracking

Asset Management

- Company property management
- Vehicle management
- Insurance and warranty-related contracts

Offboarding

- Termination details/history/checklist
- Exit interview
- Notifications of termination
- COBRA elections/refusals
- COBRA administration

Human resources management

Onboarding

- New hire checklist/welcome/workflow
- Personal information
- I-9 submission/signoff/E-Verify
- W-4 election/submission
- Employee self-service: benefits overview and enrollment
- Property allocation
- HR document and forms creator (custom forms)

Benefits Administration

- Employee self-service: benefits overview and enrollment/open enrollment/life event enrollment/auto-enrollment
- Defined benefits eligibility
- Benefits-driven payroll deductions
- Carrier connections and forms
- Effective date benefit plans
- Evidence of insurability

Position Management

- Position creation and / or import
- Position budget setup
- Position assignments
- Position hierarchy chart
- Integrated budget versus actual tracking
- Position audit reports
- Set defaults at the position or job level
- Tie cost centers to positions
- Training, certification, and credential tracking

Compliance and Reporting

- New hire reporting
- Notifications regarding date expirations
- EEO reporting
- Vets 100 reporting
- Workers' compensation injuries/claims management
- OSHA reporting
- Affordable Care Act (ACA) management*

** Requires additional module(s)*

ProWork HR (cont.)

HR Resources
Document storage
Document retrieval tracking
Employee directory
Employee self-service
Organizational charts
Company events and news
HR documents and forms creator (custom forms)

Mobile Application
Employee information
Benefits enrollment
Applicant portal*
Job requisition management*
HR actions
Checklists
Hire/rehire
Position assignments
Performance management*
Terminations
Learning management
Compensation management*
HR, performance*, recruitment*, and compensation* reporting/ visualizations

** Requires additional module(s)*

ProWork Time Keeping

Labor Management

- Employee/manager self-service
- Timesheet approval workflow
- Mass edit capabilities
- Import/export utility
- Exception handling
- Document storage (receipts, company handbook, etc.)
- Automated points tracking (attendance trends)
- Temporary manager (backup) assignment
- Itemized expense tracking
- Employee self-service time off request tool and manager approval workflow
- Time-off planning
- Open absences/Bradford factor scores for absence tracking

Accruals*

- Tracking of Eligibility, Tenure, Hours Worked
- Synching with External HR or Payroll Systems

Scheduling

- Daily, weekly, or configurable recurring patterns
- On-the-fly entries/edits for day-to-day changes
- Dynamic time off durations based on scheduled hours
- Visibility into employee timesheet
- Assign employees to schedules or schedules to employees
- Assign two schedules per employee per day
- View schedule, location, department, job, etc.

Pay Rules

- Location
- Cost center (nine cost centers with up to 10 levels each)
- Shift differentials
- Pay rule priority
- Autopopulated holidays
- Multiple pay periods (weekly, monthly, etc.)
- Time zones
- Non-standard pay periods
- Employee contract-based pay rules
- Automatic deductions (breaks, meals)
- Paid meals
- Annualization tracking
- Flat pay
- Extra time and guaranteed minimum time
- Grace and rounding
- Holiday pay
- Overtime

Rate Tracking

- Job costing
- Pay categories (such as direct, indirect)
- Multipliers, special rates
- Effective dating
- Counter value calculations
- Piece rate quantity tracking (units, miles, etc.)
- Pay rate per piece/piece rate requirements

** ProWork Accruals is an add-on module.*

ProWork Time Keeping (cont.)

Reports

- Over 50 built-in standard reports
- Custom/ad hoc reports
- Data visualization and dashboarding capabilities
- Ability to export to five formats (CSV, Excel, PDF, HTML, XML)
- Daily email summary report
- Saving and sharing reports with quick link access
- In/out dot board
- Exception reporting
- Time off calendar and roster
- Dynamic drill-down capabilities
- Security profile settings for defining access
- Points history
- CMS submission

Mobile Application

- Timesheet (completion, submission, correction, manager approvals)
- Accruals (balances and history)*
- Schedule
- Time off requests (submission, balances, history, manager approvals)
- Overtime requests
- Time off calendar
- Punch in/out
- Offline punch
- GPS punch tracking/geofencing
- Job/cost center transfer
- Contracts views
- Piecework collection
- Reports access and data visualization/dashboard access
- Employee attendance tracking

Data Collection

- Ethernet-based clocks
- Mag stripe, proximity, and bar code badges
- Biometric verification and identification
- Remote hardware management
- Remote punch via mobile app

Security

- Permanent, detailed audit trail
- IP address and/or punch restriction
- Application manager/user access profiles
- RSA login authentication
- Single Sign-On (SSO)
- User/manager configurable user interface
- Virtual code authentication

Email Notifications (alerts, reminders, etc.)

- Standard time off request, rejection, and approval
- Standard timesheet request, rejection, and approval
- Beginning and end of period manager/employee notifications
- Accrual balance notifications*
- Exception notifications
- Point notifications
- Companywide announcements

**ProWork Accruals is an add-on module.*

ProWork Payroll

Payroll Process

- Built-in test environments
- Calculations as you go
- Payroll prep checklist and quick links
- Correction delta process for easy recalculation of payroll edits
- Custom batch payroll entry screen
- Direct deposits
- Gross to net
- Pay stub printing/distribution
- Payroll alerts
- Payroll batches by pay frequency
- Real-time payroll processing
- Reconciliation pay statement
- Vendor validation
- Multiple payroll processing
- Garnishment deduction wizard

Payroll Reporting

- Change history reporting
- Consolidated reporting across tax IDs
- Cross-year reporting
- Date-driven reporting across all years
- Excel® native reports
- Integrated report writer
- Data visualization and dashboarding capabilities
- Reports sent by email
- Standard report library
- 401(k)/retirement plan 180° integrations

Payroll Setup

- Geospatial tax identification
- Labor distribution and cost center tracking
- Multi-EIN support

General Ledger/Year End

- Automated reciprocity tax withholding
- General ledger processing
- Year-end processing

Payroll Services

- Check printing/distribution
- Employee direct deposit
- Tax filing/deposits
- Tax filing/payment
- Garnishment disbursement

Benefits Administration

- Benefits and insurance management*
- COBRA administration
- Leave request management*
- Total compensation statement
- Workers' compensation
- Affordable Care Act Form 1094-C*

Platform and Security

- Profile-based functionality security
- Unlimited users with security
- Automated event notifications
- Third-party software interfaces
- Unlimited data storage

Mobile Application

- Direct deposit/electronic consent
- View pay statements, W-2s, W-4s, I-9s, and 1099s

** Requires additional module*

ProWork Scheduler

Build

- Workload planning* — automatically generate shifts based on imported business data
- Optimized schedule generation — take a step beyond simply meeting constraints and achieve business goals such as lowering cost, reducing overtime, meeting employee preferences and much more,
- Budget and workload definition
- Shift and schedule definition
- Schedule rule and constraints definition
- Manual schedule planning and editing
- Schedule pattern templates

Fill

- Schedule groups or individuals
- Schedule to skill and proficiency
- Open-shift visibility
- Automatic shift assignment — have the system automatically assign shifts based on several important factors such as availability, skills, location, and much more
- Split shifts
- Color-coded availability
- Drag-and-drop fill

Mobile Application

- View schedule
- Swap shifts (peer approvals available)
- Coverage requests
- Open shift requests
- Scheduling reports, visualizations, and dashboards

Manage

- Schedule change alerts and notifications
- Skill tracking
- Credential and certification tracking*
- Staff management drag-and-drop shift transfer
- Call list
- Schedule day view — consolidated picture of 24 hour period for easy analysis and management
- Employee availability and preferences
- Fatigue management
- Open-shift management — automatically displays the available employees who meet shift criteria, allowing the shift to be offered and accepted by those employees within a predefined time frame
- Employee self-service: request coverage
- Employee self-service: shift swap
- Employee self-service: request open shift
- Timesheet sync** — ensure schedules are posted to employees' timesheets
- Employee self-service — approve schedule changes (where secure scheduling ordinances apply)

Measure

- Reporting
- Coverage graph and metrics
- Data visualization and dashboarding capabilities
- Detailed audit trails
- Planned-to-actual schedule metrics

Notifications

- Schedule changes
- Shift swap requests
- Coverage requests
- Open shifts posted
- Open shifts requested

**Add-on functionality required*
***Applicable only if the Time Keeping module is being licensed*

ProWork Accruals

Prerequisites: Requires ProWork Time Keeping or Payroll

Accrual Settings

- System-maintained values — accrual balances will be calculated automatically in system
- User-maintained values — accrual balances will be manually updated by the system administrator
- Imported values — accrual balances will be calculated externally and imported to the system on a regular basis
- Tenure changes — will be shown if tenure changes in the middle of an accrual period
- Maximum accrued amount (per accrual year) — maximum hours that can be accrued based on tenure
- Maximum running balance — maximum balance that an employee can have at any given time
- Balance move — move any excess accrued amounts to a specific bucket
- Utilization — order in which different time-off buckets are used
- Accrual day — first or last day of month
- New-hire accruals — when and how much a new hire starts accruing his or her first month
- Sick time compliance
- Waiting period schedule — schedule on which an employee will accrue after the waiting period settings have been reached
- Processing accruals — amount and frequency accruals are calculated (automatically, manually, individual users, multiple users, all users)
- Accrual termination — allows for multiple options to pay out accrual balances upon termination of an employee

Benefit Accrual Profiles — determines the rate at which an employee accrues benefit time

- Default — applied to all new employees added in system
- Tenure
- Hours worked
- Points
- Waiting period
- Carryover settings

Accrual Management

- Modify accrual balances
- Zero out accrual balances
- Import accrual balances
- Modify employee hours taken
- Test accruals

Notifications

- Negative balances
- End of a waiting period

Employee Self-Service

- View accrual balances
- Request time off — automatically updates accrual balances
- Time-off balance report

Mobile

- View accrual balances
- Request time off
- Approve time off
- Accruals reports, visualizations, and dashboards
- View time off history
- View open absences

Payroll*

- Calculate accruals in payroll based on hours worked
- Display accrual balance on pay statement

**Requires ProWork Payroll*

ProWork Attestation

Prerequisite: Requires ProWork Time Keeping

Device Support

- Kronos InTouch® time clock
- Timesheet clock
- Web clock

Workflows

- Attestation questionnaire
- Attestation manager change request
- Cascading prompts when responses may trigger follow-up questions or requests
- Generation of email to employees or manages notifying of to-do item

Employee Actions

- Attestation approval
- Attestation rejection
- Cancel/postpone attestation
- Cancellation/postponing of attestation — Note that can reject or approve
- Reason code included

Employee Prompts

- End of shift (daily)
- Timesheet submission
- Configurable questions
- Configurable response choices
- At every punch — requires custom configuration

Reports

- Attestation audit report
- Attestation summary report
- Attestation summary dashboard widget
- Data visualization and dashboarding capabilities

Notifications and To-Dos

- Missed attestation to-do
- Rejected attestation email notification
- Approved attestation email notification

ProWork ACA Manager

Prerequisites: Requires ProWork Time Keeping or Payroll or HR

Measurement Periods

- Initial measurement configuration — measurement, administration, and stability periods
- Standard measurement configuration — measurement, administration, and stability periods

Compliance Alerts

- Minimum value plan offered* or **
- Affordable plan offered* or **

Notifications

- ACA benefits enrollment* or ** — sends email when the ACA status changes to full-time in order to offer benefits enrollment
- ACA predicted status change — sends email about a possible upgrade or downgrade in employee status
- ACA status change
- Projected change in status
- Current benefit plan* or **

Reports

- Employee ACA status — all employees and their assigned ACA profiles
- ACA data detail — each employee and his or her detailed ACA history for the selected date range
- ACA data summary — total amounts for the selected date range within each affected ACA field
- Ad hoc reports
- Imports — pull ACA timeline information into system
- Data visualization and dashboarding capabilities
- Form 1094-C employee count — drill down into the numbers reported on Form 1094-C Part III
- ACA account status change history — list of changes in status for each employee

Widgets/Views

- ACA timeline widget — employee numbers and settings for each month
- ACA timeline exceptions widget — force calculation exceptions as of a certain date
- ACA summary widget — summary of ACA data for an employee
- ACA compliance overview widget — customizable view of ACA data
- ACA employees status history widget — lists all changes in dates of service for each employee

Calculations/Profile Rules

- Future possible downgrade to part-time
- Future possible upgrade to full-time
- Monthly hours from payroll**
- Monthly hours from timesheets***
- ACA status
- Minimum value plan offered* or **
- ACA profile effective date
- Support for nonvariable-hour EE waiting period
- Benefit profile configuration* or **
- Break-in-service rule support
- COBRA tracking

**Need ProWork HR*
***Need ProWork Payroll*
****Need ProWork Time Keeping*

ProWork ACA Manager (cont.)

IRS Forms — autopopulated with information tracked in system or imported
1094-C
1095-C
Employee self-service view of the 1095-C form
Mass population of 1095-C forms
Mass editing of form fields

Year-End Processing
Year end process checklist
Final forms
Form delivery — electronic and hard copy to employees
Format forms to file — AIR submission (e-filing) or paper
Break-in-service rule support
Corrections — AIR correction and replacement formats supported

ProWork Leave Manager

Prerequisites: Requires ProWork Accruals with Time Keeping or HR

Request Management

- Leave of absence requests
- Approval of requests
- Rejection of requests
- Management of requests
- Modify balances
- Modification of balances — Employee self-service
- Leave of absence workflow — customizable configuration
- Qualifier questionnaire

Views

- View history
- View balances
- Leave of absence calendar
- Entitlement based on leave profile
- Global entitlement report — employee entitlement amount, what has been taken, balance, type of leave, entitlement as of date, taken as of date
- Ad hoc reports

Manager Tools

- View leave requests for any employee
- View leave cases for any employee
- Add new case
- Close existing case

Mobile

- Request leave of absence
- Approve requests
- Reject requests
- View leave of absence history
- Access leave of absence forms

Compliance

- Continuous leave tracking
- Intermittent leave tracking
- Automated tracking of leave eligibility, including the hours worked eligibility criteria rule, type, and duration
- Automated notifications
- Department of Labor forms

Leave Administration

- Leave profile configuration
- Populate timesheet from leave case*
- Append HR documents directly to an employee's case record
- Permissions — determine what functionality employees or managers have
- Department of Labor forms

**Need ProWork Time Keeping*

ProWork Cross-Platform Features

ProWork Marketplace*

- Self-service apps from ProWork partners expanding the platform's functionality, such as G Suite for Google Cloud and Certify

**For additional Marketplace partnership info, see the ProWork HR feature list.*

Employee Perspectives

- Delivers an at-a-glance view of employee data that can serve as a predictive scorecard of key employee metrics

ProWork Mobile App

- Compatible with Apple and Android devices
- Download free from your device's app store

Integration Hub

- Supports integration of your ProWork solution with any combination of cloud, Software-as-a-Service (SaaS), or on-premise applications

ProWork People Analytics

- **Gather:** Gain detailed workforce and process insights across your organization with real-time reports
- **Visualize:** Focus on the facts that matter to make quick decisions using charts and dashboards
- **Predict:** Use people data to proactively manage workforce trends through Employee Perspectives, ProWork Scheduler, and Succession Planning
- **Grow:** Drive business outcomes by connecting to curated views of your workforce data delivered by a dedicated analytics services team

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