



EMPLOYER

March 2019 Release Notes

1 New report type: onboarding report

1. BerniePortal allows employers to ask custom questions of employees during the onboarding process. Employees can also change their answers to those questions after they've onboarded.
2. Before this update, the answers to these questions only appeared on the employee's record.
3. With this update, there is now a report that employers can pull that will have all of the employee's answers to the questions on it.
4. One "use case" example is employee T-Shirt size. If an employer orders t-shirts for employees from time to time and collects employee t-shirt size during onboarding, the employer can now run a report whenever they need everyone's t-shirt size (they don't have to look at each employee record).

2 Improvements to the employer's user interface for reports

1. This update makes it easier for employers to generate reports and limit the output of the reports to certain subgroups of employees.
2. Besides being a more modern interface, it also sets BerniePortal up to offer custom reports alongside its standard reports.

3 Custom reports: Step 1

1. Before this update, employers could not generate any sort of "custom report". Instead, BerniePortal had standard reports to address needs employers had for getting data out of BerniePortal.
2. While the standard reports generally had all of the information an employer needed, they would not always be in the format desired by the employer. For example, the order of the columns may not be in the order that the employer wanted.
3. With this update, employers can make custom reports that they can re-use that are composed of both demographic data and onboarding data, including the custom questions that employers ask during onboarding. The columns can be in whatever order is desired by the employer.
4. We are calling this "Step 1" because employee deduction and eligibility data will not be available for custom reports with this update. We are planning to add that in a future update later this year.

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