



# BerniePortal

## February 2018 Release Notes

*Four areas of improvement:*

### 1 Custom labeling

1. For billing subgroups: Have you had a client who divided up their bill into a lot of different divisions, departments, or store locations? BerniePortal has allowed separating employees along those lines by using Billing Subgroups. It even had three levels of Billing Subgroups for your most complicated groups. They were calling Billing Primary, Billing Secondary, and Billing Tertiary. With this update, your client can replace those labels with the labels they use in their own business. In other words, they can say that Billing Primary should be "Department", Billing Secondary should be "Division" and Billing Tertiary should be "Location". Once they do that, their own custom labels will begin showing on all reports and PDFs rather than BerniePortal's system default labels of Billing Primary, Billing Secondary, and Billing Tertiary.
2. For nontraditional benefit types: Do you have a client who offers Acupuncture as a benefit? In the past, this Benefit would have been communicated as a generic "Voluntary" benefit type, and your clients had the ability to have up to three of these. When employee enrolled, they would have seen the Acupuncture plan categorized as a "Voluntary" benefit type. With this update, your client can replace the system default "Voluntary" label with "Acupuncture" or whatever label they or you want.

### 2 Uploading PDFs to non-custom onboarding categories

1. Your client likes BerniePortal's onboarding capability and wants to use it. The problem is that they want all employees in the system, not just new hires going forward. They have fifty employees who have already filled out their W-4 and I-9, and they want to be able to upload those documents into the W-4 and I-9 categories of onboarding. In the past, those categories could only store the system-generated W-4s and I-9s. To upload W-4s and I-9s that had already been filled out on paper required creating separate, custom onboarding categories and uploading into those categories.
2. Now, HR can upload already existing W-4s and I-9s into the W-4 and I-9 categories directly.

### 3 Attaching a PDF to an onboarding document

1. Your client likes BerniePortal's onboarding capability and wants to use it. The problem is that they have this one onboarding document - maybe it is an employee handbook - that has all sorts of pretty graphics and charts that they cannot recreate in the fields provided by BerniePortal. They want employees to be able to see those pretty graphics and charts, and so they want to upload the PDF exactly as it is and just have some language that says "Attached is our employee handbook. Please download and read, and sign below indicating that you will do so." Historically, they could not upload PDFs to onboarding documents and so they could not do this.
2. Now, HR can attach PDFs to onboarding documents so that they can do this.

### 4 Improvements to carrier form mapping

1. We continue to make investments in this area, and over the next several months hope to have addressed the challenges posed by even the most unique carrier forms.
2. The improvements you'll notice this month seem at first glance to be most aesthetic - we've made it much easier to navigate mapping a carrier form. They also set us up for mapping more and more checkbox scenarios - stay tuned :)