Deltek Costpoint HotFix Readme

Released: October 13, 2017

Employee Self Service (ESS) Benefits Enrollment Enhancements

Costpoint Employee Self Service now provides user experience improvements for benefits enrollment through life events or open enrollment. With this release, the Benefits Enrollment screen and Life Events/New Hires screen will use a layout that is similar to ESS in Deltek Time and Expense. Existing tabs are now arranged vertically on the left side of the screen to allow you to quickly view corresponding benefit data. You can now use **Continue** and **Back** buttons for navigating through each tab until you complete the entire benefit enrollment process.

> For more details, please refer to the *Costpoint 7.1.1 Employee Self Service Benefits Enrollment* video demonstration which you can view at: https://help.deltek.com/Product/Costpoint/USS/People/BenefitsEnrollment.

In addition to these enhancements, the release also includes the following changes to the tabs on the Benefits Enrollment and Life Events/New Hires screens:

Current Elections (Benefits Enrollment Screen Only)

- The label changed from "New Plan Year" to "New <Pay Period Frequency> Premium" (for example, New Monthly Premium). This column now displays a subtotal amount. The label changed from "Current Plan Year" to "Current <Pay Period Frequency> Premium" (for example, Current Monthly Premium).

- The Query button is no longer available.

Dependents and Beneficiaries

- Remove the links to the Beneficiary subtasks

- The Current Benefits subtask includes the following changes:

    - The subtask name changed from "Current Benefit Coverage" to "Current Benefits."

    - The column name changed from "Module" to "Benefit Type."

- In the Benefit Enrollment Elections/Life Event Elections subtask, the column name changed from "Module" to "Benefit Type."

Dental Insurance, Dependent Life, Medical Insurance, Spouse AD&D, Spouse Life Insurance, and Vision Insurance

- These tabs now have the same functionality and layout.

- A group box displays the current benefits at the top of the screen. This is labeled as: "*(Type of Insurance)* - Current Coverage Level". For example, Vision Insurance - Current Coverage Level.

- A Select New Coverage Level subtask displays all the options for the benefit for the new plan year in a table. You can select only one option from table.

- In applicable tabs, the subtask name changed from "Dependent Information" to "Select Dependents for Coverage." The **Covered** column in this subtask is now labeled "Select."

- In applicable tabs, the subtask name changed from "Spouse Insurance" to "Select Spouse for Coverage." The **Covered** column in this subtask is now labeled "Select."

Employee Life Insurance, Supplemental Life, Long Term Disability, Short Term Disability, AD&D, and Supplemental AD&D

- These tabs now have the same functionality and layout.

- A group box displays the current benefits at the top of the screen. This is labeled as: "*(Type of Insurance)* - Current Coverage Level". For example, Employee Life Insurance - Current Coverage Level.

- A Select New Coverage Level subtask displays a table of all the benefit options for the new plan year. You can select only one option from table.

Medical FSA, Dependent FSA, and Medical HSA

- The column name changed from "Current" to "Current Contribution."

- The column name changed from "New" to 'New Contribution."

Beneficiaries

- The tab name changed from "Designate Beneficiaries" to "Beneficiaries."

Other Benefits

The Current Coverage Level and New Coverage Level are now displayed subtasks instead of as tabs. You will still use Lookup function to select new coverage options on this tab.

Summary (Benefits Enrollment Screen Only)

- A new button, **Confirm**, allows you to authorize your benefit selections. This button performs the same action as clicking the **Default Action** (gears) icon on the global toolbar.

- Elections that you did not select will have a blank **Plan** column and a **Status** column value of **Election Skipped**.

Known Issues

This section includes summaries of the issues that exist in Deltek Costpoint and will be resolved in the future. You will notice that the descriptions of some software defects contain extra information, including ways to work around the defects. The additional information has been included in case you instituted some of the workarounds and can now stop using them, or you simply want more background information about the defect repairs.

> This section does not contain a complete list of outstanding issues. Deltek only includes the high priority issue in Deltek Costpoint for this release. Please contact Deltek Customer Care if these known issues present a significant impact on your business.

Benefits Enrollment (ESMBENENROLL)

- **Deltek Defect Tracking Number: 848225**

  Description: The following unexpected error displays if the user attempts to roll over their current Medical HSA election to the new plan year, and they also opt to roll over their Medical FSA: "An HSA may be elected with an FSA only if the FSA is designated as a Limited Purpose FSA."

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

  Workaround Before Fix: None.

  Additional Notes: None.

- **Deltek Defect Tracking Number: 852012**

  Description: Error messages will continue to display even after the issue is rectified. These old errors will not prevent you from saving or continuing the process, but these errors also should not display after you fix the issue.

  Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

- **Deltek Defect Tracking Number: 852715**

   Description: On the Dependent Life Insurance tab, if the employee has existing Dependent Life coverage and has not selected new Dependent Life coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Dependent Life Coverage.

- **Deltek Defect Tracking Number: 852716**

   Description: On the Spouse Life Insurance tab, if the employee has existing Spouse Life coverage and has not selected new Spouse Life coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Spouse Life Coverage.

   Customers Impacted: This defect affects Costpoint Employee Self Service users.

   Workaround Before Fix: None.

   Additional Notes: None.

- **Deltek Defect Tracking Number: 852717**

   Description: On Spouse AD&D Insurance tab, if the employee has existing Spouse AD&D coverage and has not selected new Spouse AD&D coverage, the Select Dependents for Coverage table is enabled. The table should remain disabled until the user selects new Spouse AD&D Coverage.

   Customers Impacted: This defect affects Costpoint Employee Self Service users.

   Workaround Before Fix: None.

   Additional Notes: None.

Direct Deposit (ESMDIRDEP)

- **Deltek Defect Tracking Number: 852070**

   Description: If your screen resolution is low when the you open the Direct Deposit tab on the Life Events/New Hires screen, the Current Accounts table may be minimized. You will need to click on the **Restore** button to expand the Current Accounts table.

   Customers Impacted: This defect affects Costpoint Employee Self Service users.

   Workaround Before Fix: None.

   Additional Notes: None.

- **Deltek Defect Tracking Number: 854131**

   Description: The application does not allow you to delete all records in the Replacement Accounts table if there is no record in the Current Accounts table.

   Customers Impacted: This defect affects Costpoint Employee Self Service users.

   Workaround Before Fix: None.

   Additional Notes: None.

Life Events/New Hires (ESMLIFEEVENT)

- **Deltek Defect Tracking Number: 742724**

   Description: When the user is categorized as a Full-Time Equivalent Employee in the Manage Full-Time Equivalent Eligibility screen and a new Life Event record is generated from the ESS Life Events/New Hires screen, the **Full Time Equivalent Employee** check box for the generated record is not selected.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

- **Deltek Defect Tracking Number: 788990**

   Description: The default Benefit Package is not based on an Employee Type of **Regular**, when a life event is saved for a Part-Time or Temporary employee that:

   - Has a Manage Full-Time Equivalent Eligibility record where **Full-Time Equivalent** value is **Y** and the **Coverage Offer Status** is **Approved**; and
   - Is not linked to a Benefit Package in Manage Employee Benefit Elections.

   Currently, the benefit package is defaulting based on the employee's **Employee Type** from the Manage Employee Salary Information screen.

- **Deltek Defect Tracking Number: 818244**

   Description: The application allows you to select a child for coverage, even though the child's age is greater than the Benefit Plan's Dependent Maximum Age.

   Customers Impacted: This defect affects Costpoint Employee Self Service users.

   Workaround Before Fix: None.

   Additional Notes: None.

- **Deltek Defect Tracking Number: 853806**

   Description: On the Medical Insurance tab, if you have a current election for Medical HSA and you selected a new election that is a High Deductible Health Plan (**High Ded Plan** check box is selected), the following error message displays: "A Health Savings Account (HSA) was previously elected. Only a designated High Deductible Health Plan can be elected with an HSA." No error message should display in this scenario.

   Customers Impacted: This defect affects Costpoint Employee Self Service users.

   Workaround Before Fix: None.

   Additional Notes: None.

- **Deltek Defect Tracking Number: 854133**

   Description: On the Direct Deposit tab, the application does not allow you to delete all records in the Replacement Accounts table if there is no record in the Current Accounts table.

   Customers Impacted: This defect affects Costpoint Employee Self Service users.

   Workaround Before Fix: None.

   Additional Notes: None.

Self Service Configuration (ESMESS)

- **Deltek Defect Tracking Number: 844957**

   Description: The application stops responding if you attempt to open the Life Events subtask link and an existing workflow model has been set up for the application.

   Customers Impacted: This defect affects Costpoint Employee Self Service users.

   Workaround Before Fix: None.

   Additional Notes: None.

Self Service Status (ESRSELFSERVSTAT)

- **Deltek Defect Tracking Number: 787914**

Description: The Self Service Status application sends a notification e-mail to an employee regarding Benefits Open Enrollment even if the **Notify Employee** option is set to **None** in the Workflow Options tab of the Configure Self Service Settings screen.

Customers Impacted: This defect affects Costpoint Employee Self Service users.

Workaround Before Fix: None.

Additional Notes: None.

- **Deltek Defect Tracking Number: 854183**

    Description: A system error occurs when previewing the report.

    Customers Impacted: This defect affects Costpoint Employee Self Service users.

    Workaround Before Fix: None.

    Additional Notes: None.

State Withholding (ESMSTATEWH)

- **Deltek Defect Tracking Number: 850886**

    Description: If the employee does not have a Federal Filing Status or does not have an Employee Tax record in Costpoint, the following error is displays: "You are currently exempt from federal taxes. In order to change your status, please see your Payroll Administrator."

    This message should be an informational message, not an error message. Please note that you will be able to proceed with the life event process even if this error message displays.

    Customers Impacted: This defect affects Costpoint Employee Self Service users.

    Workaround Before Fix: None.

    Additional Notes: None.

Patches and System JAR Requirements

These enhancements require the following Costpoint releases:

- Costpoint 7.1.1 System JAR 033 (cp711_sys_033.zip)
- Common lib - BENEFITSLIB (cp711_cmnlib_BENEFITSLIB_002.zip)

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	Application ID	Application Name	Application File
People	Employee Self Service	ESMBENENROLL	Benefits Enrollment	cp711_esmbenenroll_009.zip
People	Employee Self Service	ESMLIFEEVENT	Life Events/New Hires	cp711_esmlifeevent_012.zip

More information about this release is on the following page.

Custom Programs Affected:

Sometimes an update can cause custom programs and reports to stop working as expected. Before applying this update, consider whether you have any custom programs or reports in the application area affected by the update. If so, contact Deltek Customer Care at http://support.deltek.com before you install the update.

To Download the HotFix Update:

1. From Internet Explorer, go to https://dsm.deltek.com.
2. Click **Run Deltek Software Manager**.
3. Log in using your Deltek Customer Care Connect credentials.
4. In the left pane of the Deltek Software Manager, expand your Deltek product.
5. Expand the Hot Fixes folder for your product, and select the update to download.
6. Click **Download** at the bottom of the screen.

To Install the HotFix Update:

Refer to the installation instructions posted on Deltek's Customer Care Connect site, https://deltek.custhelp.com.

- For Costpoint 7.1.1 updates, refer to Knowledge Base article 79232.

- For Costpoint 7.0.1 updates, refer to Knowledge Base article 73769.

- For Costpoint 7.0 updates, refer to Knowledge Base article 67722.

Before you install this update, please review all previous updates in the Knowledge Base article. You may need to install prerequisite programs or database patches (described in the Knowledge Base article) prior to installing this update. Note that when you download an update using Deltek Software Manager (DSM), all dependent files are automatically downloaded.

To Check to See if the HotFix is Installed:

1. Open the application that was updated.

2. Click **Help** » **About Costpoint** from the Costpoint toolbar. This will display a screen that shows you the latest update JAR for the application that is open, as well as the latest system JAR and all patches applied to the system.

More Information:

If you have any questions, please contact Deltek Customer Care at https://support.deltek.com.