

Working With Notifications

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Follow the steps below to work with your Company Notifications.

A *Company Notification* is a message sent by email (or SMS) that is triggered by an event in Wurk, such as a new hire being added to the system, or a Cannabis Badge expiring. Your Administrator (and other authorized users) can edit and create these and configure *when* and *why* they trigger, and *who* they are sent to.

A *Company Announcement*, by contrast, is a message that can display in Wurk as a popup when the user first logs in (and or as on their dashboard), and is a more general announcement. Unlike Notifications, these are tied to users' **Security Profiles**. Your Administrator (and other authorized users) can edit and create these and configure *who* sees these at login and/or on their dashboard. Announcements are often used to ensure that employees get **Company Documents**.

START HERE

1. From the main menu, search for *Notifications* and click the **Notifications (Global Setup)** search result (or navigate to **Admin>Global Setup>Notifications**).

The screenshot shows the 'würk' interface for 'COMPANY SETTINGS' under 'Company Notifications'. The table below lists various notifications:

System	Event	Name	Description	Enabled
ACCOUNT	Checklist Created	Checklist Created - Onboarding	*Enable prior to Go-Live if using Onboarding Checklists	
ACCOUNT	W4 Processed	W4 Processed		Y
ACCOUNT	Credential Expiration	30 Day Credential Expiration	*Update Credential Type filter if not applicable to all Credentials	Y
ACCOUNT	Credential Expiration	60 Day Credential Expiration	*Update Credential Type filter if not applicable to all Credentials	Y
ACCOUNT	Password Reset	Password Reset		Y
ACCOUNT	Created	Account Created w/Login Instructions	*Enable prior to Go-Live	
ACCOUNT	Checklist Reminder	Checklist Item Reminder		Y
ACCOUNT	I-9 Expiration	I-9 Expiration: 14 Days	Employee & HR Admins	Y
APPLICANT TRACKING	Applicant Opened Account	Applicant Opened Account		Y
APPLICANT TRACKING	Applicant Applied For Job	Applicant Applied for Job		Y
APPLICANT TRACKING	Applicant Password Reset	Applicant Password Reset		

This list typically shows the **Enabled** notifications by default. You can change the filter to show **All** if you want to see all notifications that have been created for your company. If you find one you need that is not

enabled, you can edit it and turn it on.

2. To work with an existing notification, click the Edit  icon next to it. The typical notifications included with your system are listed below, however, your company may have created additional ones.

Type of Notification	Triggering Event	Message Title	Description
ACCOUNT	Checklist Created	Checklist Created - Onboarding	Notifies an employee that a Checklist has been assigned to him or her and is in the ToDos Inbox for completion (typically enabled if using Onboarding Checklists)
ACCOUNT	W4 Processed	W4 Processed	Notifies employee that his or her W4 form has been processed and added to his or her record
ACCOUNT	Credential Expiration	30 Day Credential Expiration	Alerts user that credential (such as Cannabis badge) expires in 30 days
ACCOUNT	Credential Expiration	60 Day Credential Expiration	Alerts user that credential (such as Cannabis badge) expires in 60 days
ACCOUNT	Password Reset	Password Reset	Alerts user that his or her password has been reset
ACCOUNT	Created	Account Created w/Login Instructions	Welcomes new employees to Wurk with login instructions and helpful links
ACCOUNT	Checklist Reminder	Checklist Item Reminder	Reminds employee to complete an item in a checklist
ACCOUNT	I9 Expiration	I-9 Expiration: 14 Days	Alerts employee and admins that the I9 form expires in 14 days
APPLICANT TRACKING	Applicant Opened Account	Applicant Opened Account	Welcomes an applicant to the Recruitment module
APPLICANT TRACKING	Applicant Applied For Job	Applicant Applied for Job	Notifies an applicant who has applied for a job in the Recruitment module that his or her application has been received
APPLICANT TRACKING	Applicant Password Reset	Applicant Password Reset	Notifies an applicant that his or her password has been reset
EASY BACKGROUNDS	easyBackgrounds Authorization Completed	Background Authorization Complete	Alerts admins that an applicant has authorized an easyBackgrounds check
EASY BACKGROUNDS	easyBackgrounds Authorize For Applicant	Applicant Background Check Authorization	Notifies employee that his or her W4 form has been processed and added to his or her record
EASY	easyBackgrounds	Employee Background	Asks an employee to authorize an

BACKGROUNDS Type of Notification	Authorize Triggering Event	Check Message Title	Backgrounds check Description
		Authorization	
HR	Event Created	MasterTax Package Notification	Confirms for your Company Payroll Contact that a quarter-end tax packet has been uploaded to Wurk and is available for download.
PAYROLL	Payroll (Submit Date Based)	Payroll Submission Reminder- 3 Days	Reminds your Company Payroll Contact to finalize a payroll for a pay date coming in 3 days.
PAYROLL	Payroll (Submit Date Based)	Payroll Submission Reminder - 5 Days	Reminds your Company Payroll Contact to finalize a payroll for a pay date coming in 5 days.
VIRTUAL CODE AUTHENTICATION	VCA Settings Change Request	Authentication Change Approval	Prompts the designated admin to approve and verify Virtual Code authentication when an employee changes his or her login

3. To create a new notification, click **NEW NOTIFICATION**. The next window lists all the preset notifications you can create. Scroll to find the one most like the notice you want to create and click the flag  icon to select it. Notice how this list is much longer than the one above, which only showed the notifications that have been *created* for your company. Think of the notifications listed below as *templates* you can use to create new notifications.

System: ACCOUNT Ungroup

	Account Contact Added/Changed	Send notification when changes are made to account contact (e.g. dependents).
	Account Created	Send notification when new account is added to the system.
	Account Status Changed	Send notification when account status is changed.
	Anniversary	Send notification before n-days before employee anniversary.
	Automatic Pay Grade Step Change	Send notification when base compensation is changed because of Pay Grade Step Change
	Base Compensation Changed	
	Birthday	Send notification before n-days before account birthday.
	Check voided	Send notification when employee check is voided.
	Checklist Completed	
	Checklist Created	

Notification Categories

The types of notifications you can work with (in the **System** column) are defined below.

- ACCOUNT – Contains notifications related to User Accounts, such as password expiration, anniversary dates, etc.
- ACCOUNT (INCIDENT) – Contains notifications for when an incident is created or closed.

- ACCOUNT (PERFORMANCE DEVELOPMENT) – Contains performance goal reminders.
- ACCOUNT (PERFORMANCE REVIEW) – Contains notifications for the multiple phases of the performance review process. (These notifications will only display if Performance Management has been enabled in the company.)
- ACCRUALS – Contains notifications for the Accruals module, such as negative balances and the ending of a waiting period.
- APPLICANT TRACKING – Contains notifications for when an applicant applies for a job, opens an account, has a custom form assigned, or resets a password.
- BENEFITS – Contains notifications for when benefit changes have been approved/rejected/submitted, as well as notifications for end dates regarding benefit/dependent benefit, and open enrollment ends.
- CHECKLIST ITEM REQUEST – Contains a Workflow notification.
- COMPANY SETUP – Contains notifications for additions/changes to bank accounts, benefit plans, company tax, cost center, deductions, earnings, time offs, and vendors
- CUSTOM FORM – Contains a notification for when an employee custom form has been created.
- EASY BACKGROUNDS – Contains notifications for when a background check is authorized or completed, or an authorization is granted.
- E-VERIFY – Contains a notification to inform users that an employee has completed E-Verify registration.
- FEEDBACK – Contains notifications related to the feedback process, such as when feedback has been added, status change, or comments added to feedback.
- HR – Contains notifications for when announcements or events are created.
- LEAVE OF ABSENCE CASE – Contains notifications for Entitlement Balance and Leave case exceeded.
- LEAVE OF ABSENCE REQUEST – Contains notifications for Approved, Rejected, and Requested.
- MARKETPLACE – Contains ACA notifications.
- POINTS – Contains a notification for when an employee accrues or loses points.
- SYSTEM – Contains notifications for when a new company document is created, or when a new system event is generated.
- TIME OFF REQUEST – Contains notifications when a time-off request is approved, canceled by an employee, changed, rejected, or requested.

- **TO DO ITEM** – Contains notifications for when a System or Company Administrator performs or deletes a ToDo item.
- **VIRTUAL CODE AUTHENTICATION** – Contains VCA Settings Change Request notification.
- **WORKERS CLAIM** – Contains a notification for new claims.

4. In the next window, create your notification and **SAVE**.



If you have SMS Integration with Twilio, you can also set whether the message will go out as a text message (for a small extra SMS fee) in the **SMS Message** area.

SMS Message

Enabled

Once you select this option, an additional window displays where you set up the text message (example below).

Notification Description

System: ACCOUNT_CREATED
 Event: Created
 Name*: Login Instructions
 Description:
 Active: *Set to Active once you want this Notification to be sent to users and available to other Admins*

Recipients

- Employee
- Email: dhuffman@enjoywurk.com
- Account's Manager 1 (Manager 1)
- Account's Manager 2 (Manager 2)
- Account's HR Director (Manager 3)
- Group:

When

When Event Occurs * Last Scheduled Run Was At 03/27/2020 12:00a

Conditions (Optional)

Employee In: All Accounts

Email/Mailbox Message

Enabled
 From*: AccountCreated@enjoywurk.com
 Subject*: Please Log Into Your Work Account

Message:
 {FULL_NAME},
 A Work account has been created for you. To login follow this link (LOGIN)
 Username: {USER_NAME}
 Password: Last 4 of your SS#
 Let your Company Administrator know if you have any questions.
 Message: Thank you!

SMS Message

Enabled
 {FULL_NAME},
 A Work account has been created for you. To login with the mobile application,
 download HCMToGo from your mobile devices app store.
 Company Shortname: HCMImpSandbox

What is SMS Integration with Twilio?

SMS Integration with Twilio is an add-on feature your company may choose to purchase from Werk. It can help increase the adoption of the WerkMobile app, HCM ToGo, by enabling company announcements and notifications to go out to employees via SMS (text messages). If you wish to add this feature, contact your Werk Account Manager. Once enabled, Administrators can set whether Company Notifications and Announcements go out as text messages in the SMS Message area (example below).

5. Your new notification will now display in the list of Company Notifications.

SMS Message

This widget displays when your company has purchased SMS Integration with Twilio

Enabled

Message

(FULL_NAME),

A Werk account has been created for you. To login with the mobile application, download HCMToGo from your mobile devices app store.

Company Shortname: HCMImpSandbox

Username: (USER_NAME)

Password: Last 4 of your SS#

Let your Company Administrator know if you have any questions.

Thank you!

TAGS [Download Tags](#)

- {ACCOUNT_CUSTOM_1}
- {ACCOUNT_CUSTOM_2}
- {ACCOUNT_CUSTOM_3}
- {ACCOUNT_CUSTOM_4}
- {ACCOUNT_CUSTOM_5}
- {ACCOUNT_CUSTOM_DATE_1}
- {ACCOUNT_CUSTOM_DATE_2}
- {ACCOUNT_CUSTOM_DATE_3}