# Our NEW isolved release goes live
## April 8, 2022

Release 8.6 – is jam packed with exciting new additions!
We are working hard to provide the best tools for you and your team.
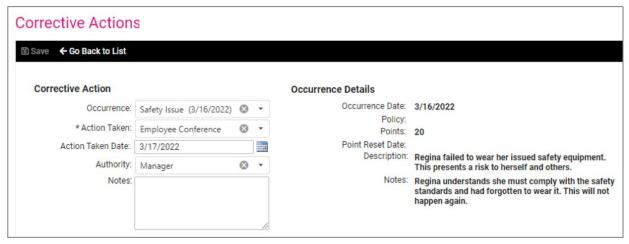
**In this release:**
**Occurrence Tracking**
**Configurable Onboarding**
**I-9 Updates**
**Menu Item Location Changes**

## Time & Labor Management
### Occurrence Tracking

The Occurrence Tracking module in isolved is a solution that takes Time Card alerts and applies points to identify when corrective actions need to take place per a company's policy. This can also be used as a stand-alone module in Human Resources where occurrences can be entered by users. As employees accumulate points and reach predetermined thresholds, a corrective action record is created, and notifications can be sent to users who need to take action. Here are a few examples where you could use occurrence tracking to help automate your processes:

- Excessive tardiness
- Safety issues
- Absenteeism



**Click here** to see the full documentation on how Occurrence Tracking works in isolved People Cloud

# Onboard & Develop
## Configurable Onboarding

Those of you who have been using our offboarding functionality have been asking for the configurable wizard format to be moved to onboarding. **You asked- we delivered!**

The Onboarding process can now be configured to allow multiple users to complete a portion of the new hire process. For example, IT may need to assign and record the employee's phone and computer, HR may need to complete Job and Labor, upload Documents, Employment Information, and assign Leave Accruals. Finally, payroll will need to enter in Salary information. Employee onboarding is a process that can prevent errors such as:

- Not completing the Employee and Employer sections of the I-9
- Not recording company-issued asset, such as a mobile devices or computers
- Not assigning the new hire a job title or assign them a supervisor
- Not assigning accruals or updating employee tax information

You can now create multiple onboarding templates and workflows for varying groups of employees. If you are not already using Onboarding, this is a feature that will need to be enabled before use. Please contact your customer service representative for activation. Below is comparison chart for each area of onboarding or bringing new hires into the isolved People Cloud platform and how you use it today vs. how it will work after our April 8th release.

| | Pre-release | Post-release (04/08/2022) |
|---|---|---|
| **Quick Hire** / **New Hire Wizard** | • Employers have the option to use Quick Hire screen for pending employees. | • ENHANCED Quick Hire is limited to those not using the onboarding process, which allows users to choose who has access outside of workflow.<br>• NEW Quick Hire screen now includes Prefix, Suffix, Personal Email, Manager Search, Supervisor Search, Work Phone and usability updates for SSN and Date of Birth. |
| | • Employers have the option to use the New Hire Wizard for pending employees. | • ENHANCED The New Hire Wizard is limited to those not using the onboarding process, which allows users to choose who has access outside of workflow.<br>• With the updates to Quick Hire, the New Hire Wizard will sunset with the June 3rd release. |
| **Pending Employees** | • Limited to the same wizard configuration for all companies<br>• Limited to one workflow approval step for all companies<br>• All users could hire or delete pending employees<br>• Initiate Onboarding is a separate menu item | • ENHANCED Client Wizard is configurable by template. All users in current workflow will be given access to Employee, Employment, Jobs, and Salary pages in the wizard upon release.<br>• ENHANCED Client Wizard allows multiple users and steps in approval process.<br>• ENHANCED Workflow configuration defines users who can hire or delete pending employees brought in via onboarding.<br>• ENHANCED Initiate Onboarding is part of the Pending Employees screen.<br>• NEW Pending Employees screen gives the user the option between a focused or detailed view.<br>• NEW Bypass option to override the workflow process.<br>• NEW Audit report has been added to capture updates made via the workflow process.<br>• NEW When bypassing the Employee wizard, any data entered to date will be saved.<br>• NEW Additional pages available to be added to the client wizard including the ability to assign messages and notices upon hire. |
| **Pending Employees via API, import, Efficient Forms** | • Employers have the option to use Quick Hire or New Hire Wizard for non-onboarded pending employees. | • NEW Employers must use the new 'Hire' option to complete pending employees brought in via import, API, or Efficient Forms. |

**[Click here](#) to watch a quick video on the Onboarding enhancements.**

# Onboard & Develop

## I-9 Updates

Below are the exciting changes we have rolling out to our I-9 screen. We wanted the I-9 screen to look as similar to the actual form as possible

- Ability to preview the form (employee or employer),
- Ability to include the form in the configurable client wizard in onboarding
- Ability to use a translator
- Ability to capture additional list A documents
- Ability to add notes to the additional information field,
- Ability to choose a work location for the employer address

### Ellie Perez (3/18/2022) - I-9 Certification
TAD Frog Co

Read instructions carefully before completing this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

**Section 2. Employer or Authorized Representative Review and Verification**

*(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")*

| Employee Info from Section 1 | Last Name *(Family Name)* | First Name *(Given Name)* | M.I. | Citizenship / Immigration Status |
| --- | --- | --- | --- | --- |
| | Perez | Ellie | M | 1 - Citizen of the United States |

| List A — Identity and Employment Authorization | OR | List B — Identity | AND | List C — Employment Authorization |
| --- | --- | --- | --- | --- |

**List A** — Identity and Employment Authorization

- *Document Title
- *Issuing Authority
- Document Number
- Expiration Date *(if any) (mm/dd/yyyy)* — MM / DD / YYYY
- *Document Title
- *Issuing Authority
- Document Number
- Expiration Date *(if any) (mm/dd/yyyy)* — MM / DD / YYYY
- *Document Title
- *Issuing Authority

**List B** — Identity

- *Document Title
- *Issuing Authority
- Document Number
- Expiration Date *(if any) (mm/dd/yyyy)* — MM / DD / YYYY

Additional Information

**List C** — Employment Authorization

- *Document Title
- *Issuing Authority
- Document Number
- Expiration Date *(if any) (mm/dd/yyyy)* — MM / DD / YYYY

**Certification:** I attest, under penalty of perjury that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment (mm/dd/yyyy): 03/18/2022 **(See instructions for exemptions)**

| *Signature of Employer or Authorized Representative | *Today's Date *(mm/dd/yyyy)* | *Title of Employer or Authorized Representative |
| --- | --- | --- |
| | 03/21/2022 | |

| *Last Name of Employer or Authorized Representative | *First Name of Employer or Authorized Representative | *Employer's Business or Organization Name |
| --- | --- | --- |
| | | TAD Frog Co |

| *Employer's Business or Organization Address *(Street Number and Name)* | *City or Town | *State | *ZIP Code |
| --- | --- | --- | --- |
| 155 N Hawthorne Road | Winston Salem | NC | 27104 |

**Verify and Sign Form**

**Section 3. Reverification and Rehires** *(To be completed and signed by employer or authorized representative.)*

| A. New Name *(if applicable)* | | | B. Date of Rehire *(if applicable)* |
| --- | --- | --- | --- |
| Last Name *(Family Name)* | First Name *(Given Name)* | M.I. | Date — MM / DD / YYYY |

**C.** If the employee's previous grant of employment authorization has expired, provide the input of the document or receipt that establishes continuing employment authorization in the space provided below.

| Document Title | Issuing Authority | Expiration Date *(if any) (mm/dd/yyyy)* — MM / DD / YYYY |
| --- | --- | --- |

I attest, under penalty of perjury, that to the best of my knowledge, this employee is authorized to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.

| *Signature of Employer or Authorized Representative | *Today's Date *(mm/dd/yyyy)* | *Name of Employer or Authorized Representative |
| --- | --- | --- |

**Sign Reverification**

# Platform

## Menu Item Location Changes

While making changes to the system over the last few months, we found that items within both the Client Management and Employee Management sections of the system were getting cluttered. Rather than having users scroll through the menus we have added additional menus and rearranged a few.

**Employee Management Menu Updates**

- Payroll Accumulations have moved under the Employee Pay menu
- Accruals have been moved under Employee Benefits > Accruals
- A new submenu for Performance has been added for
  - Awards
  - Occurrences
  - Corrective Actions
  - Add Review
  - Schedule Review
  - Review History
- A new submenu for Regulatory has been created and will have the following underneath it
  - Federal Reporting Data
  - OSHA Incidents
  - WOTC Certifications
- A new submenu for Training and Development has been created and will have the following underneath it
  - Certifications
  - Education
  - Skills
  - Training

| EMPLOYEE MANAGEMENT | EMPLOYEE MANAGEMENT |
|---|---|
| Employee Summary | Employee Summary |
| New Hire Wizard | Employee Quick Hire |
| Quick Hire | Share & Perform |
| Quick Hire - Time Only | Employee Maintenance > |
| Employee Maintenance > | Employee Pay > |
| Employee Pay > | Employee Benefits > |
| Employee Benefits > | Human Resources > |
| Human Resources > | Regulatory > |
| Payroll Accumulations | Training and Development |
| Employee Notes | Applicant Tracking |
| Performance Reviews > | |

Here is a breakdown of the new menu items

**Employee Pay ∨**
- Salary
- Alternate Pay Rates
- Tax Information
- Earnings
- Deductions
- Garnishments
- Memo Calculations
- Direct Deposit
- Payroll Accumulations

**Employee Benefits ∨**
- Benefit Plans
- Benefit Rate Factors
- Group Term Life
- Life Events
- Life Events Wizard
- ACA Measurement Period
- ACA Report Overrides
- Accruals ∨
  - Accrual Balance History
  - Accrual History Updates
  - Comp Time Balance History

**Human Resources ∨**
- Company Assets
- Employee Assignments
- Employee Contacts
- Employee Documents
- Employee Notes
- Prior Employment
- Performance ∨
  - Awards
  - Occurences
  - Corrective Actions
  - Add Review
  - Schedule Review
  - Review History
- Regulatory ∨
  - Federal Reporting Data
  - OSHA Incidents
  - WOTC Certification
- Training and Development ∨
  - Certifications
  - Education
  - Skills
  - Training

**Employee Admin Tools Menu Updates**
With our Employee Admin Tools menu, we have moved all our I-9 screens to funnel under the I-9 Management menu item rather than being scattered in different areas of the system.

**EMPLOYEE ADMIN TOOLS**
- Employee Administration ∨
  - Employee Scheduling ＞
  - Enrollment Management
  - I-9 Management ∨
    - Form I-9
  - Test Client Screen
  - Pending Employees
  - Pending Terminations
  - Pending Workflow
  - Self-Service Management
- Employee Analytics ＞
- Employee Utilities ＞

**EMPLOYEE ADMIN TOOLS**
- Employee Administration ∨
  - Employee Scheduling ＞
  - Enrollment Management
  - I-9 Management ∨
    - E-Verify
    - Form I-9
    - I-9 Audit
    - Informational I-9 Data
  - Pending Employees
  - Pending Terminations
  - Pending Workflow
  - Self-Service Management
- Employee Analytics ∨

**ısolved**

**Client Management Menu Updates**
To match up with the changes that we have made with the Employee Management screen, we have added the new menus to Client Management for HR Administration, Performance and Training and Development.

- HR Admin menu has been renamed to HR Administration
- Employee Messages has moved under the HR Administration menu
- A new submenu for Performance has been added for
    - Awards
    - Corrective Actions
    - Performance Review Ratings
    - Performance Review Types
    - Performance Review
- A new submenu for Training and Development has been added for
    - Certifications
    - Education
    - Skills
    - Training