



# Our NEW isolved release goes live

June 30, 2023

Release 9.12 has some exciting new additions! We are working hard to provide the best tools for you and your team.

## In this release:

- Adaptive Employee Experience – Employee Documents
- Benchmark Insights
- QuickBooks Online Integration

## isolved Platform

### Adaptive Employee Experience: Employee Documents

Managers and supervisors will have access to employee documents in Adaptive Employee Experience. Users will be able to upload, view, and edit documents per rules that are set up at the company level.

Tasks Employees Calendar Schedule

Documents

Employee >

Employer >

Position >

Absences >

Assignments

Documents

McAdoo, Isaac  
AFC Richmond

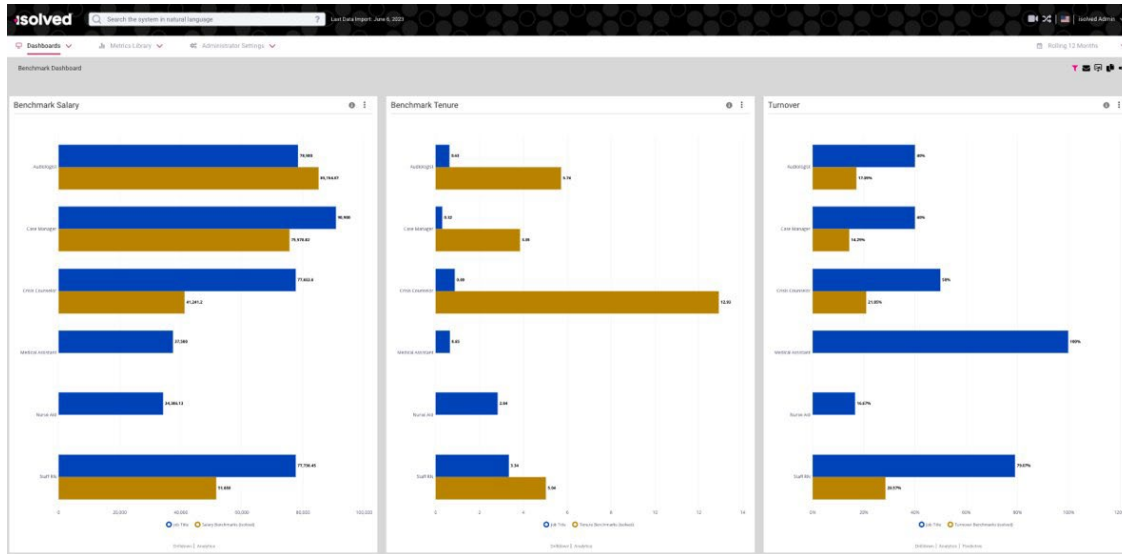
Category Personnel + UPLOAD

Document	Type	Uploaded
▼ Uncategorized		
ElectronicTaxFormDeliveryConsent.pdf	Electronic Delivery	06/12/2023
▼ sub1		
Adaptive Enhancement Cleanup (version 1).xlsb.xlsx	Certification	06/12/2023
ElectronicSignatureConsent.pdf	Electronic Consent	06/12/2023



## Benchmark Insights in Predictive People Analytics

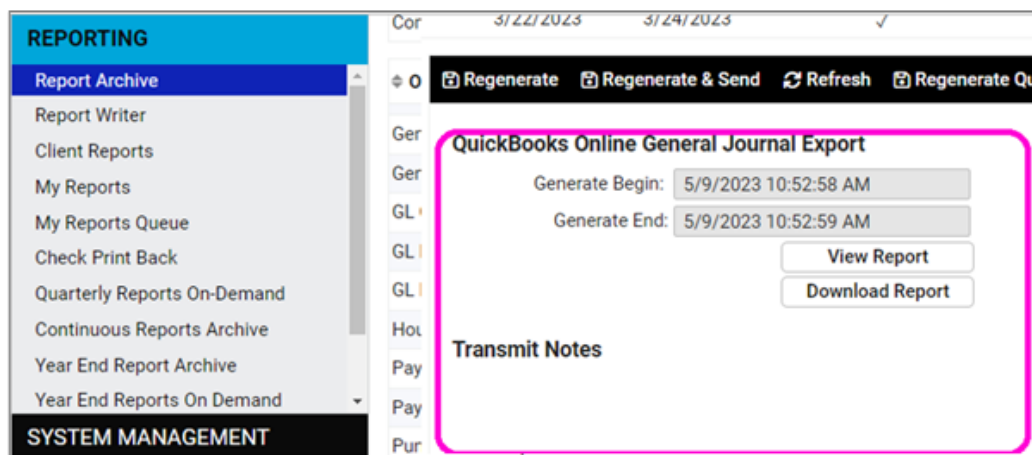
isolved Benchmark Insights provides our clients with the ability to compare by job their internal salaries, tenure, and turnover to external averages across the marketplace. Clients can then use these insights to strengthen their workforce strategy and optimize individual performance. For more information on this exciting, new offering reach out your account manager today!



## Marketplace

## QuickBooks Online Integration

Clients can now integrate QuickBooks Online into isolved! The system allows for Service Bureau and Client Users to setup the mapping exports into QuickBooks Online from the system. To learn more about QuickBooks Online Setup, click here for the isolved University article: [QuickBooks Online Integration Setup \(Client\)](#)



## Screen Updates

Over the next few months, you will see that we are refreshing several screens, moving them to a more modern look using the new grid style that you have already seen on other newer screens. The overall functionality remains the same with some differences noted below.

This is an example of the previous version of the Prior Employment screen:

Prior Employment isolved University

Employer	Job Title	Start Date	End Date	Ending Salary
ABC Finance Company	Project Manager	1/16/2012	6/25/2020	
Big Box Retailer	Stockperson	12/5/2020	1/15/2012	\$20,800.00

**PRIOR EMPLOYMENT DETAILS**

Employer: ABC Finance Company  
 Job Title: Project Manager  
 Start Date: 1/16/2012  
 End Date: 6/25/2020  
 Salary Info: Annual  
 Ending Salary:  
 Ending Hourly Rate:  
 Job Description:  
 Change Reason: Reduction in staff  
 Manager/Reference  
 Location:

This is an example of the new screen, where you can sort, filter, group, and view all pieces of information:

Prior Employment isolved University

Expand All Groups Collapse All Groups Clear Grouping/Filters

Drag a column header here to group by that column

Employer	Job Title	Job Description	Start Date	End Date	Ending Salary	Change Reason	Manager/Reference	Location
ABC Finance Company	Project Manager		1/16/2012	6/25/2020		Reduction in staff		
Big Box Retailer	Stockperson		12/5/2010	1/15/2012	\$10.00 per hour	Finished school		

The screens that will be updated with this release:

- Client Management > Tables > Misc Field Categories: Updated grid layout and added export to Excel
- Employee Management > Employee Maintenance > Organization Supervisor/Manager: Updated grid layout and added export to Excel
- Employee Self-Service > Jobs: Updated grid layout
- Employee Self-Service > Direct Deposit: Updated grid layout
- Employee Management > Employee Pay > Direct Deposit: Updated grid layout and added export to Excel

## 9.13 Sneak Peek

We are still working on new items for release v9.13 on July 14<sup>th</sup>. Please check the next newsletter for more information.

## Compensation Management

The compensation management tool allows users to manage bonuses and salary adjustments directly in isolved utilizing a full workflow process complete with functionalities including email reminders and collaborative input from different levels of organization.

### Event Setup Screen

From this screen, users can set up new compensation events with their preferred settings before an event begins.

→ Next   ○ Cancel

**Event Details**

\* Event title

Event description

\* Compensation type Search or Select from list

**Evaluation Period**

\* Begin date

\* End date

**Entry Options**

\* Type Search or Select from list

\* Based on Search or Select from list

**Legals**

Available legals

Legal 1 >

Legal 2 >

Legal 3 >

Legal 4 >

Legal 5 >

Legal 6 >

Legal 7 >

Legal 8 >

Legal 9 >

Selected legals

Legal 1 x

Legal 2 x

**Eligibility Rules**

Available rules

222 365 >

Active EEs lets me make it really long... >

Client crossover >

Comp Mgmt Assigned >

Comp plans >

Dept Medding K >

Dept Others >

Dept Villians >

EE 277 >

Selected rules

Legal 1 x

Legal 2 x

### Compensation Analysis Screen

Approvers can view their assigned employees and make their recommendations based on employee profiles and recommendations from previous steps (if applicable).

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Event: Quarterly Bonus Q2 2023 b

Submit   ← Go Back to List   Expand All Groups   Collapse All Groups   Clear Grouping/Filters

Drag & drop column header here to group by that column

Employee Name	Job Title	Hire Date	Base Salary	Notes	Amount	Percent	Results
Elisa A Bird 1588	Tech Support	9/1/2018	\$44,999.76 annual	team player	2,249.99	5.0000	2,249.99
Maeve B Berry 1757	Tech Support	9/1/2018	\$54,999.88 annual				
Jaylyn C Blanchard 2100	Tech Support	9/1/2018	\$80,999.88 annual				
Reina B Benson 2108	Tech Support	9/1/2018	\$35,000.16 annual				

## Event Management Screen

Users can view the status of all steps of a compensation event. From this screen, users can check the completion of steps per assigned approver and additionally advance steps if necessary.

Event Management isolved University

← Go Back To List

Event: **Quarterly Bonus Q2 2023 f**

Event Period

Event Open 6/20/2023

Step 1 - Assigned Spvr/Mgr 50% 6/20/2023

dmills@isolvedhcm.com 6/20/2023, 10:27:24am

Approver Submitted

Brycen A Gentry ✓

Deven A Gilmore ✓

Step 2 - Department Manager Due: 07/06/2023 0% Advance

Event Cancel Cancel

## Prior Pay Period Modifications

With the July 14<sup>th</sup> release, prior pay period modifications or retroactive pay adjustments functionality will be introduced! Users with access will be able to “Unlock” time cards and make pay adjustments.

## Force Direct Deposit Prenote

Client and Service Bureau users will have the ability to force a prenote on an employee’s bank account. This feature is an additional measure of security against fraud.

## BIPA Updates

July 14<sup>th</sup> will be the last day for employees to have the ability to consent at the clock prior to their templates being deleted if they haven’t consented already. It is important to make sure all clocks are updated to the latest firmware, so employees can do so.