

Our NEW isolved release goes live:

September 8th, 2023

Release v9.17 has some exciting new additions! We are working hard to provide the best tools for you and your team.

In this release:

- COBRA Client Portal Updates
- Compensation Dashboard
- Updated WOTC Form
- University Search Enhancement
- Report Archive
- Screen Updates

Benefit Services

COBRA Client Portal Updates

We are including a couple COBRA Open Enrollment enhancements on the COBRA Client portal:

Additional Open Enrollment Functionalities

Clients can now add Possible Electees inside of that Open Enrollment job. These are individuals that are not listed within the Launch Pad. Additionally, we've added the ability to export and import the list of participants for the Open Enrollment process.

	Name	Address 1	Address 2	City	State	Zipcode
🕂 📝 🔇	Sally Knowles	60 Juniper Ave		Athens	М	49036
🕂 📝 🚭	Carla Blech	124 Charles St		Coldwat	М	49036
🕂 📝 🚭	Sara Pifer	1430 Lawndal		Niles	М	49120
🕂 📝 🚱	Lisa Rockwell	312 Smith Rd		Coldwat	М	49036
🕂 📝 🚭	Kerry Stephens	10 Hewitt St		Qunicy	М	49082
🕂 📝 🚭	Susan Brown	903 Pristine A		Angola	М	46703
🕂 📝 🚭	Kendra Burns	189 N Fiske Rd		Coldwat	MI	49036



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Open Enrollment Packets

We increased the number of documents that can be attached to be included within the Open Enrollment packets.

you have a Summary of Benefits and Coverage or variable rate table that you would like to include within the Open Enrollment mailing, you may upload the single document here.									
cument format requirement	ts must be in a .pdf and the	size cannot exceed	a maximum file size 20MB with a page limit of 32 page	s.					
REPLACE	REMOVE	File Name:	Explanation of benefits 11.19.2022.pdf	Туре:	.pdf Size	10 page(s) (564,221 bytes)			
REPLACE	REMOVE	File Name:	Explanation of benefits 3.11.2023.pdf	Туре:	.pdf Size	10 page(s) (719,520 bytes)			
REPLACE	REMOVE	File Name:	Explanation of benefits 4.8.2023.pdf	Туре:	.pdf Size	12 page(s) (729,164 bytes)			

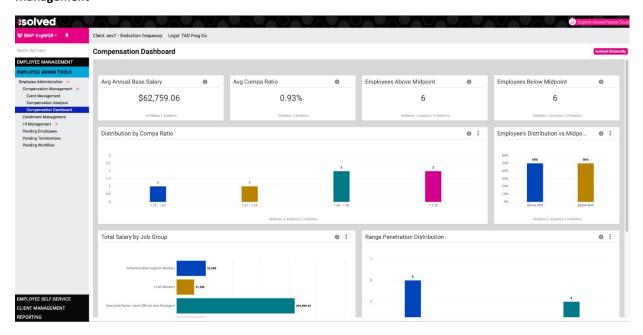




Benefits/HR

Compensation Dashboard

The Compensation Dashboard is slated to be released with the 9.17 product release. The Dashboard allows users to gain valuable insight into their Compensation data at a glance and gives users a visual representation of their real compensation information. This new dashboard will be available under **Employee Admin Tools>Employee Administration>Compensation Management**



Updated WOTC Form

The US Department of Labor released an updated version of the Work Opportunity Tax Credit form 9061. Classic onboarding and ESS have been updated to use the new version that now expires 05/31/2026. Please note, given the questions on form 9061 no longer map directly to IRS form 8850, the Form 9061 is the only form that can be completed by a new hire.





Learn & Grow

University Search Enhancement

The global search function within the University has been enhanced with an improved search engine. This new search engine provides numerous new features, including:

- Typo tolerance: accurate search results may be returned now even if there are minor typos in the search terms.
- Improved relevancy: search results are now more relevant to the search terms.
- **Search highlighting**: the keywords that match your search terms are now highlighted in the search results, making it easy to identify why a particular resource has been found in the search.

solved world	MYCLASSROOM ~	CLASSROOM ~	LIBRARY ~	QUICK HELP VIDEOS	COMMUNITY	CAMPUS LOUNGE ~	CONTACT ~
103 Search Results for "Share & Perform	n"						
Advanced Search Options							~
Type: Course							ttempts: 1,773
3602022 - Share & Perform - 360 Review (Reviewee Perspective))						
The 360 degree review is a professional feedback opportunity for a group of coworker when relevant, feedback from external sources who interact with the employee, such effectiveness as an employee, coworker or staff member is viewed by others							
View Course >							
Type: Course							Attempts: 2
R02023PMPMANAGERS - Reference Guide- Completing Your Rev	riews in <mark>Share</mark> & Pr	<mark>erform</mark> - Manage	ers				
Reference guide to assist with completing Drave & Perform performance reviews for N	fanagers.						
View Course >							
Type: Course							Attempts: 3
R02023PMPMANAGERS - Reference Guide- Completing Your Rev	riews in <mark>Share</mark> & Pr	<mark>erform</mark> - Manage	ers				
Reference guide to assist with completing Share & Perform performance reviews for N	lanagers.						
View Course >							
Type: Course							ttempts: 1,413
RG2023PMP - Reference Guide- Completing Your Review in Shar	e & Perform- All Er	nployees					
Reference guide to help all employees with completing your review in Share & Perform	ŧ.						
View Course >							





Platform

Report Archive

Report Archive Screen has been updated to ensure a better user experience and to reduce the amount of screen navigation needed. On the initial screen reports are ordered by Payroll Run number with the ability to expand and collapse the list of reports.

Report Archive									isolved Univ	versity 🛛 🖗 Help 🔻
* Pay Date Year: 2023	▼ Filter									
V Expand All Groups Collapse	e All Groups 5 Clear Grouping/Filters (Refresh								
Drag a column header here to group	p by that column								🕒 🔍 Search	L
Payroll Status 🕎	Payroll Type 🍸 Status	Run # 🍸 Period Begin 🍸	Period End 🍸	Run Date 🕎	Pay Date 🕎	Last of Month 🕎	Last Of Quart 🕎	Last of Year 🕎	New Fiscal Y 🝸	Actions
 Complete 	Special	72 7/1/2023	7/31/2023	8/11/2023	8/15/2023					+
> Complete	Regular Payroll	71 7/23/2023	8/5/2023	8/11/2023	8/11/2023					+
> Void	Special	70 7/1/2023	7/31/2023	8/11/2023	8/15/2023					+
> Void	Regular Payroll	69 7/23/2023	8/5/2023	8/11/2023	8/11/2023					+

From the expanded view there are icons to view, download and see more.

Report Archive									isolved University 🔯 Help 💌
* Pay Date Year: 2023	✓ Filter								
V Expand All Groups ^ Collapse	All Groups 🕤 Clear Group	ing/Filters 💽 Refr	resh						
Drag a column header here to group	by that column								Q Search
Payroll Status 🕎	Payroll Type	Status	Run # 🍸 Period Begin 🍸	Period End 🍸	Run Date 🍸	Pay Date 🕎	Last of Month 🕎 Last Of Quart 🍸	Last of Year 🕎	New Fiscal Y 🍸 Actions
 Complete 	Special		72 7/1/2023	7/31/2023	8/11/2023	8/15/2023			+
Dana II Carrows		GENERATED							0.1
Payroll Summary		GENERATED							₽ ≙
Payroll Register		GENERATED							
New Employee and Change Aud	dit	GENERATED							۵ 🗠

After clicking through to see more, all items will have regenerate icon represented by the two rotating arrows.

Report Archive				isolved University 👔 🖗 Help
← Go Back to List 🕐 Refresh				
Run Number 72 (7/1/2023-7/31/2023	•			
Output Item 🍸	Status 🍸	Generate Begin 🍸	Generate End 🍟	Actions
Payroll Summary	GENERATED	8/11/2023 1:45:57 PM	8/11/2023 1:45:59 PM	0
Payroll Register	GENERATED	8/11/2023 1:45:59 PM	8/11/2023 1:46:01 PM	C
New Employee and Change Audit	GENERATED	8/11/2023 1:46:01 PM	8/11/2023 1:46:02 PM	0
Exceptions	GENERATED	8/11/2023 1:46:04 PM	8/11/2023 1:46:05 PM	0



-solved

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 stays the same with some differences noted below.

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

Prior Employment									
✓ Expand All Groups ∧ Collapse All Groups ⊃ Clear Grouping/Filters									
Drag a column header here t	Drag a column header here to group by that column								
Employer	Job Title	Job Description	Start Date \downarrow 🍸	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 > Billing > Pay Group Billing: Updated Grid Layout. Users can export data.
- Client Management > HR Management > Performance > Performance Reviews: Updated Grid Layout. Users can export data.
- Client Management > Tables > Workers Comp Rates: Updated Grid Layout. Users can export data.
- **Reporting > Report Archive:** Updated Grid Layout.
- Security > Partner Users: Updated Grid Layout. Users can export data.
- System Management > System Maintenance > Accumulator Types: Updated Grid Layout. Users can export data.

9.18 Sneak Peek

We are still working on new items for release v9.18 on September 22nd. Please check the next newsletter for more information.

BIPA Update

We are moving forward with the next phase in our BIPA rollout on October 6th, 2023. The next phase is to delete templates for employees that have not consented (manually or at the clock) to use the touchpad for clocking in (postponed from 9/8/2023 release).

Once a template is deleted, the employee will need to create a new template. It is important to start this process early to avoid having to re-enroll employees. As a reminder, the deleting of templates will also occur on our velocity and IQ model clocks (with touchpads) when a manual consent form is not present. Please ensure you have manual consent forms attached to prevent the deletion of employee templates.

<u>To support your preparation for the 10/6 release</u>, there will be two reports available with the release on 9/22 - a new report called "Employee Consent Report" and an updated version of the report called "Employee Clock Settings with Template Data".

