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Our NEW isolved release goes live:
October 20th, 2023

Release v9.20 has some exciting new additions! We are working hard to provide the best tools for you and your team.

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Platform

isolved People Cloud Mobile App

The new isolved People Cloud Mobile App is now available in the Android and Apple App Stores!!

What is the isolved People Cloud Mobile App? The isolved People Cloud Mobile App is a convenient, flexible, and secure way to access the capabilities of isolved's Adaptive Employee Experience (AEE) within a downloadable mobile app. The app provides employees with self-service access to a modern HCM platform that enables them to effortlessly manage critical HR services, regardless of their work location or preferred device.

Is the new app better than the previous web-based app? Yes, while core functionality remains the same, users can take advantage of phone specific push notifications, biometric log in features, and having the app available in native app store.

How do you access the isolved People Cloud Mobile App? To access the isolved People Cloud Mobile App, users go to the app store for their Android or iPhone and search for the "isolved People Cloud". From there they will be able to install it on their phone.

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What should I look for in the app store? The app is called isolved People Cloud and here is a screenshot of the icon to look for.

isolved People Cloud
Empowering your people
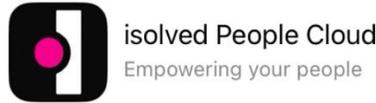
Form I-9 in AEE

In this release, there are a handful of changes to Form I-9 in Adaptive Employee Experience. Firstly, since the USCIS allows for up to four preparers or translators, there is a new button on the **Preparer and/or Translator Certification** screen to add up to four fields to support this.

I attest, under penalty of perjury, that i have assisted in the completion of Section 1 and that to the best of my knowledge the information is true and correct.

Signature of Preparer or Translator

Date
10/16/2023

Last name (family name)

First name (given name)

Middle initial (if any)

Address (street number and name)

City or Town

State
Select

Zip code

+ ADD ANOTHER PREPARER OR TRANSLATOR

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Additionally, employees now can upload supporting documents (e.g., Driver's License, Passport, Social Security Card, etc.) directly from the screen as shown below. **Please note that this is not required for Employees to do.**

Human Resources

Form I-9 in Classic Onboarding

Similar changes have also been made to **Classic Onboarding** in this release to support USCIS changes to form I-9.

Changes for Employee
- o   Minor verbiage changes – fields have not changed nor are affected by new wording.
- o   Employees will no longer have to indicate "N/A" in the Middle Initial and Other Last Names Used fields and can be left blank as it is no longer required by USCIS.
- o   "Add preparer and/or translator certification" will now be a pop up on the same screen and will allow for up to 4 entries that can be deleted or edited.

Changes for Employer
Changes have been made throughout the screen **Employee Admin Tools › Employee Administration › Pending Employees › Selected Employee's "Client New Hire Wizard"** to reflect the updated I-9 form.

I-9 Certification Screen changes:
- o   Minor verbiage changes – fields have not changed nor are affected by new wording.
- o   Added an "Add New" option under Document Title that allows the reviewer to add a document not listed.
- o   Added "Section 1 Employee Information and Attestation", which will be a link to the employee portion of the form (document should pop up in a separate window)

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- o If an employee uploads any supporting documents, they will appear under "Section 1 Employee and Attestation", and will be listed by description or by document name (if description not provided)
- o Added a check box that indicates "Check here if you used an alternative procedure authorized by DHS to examine documents.
- o Removed validation from the Employer/Authorized representative signature.

Please note: The function to directly upload supporting documents to the Employee Form I-9 will be available in Classic Onboarding in release v9.21 on 11/3.

EEO Export Updates

With this release, there have been updates made for EEO Reporting! An export is now available and the necessary updates for that export have been made:

First, the Establishments page under **Client Management › Client Maintenance › Establishments** has been updated. The main screen has been updated with a new grid layout.

Second, on the "Add New Establishment" screen, "Address" and "NAICS override" fields have been changed to be searchable dropdown fields. There is also a new checkbox for federal contractor which is a new field that must be included in the EEO Export. If there is a federal contractor and the checkbox is checked, there is an added field for Unique Entity ID (UEI). The "Work Location" section has been updated from having checkboxes to flyover field where values can be searched and selected.

Third, in the EEO1 Export Report there is a new added field for OFS Company ID.

Payroll

Pending Wire Received

PEOs will now have the flexibility when processing pending wires now that the new Pending Wires Received utility is here! This will replace the current approval process on the Daily ACH page under Pending Wires tab, and the utility can be found under **Production Utilities › Export File Creation › Pending Wires Received.**

Each transaction can have their amount received adjusted to either be a partial or full amount received. A transaction can be approved for release to the ACH. When the "paid in full" box is selected, the amount received will automatically populate, and the Approve for Release will also automatically check. All changes for the date range will be tracked and displayed back on the main screen as long as they are outstanding, as well as having the ability to export this data to excel.

* Please Note that the Daily ACH's Pending Wires tab will be updated to be read-only. All files will be approved/unapproved on the new Pending Wires Received UI.

Company Tax Report

With this release, partners will now be able to control access to the Tax Maintenance information, but still be able to share the Notes. On the Company Tax Export, we've allowed for Notes to be selected and added to the Company Tax Report. When selected, notes will appear in the report allowing for those without access to the Tax Maintenance screen to have access to the notes without partners having to grant access.

Block MO Timely Tax Payment

On the Tax Maintenance screen for Missouri withholding, there is now added ability to block MO Timely Payment Tax Credit. The credit will still be calculated, but this will block it from automatically going back to the clients. By default, this option will not be selected, and the credit will go back to the clients. When this option is selected, a positive ACH adjustment record will be created, in the same amount as the tax credit, to offset the tax credit. The report name will either be "Blocked MO Timely Pmt Tax Credit by Pay Date" or "PEO Blocked MO Timely Pmt Tax Credit by Pay Date".

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State Levy Addenda

With this release, isolved can now support ACH payments for State Tax Levy! We've updated the ACH logic to support system ACH payments for state tax levy garnishments and formatted the '7' (addenda) record using their specifications. The System Garnishments › Payees tab has been updated to allow for the tax payment type code that needs to be included in Addenda record.

Talent Management

Share and Perform Tax Export

Just in time for the year-end, Share and Perform has added a Tax Export report that will support clients in the potential taxation of purchased items in the rewards store! A couple of functionalities have been made to support this new feature.

First, under the Organization Items tab, users will now have the ability to mark an item as "Taxable" by clicking the checkbox under the Edit Item function.

Second, under the Orders screen, along with a new date range selection tool that allows users to filter orders, there is the new "Export Tax Data" report under the existing "Export Orders" option. This report is importable into isolved for tax purposes.

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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:

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		

Prior Employment — isolved University
Expand All Groups Collapse All Groups Clear Grouping/Filters
Drag a column header here to group by that column — Search...

The screens that will be updated with this release:

- **Client Management › Labor & GL › Labor & GL Fields**
    - Updated Grid Layout.
    - Users can export Data.
    - Added filtering for each column.
- **Employee Management › Employee Benefits › Accruals › Leave Accruals**
    - Updated Grid Layout.
    - Users can export data.
    - Will show active and inactive accruals with columns for Accrual Plan, Current Balance, Service Date and Length of Service.
    - Added filtering for each column.
- **Employee Management › Employee Maintenance › Misc Data Sets**
    - Updated Grid Layout.
    - Inactive Fields are represented with triangle warning icon, Inactive Fields cannot be edited because they are inactive.
- **Production Utilities › Client Change Log–All Clients**
    - Updated menu name to **"Client Change Log – All Clients"**
    - Updated Grid Layout.
    - Date range is defaulted to last 30 days, this can be edited to any range within 1 year.
    - Tables have been sorted in select list between **Client level tables, Legal level tables** and **Pay group level tables.**
        - Tables in their groups are sorted alphabetically and are searchable.
    - Columns have been reordered to Client ID, Legal, Pay Group, Key, Field, Old, New, Date, User
    - Added filtering for each column.
    - Users can export data.
    - Added "Column Chooser" button next to export which allows users to drag and drop columns back into the table that are missing/empty.

- **System Management › System Maintenance › Landing Page Data › Service Bureau Links**
  - o Updated Grid Layout.
  - o Users can export Data.
  - o Added filtering for each column.
- **System Management › System Setup › Account Rep Types**
  - o Updated Grid Layout.
  - o Users can export Data.
  - o Added filtering for each column.