



Our NEW isolved release goes live:

July 19, 2024

Release v10.12 and v10.13 has some exciting new additions! We are working hard to provide the best tools for you and your team. Check out the [Feature Release Summary Video](#) available!

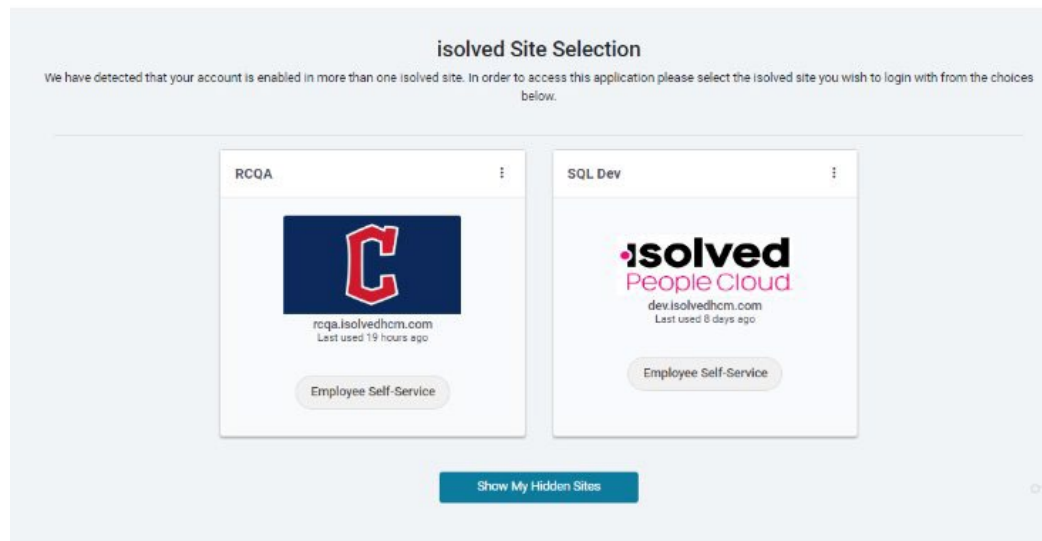
In this release:

- AEE: Site Selection, Switch User Screen
- Payroll: Updated Payroll Run History Screen
- Human Resources: Tax Form Updates
- Platform: COBRA using Identity for Login
- Learn & Grow: Compliance Bundle
- Screen Updates

Adaptive Employee Experience

Site Selection

With this release, we are making the site or tenant selection process when logging into isolved more intuitive and user friendly. Key features include logic update that will only display the site or sites they have an active AEE account in, and a UI update where sites will show as blocks that spell out the site name, have a logo, and a message of when you last accessed the site. Users will also have the ability to hide or unhide a site within the view!



Switch User Screen

To be consistent with the current login process used in Core, the Adaptive login will be updated to have a User Selection Screen that will allow you to choose your user.

As currently designed, when logging into Adaptive, if an employee has more than one user associated with their email address, they are logged into the first available pending employee associated with that address, or, if no pending employees are available, the first active employee available from list of active employees.

Adaptive Login will be updated as follows:

- If an AEE User has only one record associated with their login in a given tenant allow them to be directly logged into that record; however, if they have more than one record force them to make selection of the record they want to use to login via User Selection Screen.
- If a User is logged into core and selects "Try our New Look" link they should be directly logged into Adaptive as that user rather than the User Selection Screen.

The screenshot shows a 'Select User' interface. At the top, there is a header 'Select User' and a user email address '██████████@isolvedhcm.com'. Below this, the text 'Self-service employees' is displayed. The main content area contains a grid of eight user cards, each representing a different employee. Each card includes a user icon, the employee's name and ID, their role, and an 'authenticated' status with a green checkmark.

Name	ID	Role	Status
Beard, Coach	5	AFC Richmond	authenticated
Benjamin, Richard	13	Crash Testing	authenticated
Bluth, Gob	1	Bluth Banana Stand	authenticated
Fowler, Erin	124	Crash Testing	authenticated
Lasso, Ted	4	AFC Richmond	authenticated
McAdoo, Isaac	1	AFC Richmond	authenticated
ONBTest, Signature	105	Crash Testing	authenticated
Renfrow, Amber	3	Bluth Banana Stand	authenticated

Payroll

Updated Payroll Run History Screen

With this release, the Payroll Run History screen has gone through a screen update. Per request from our users, most of the screen is to remain the same except for:

- Billing items under Billing History tab have been alphabetized
- Counts under Payroll counts have been broken into 2 sections on this tab. The left block are the counts with values this payroll and the Payroll Counts that are zero are displayed in the right block. Both lists have been alphabetized
- Services that were blocked will show at the top of the list under the Service tab and have been alphabetized

Payroll Run History Screen:

The screenshot shows the 'Payroll Run History' screen for 'isolved University'. It features a table with columns for Payroll Status, Payroll Type, Run #, Period Begin, Period End, Run Date, Pay Date, Last of Month, Last of Quarter, Last of Year, and New Fiscal Year. Below the table are four information panels: PAYROLL RUN INFORMATION, PAYROLL DATE INFORMATION, PERIOD FLAGS, and TIME INFORMATION.

Payroll Status	Payroll Type	Run #	Period Begin	Period End	Run Date	Pay Date	Last of Month	Last of Quarter	Last of Year	New Fiscal Year
Complete	Regular Payroll	119	6/17/2024	6/20/2024	7/12/2024	7/5/2024				
Complete	Regular Payroll	118	6/3/2024	6/16/2024	6/20/2024	6/21/2024	✓	✓		
Complete	Regular Payroll	117	5/20/2024	6/2/2024	6/5/2024	6/7/2024				
Complete	Regular Payroll	116	5/6/2024	5/19/2024	5/21/2024	5/24/2024	✓			
Complete	Regular Payroll	115	4/22/2024	5/5/2024	5/9/2024	5/10/2024				
Complete	Regular Payroll	114	4/8/2024	4/21/2024	5/2/2024	4/26/2024	✓			

Payroll Counts Tab:

The screenshot shows the 'Payroll Counts' tab within the 'Payroll Run History' screen. It displays a table of payroll runs and a detailed breakdown of counts into two sections: 'Items with Counts' and 'Items without Counts'.

Payroll Status	Payroll Type	Run #	Period Begin	Period End	Run Date	Pay Date	Last of Month	Last of Quarter	Last of Year	New Fiscal Year
Complete	Regular Payroll	96	6/9/2024	6/22/2024	7/1/2024	6/28/2024	✓	✓		
Complete	Regular Payroll	95	5/26/2024	6/8/2024	6/17/2024	6/14/2024				
Complete	Regular Payroll	94	5/12/2024	5/25/2024	6/4/2024	5/31/2024	✓			
Complete	Regular Payroll	93	4/28/2024	5/11/2024	6/4/2024	5/17/2024				
Complete	Regular Payroll	92	4/14/2024	4/27/2024	6/4/2024	5/3/2024				
Complete	Regular Payroll	91	3/31/2024	4/13/2024	6/4/2024	4/19/2024	✓			

Items with Counts	Count	Items without Counts
#Taxes with EIN = Applied For	17	3rd Party ACH Payments-Excluding Benefit Provider
#Taxes with EIN = Applied For over 90 days	4	Active 1099 Employees In Company
ACA Employment Status	38	Active 1099 Employees In Pay Group
Active Employees In Company	32	Active Employees NOT Paid in Period
Active Employees In Month	32	Employees Terminated in Payroll
Active Employees In Pay Group	32	Employees With Paid Expense Transactions For Company In Month
Active Employees In Payroll	32	Employees With Paid Expense Transactions For Company In Previous Month
Active Employees with Time Clock ID	2	Employees With Paid Expense Transactions For Pay Group In Month

Services Tab:

Payroll Run History

isolved University [Help](#)

* Pay Date Year: 2024 [Filter](#)

Payroll Status	Payroll Type	Run #	Period Begin	Period End	Run Date	Pay Date	Last of Month	Last Of Quarter	Last of Year	New Fiscal Year
Complete	Regular Payroll	97	6/23/2024	7/6/2024	7/15/2024	7/12/2024				
Complete	Regular Payroll	96	6/9/2024	6/22/2024	7/1/2024	6/28/2024	✓	✓		
Complete	Regular Payroll	95	5/26/2024	6/8/2024	6/17/2024	6/14/2024				
Complete	Regular Payroll	94	5/12/2024	5/25/2024	6/4/2024	5/31/2024	✓			
Complete	Regular Payroll	93	4/28/2024	5/11/2024	6/4/2024	5/17/2024				
Complete	Regular Payroll	92	4/14/2024	4/27/2024	6/4/2024	5/9/2024				

Payroll Run History [Billing History](#) [Payroll Counts](#) **[Services](#)** [Blocked Pay Items](#) [Impound Bank Accounts](#) [Third Party Payees](#)

Service	Blocked
Employee Direct Deposit	YES
1099 Electronic Filing	NO
ACA Electronic File	NO
ACA Forms Print	NO
ACA Reports	NO
Applicant Tracking	NO
Base Payroll Package	NO

Human Resources

Tax Form Updates

With this release, we've made updates to Federal withholding forms, State withholding forms, employee withholding forms that are used in onboarding, and those using the Tax Updates functionality in self-service.

Here is the list of changed forms:

U.S. Form Changes
Maine: Maine Guided Flow module updated
New Mexico: Federal values allowed for NM101
New York: Form IT-2104 question validations updated
Virginia: Form VA-4b PDF updated
Miscellaneous: Help text added to ME101 and MN 103, Exemption question in AZ, CO, and WI guided flows updated

Please refer to the full [Symmetry Release](#) document for more details.

Platform

COBRA using Identity for Login

With this release, the COBRA portal will additionally undergo an enhancement to leverage the new Identity login functionality. Upon your first login after July 19, 2024, you will be guided through a simple account migration process. Moving forward, you can continue to sign in with your email address and password. Additionally, you will have the option to choose from various two-factor authentication methods such as Text (SMS), email, or any authenticator for added security.

Note: This adjustment is currently exclusive to the COBRA Customer portal. As we extend this enhancement to COBRA participants, we will furnish them with comprehensive information on how it will affect their experience.

Should you require any assistance with the new setup, we encourage you to consult our comprehensive [COBRA portal Log In Guide](#). For any further inquiries or support, feel free to contact our dedicated COBRA Customer Support team via email at crm@isolvedhcm.com.

Learn & Grow

Compliance Bundle



The new Learn & Grow Compliance Bundle will be released with 10.13! This is a slimmed-down version of our Content Library featuring 25 Compliance Courses with basic administrative features allowing clients to track course completion.

Architecture

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 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 following Screens have been updated in this release.

Client Management > Client Maintenance > Legal Services:

- Updated grid layout.
- Added filtering to all columns.
- Added export to excel.
- Added edit action button.

Client Management > Payroll > Pay Item Default Values:

- Background performance updates only.

Client Management > Workflow Setup > Onboarding Template:

- Updated grid layout.
- Added edit and delete action buttons.

Payroll Processing > Payroll Entry > Time Entry Total:

- Background updates.

10.14 Sneak Peek

We are still working on new items for release v10.14 on August 2, 2024. Please check the next newsletter for more information.

Adaptive Employee Experience

Unified Header

We are going to hold on to this one a little longer. The Unified Header has been tentatively rescheduled to the v10.14 release to ensure a quality release.

This enhancement will improve the and consistency of AEE, ensuring a more productive navigation experience for our users.

What is changing?



As part of this update, users will notice the following changes in AEE:

- Addition of new speed dial capabilities for punching in and out
- Relocation of the profile picture with options to manage the account in Identity or log out
- Access to the settings function for user preferences, switching users, and more through the profile picture

Payroll/Service Bureau

Garnishment Past Due Amount Release

On the Employee-level of Garnishments, we are going to be adding a Past Due Amount under the Garnishment Calculation section that will allow users to collect the past due amounts as part of payroll. Once an amount is entered, the system will automatically include it into the total about due.

Predictive People Analytics

ROI, KPI, Org Chart Dashboards

We know some of you are going to be happy to hear this! We are going to be re-releasing the PPA Embedded Dashboards starting this August. More details about the release to come!