

January 2021

isolved™

Adaptive Employee Experience

Manager/Supervisor Guide

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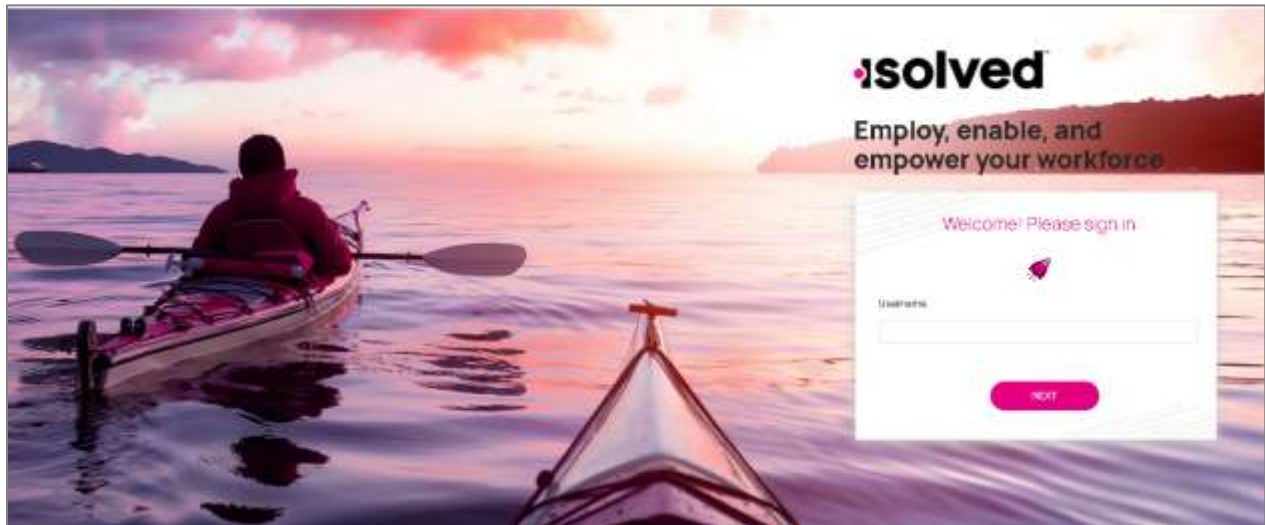


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General Login and Navigation

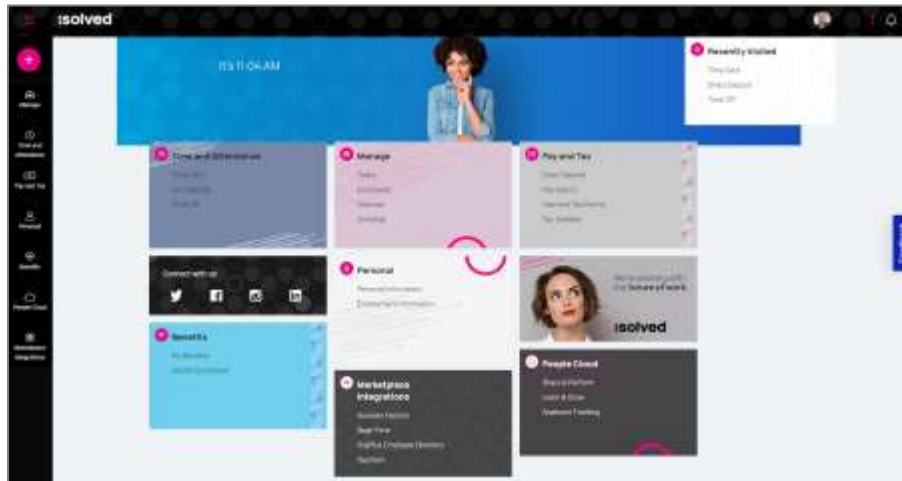
Navigate to the isolved Adaptive Employee Experience website using a web browser of your choice.



1. Key in your username (this is your self-service email address)
2. Click on the **Next** icon after entering your username
 - a. **Note:** If you entered your username incorrectly, choose "This is not my username" which will bring you back to the main login page.
3. Key in your password
 - a. **Note:** If you have forgotten your password, choose "Forgot my password" which allows you to reset after answering your security questions.
4. Click on the **Next** icon which will log you into Adaptive Employee Experience

Welcome Page Navigation

The welcome page allows you to see all items you have access to in one screen.



Each card is geared towards the general task you are looking to complete:

- **Time and Attendance:** Used for all standard time functions such as viewing and verifying your Time Card, requesting time off, and viewing your schedule.
- **Personal:** Used to update your personal information such as address, emergency contacts, dependents, beneficiaries, and federal reporting data.
- **Pay and Tax:** Used to view and edit direct deposit, pay history, year-end tax forms, and update your tax withholdings.
- **Benefits:** Used to view your benefits summary and link you to benefits enrollment.
- **People Cloud:** Has links to access Learn & Grow, Share and Perform, Benefit Services, and Applicant Tracking.
- **Marketplace Integrations:** Will link you to any 3rd party or legacy isolved applications your company might use.

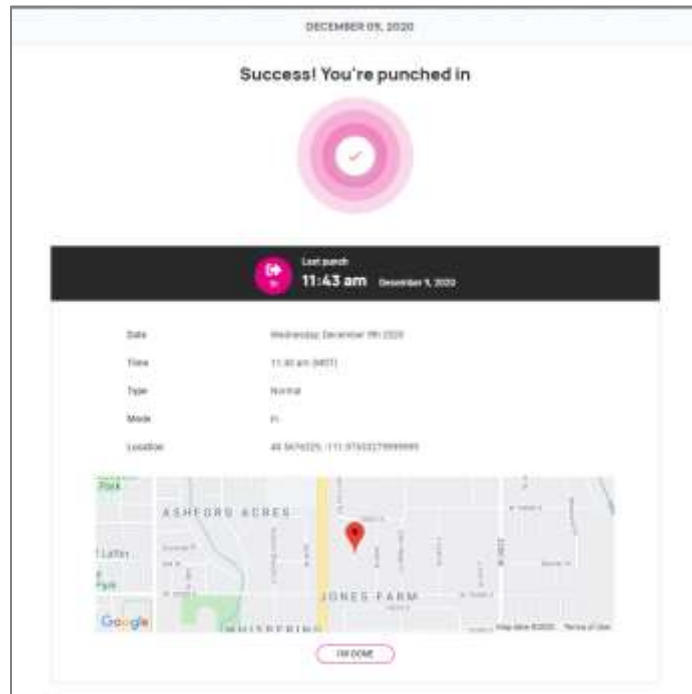
To navigate, you can use the icons on the left-hand side of the screen, click on the cards in the center, or use the recently visited card in the top right-hand corner which is populated by the cards you have visited recently.

Self-Service Punching

Once logged in, you can immediately create a punch by using the pink + symbol located at the top left corner of the page as seen below. In this menu, a punch can be created using two different methods:

Quick Punch

If you select quick punch, the system will immediately create a punch for the current date and time, without the option to add punch notes or any other punch options. Once the punch is created you will see a punch confirmation on the screen as shown below:



Detailed Punch

If you select detailed punch, the system will open a creation screen and display the current date and time. Note: the date and time fields are not editable during self-service punching. The punch options available in the detailed punch screen are as follows:

Note: options on this screen may differ based on your company permissions.

- a. **Type:** allows you to specify the punch type for the entry. The options are Normal, Meal, and Break.
- b. **Mode:** allows you to specify if the punch is an IN, OUT, AUTO, or TRANSFER.
 - a. IN means you are clocking in and is typically used when you are first in for the day or coming back from a break or meal.
 - b. OUT means you are clocking out and is typically used when you are leaving for the day or leaving for your break or meal.
 - c. AUTO allows the system to determine
 - d. TRANSFER allows you to move from one labor value to another without having to create multiple punches. When using the transfer option isolved will create 2 punches; one clocking you out of your current labor and one clocking you into the labor you transferred to.
- c. **Labor:** If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use your default labor allocation.

d. **Notes:** If notes are entered, anyone looking at the Time Card will be able to view the details.

Manage > Tasks

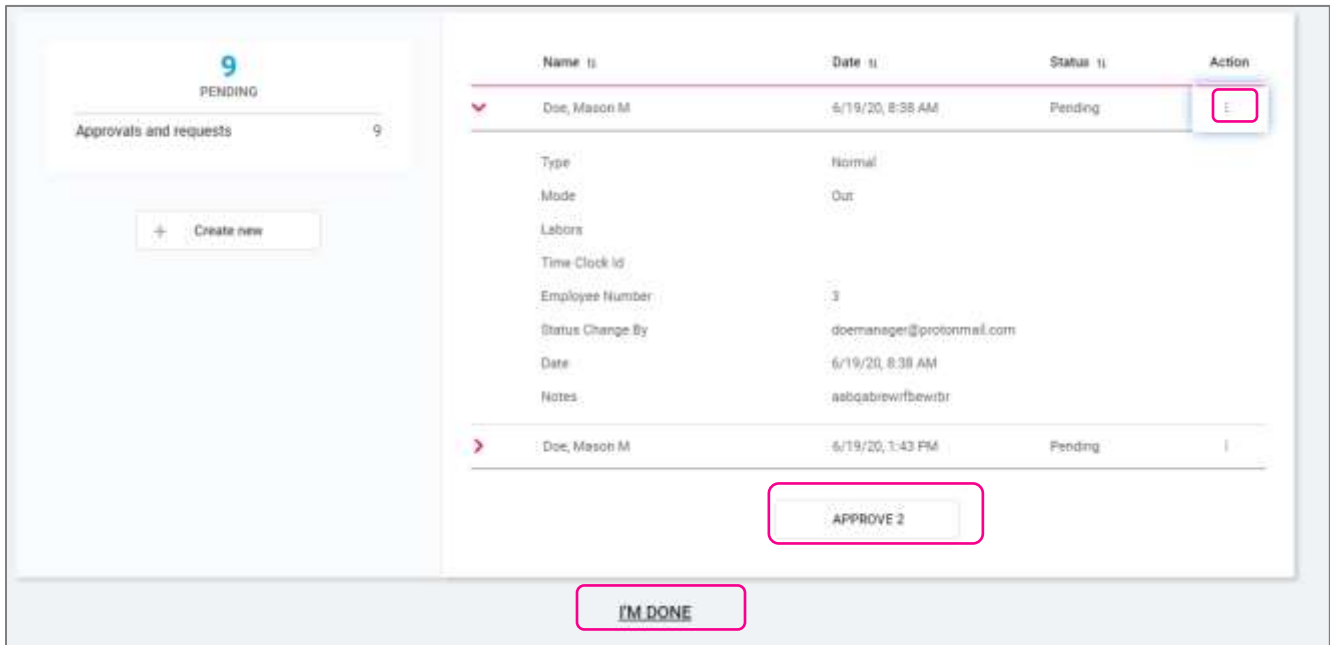
The Manage Tasks screen provides an overview of pending requests such as: punch requests, Time Card approval, time off requests and address/contact updates. Each link on this screen will expand to view details around the request and allow approval.

Approvals and requests	
Pending punch requests	2
View and approve time cards	1
Time off request	5
Address/Contact updates	1

The total on the left-hand side of the screen considers all the approval and request counts on the right.

Pending Punch Request

Once you click the **Pending Punch Requests** link any pending punch requests requiring your attention will be displayed.

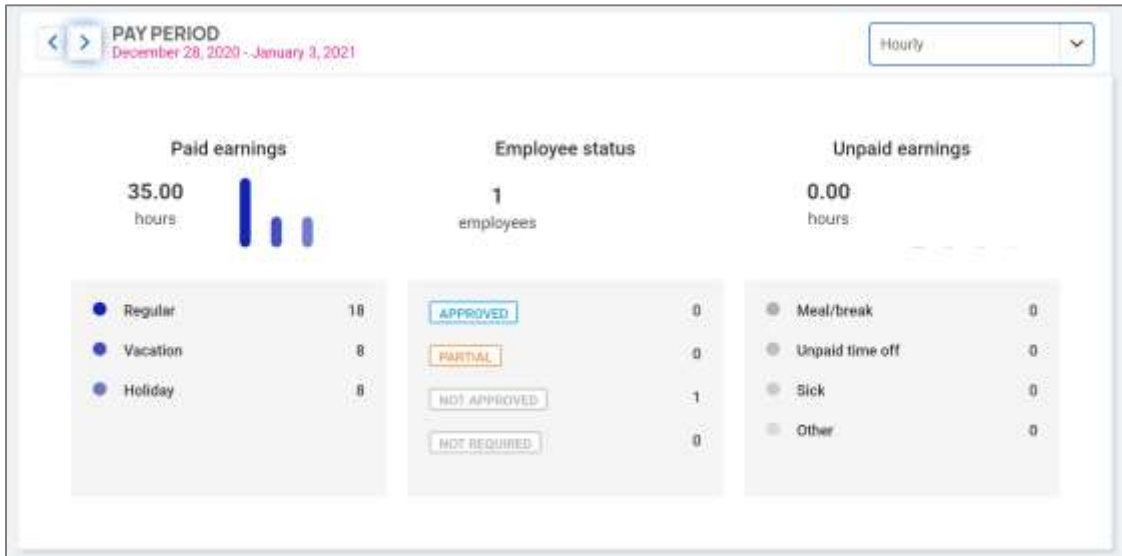


To approve or reject the request you can choose the > symbol to expand the request and review the details. Select the ⓘ symbol and you the option to Approve or Reject the request. If you have more than 1 pending punch request, you can choose the Approve button at the bottom of the screen to approve all at the same time.

Once you have completed the tasks, select Manage > Tasks and choose **I'm Done** at the bottom and you will be redirected back to the main screen.

View and Approve Time Cards

Once you click the **View and Approve Time Cards** from the **Manage** screen link, the summary will display a graphical breakdown of all paid earnings, employee verification statuses and unpaid earnings for your employees. If you have employees in different pay periods you can select the drop-down in the right corner to change the pay period you are viewing.



All details from the graphs above are listed underneath with a place for you to review and verify.

- To verify, select the checkbox on the far-right side of the screen. You can also select the approve button at the bottom if you wish to approve all TimeCards at once.

Note: If an employee has outstanding critical Time Card errors, such as missing punches, it will not allow you to verify their time.

Employee	Total	Paid	Unpaid	Ad \$	Alerts	Timecard status	Your approval
Doe, Supervisor	0.00	0.00	0.00	0.00	▲	NOT APPROVED	<input type="checkbox"/>

APPROVE 1

IM DONE

If you'd like to review an individual employee's time, select their name from the list and the TimeCard data will populate.

Day	Total	Paid	Unpaid	Adj \$	Alerts
Monday December 28	8.00	8.00	0.00	0.00	
Tuesday December 29	10.00	10.00	0.00	0.00	
Wednesday December 30	8.00	8.00	0.00	0.00	
Thursday December 31					
Friday January 1	8.00	8.00	0.00	0.00	
Saturday January 2					
Sunday January 3					

Time Card Review

A breakdown of the Earnings, Labor, Adjustments (mileage, bonus or reimbursements) as well as a summary of alerts are located on the left-hand side of the screen.

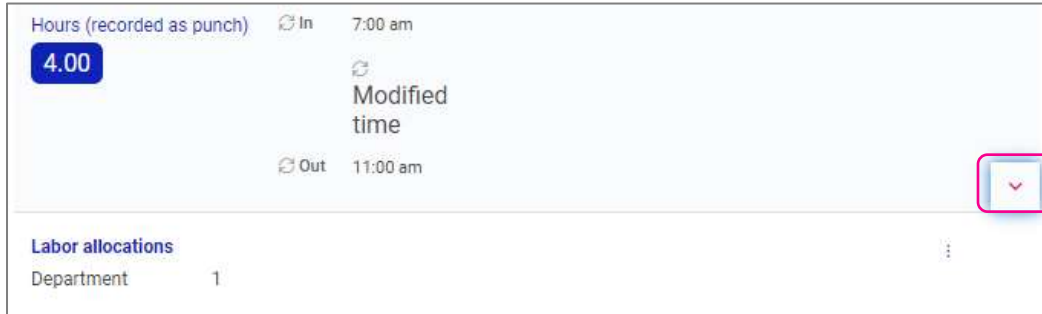
The default view of the Time Card is a spreadsheet view with expansion options. You can select the > icon next to the date to expand the details. When expanded, you can see actual punch times, total hours, and errors.

Day	Total	Paid	Unpaid	Adj \$
Monday December 28	8.00	8.00	0.00	0.00

Hours (recorded as punch) In 7:00 am
4.00
Modified time
Out 11:00 am

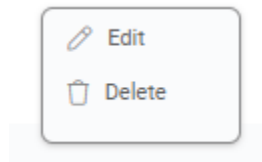
To view labor attached to punches choose the > icon in the lower right corner and the screen will expand.

Note: Labor will only display if outside of the employee's home value.

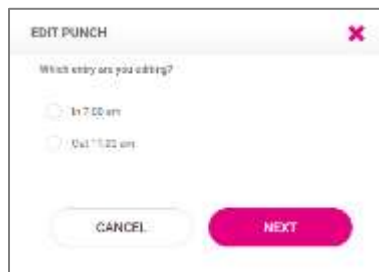


Editing Records

To edit an existing record, expand the date choose the > icon in the lower right-hand corner and then choose the  icon and you will have an option to **Edit** or **Delete**



When you select the **Edit** option, you will be prompted with an **Edit Punch** screen letting you choose which punch you are editing



- Select the punch you are wishing to edit and choose **Next**
- Make any adjustments you see fit
- Choose **Save**

[Adding Records > Hours](#)

To add a new record to the employee Time Card, choose the **Create New** button in the top right-hand corner of the Time Card. You will be prompted to choose what type of record you are adding; Punch, Hour, Adjustment or Absence.



Once you have selected **Hour** in the create new record screen choose **Next** to fill out the hour details.

Help Docs

- Enter the **Start Date**
- Enter the **Start Time**
- Enter the **End Date**
- Enter the **End Time**
- The **Duration** will auto populate based on the start and end time
- **Type** allows you to specify if the hour type is Normal, Meal, and Break
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details.
- If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no **labor** is selected, isolved will use your default labor allocation
- Choose **Save** and the hour record will be added to the employee Time Card

Adding Records > Punches

Once you have selected **Punch** in the create new record screen choose **Next** to fill out the punch details.

The screenshot shows a form for creating a punch record. At the top, there are two input fields: "Punch date" with the value "12/10/2020" and "Punch time" with the value "08:38 PM". Below these are two dropdown menus: "Type" set to "Normal" and "Mode" set to "Auto". A checkbox labeled "Do not round time" is present and unchecked. The form is divided into sections by horizontal lines. A section titled "Labor Fields" is visible, followed by a "Notes" input field. At the bottom, there are two buttons: "BACK" and "SAVE".

- Select the **Punch Date**
- Enter the **Punch Time**
- **Type**: allows you to specify the punch type for the entry. The options are Normal, Meal, and Break.
- **Mode**: allows you to specify if the punch is an IN, OUT, AUTO, or TRANSFER
 - a. IN means you are creating a punch in and is typically used when you the punch you are creating is the first in for the day or coming back from a break or meal
 - b. OUT means you are clocking out and is typically used when you the punch you are creating is for when the employee is leaving for the day or leaving for break or meal
 - c. AUTO allows the system to determine
 - d. TRANSFER is used to move from one labor value to another without having to create multiple punches. When using the transfer option isolved will create 2 punches; one clocking the employee out of their current labor and one clocking them into the labor transferred to.

Help Docs

- **Labor:** If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use your default labor allocation.
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details
- Choose **Save** and the punch record will be added to the employee Time Card

Adding Records > Adjustments

Once you have selected **Adjustments** in the create new record screen choose **Next** to fill out the details.

Note: Adjustments are typically used (if enabled by your company) to enter mileage, bonus or reimbursements.

The screenshot shows a form for creating an adjustment record. It has the following fields and sections:

- Date:** A text input field.
- Adjustment:** A dropdown menu with "Select" as the current option.
- Type:** A dropdown menu with "Select" as the current option.
- Amount:** A text input field.
- Notes:** A text input field.
- Labor Fields:** A section header in pink text, followed by a blank area for labor allocation.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom.

- Enter the **Punch Date**
- Select the type of **Adjustment**
- Choose whether you are enter this adjustment as **Hours or Dollars** (there may only be 1 option based on your company setup)
- Enter the **Amount**
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details.
- **Labor:** If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use your default labor allocation
- Choose **Save** and the adjustment record will be added to the employee Time Card

Adding Records > Absences

Once you have selected **Absence** in the create new record screen choose **Next** to fill out the details.

- Select the **Absence Policy**
- Enter the **Date** for the absence
- Enter the **Hours** amount being taken
- Choose the **Start Time** for the absence
- If the absence is tied to an accrual plan, the **Available Balance and Balance After Request** will populate
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details
- Choose **Save** and the absence will be added to the employee Time Card

Reviewing/Excusing Alerts

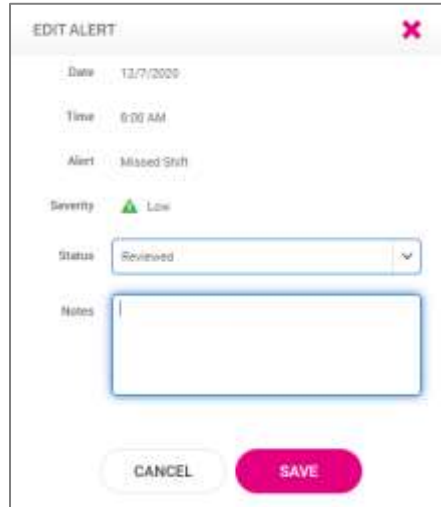
Should an employee have an alert on their Time Card (missing meal, missed shift etc.) you can set the alert to **Reviewed** or **Excused**. When viewing the employee Time Card, you will see the color code icon in the far-right side letting you know there is an alert pending your attention.

Day	Total	Paid	Unpaid	Adj \$	Alerts
> Monday December 7	0.00	0.00	0.00	0.00	

- To review or excuse choose the > icon to expand the date
- Select the symbol and select **Edit**

Day	Total	Paid	Unpaid	Adj \$	Alerts
Monday December 7	0.00	0.00	0.00	0.00	
Missed Shift 8:00 AM Edit					
Unscheduled Absence 8:00 AM					

- An edit alert popup will appear allowing you to set the **Status** and add any **Notes**



The screenshot shows a modal window titled "EDIT ALERT" with a close button (X) in the top right corner. The form contains the following fields and options:

- Date:** 12/7/2020
- Time:** 6:00 AM
- Alert:** Missed Shift
- Severity:** Low (indicated by a green triangle icon)
- Status:** A dropdown menu currently showing "Reviewed".
- Notes:** A large text input area.
- Buttons:** "CANCEL" and "SAVE" buttons at the bottom.

Verification

You can use the **Approve** button on the left side of the screen to approve once you have completed the review of their Time Card. Once approved it will date and time stamp your approval



The screenshot shows a vertical flow of three steps, each with a circular progress indicator:

- Employee
- Supervisor
- Waiting for your approval

At the bottom of the screen, there is a button labeled "APPROVE" which is highlighted with a red rectangular box.

Once you have verified the time, you can choose the **I'm Done** link at the bottom of the Time Card to be brought back to the **Manage > Tasks** screen.

Note: The system will not allow you to verify the Time Card if there are outstanding high or critical alerts pending your review and correction. Example: Missing Punch

Time off Requests

Once you click the **Time off Request** link from the **Manage** screen, all pending time off requests will populate for your review.

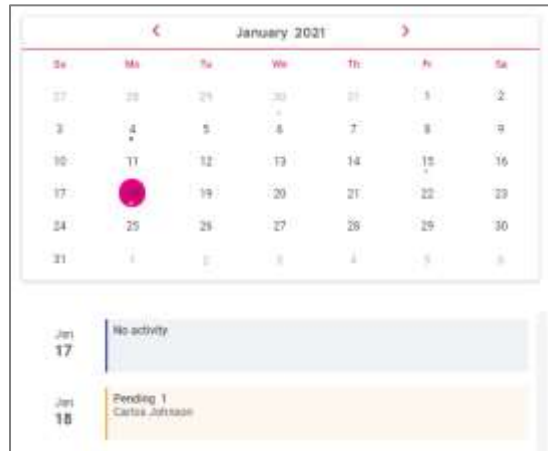
Name	Dates	Hours	Policy
Johnson, Carlos Adan	1/15/21	8.00	Vacation
Johnson, Carlos Adan	1/18/21	8.00	Vacation

[CLOSE](#)

The basic details are listed on the main screen, but you can select the employees name and the full request details will populate

The screenshot shows the details of a time off request for Carlos Adan Johnson. On the left, there is a status bar with a checkmark, the employee's name, a timestamp (12/10/2020 03:26pm), and the status 'Waiting your approval'. Below this are 'APPROVE' and 'DECLINE' buttons. The main content area shows the request for January 18, 2021. It displays 'AVAILABLE 104.00 HOURS' and 'AFTER REQUEST 96.00 HOURS'. Below this, it lists 'Total hours requested: 8.00', 'Time off type: Vacation', 'From: Monday January 18, 2021', 'To: Monday January 18, 2021', and 'Notes: Heading to the mountains with the family'. A 'Show' link is next to the notes.

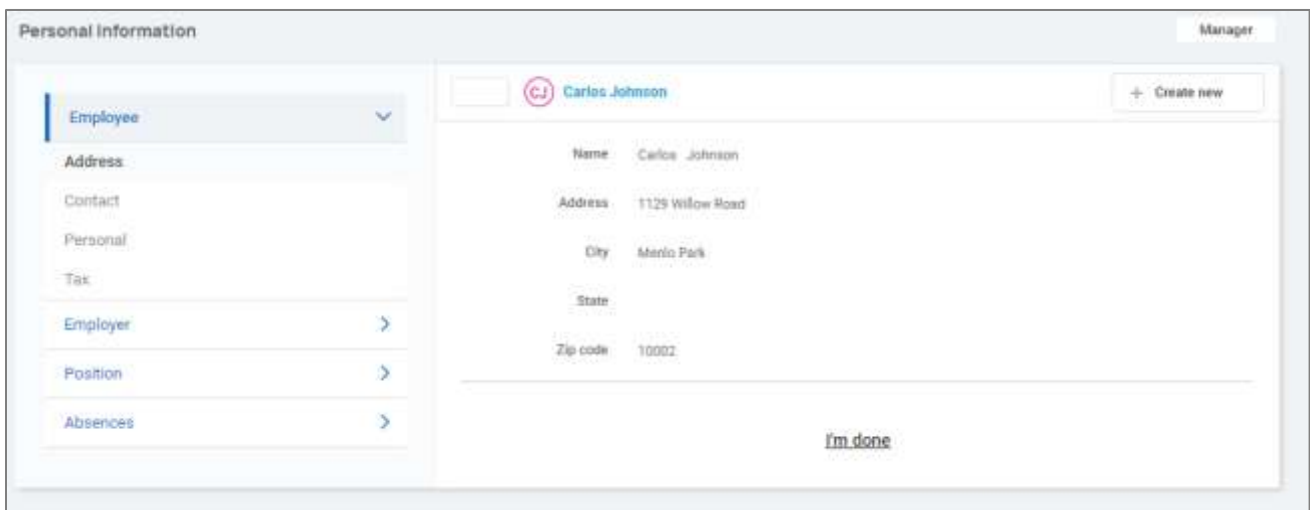
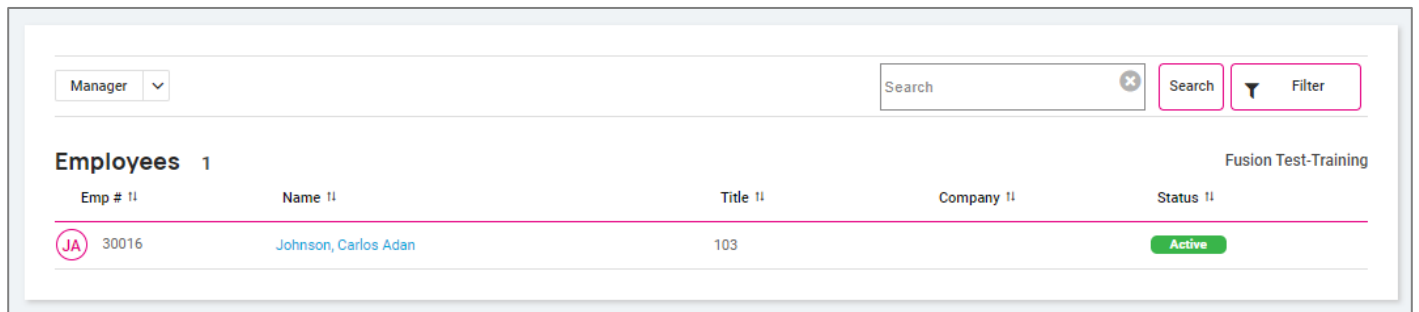
- If the request is attached to an accrual plan, the employees current available balance and what their balance will be if the request is approved will display
- The **Show** link next to the calendar icon allows you to see if any other employees assigned to you have this day off



- To **Approve** or **Decline** the request, use the buttons on the left side of the screen. Once approved the absence will automatically add to the employee's Time Card.

Manage > Employees

Once you click the **Employees** link from the **Manage** screen a listing of all employees who report to you will populate. You can select the employees name from the list and their **Personal Information** will populate for review.



Employee

The **employee** section allows you to view/edit (based on company permissions) the selected employee's information such as address, contact information, personal (DOB, marital status, gender, and military status), and tax.

Employer

The **employer** section allows you to view/edit (based on company permissions) the selected employee's employment, management and pay information.

Position

The **position** section allows you to view/edit (based on company permissions) the selected employee's job and organization and labor information.

Absences

The **absences** section allows you to view an overview of the employee's accrual plans, any current absences, and a list of historical absences


Absences > Overview

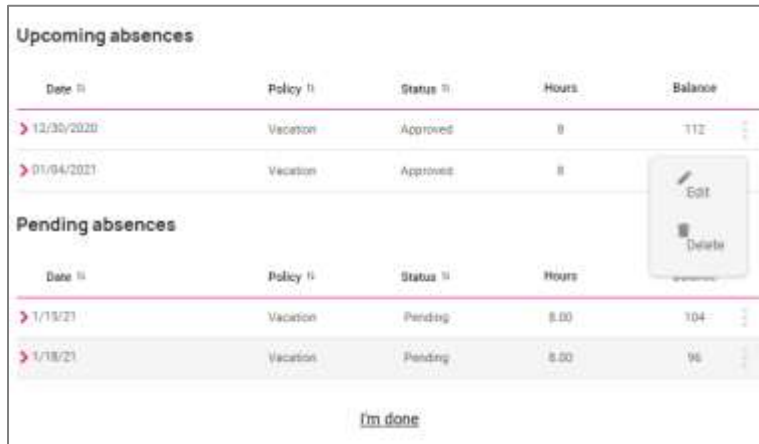
The **overview** screen allows you to see any assigned accrual plans as well as the hours earned, current and projected balance details for the selected employee.

Policy	Vacation
2020 Plan year January - December	
Service date	10/07/2013
Length of service	7 Years, 2 Months (86 Months)
Award schedule	Scheduled (First Pay of Year) period
Last award date	
Accrual rate per pay period	120.00 hours
As of last pay period end	>
Projected current pay period	>
Projected current plan year	>
Projected next plan year	>

[fm_done](#)

Absences > Current

The **current** screen allows you to see lists of any upcoming and pending absences. You can use the  symbol to edit or delete these absences from the system.



Upcoming absences				
Date	Policy	Status	Hours	Balance
> 12/30/2020	Vacation	Approved	8	112
> 01/04/2021	Vacation	Approved	8	

Pending absences				
Date	Policy	Status	Hours	Balance
> 1/18/21	Vacation	Pending	8.00	104
> 1/18/21	Vacation	Pending	8.00	96

[Done](#)

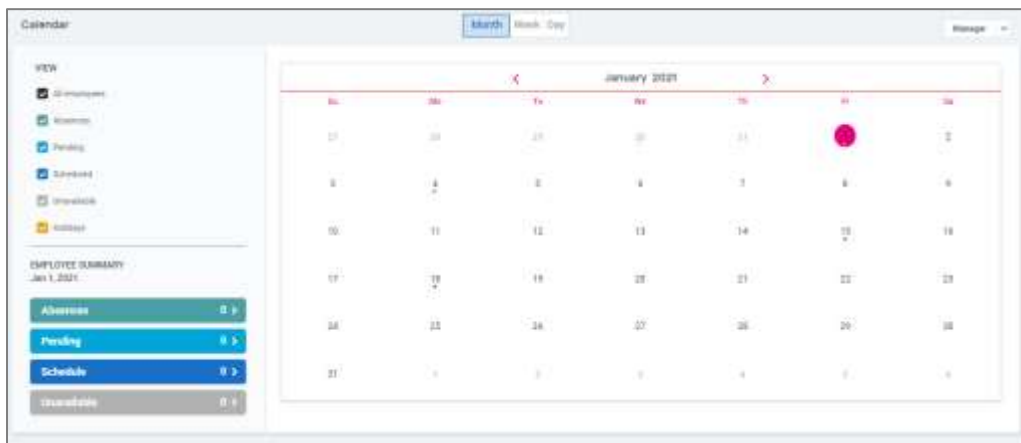
Absences > History

The **history** screen allows you to see a list of historical absences for the selected employee.

Date	Policy	Status	Hours	Balance
> 12/30/2020	Vacation	Approved	8	112

Manage > Calendar

The **Calendar** allows you to view your employees' absences, scheduled hours, unavailable time, and holidays in a calendar format.



The calendar provide the ability to view items in a Monthly, Weekly, or Daily view. Simply select the words at the top of the calendar to adjust your display.

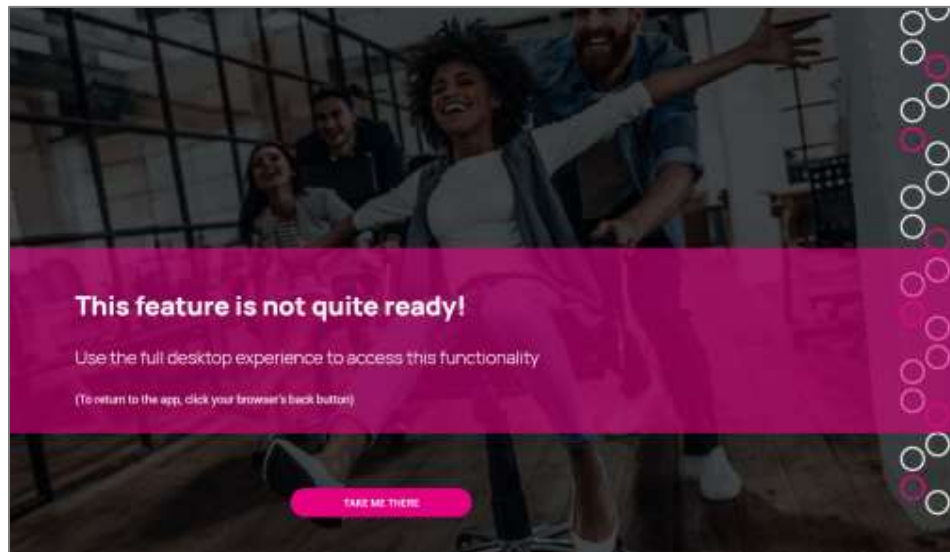
The filters on the left-hand side of the screen allow you to determine what items you want to display on the calendar. The options are as follows:

- All Employees: Displays all items listed below in the calendar view for all your employees.
- Scheduled: Displays the days and hours your employees are scheduled to work.
- Absences: Display all approved absences.
- Pending: Displays all pending (not approved or denied) absences.
- Holidays: Displays company holidays.

The Summary at the bottom totals up all the types associated to your current calendar view.

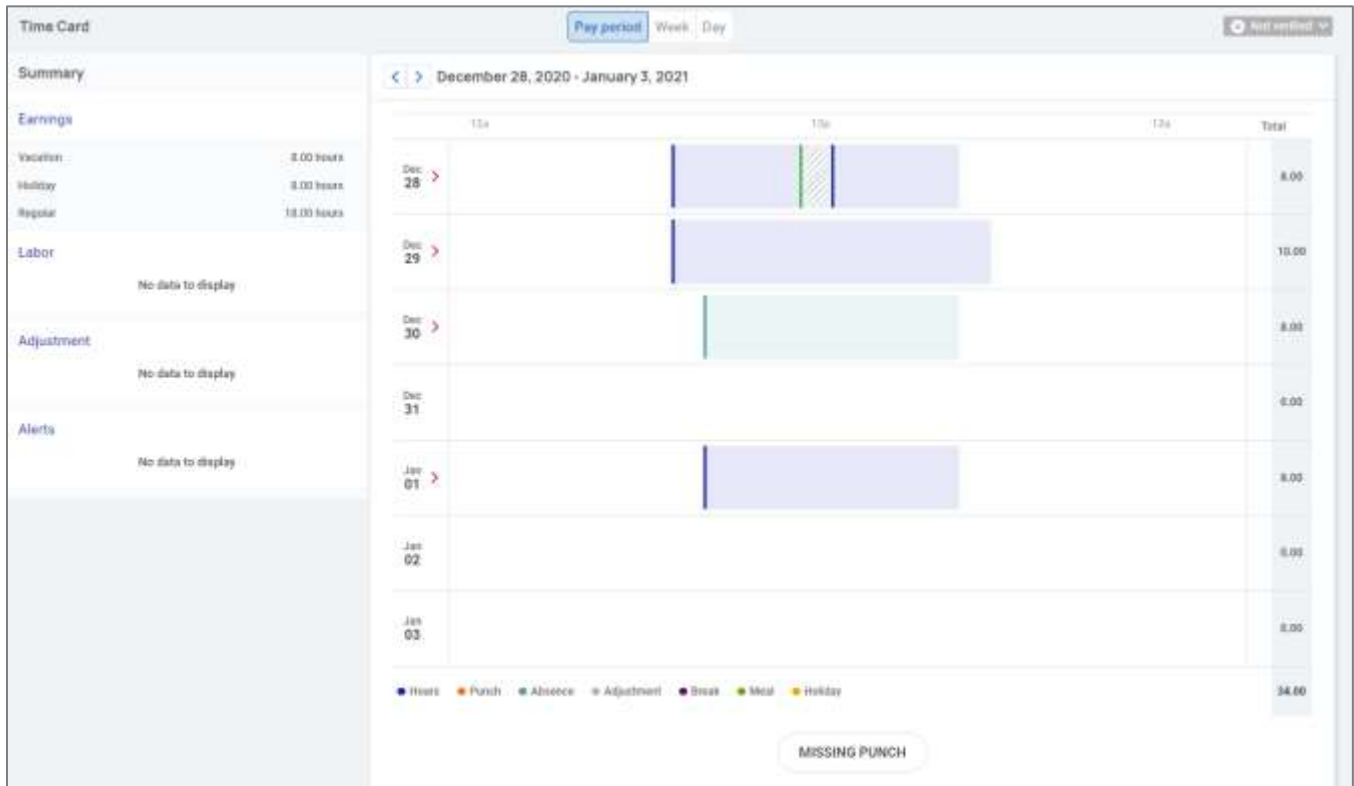
Manage > Schedule

The **Schedule** screen will give you a link into the full desktop experience to add or edit schedules for your employee. Click in the **Take Me There** button to begin your enrollment



Time and Attendance > Time Card

The following is a breakdown of the different areas located on the Time Card and their functions:



Time Card Date Range

The default view of the Time Card is automatically set to the current Pay Period. You can change the view by selecting the Pay Period, Week, and Day buttons in the top-center of the screen. You can toggle between dates by selecting the < > buttons with the date next to them.

Data Summary

A breakdown of the Earnings, Labor, Adjustments (mileage, bonus or reimbursements) as well as a summary of alerts are located on the left-hand side of the screen.

Daily Breakdown

The default view of the Time Card is a Gantt chart of your time. You can select the > icon next to the date to expand the details. When expanded, you can see actual punch times, total hours, errors, and labor associated to the punches.

The color coding of items on the Time Card are as follows:

- Hours
- Punch
- Absence
- Adjustment
- Break
- Meal
- Holiday

Submitting a Missing Punch

Should you miss a punch at any time, you can select the Missing Punch button at the bottom of the Time Card. This option allows you to submit a request that routes directly to your manager/supervisor to approve the missing punch.

Once you select the **Missing Punch** button, you will fill in the requested details and select **Save**.

- **Punch Date:** Date of the missing punch
- **Punch Time:** Time of the missing punch
- **Type:** Designate if it should be a normal (standard in/out), meal or break punch
- **Mode:** Auto, In, Out, or Transfer
- **Labor:** Should the time be tied to a certain labor field such as department, job or task
- **Notes:** Add any notes for your manager/supervisor to view during the approval process

The screenshot shows a 'MISSING PUNCH' form with the following fields and sections:

- Punch Date:** 12/28/2020
- Punch Time:** 12:02 PM
- Type:** Normal
- Mode:** Auto
- Labor Group:** Company: None, Electronic: 1-TIME
- Labor Fields:** Department: BUDEV - Business Development, Status: Other, Job: 01, Group: 01
- Buttons:** BACK, SAVE

Time Card Verification

Time Card Verification is an optional feature that allows you to electronically sign off on the Time Card prior to the data being populated to the time entry grid for payroll processing.

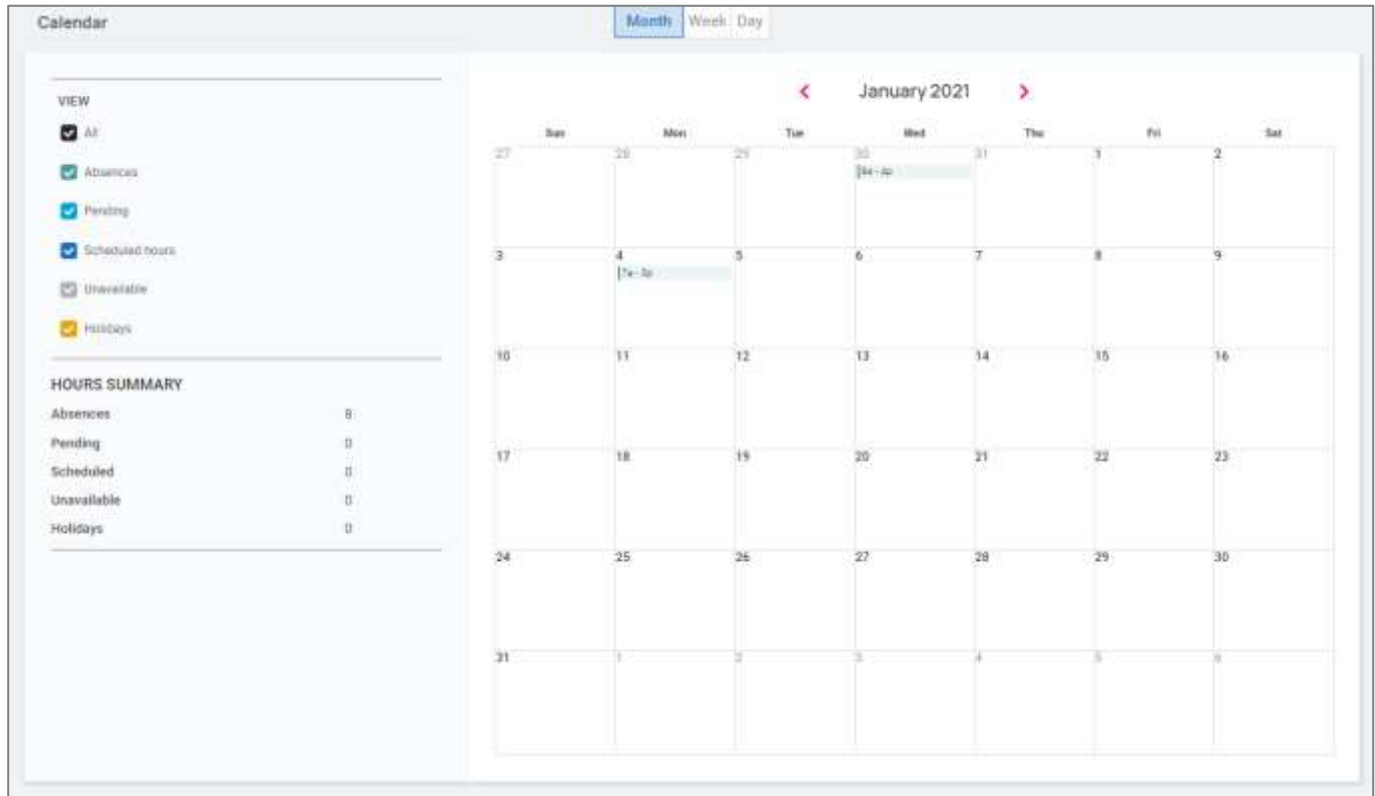
The button to verify is in the top right-hand corner of the Time Card. You will select the square checkbox next to the Employee section to verify.



Note: The system will not allow you to verify your Time Card if there are outstanding high or critical alerts pending your manager or supervisors review.

Time and Attendance > My Calendar

My Calendar allows you to view your absences, scheduled hours, unavailable time, and holidays in a calendar format. Below is a screenshot and details of the My Calendar screen:



The calendar allows you to view items in a Monthly, Weekly or Daily format. Select the words at the top of the calendar to adjust your display.

The filters on the left-hand side of the screen allow you to determine what items you want to display on the calendar. The options are as follows:

- All: Displays all the items listed below in the calendar view.
- Absences: Displays all approved absences.
- Pending: Displays all pending (not approved or denied) absences.
- Scheduled Hours: Displays the days and hours you are scheduled to work.
- Unavailable: Displays the days and hours you set yourself to "Unavailable."
- Holidays: Displays company holidays.

Note: Hours that are displayed as "Unavailable" are not guaranteed. Manager/Supervisors can still schedule you during these times.

The Hours Summary at the bottom totals up all the types and hours associated to your current calendar view.

Time and Attendance > Time Off

The Time Off screen can be opened by selecting the Time Off button at the top of the Time Card view. This allows you to view details of your accrual plans, upcoming, pending, and past time off requests.

The first section provides a summary of your accrual plans with balances, and if selected, a detailed outline on when you last accrued time, any upcoming accrued time, etc.



When you select the **Detail** button on the right-hand side, the details around that specific accrual plan will be outlined



- **Service Date:** This lists your hire date or rehire date, in some case where the accrual is being calculated from.
- **Length of Service:** Based on your Service Date, this calculates your length of service with the company.
- **Award Schedule:** This lets you know how frequently you are awarded the accrual time.
- **Last Award Date:** This displays the last date you were awarded time for this accrual.
- **Accrual Rate:** This displays how much time you earn on each award schedule.
- **As of Last Pay Period End:** Once expanded using the > on the right side, this displays your available balance as of the last pay period, hours used last pay period and year to date.
- **Projected Current Pay Period:** Once expanded using the > on the right side, this displays projections for the current pay period. It displays how many hours were taken, how many hours will be accrued, and what hours are pending (requests that have not been approved or are in the future).
 - Note: Pending hours are not included in your balance.

Help Docs

- **Projected Current Plan Year:** Once expanded using the > on the right side, this displays projections for the current plan year. It displays how many hours were taken, how many hours will be accrued, and what hours are pending (requests that have not been approved or are in the future).
 - Note: Pending hours are not included in your balance.
- **Projected Next Plan Year:** Once expanded using the > on the right side, this displays projections for the next plan year. It displays how many hours were rolled over from the previous plan year, what your current balance is, how many absence hours are approved, how many hours will be accrued, and what hours are pending (requests that have not been approved or are in the future).
 - Note: Pending hours are not included in your balance.

The bottom of the time off screen outlines any upcoming time off requests, pending requests, and historical time off entered into the system, as well as company observed holidays.

The screenshot displays the Time Off management interface. It is divided into four main sections:

- UPCOMING TIME OFF:** A table with columns for Date, Absence policy, Hours, and Status. It is currently empty.
- PENDING REQUESTS:** A table with columns for Date, Absence policy, Hours, and Status. It contains two entries:

Date	Absence policy	Hours	Status
10/6/20	Sick	1	Pending
10/10/20	Sick	1	Pending

A "View 3 more" link is located at the bottom right of this section.
- PAST TIME OFF:** A table with columns for Date, Absence policy, Hours, and Status. It contains two entries:

Date	Absence policy	Hours	Status
3/23/20	Vacation	8	Approved
5/18/20	Vacation	8	Approved

A "View 29 more" link is located at the bottom right of this section.
- 2020 holidays:** A list of holidays for the year 2020:

Date	Holiday
Jan 1	New Years
Jan 15	M.L.K. Jr Day
Feb 2	President's Day
May 25	Memorial Day
Jul 3 - Jul 5	State Range
Jul 4	Independence Day
Sep 7	Labor Day
Oct 2	Columbus Day
Nov 6	Veterans Day
Nov 26	Thanksgiving Day
Dec 25	Christmas Day

Requesting Time Off

To submit a time off request, you will select the **Time Off** button in the top right corner of the screen.

The screenshot shows the top portion of the Time Off screen. At the top, there are navigation tabs: "Time Card", "My Calendar", and "Time Off" (which is selected). Below the tabs is a "Summary" section with the text "UPDATED AS OF LAST PAY PERIOD END" and "8/24/2020 - 8/30/2020". In the top right corner of the Summary section, there is a button labeled "+ TIME OFF" which is highlighted with a pink rectangular box.

- Select the **Absence Policy**
- Select the **From** and **To** dates
- Enter the **Start Time** for the request

Help Docs

- Update the corresponding **Days of the week**
- Enter the **Number of hours** per day you are requesting
- Double check the **Total Requested Hours**
- Enter any **Notes** you want the approver to see
- Choose **Submit**

Once the request has been submitted, it will go through your company workflow process for approval.

TIME OFF REQUEST

Policy: PTO

From: 12/16/2023 To: 12/16/2023

Requested days off: Su M Tu W **Th** F Sa [Deactivate all](#)

Available Hours: 349.00 After Request Hours: 341.00

Start time: 08:00 Hours per day: 8

Total requested: 8 hours

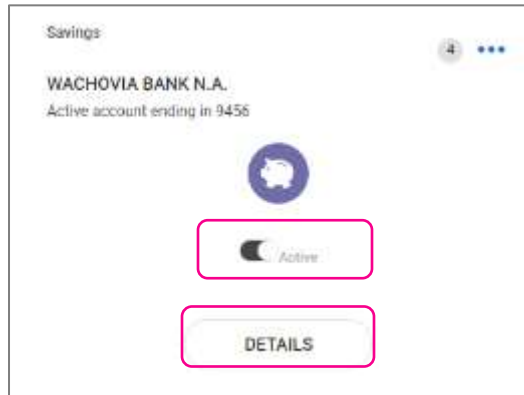
Note: [Text Area]

[CANCEL](#) [SUBMIT](#)

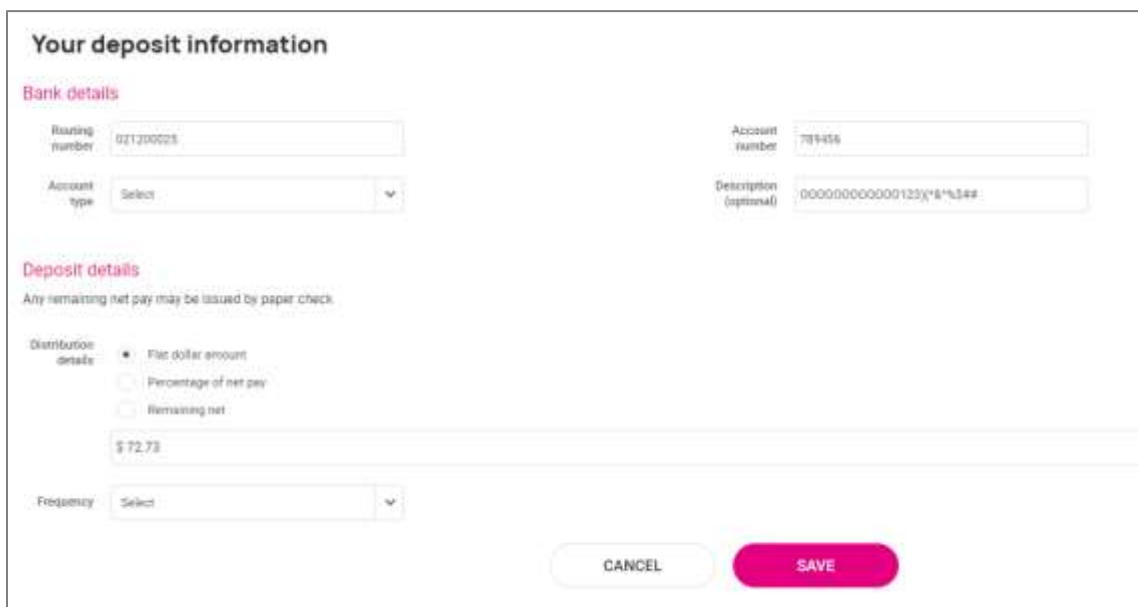
Pay and Tax > Direct Deposit

Your current Direct Deposit account(s) will appear when you access this screen. The details are masked for confidentiality purposes. There are several options when using this screen

- To deactivate this account, click on symbol. You will receive a confirmation stating, "Deactivate this account?" Click on Deactivate to agree. Cancel if you do not wish to deactivate this account.
- To view or edit your current accounts, click on the details button
 - Your Bank Details will appear including
 - Routing Number
 - Masked Account Number
 - Account Type
 - Description (if applicable)
 - Distribution Details (net pay or partial amount)
 - Frequency of direct deposit




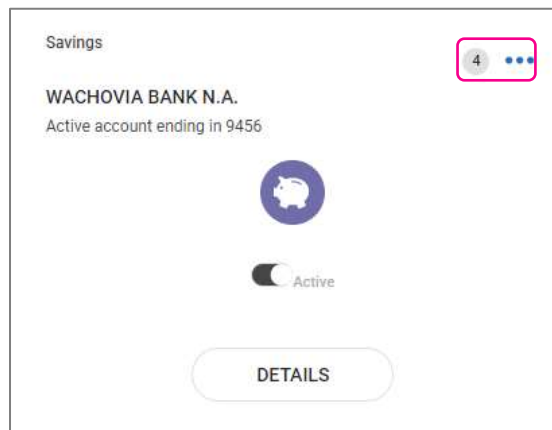
If you need to make an adjustment to the account select the **Edit** button, make the adjustments and choose **Save**



If you need to add a new direct deposit account, from the main direct deposit screen, click on the **Add New** button and add the following:

- **Routing Number:** If you enter an incorrect routing number, a message indicating "Routing number is invalid" appears. Correct the number to continue
- **Account Number:** Enter the account number from your account
- **Account Type:** Select the applicable check type
- **Distribution Details:** Select either:
 - Flat dollar amount – if selected, enter amount
 - Percentage of Net Pay – if selected, enter percent
 - Remaining Net (you may only have one Remaining Net account)
- **Frequency:** Select how often you want the funds in this account
- Click on **Save**

If you have multiple bank accounts and wish to re-sort the order in which they are used for Direct Deposit, click on  symbol in the upper right-hand corner. Instruction will appear on how to reorder your accounts. It is a simple drag-and-drop. See the instructions below.

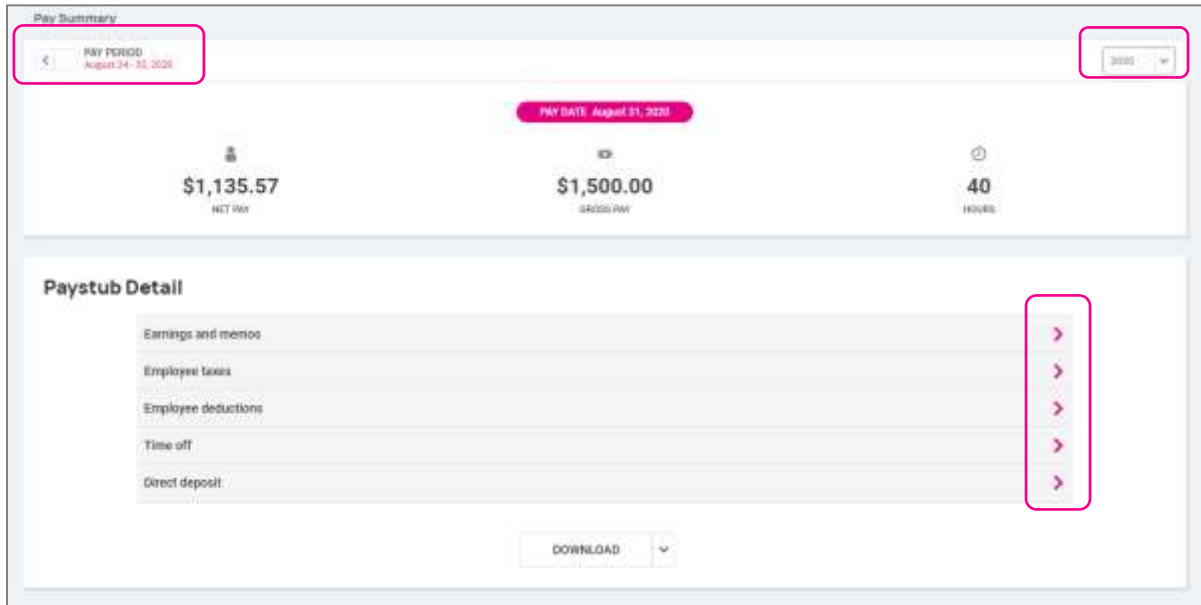


Payroll and Tax > Pay History

The Pay History screen is where you can obtain and download copies of your check stubs. Your most recent Pay Summary appears at the top of the screen and for confidentiality purposes, only the Gross and Net Pay displays along with the hours you worked (if applicable). The Pay Date also appears in the center.

To see the details of your check, you may click on any of the sections of your Paystub Detail. Please make sure you are viewing in a private location. The details include:

- Earnings
- Employee Taxes
- Employee Deductions
- Direct Deposit

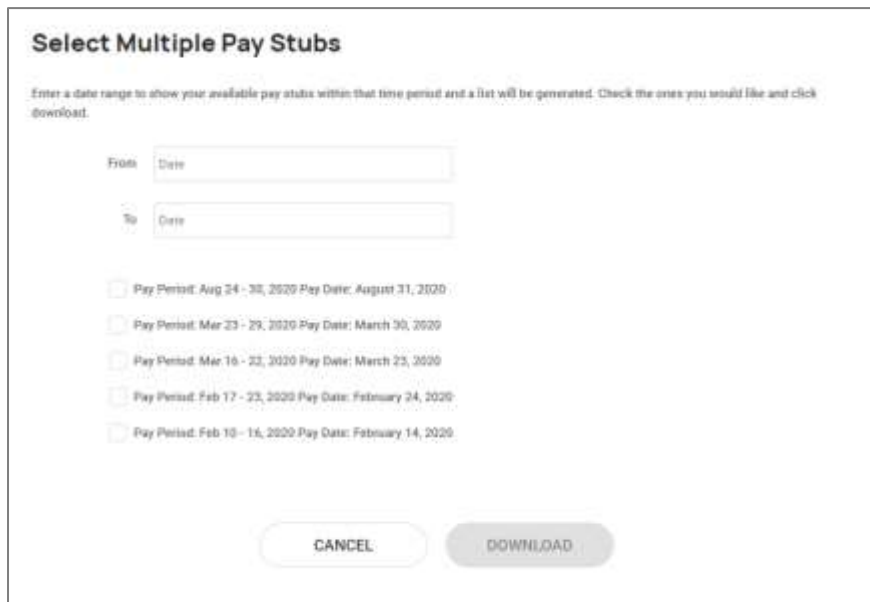


If you choose the > next to the details section, the area will expand with full details.

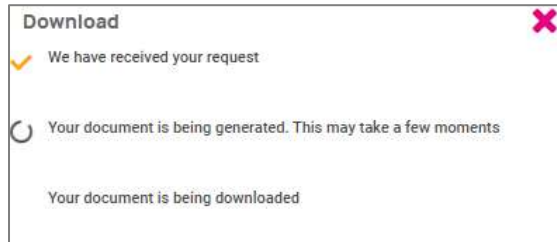
You can change the check detail by using the < in the top left-hand corner to move backwards through pay dates. You can also toggle between years on the right-hand side of the screen.

To download a copy of your pay stub, navigate to the bottom of the screen and click the arrow next to **Download**.

- If **Multiple Pay Stubs** are selected, a list of checks in the current year will appear. You may also add a date range at the top of the screen. Select the checks you wish to download by clicking on the box in front of the check date.
- Once your selection is complete, click on **Download**.



- If you select **This Check** a copy of your current check will begin downloading
- Once the file has downloaded, open the PDF version of your Pay Stub and save or print.



Pay and Tax > Year-end Tax Forms

The Year-end Tax forms screen will display forms for the current year (if closed) and the past years. All forms will be displayed in the summary layout

Summary		
Name ¹¹	Year ¹¹	Instructions
1095-C	2019	View
W-2	2019	View

To view your Year-end Tax Form, click on the **Name** of the form in the first column. A pop-up appears indicating that your form is generating. Once available, the form will be available in PDF. Open the PDF and view and/or print your Year-end Tax Form. Here is an example of a W-2 stored in this section.

Copy B--To Be Filed With Employee's FEDERAL Tax Return				OMB No. 1545-0008			
This information is being furnished to the Internal Revenue Service.							
a. Employee's social security number 222-33-4453	1. Wages, tips, other compensation 406.00	2. Federal income tax withheld 16.37		a. Employee's social security number 222-33-4453	1. Wages, tips, other compensation 406.00	2. Federal income tax withheld 16.37	
b. Employer ID number (EIN) 13-9999999	3. Social security wages 406.00	4. Social security tax withheld 25.17		b. Employer ID number (EIN) 13-9999999	3. Social security wages 406.00	4. Social security tax withheld 25.17	
d. Control number 2005-30044	5. Medicare wages and tips 406.00	6. Medicare tax withheld 5.89		d. Control number 2005-30044	5. Medicare wages and tips 406.00	6. Medicare tax withheld 5.89	
c. Employer's name, address, and ZIP code Fusion Test-Training 100 Main St New York, NY 10004				c. Employer's name, address, and ZIP code Fusion Test-Training 100 Main St New York, NY 10004			
e. Employee's name, address, and ZIP code Edgar S Johnson 3276 Haga Drive San Jose, 10005				e. Employee's name, address, and ZIP code Edgar S Johnson 3276 Haga Drive San Jose, 10005			
7. Social security tips	8. Allocated tips	9.		7. Social security tips	8. Allocated tips	9.	
10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12		10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12	
13. Statutory employee Retirement plan Third-party sick pay	14. Other WYD01 D.60	12b. Code 12c. Code 12d. Code		13. Statutory employee Retirement plan Third-party sick pay	14. Other WYD01 D.60	12b. Code 12c. Code 12d. Code	
15. State NY	Employer's state ID number 139999999 0	16. State wages, tips, etc. 406.00	17. State income tax 9.84	15. State NY	Employer's state ID number 139999999 0	16. State wages, tips, etc. 406.00	17. State income tax 9.84
18. Local wages, tips, etc. 406.00	19. Local income tax 6.81	20. Locality name NEW YORK		18. Local wages, tips, etc. 406.00	19. Local income tax 6.81	20. Locality name NEW YORK	

Also available under Summary are the Instructions for the Year-end Tax form selected. Simply choose the **View** icon on the right-hand side for them to populate.

Summary		
Name ¹¹	Year ¹¹	Instructions
1095-C	2019	View
W-2	2019	View

Pay and Tax > Tax Updates

The **Tax Updates** screen allows you to begin the process of updating your withholdings. Your current Tax Withholdings for Federal, State and Local (if applicable) will appear when you access the screen.

Tax Updates Wizard

Make changes and updates to your tax withholdings:

START WIZARD

Enable 3rd party cookies in your browser settings if the wizard above ("your session is inactive").

Federal

Show tax

Filing status: Married Filing Jointly

Dependent exemption amount: \$7,503.00

Additional income amount: \$3.00

Additional withholding: \$234.00

State

Non Resident State

State: NJ

Tax description: NEW JERSEY WH

Show tax

Filing status: Married/Civil Union Partner Separate

Exemptions: 3

Additional withholding: \$3.00

If you need to change your Tax Withholdings and complete a new tax form, click on the **Start Wizard** button on the left-hand side of the screen as outlined above.

Note: Please read the message below Start Wizard to ensure you have the correct settings in your browser.

Once you select Start Wizard, you will be presented with the **Tax Withholdings** screen to start or sign out. To start a new form, click **Start**.

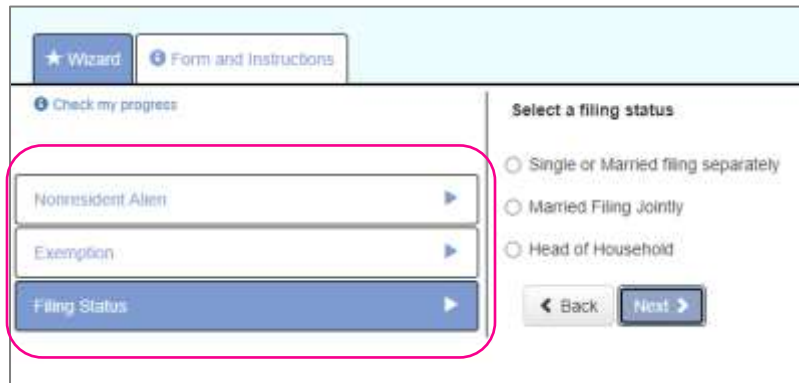


You can then choose the jurisdiction by selecting the radio buttons and **Continue**. If you wish to change your Federal withholding, click on "Help me determine which withholding forms apply to me" and take the **Survey**.

Once the survey is complete, click on the **Start** icon in the Federal-Summary.



You can click on the **Back** button if you made an error on your survey or move forward and complete each section in the form by responding to questions on the screen and clicking the **Next** icon. Your progress will be saved on the left side, and you can return to any section by using the **Back** button or the side menu.



The next page gives you the following options:

- I want to use the worksheet to calculate roughly accurate withholding
- There are only two jobs total. The option is accurate or jobs with similar pay, otherwise more taxes than necessary may be withheld
- None of the above

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Choose one

- I want to use the worksheet to calculate roughly accurate withholding.
- There are only two jobs total. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.
- None of the above

Select the desired option and click on **Next**. Depending on your selection, different options may appear. In the example below, "None of the above" was selected, since the Forms and Instructions were already used to determine the withholding.

Complete each section by responding to the questions on the screen and clicking on **Next**.

Once complete, you can view or print your completed W-4. You must also attest to the accuracy of the W-4 by clicking on:

- Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct and complete
- Enter your PIN in the box provided by entering the last 4 digits of your SSN
- Once complete, click on Submit Form

★ Wizard Form and Instructions

Please review the document below

If you would like to make any changes, you may [return to the previous page](#).

If you would like to submit this form, please agree to the terms below.

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Please verify the accuracy of your tax forms and electronically sign the documents by entering a PIN. Your PIN is the last four digits of your SSN.

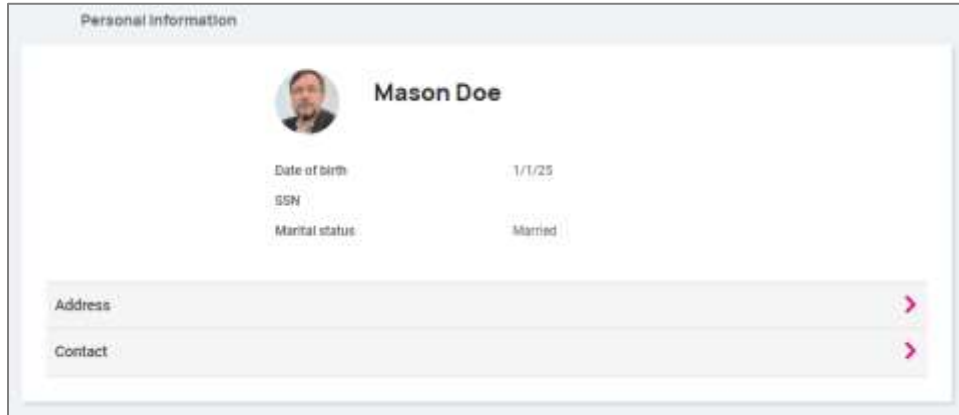
1234


You will receive a confirmation stating "Your form has been submitted. All sections are completed."

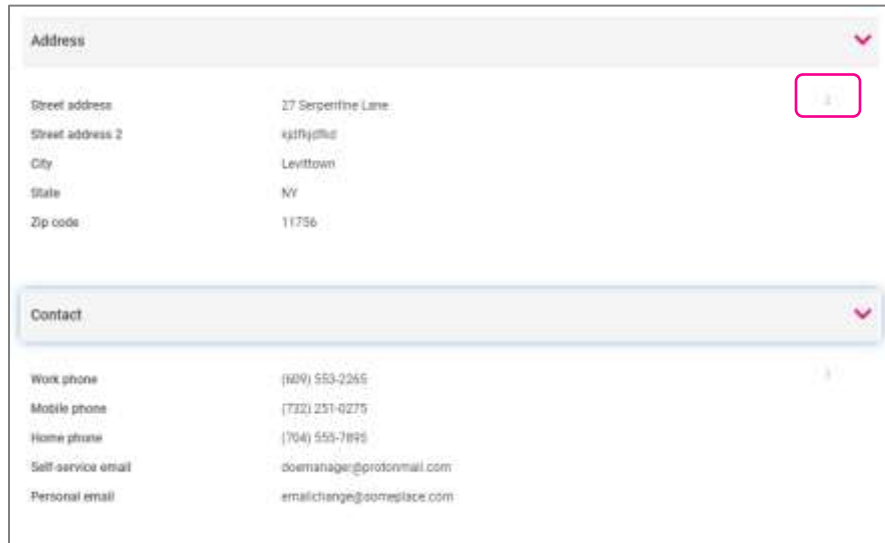
If you have addition jurisdictions to complete, follow the same procedures.

Personal > Personal Information

The Personal Information screen allows you to view your Name, Date of Birth, SSN (masked) and Marital Status. You also have a drop-down menu to view your Address and Contact information.

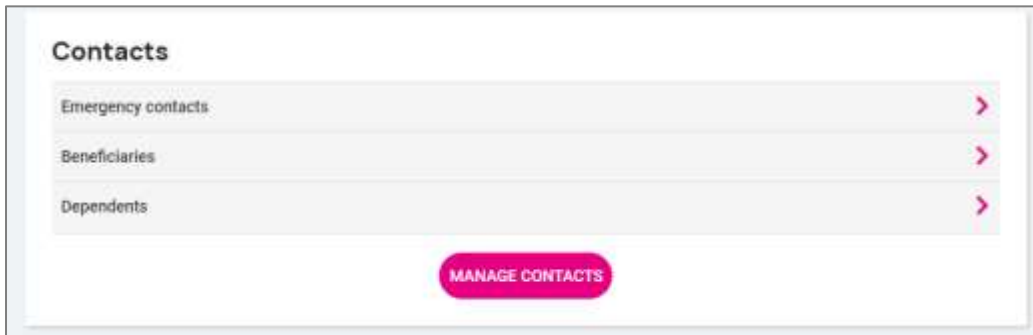


By selecting the > you can expand your address and contact info to see the details on file. If your company allows you to edit/update this information you will see the  icon on the right-hand side which allows you to edit the details.




Contacts

The next section labeled **Contacts** stores any existing Emergency Contacts, Beneficiaries and Dependents available. If you need to add to any of the categories, click on the **Manage Contacts** button. A new page will appear which allows you to **Add New** or **Edit** contacts.



The  symbol will allow you to edit or delete the contact on file if needed.

Manage Contacts				
Name	Beneficiary	Dependent	Emergency	
McCorkle, Josiah	✓	✓	✓	

If you need to **Add New** choose the button at the bottom of the screen and fill out the form that opens.



Contact type

Beneficiary
 Dependent
 Emergency

General

Relationship: ▼
Select when adding this name as a beneficiary

First name:
Last name:
Prefix:
Suffix:

Contact

Work number:
Mobile number:
Home number:
Email address:

Use employee address

Address:
Address 2:
Zip code:
City:
State:

Personal


SSN:
Update SSN:
Date of birth:
Update date of birth:
Gender: ▼

Note: You can check "Use employee address" or key in a different address. Once saved, the information appears under the appropriate contact type drop-down menu.

Federal Reporting Data

There are three options under Federal Reporting Data:

- Disability Self-Identification
- EEO Self-Identification
- Veteran Self-Identification

By using the arrow  symbol, you can view the information that your employer currently has recorded for these categories. If you wish to add or change any of the categories, click on the arrow.

Disability Self-Identification

If available, your "Current disability status" is displayed. You are also given with the reason why you are being asked to provide this information.

After reading, you can decide to respond:

- Yes, I have a disability, or have a history/record of having a disability
- No, I don't have a disability, or a history/record of having a disability
- I don't wish to answer

Make your selection and click on **Save**. The information provided displays as your "Current disability status" upon save.

EEO Self-Identification

If available, your current Gender and Ethnic Origin displays. You are also given the reason why you are being asked to provide this information.

After reading, you can decide to respond to the Gender Identification using the following selections:

- Female
- Male
- I don't wish to answer

You can then decide to respond to Race and Ethnicity Identification using the following selections:

- Hispanic or Latino
- White (Not Hispanic or Latino)
- Black or African American or other Pacific islander
- Asian (Not Hispanic or Latino)
- Native American or Alaska (Not Hispanic)
- Two or more races (Not Hispanic or Latino)
- Chose not to answer

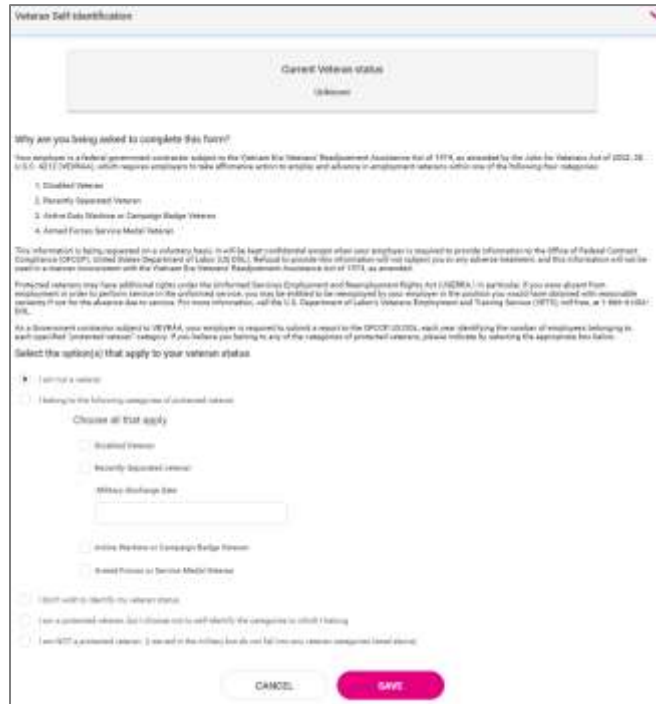
If you want to add or change your information, make your selections and click on **Save**.

For more information about the Race and Ethnicity selections or to read the Anti-Discrimination Notice, select the following:

- > [Definitions of race and ethnicity](#)
- > [Anti-discrimination notice](#)

Veteran Self-Identification

If available, your “Current Veteran Status” displays. You are also given the reason why you are being asked to provide this information.



After reading the reason, you can add or edit the information by selecting the Veteran status that applies:

- I am not a veteran
- I belong to the following categories of protected veteran:
 - Disabled Veteran
 - Recently Separated Veteran (discharge date)
- I don't wish to identify my veteran status
- I am a protected veteran, but I choose not to self-identify to which I belong
- I am NOT protected veteran, I served in the military but do not fall into the veteran categories listed above

After making your selections, click on **Save**.

Once the information is saved, it will replace your “Current Veteran Status.”

For more information on the “Definition of protected veteran,” “Reasonable accommodation notice” and “Anti-Discrimination note,” click on the following:

- > [Definitions of protected veterans](#)
- > [Reasonable accommodation notice](#)
- > [Anti-discrimination notice](#)

Benefits > My Benefits

The My Benefits screen allows you to assess your elected personal benefit package and at a quick glance, view your annual and per pay deductions for those benefits.

The screenshot shows the 'My Benefits' summary page. On the left, there is a navigation menu with tabs for 'Summary', 'Current', 'Waived', and 'History'. The 'Current' tab is selected. The main content area is titled 'BENEFIT COST AND CONTRIBUTIONS'. It displays two large figures: '\$7,800.00 ANNUALLY' and '\$150.00 PER PAY PERIOD'. Below these figures is a table listing benefits and their costs:

Benefit	Cost
401(k)	\$150.00
HSA (Other category)	\$0.00
Vision Pre-Tax 125	Waived

Below the table, there is a disclaimer: '*Elected costs is an estimate only. Actual deduction amounts can vary in specific instances. For example, a 5% deferred compensation (i.e., 401k plan) election is projected using your base pay, but the deduction is calculated using actual compensation and plan rules. Plans that require Endorse of Insurability (EOI) such as life insurance, reflect the cost of the requested amount but the deduction may be based on actual coverage until EOI is approved.'

By selecting the **Current** tab on the left-hand side, you will see the benefits you are currently enrolled for in a detailed view with effective dates, per pay amounts, and frequencies.

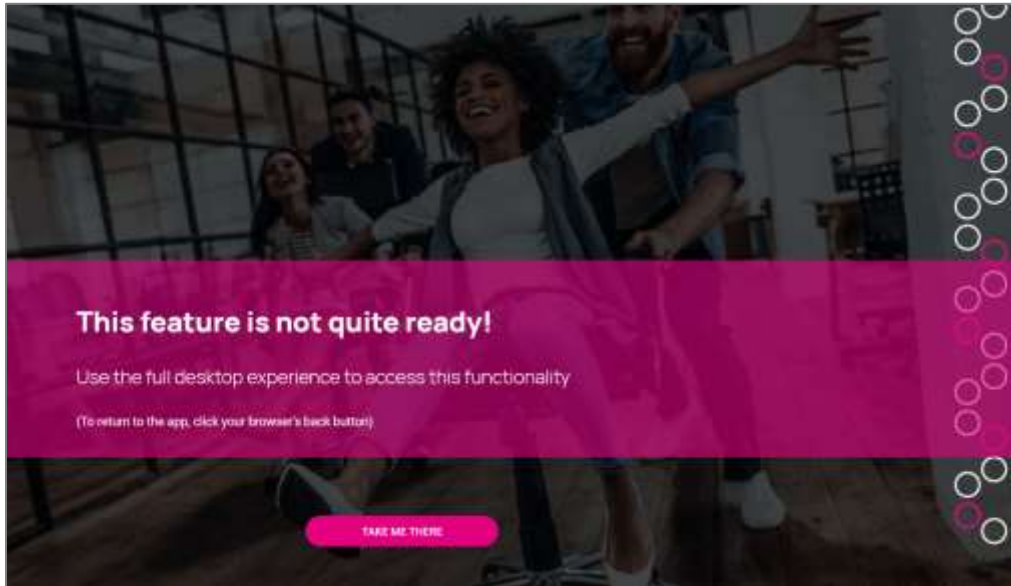
The screenshot shows the detailed view for the '401(k)' benefit. The left navigation menu has 'Current' selected. The main content area shows '401(K)' with a sub-tab '401(K)'. It indicates the benefit is 'Effective 5/26/2019'. A table shows 'Deductions' for '401K' at '\$150.00'. To the right, a callout box shows a calendar icon, '\$150.00', and 'Every Pay'.

When you select the **Waived** tab on the left-hand side, you will see the information on plans that you have waived and the date the waiver took effect.

The screenshot shows the detailed view for a waived benefit. The left navigation menu has 'Waived' selected. The main content area is titled 'WAIVED BENEFITS'. It lists 'VISION PRE-TAX 125' and indicates it is 'Effective December 1, 2020'.

Benefits > Benefit Enrollment

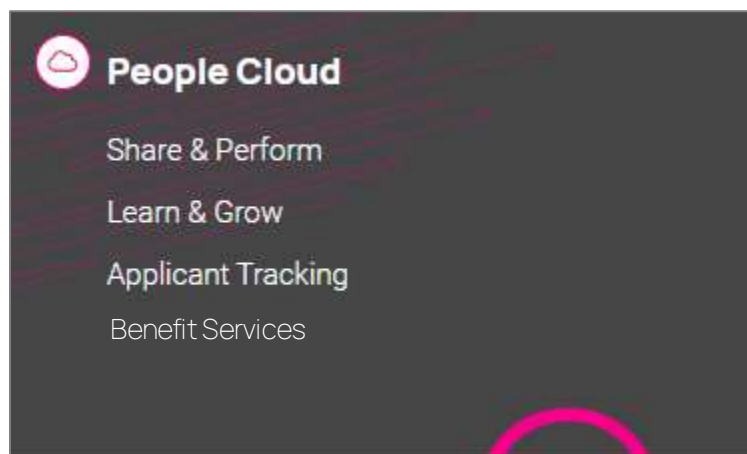
The Benefit Enrollment screen will give you a link into the full desktop experience to begin your enrollment. Click in the **Take Me There** button to begin your enrollment



People Cloud

The links within the People Cloud tile will log you in through SSO (single sign on) to other isolved modules:

- Share & Perform: This will take you to the engagement management platform
- Learn & Grow: This will take you to the online LMS (learning management system)
- Applicant Tracking: This will take you to the applicant tracking platform
- Benefit Services: This will take you to COBRA





Help Docs

Marketplace Integrations

The links within the Marketplace Integrations tile will log you in through SSO (single sign on) to any integrations your company may have setup with 3rd party companies, or company's isolved partners with.