



**PAYSERV**  
PAYROLL SOLUTIONS

## Our NEW isolved release goes live

September 3, 2021

7.16 - Benefit Evaluation Utility

7.16 - Employee Summary and Employee Profile Screen

7.16 - Time Attestations & Notes on Punches

7.15 - Benefit Evaluation Utility

7.15 - Managerial Assignments

7.15 - Payroll & Tax Maintenance

Release 7.16 – The updates keep coming! We are working hard to provide the best tools for you and your team.

### Benefit Evaluation Utility

Our 7.16 release continues to build on the latest 7.15 release as we add two more evaluations to the benefit evaluation utility that will be helpful during the client implementation process and open enrollment season:


- Employees with missing beneficiary dependent field requirements such as birthday, social or gender
- Employees who do not meet the requirements for routing and account information, such as an employee enrolled in an HSA plan that requires bank information and it is missing on the employee record.


### Employee Summary and Employee Profile Screen


Several enhancements have been made to both our Employee Summary and Employee Profile Screens that we believe users will find exciting and helpful. In the interest of privacy and in accordance with federal law, we are removing the EEO information from the summary. Along with this change, we have implemented some additional fields to the employee profile:

- Contact card with profile picture for the employee
- Field for preferred pronouns
- Job title and work location
- Contact phone numbers
- Self-service email address

- Home address
- Link to employee notes







**Dr Joe Matthews**  
He/Him  
Sales Account Manager  
 Pittsburgh, PA

Work Phone	800-123-4567
Mobile Phone	515-222-1245
Home Phone	515-222-1245
Self-Service Email	John@abcco.com
Address	132 Main Street Orem, Utah 84058

Within the **Personal Information** area, we are adding an icon that allows users with proper permissions to unmask the SSN and Birth Date within the summary. A field that displays an employee’s Military status has also been added on this screen.

<b>PERSONAL INFORMATION</b>	SSN XXX-XX-XXXX 	Birth Date 04/20/XXXX 	Gender Chose not to answer	Marital Status Married	Personal Email jman@gmail.com	Military Status Retired
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The following records have been added within the **Employment Information** area:

- DBA
- Timeclock ID
- Length of Service for Hire Date
- Adjust Service Date with Length of Service
- ACA Status

<b>EMPLOYMENT INFORMATION</b>	Legal Company ABC Company	DBA ABCD Company	Employee ID 1267	Timeclock ID 1267	Hire Date 3/6/2019 2 Years, 5 Months, 15 Days	Adjusted Service Date 1/1/2018 3 Years, 7 Months, 11 Days
	Status Active2	Employment Category Full Time	ACA Status ACA Full Time			

**NOTE:** For terminated employees, the employment category will no longer display, instead the termination type and reason will be displayed.

**Job Information** the following items were added/adjusted:

- Length of service they have been in the job title
- Job Group
- The FLSA seasonal exempt as they are used for reporting info only
- Moving the assigned manager/supervisor to

<b>JOB INFORMATION</b>	Job 1030- Sales Account M ...	Effective Date 5/9/2019	Length of Service in Job 5 Days, 7 Months, 14 Days	Job Group	EEO Category Professionals	Workers Comp 2003 - Bakeries & Cracker .
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**Pay Information** will now only display on the EE summary and have been masked with an eye icon that can be clicked to view the salary based on salary restrictions permissions. The following fields were also added:

- Direct Deposit to see if they have a full or partial setup or none
- Whether their check stub is printed based on the employee general screen
- Alt. Address (override address) on file to send the paystubs.

<b>PAY INFORMATION</b>	Pay Group Monthly	Frequency Monthly	Pay Type Salary	Normal Hours 173.33	Pay Effective Date 3/6/2019	Salary XXXXX.XX annually XXXXX.XX per pay XX.XXXX per hour
	Direct Deposit Full Direct Deposit	Printed Pay Stub Yes	Alternate Address 9889 St Charles Place #655 Provo, Utah 84056			

Within the **Tax Information** section, the W4 fields for Federal and State have been updated and the work and resident locations have been combined to show on one area. The following items were added as well:

- Tax Exemption Field
- Alt. Address (override address) on file to send the tax forms.

<b>TAX INFORMATION</b>	Federal Married Block Tax: Y	State North Carolina Married \$2,000.00 (Dependents)	Location Orem, UT (Work) UT123456 (Resident)	School District 22275	Tax Exemption FICA Exempt	Alternate Address 9889 St Charles Place #655 Provo, Utah 84056
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**Managerial Assignments** will now list both assigned and organization manager/supervisor information. If the manager or supervisor is terminated, an icon will appear as pictured below.

**Managerial Assignments** Isolved University

Employee Assignments Supervisor Assignments Manager Assignments Job Assignments **Organization Assignments**

▼ Expand All Groups ▲ Collapse All Groups ↻ Clear Grouping/Filters

Drag a column header here to group by that column

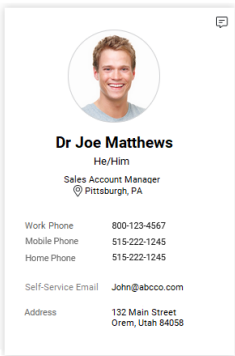
Legal Name	Employee Name	Employee ID	Status	Job	Assignment Options				
					Legal	Organization	Organization Value	Supervises Others	Manages Others
ABC Company	Renae Bell (Jen)	1256	Active	Clock Maintenance	ABC Company	All	All	✓	✓
Danielie Test Company-1	Jackie Chan	4	Active		All	Division	01		✓

The **Organization Information & Labor** section has been reformatted with a carousel type design to display maximum detail in these areas.

<b>ORGANIZATION INFORMATION</b>	←	Division 2- Direct	Department 10- Finance	Branch Remote	Location PA	Team Sales	Benefits Class 2	→
<b>LABOR INFORMATION</b>	←	Project Project A	GL Account # 14135	Date 1/8/2015	Group Professionals	Cost Center BQ34F	Work Class Class 3	→

Below is a screenshot of how the updated **Employee Summary** will appear:

Employee Summary



**Dr Joe Matthews**  
He/Him  
Sales Account Manager  
@ Pittsburgh, PA

Work Phone: 800-123-4567  
Mobile Phone: 515-222-1245  
Home Phone: 515-222-1245

Self-Service Email: John@abcco.com  
Address: 132 Main Street, Provo, Utah 84058

PERSONAL INFORMATION											
SSN	XXX-XX-XXXX	Birth Date	04/20/XXXX	Gender	Chose not to answer	Marital Status	Married	Personal Email	jman@gmail.com	Military Status	Retired
EMPLOYMENT INFORMATION											
Legal Company	ABC Company	DBA	ABCO Company	Employee ID	1267	Timeclock ID	1267	Hire Date	3/6/2019	Adjusted Service Date	11/1/2018
Status	Active2	Employment Category	Full Time	ACA Status	ACA Full Time				2 Years, 5 Months, 15 Days	3 Years, 7 Months, 11 Days	
JOB INFORMATION											
Job	1030- Sales Account M ...	Effective Date	5/9/2019	Length of Service in Job	5 Days, 7 Months, 14 Days	Job Group		EEO Category	Professionals	Workers Comp	2003 - Bakeries & Cracker .
PAY INFORMATION											
Pay Group	Monthly	Frequency	Monthly	Pay Type	Salary	Normal Hours	173.33	Pay Effective Date	3/6/2019	Salary	XXXXXX annually XXXXXX per pay XX,XXXX per hour
Direct Deposit	Full Direct Deposit	Printed Pay Stub	Yes	Alternate Address	9889 St Charles Place #655 Provo, Utah 84056						
TAX INFORMATION											
Federal Married	Block Tax: Y	State	North Carolina Married \$2,000.00 (Dependents)	Location	Orem, UT (Work) UT123456 (Resident)	School District	22275	Tax Exemption	FICA Exempt	Alternate Address	9889 St Charles Place #655 Provo, Utah 84056
ORGANIZATION MANAGEMENT											
Assigned Manager	Judy Jenkins	Assigned Supervisor		Organization Manager(s)	Manager EE Audit 3 test Hazel Arnoldscopy2	Organization Supervisor(s)	Supervisor EE Renae Bell				
ORGANIZATION INFORMATION											
Division	2- Direct	Department	10- Finance	Branch	Remote	Location	PA	Team	Sales	Benefits Class	2
LABOR INFORMATION											
Project	Project A	GL Account #	14135	Date	1/8/2015	Group	Professionals	Dept Center	BQ34F	Work Class	Class 3

This 7.16 release has also updated all versions of the **Employee Profile Report** to display 2020 W4 data.

Employee Identification			Personal				Employment			
<b>Name:</b> Cathy Charles <b>Address:</b> 123 East NEW YORK, NY 10002  <b>SSN:</b> 333-33-4433 <b>Emp #:</b> 99110			<b>BirthDate:</b> 1/1/1970 <b>Home Phone:</b> <b>Mobile Phone:</b> <b>Office Phone:</b> <b>Personal Email:</b> <b>Self Service Email:</b> dbilski@isolvdhcm.com <b>Marital Status:</b> <b>Gender:</b> Female <b>Military Status:</b>				<b>Status:</b> Active <b>Hire Date:</b> 11/9/2015 <b>Employment Category:</b> Full Time <b>Timeclock ID:</b> <b>Original Hire Date:</b> <b>ReHire Date:</b> <b>Termination Date:</b> <b>Adjusted Service Date:</b>			
Pay Information			Tax Information				EEO & Veterans Information			
<b>Effective Date:</b> 11/9/2015 <b>Pay Group:</b> XXBiweekly Processed <b>Pay Frequency:</b> Bi-Weekly <b>Pay Type:</b> Salary <b>Standard hours:</b> 80.0000 <b>Hourly Rate:</b> 12.5000 <b>Per Pay Salary:</b> 1,000.00 <b>Annual Salary:</b> 26,000.00			<b>Federal:</b> Married <b>Exempts:</b> 1 <b>Additional Tax:</b> \$10.00 <b>Res State:</b> NY    Married <b>Exempts:</b> 1 <b>Additional Tax:</b> \$10.00 <b>Wrk State:</b> OH <b>Exempts:</b> <b>Additional Tax:</b> <b>Work Location:</b> NORTH OLMSTED, OH <b>School District:</b> <b>Tax Exempt Status:</b>				<b>EEO Category:</b> <b>Ethnic Origin:</b> <b>Separation Date:</b> <b>Recently Separated Vet:</b> No <b>Protected Vet:</b> No			
Earnings			Deductions				Garnishments			
<b>Title</b>	<b>Type</b>	<b>Value</b>	<b>Title:</b>	<b>Type</b>	<b>Value</b>	<b>Balance</b>	<b>Title:</b>	<b>Type</b>	<b>Value</b>	<b>Balance</b>
Direct Deposit										
<b>Seq</b>	<b>Deposit Frequency:</b>	<b>Deposit Type:</b>	<b>Routing</b>	<b>Account #</b>	<b>Status</b>	<b>Deposit Value</b>				
0	Every Pay	Checking	041001039	342424	Active	Remaining Net				
Leave Accruals										
<b>Plan Title</b>	<b>Type</b>	<b>Accrual Rate</b>	<b>Balance</b>							
PDO	PDO	3.33	103.33							
Job Information						Organization & Labor				
<b>Job Title:</b>	Electrician	<b>Job Code:</b>	500	<b>Department:</b>	100 - 100					
<b>Manager:</b>	Vinnie T Chase	<b>Job Group:</b>		<b>Division:</b>	MI - MI					
<b>Supervisor:</b>		<b>FLSA Exempt:</b>	No	<b>Project</b>						
<b>Workers Comp:</b>		<b>Seasonal:</b>	No	<b>Location</b>						
<b>Effective Date:</b>	11/9/2015	<b>Union:</b>	No	<b>GL Account</b>						
				<b>Date</b>						
Miscellaneous Fields										

## Time Attestations & Notes on Punches

Our 7.16 release continues to build on the latest 7.15 release as we add two more evaluations to the benefit evaluation utility that will be helpful during the client implementation process and open enrollment season:

In compliance with a California Attestation requirement, the 7.16 release has added new attestation to grant users the ability to ask employees questions when they clock in and out. However, this exciting new feature can also be used for COVID-19 health checks and standard break attestation. The screen shot below shows an employee who has indicated that they did not take the required breaks for every specified, legal amount of time worked during a single shift. An employee's answer to this attestation question can be utilized during detailed, quick, and auto punch functionality in time. Anytime an employee answers "no" to taking a break, it will be noted on the individual timecard along with any associated notes

Here is an example of the employee clocking out at the end of the day. You can see they have the option to choose Yes or No to the question asked.

DO you attest that for every 5 hours worked you took a 30 minute break?

Yes  
Choose...  
No  
Yes

Save Cancel

If they choose "No", the employee will be prompted for a response on why.

Please indicate the reason a meal break was not taken.

Save Cancel

Once saved, here is an example of the attestation response displayed on the timecard.

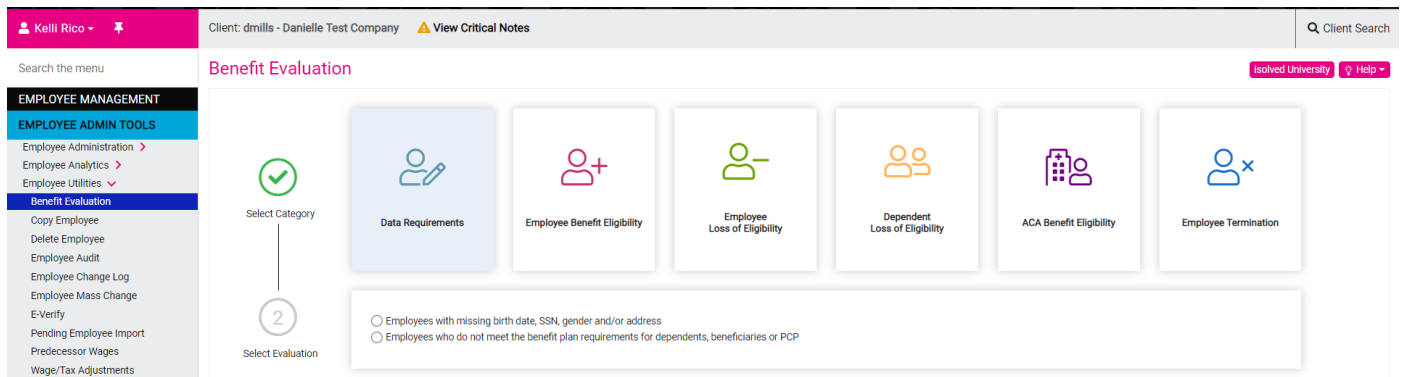
4:00 AM-10:34 AM 6.57 hrs	<b>Punch</b>		<b>Additional Notes</b>
	In	Mon 4:00 AM EDT	OUT:DO you attest that No
	Out	Mon 10:34 AM EDT	for every 5 hours
	Duration	6.57	worked you took a
		· Modified Time	30 minute break?
			Please indicate
	<b>Labor</b>		Offered OT by my
	Department	8290	the reason a meal
	Job	11CLEANE	break was not
			taken.
	<b>Alerts</b>	Status	
	<b>Policy Group</b>	FT Hourly	

Catch up on Release 7.15 – This release showcased a streamlined methods for users to keep track of and maintain employee information.

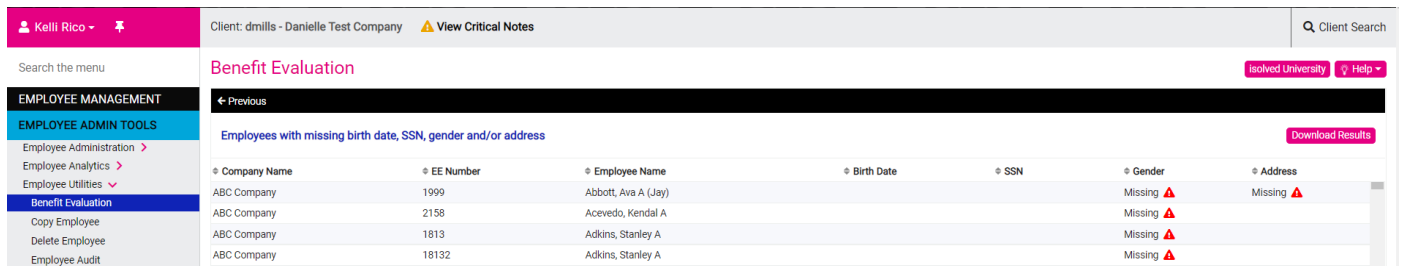
## Benefit Evaluation Utility

Our 7.15 release has an exciting new evaluation that helps identify employee profiles that are missing important details from our predefined categories such as birth date, social security number, gender, and address. When selecting the “Data Requirements” category on the far left of the new user interface, two radio button sub-category options will be displayed as listed below for identifying employees with missing fields.

1. Show Employees with any missing values
2. Show employees with missing required values only.



This change is key for implementation success and auditing. As you can observe in the third screen shot below, the user can successfully query employees who meet your selected radio button criteria. Finally, there's been a streamlined update to radio buttons under the Employee Loss of Eligibility category which is third from the left. This is a notable improvement over the former check boxes in the last screen shot below.





The below image is a screenshot of how the tool appeared prior to this release.

## Benefit Evaluation

→ Next

The Benefit Evaluation Utility has several evaluation processes. Select the evaluation process(es) you would like to run and click 'Next' to begin. The evaluation process may take several minutes. Do NOT leave this window or close your browser while the evaluation is in process.

### Employee Benefit Eligibility Evaluation

- Existing employees eligible for a benefit plan with no plan election
- New hires eligible for a benefit plan from   to  

### Benefit Plan Requirement Evaluation

- Employees who do not meet the benefit plan requirements for dependents, beneficiaries or PCP





### Employee Loss of Eligibility Evaluation

- Employee loss of eligibility for a benefit plan
- Employee loss of eligibility for a coverage code
- Employee loss of eligibility for a benefit plan dependency

### Dependent Loss of Benefit Eligibility Evaluation

- Dependent loss of eligibility for a benefit plan

### ACA Benefit Eligibility Evaluation

- Employee loss of ACA eligibility for a benefit plan from   to  
- Employee gain of ACA eligibility for a benefit plan from   to  



# Managerial Assignments

In our last 7.14 release we added a Managerial Assignments analytics screen for Employees, Supervisors, Managers, and Job assignments. With our 7.15 Release we have added a new tab titled “Organizational Assignments” located to the right of Job Assignments at the top navigation bar. This tab will display active and inactive employees who are categorized as managers and supervisors within your managers. Like the Employee Assignments and Job Assignments Tabs, users can export reports to Microsoft Excel or use the filters within Column Chooser to reflect their specific viewing preferences. The data seen in the Managerial Assignments screen is obtained from the Organization Supervisor/Manager screen under Employee Maintenance.

The screenshot displays the 'Managerial Assignments' screen. The top navigation bar includes tabs for 'Employee Assignments', 'Supervisor Assignments', 'Manager Assignments', 'Job Assignments', and 'Organization Assignments' (which is currently selected). The main content area features a table with the following columns: Legal Name, Employee Name, Employee ID, Status, Job, and Assignment Options. The Assignment Options sub-section includes Legal, Organization, Organization Value, Supervises Others, and Manages Others. The table contains five rows of data representing different assignments.

Legal Name	Employee Name	Employee ID	Status	Job	Assignment Options				
					Legal	Organization	Organization Value	Supervises Others	Manages Others
ABC Company	Renae Bell (Ien)	1256	Active	Clock Maintenance	ABC Company	All	All	✓	✓
Danielle Test Company-1	Jackie Chan	4	Active		All	Division	01	✓	✓
Danielle Test Company-1	Jackie Chan	4	Active		ABC Company	Field14	14	✓	
ABC Company	Manager EE	1311	Active	VP	ABC Company	All	All		✓
ABC Company	Supervisor EE	1312	Active	President	ABC Company	All	All	✓	

# Payroll & Tax Maintenance

When adding a company located within New Mexico, users will now be prompted with a popup window that has the check box "Track Not Taken Balance" option automatically defaulted on the New Mexico Workers Compensation Assessment Employee Tax Fee. This release was catalyzed by New Mexico's reconciliation challenge that occurs when the employee is not being paid. If the employee is not listed there or doesn't pay their fee at the end of the quarter, the fee will revert to the employer who is responsible for any unpaid tax.

The screenshot shows a 'Tax' popup window with the following sections and fields:

- Display Missing EIN** (checkbox)
- Tax** (header)
- NM-WORKERS COMP ASSESSMENT EE** (title)
- Payee** section with address: NM Department of Taxation and Revenue, P.O. Box 2527, Santa Fe, 87504-2527
- Override Overpay Options** section with a dropdown menu for 'Overpay Option' and a text field showing 'Default: Refund All Quarters'.
- Not Taken Balance** section with a checked checkbox for 'Track Not Taken Balance'.
- Mark Return as Final** section with an unchecked checkbox for 'Mark Return as Final'.
- Last Pay Date:** (text field with a calendar icon)
- Save** and **Cancel** buttons at the bottom right.