

January 2021

The logo for 'isolved' features a small pink circle to the left of the word 'isolved' in a white, lowercase, sans-serif font. A trademark symbol (TM) is positioned at the top right of the word.

isolvedTM

Employee Self-Service

User's Guide

Help Docs

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Help Docs

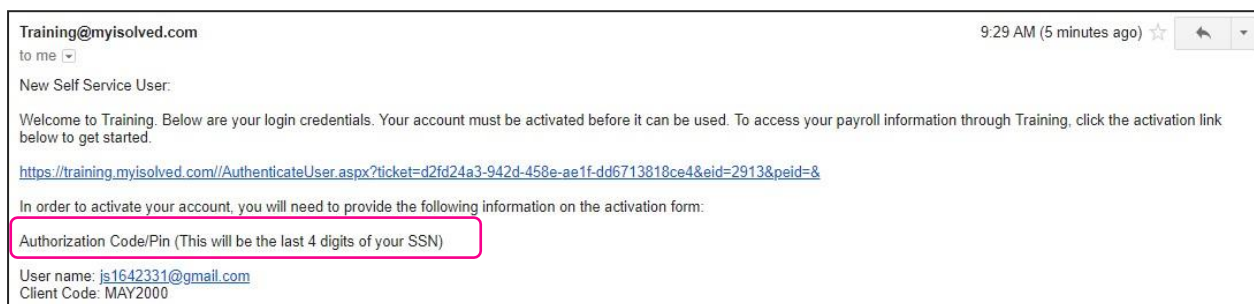
Overview

This document will outline Employee Self-Service (ESS) log in information and maintenance. It will review some of the screens that your employer may give you access to. You may have each of these screens in either “view only” or “update” mode, depending on the setup requested by your employer. Here are some of the screens available:

- **Name/Address:** A screen where you may be able to view the current information or change the current information.
- **Documents:** A screen where you may be able to view any documents stored in the system based on your file (I9, W4, etc.), or where you may be able to upload documents and save them to your file.
- **Pay History:** A screen where you can view your pay stubs with all details. You are also able to view or print the stub for your records.
- **W2/ACA/1099 Forms:** A screen where you can view your W2, ACA or 1099 forms. You are also to print the form, but it is not printed on the IRS approved paper. You must contact your employer if you need an IRS approved form.
- **Training:** A screen where you can view all training completed or add any training you have completed. These types of screens are available for many HR related categories.
- **Employee Contacts:** A screen you can view employee contacts. A separate screen may be available for dependents or beneficiaries. You may be able to add and change that information.
- **Direct Deposits:** A screen where you can view your current direct deposit information or add and change that information.
- **Tax Updates Wizard:** A screen where you can view your current tax withholding and status or change the information.
- **Benefit Updates:** A screen where you can update your Deferred Compensation deduction amount, HSA amounts or direct deposit, as well as Primary Care Physician if the benefit plan is set up update.

Employee Self-Service Initial Email

Your employer will initiate a system-generated email to you upon the activation of Employee Self-Service. This email is from a no-reply email address. Here is what it will look like:



You must click on the link provided in the email. The **Username** is the email address provided or given to you by your employer which is usually your work email address. A personal email address may be used. Whichever email address is provided in the email will be your username each time you log into Employee Self-Service.

Your one-time authorization code for your initial sign-on is the last four digits of your SSN.

Employee Self-Service Initial Sign-on

New User Account Setup
To activate your new account please enter the following information into the fields below and click the Continue button.

Account Information

User Name:

Client Code:

Company Name:

Employee Name:

Identity Confirmation

* Authorization Code/Pin:

This information is located in the activation email sent to you.

Setup Account Password

* New Password:

Choose a password for your new account. Please ensure that passwords are a minimum of 12 characters (at least one lower case alpha [a-z], one upper case alpha [A-Z], one numeric [0-9], and one special character. Spaces are allowed to support the use of easier to remember passphrases. Going forward, your password will not expire.

* Confirm New Password:

Re-enter your password to ensure it is correct.

* Challenge Question:

Choose a question only you would know the answer to. You will be prompted to answer this question if you need to reset your password.

* Challenge Answer:

Specify the answer to the challenge question you created above.

* Confirm Answer:

Re-enter the answer from above to ensure it is correct.

Contact Information

Mobile Phone:

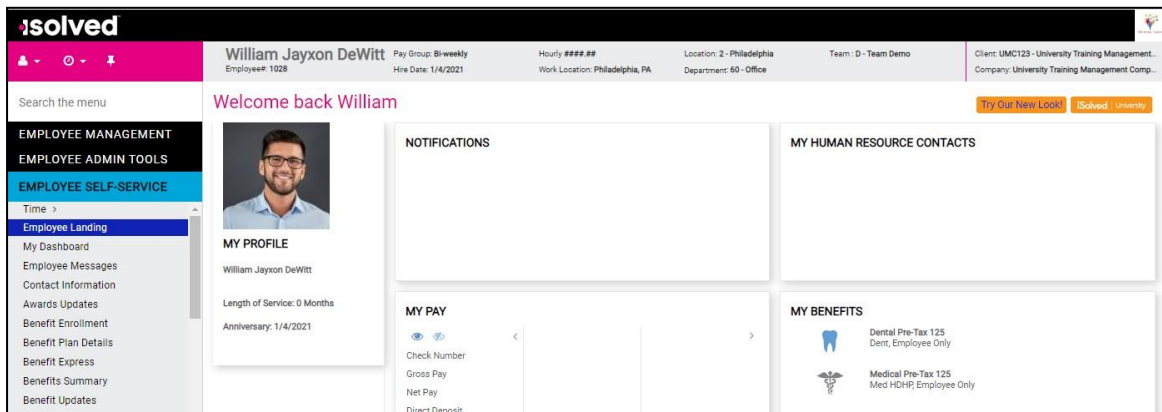
Once you click on the link provided, the **Username** and **ClientCode** will be pre-filled.

- You must add your **Authorization Pin** number (the last 4 digits of your SSN).
- Create and confirm a **Password**.
- Please ensure that passwords are a minimum of 12 characters (at least one lower case alpha [a-z], one upper case alpha [A-Z], one numeric [0-9], and one special character. Spaces can support the use of easier to remember passphrases. Your password will not expire.
- You then must select a challenge question/answer and confirm your answer.
- It is best to add your cell phone number in order to receive text messages if you are accessing your Employee Self-Service from a different IP address.

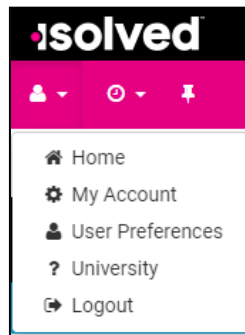
Help Docs

First Time Log-in

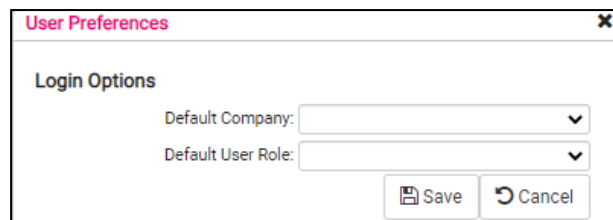
Once you click on **Continue** from the initial New User Account Setup, it will log you into Employee Self-Service. Depending on the roles set up for you by your employer, your screen could have one, two, or more subjects listed on the left side menu. Here is an example:



Under your name on the left landside is a drop-down menu.

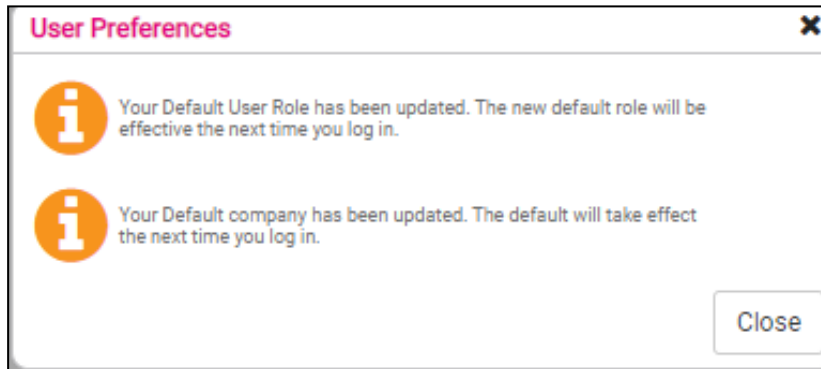


- Click on **My Account** to add or change your mobile phone number, change your password, or change your security question.
- Click on **User Preferences** if you are an employee, manager or supervisor for multiple companies using the same Email address. When selecting this option, a box will appear that will contain a drop down with any Default Company or Default User Role to select from. All companies and user roles assigned to the employee will appear in the drop-down box. Once selected and saved, this will be the User Role and Company you will see the next time you log in. This becomes your Default User Preference.

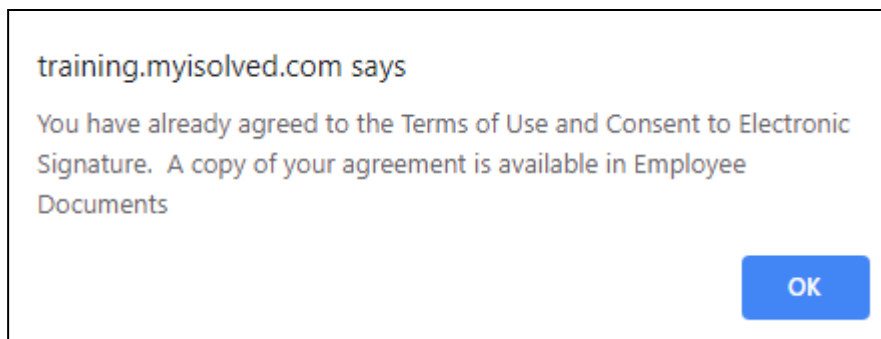


Help Docs

- Once Saved, a confirmation will appear.



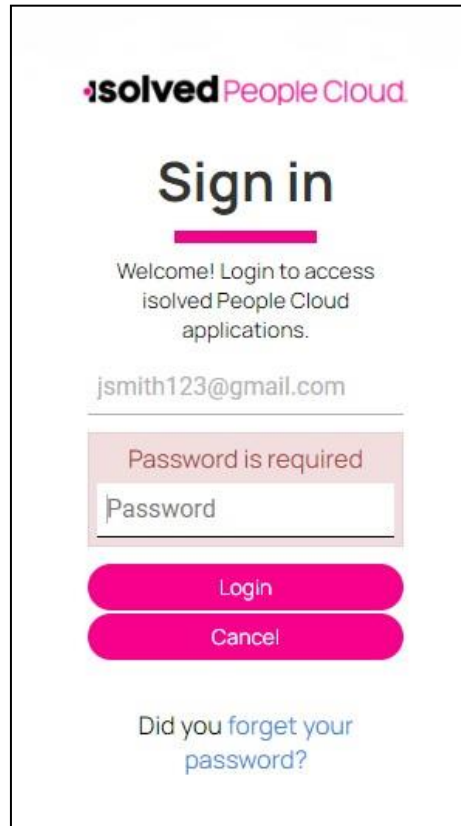
- Click on **Electronic Consent**. If you have already signed the Electronic Consent form, a pop up will appear indicating that. If not, the document will appear for your signature.



- Click on the **University** link to create an account for access to help documents or recorded videos about the isolved system.
- **Home** will take you back to your **Welcome** page.
- **Logout** is used when you have completed your activities in Employee Self-Service.

Help Docs

Please remember to save the URL to your favorites or bookmark the page.



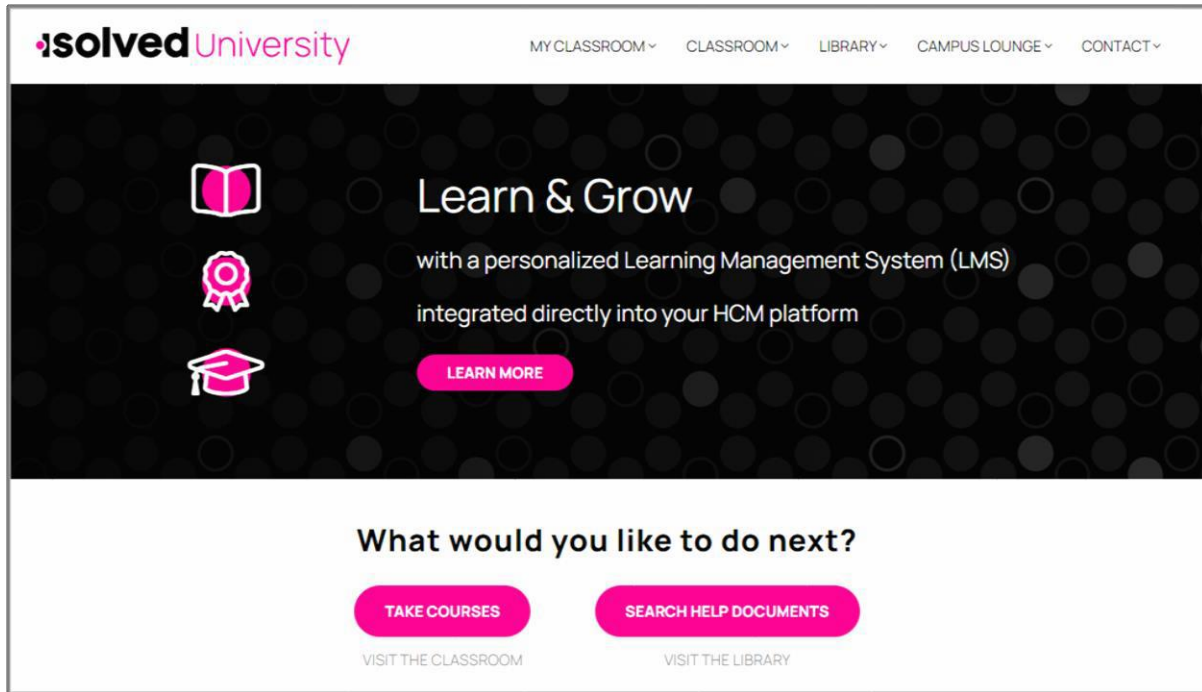
When accessing isolved in the future, you may key your password incorrectly. If you enter an incorrect password five times, you will be locked out of the system. You will receive a message after each incorrect attempt indicating the remaining number of attempts. After the fifth incorrect attempt you will be locked out of the system for 10 minutes. After 10 minutes has passed, click on the “Forgot Password” link to reset your password. If you need access sooner, contact your company’s administrator to unlock your account.

- Type in your Username.
- You can then request a new Authorization Code by email or text.
- Type in the Authorization Code received.
- Verify the answer to your Challenge Question.
- Create a new Password.
- Confirm the new Password.
- Click Next and log on using the new password.

Help Docs

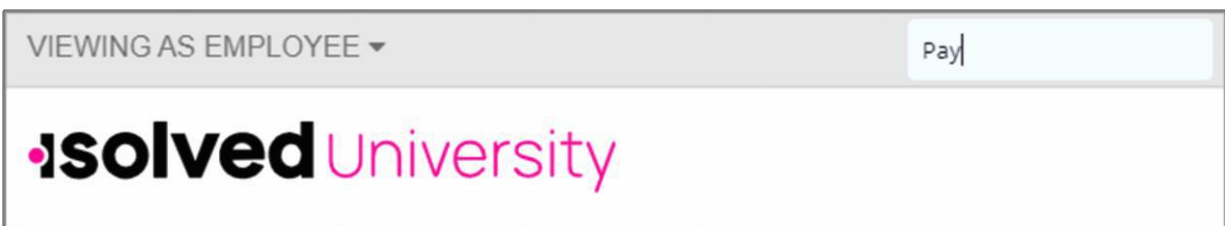
isolved University and Library

The isolved | University and Library are full of knowledge-based materials and videos to enhance your ability in using Employee Self-Service. Let's look at some options.



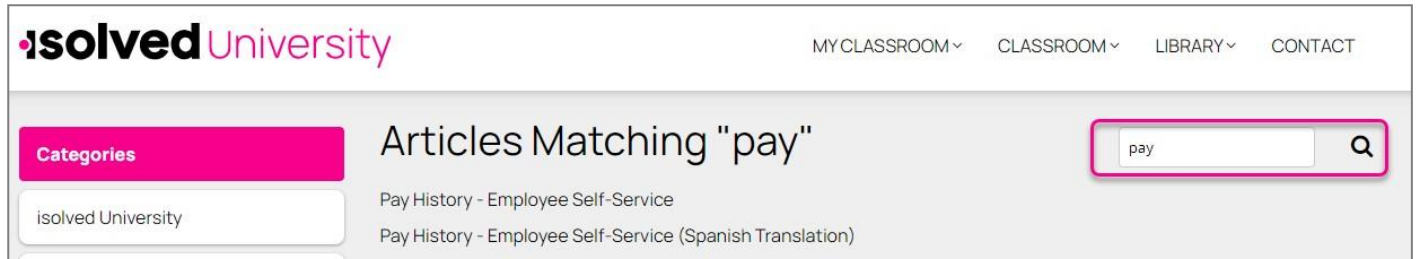
You may click on the drop-down menu at the top of the screen, or click on **Articles** to see all articles published for your help. If a new article is published, it will be listed under the **New Articles** section on the front page of the Library.

If you know the name of the article, you can click on the **Search** button at the top of the page, and key in the complete name, or a portion of the name of the article. It will narrow your search.



You may also search for articles by selecting the drop-down menu under **Library** and clicking on "Articles." Categories are displayed on the side menu. Click on or expand to search articles grouped by the selected category. You may also use the search box to look for a specific topic or title.

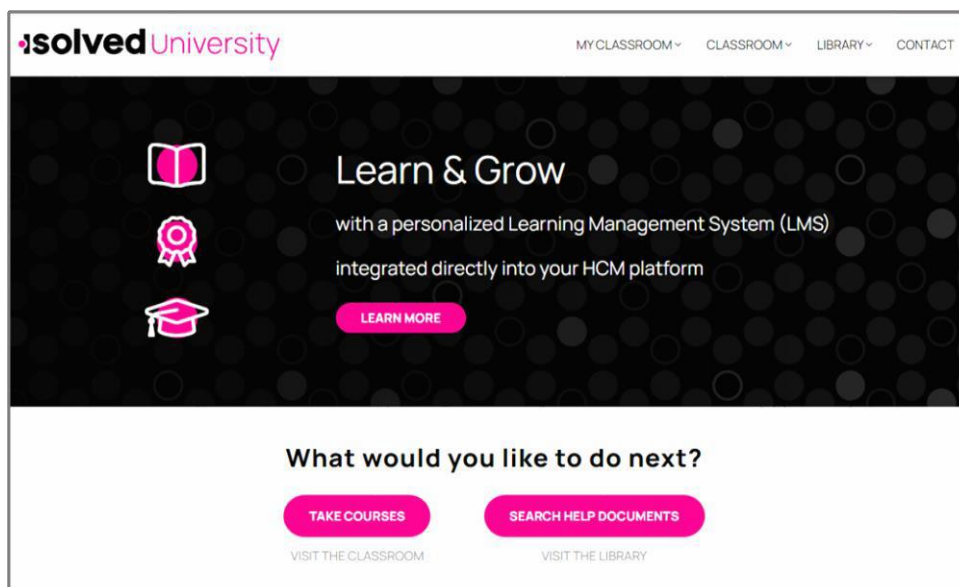
Once you have keyed in the subject, click **Search**. Based on the search above, the results are listed. Here is a section of that list.



- Click on the article name.
- A description of the article or an attachment will be available with more details.
- Open the attachment.
- You can save or print the article for your records.

isolved | University

In order to access isolved | University, click on the icon on the front page. The main page contains “New Courses” and “Popular Articles.”



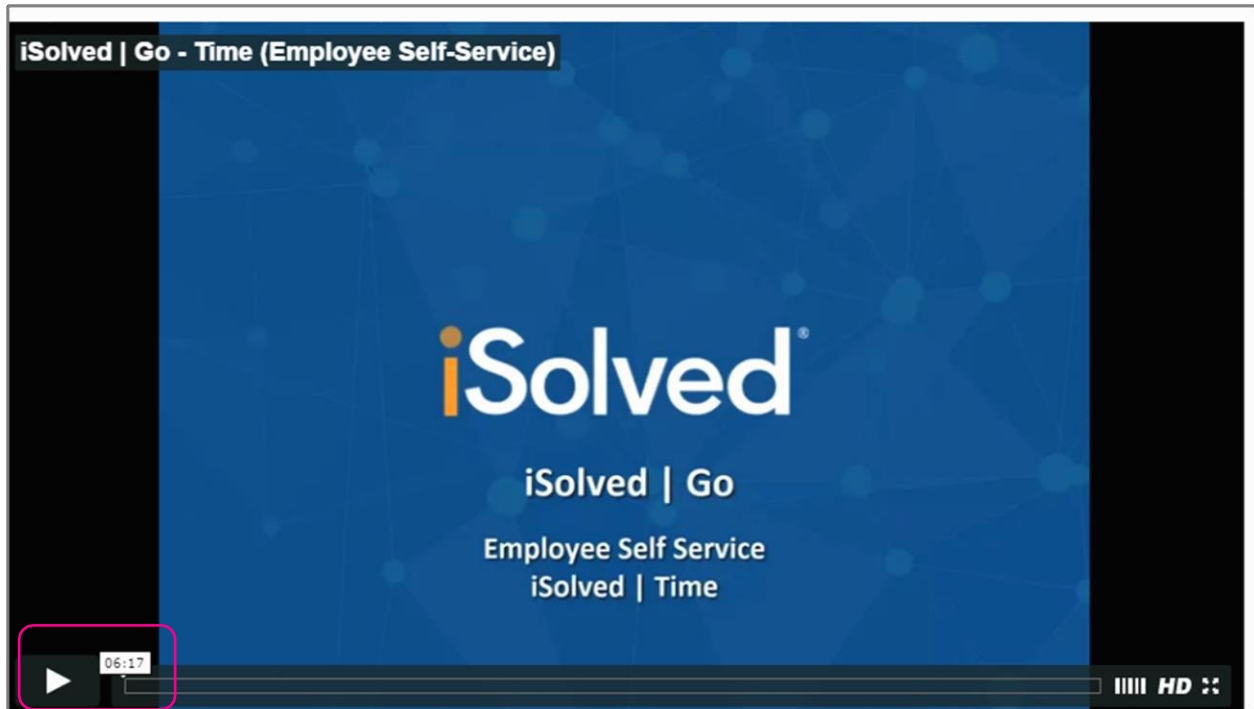
The **Classroom** drop-down menu gives you the following options:

- Dashboard
- Courses
- Course Paths
- Certificates

Click on **Courses** from the drop-down menu to see the courses available to you. New courses are added all the time, so please check back if you don't see the course you're looking for.

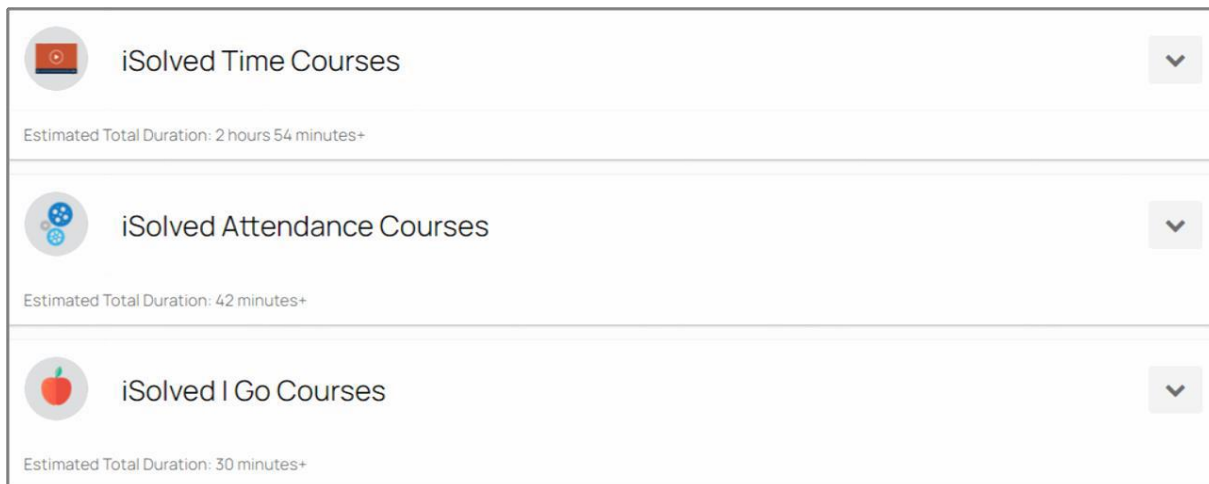
7000 - EMP – Employee Self-Service	Passed	▼
7001 - EMP – Understanding Your Paycheck	Passed	▼
7002 - EMP – iSolved I Time - Employee Training		▲
🕒 Estimated Duration: 33 minutes		
<p>This training will guide you through self-service punching, time card views, absences and submitting time off requests. A short test will be provided at the end of this training to check for understanding.</p> <p>VIEW COURSE > ☆</p>		
7003 - EMP – iSolved I Time - Manager/Supervisor View (A)	Passed	▼
7004 - EMP – iSolved I Time - Manager/Supervisor View (B)	Passed	▼
7005 - EMP – iSolved I Time - Admin View (A)	Passed	▼
7006 - EMP – iSolved I Time - Admin View (B)	Passed	▼
7007 - EMP – iSolved I Time - Admin View (C)	Passed	▼
7008 - EMP – iSolved I Time- Attendance (A)	Passed	▼
7009 - EMP – iSolved I Time- Attendance (B)	Passed	▼
7010 - EMP – iSolved I Go - HCM (Employee Self-Service)	Passed	▼

The course contains a video. Click on the **Play** button to listen and watch the video.



The length of the video in minutes and seconds is highlighted next to the **Play** button so you can allot the proper time to watch the video. You may pause the video at any time by selecting the appropriate icons at the bottom of the video.

Course Paths, listed in the drop-down menu, guide you through a path to pass an outlined series of courses, earn badges and change grade levels and ranks. These paths vary by user type.



Chapters	▼
Part I	▼
Part II	▼
Take Test	

- Some videos contain a **Test** to check your knowledge. The tests are short and contain multiple choice or true/false questions.
- Some videos may have parts so you can complete one section at a time. When you return, you will know where you left off.
- Some videos may have Related Articles attached which will point you to an article in the isolved Library that could assist you with the knowledge retention for this course.

isolved|University also includes **Course Paths** and **Certificates** for completing courses and paths. You can also earn **Ranks, Points** and **Badges**.

[Courses](#) [Course Paths](#) [Certificates](#)

Current Grade Level
Senior

Current Rank
Ace

Current Points
1070

Badges [View all >](#)

Also, check back into the University for additional courses and updates about isolved. We are adding materials to the Library and University all the time to keep you up to date on any changes or enhancements to your service.

Help Docs

Employee Self-Service

The menu is located on the left-hand side. The items you have available were assigned to you by your employer. I will review some of the more common menu items. By clicking on the menu item name, it will take you to a new screen.

Pay History

Pay History is a record of each check stub available in isolved. The history at the top of the page is by year and check date. It includes "Gross Pay," "Total Hours," "Net Pay," "Check or Voucher Number," "Check Amount," "Description" and "Payroll Run #."

Pay History							
Year:	2020						
Check Date	Gross Pay	Total Hours	Net Pay	Check\Voucher #	Check Amount	Description	PR Run #
10/09/2020	1600.00	80.00	1282.97	10080	1282.97	Regular Check	6
09/25/2020	1600.00	80.00	1288.72	10061	1288.72	Regular Check	5
09/11/2020	1600.00	80.00	1282.97	10041	1282.97	Regular Check	4
07/03/2020	2506.40	80.00	1969.26	10021	1969.26	Regular Check	3

In order to see more Pay History, use the scroll bar on the right-hand side of the menu, or change the **Year** in the drop-down box.

The screen default will be a view of your most current pay stub. The top of the pay stub is a summary of dates and employee information, including withholding status.

Check Type:	Regular Check	Gross Pay:	2258.40	Regina A Borland 1144 Colonial Ave Roselyn, PA 19001	Employee #:	1005	Location	2
Check Date:	09/25/2020	Gross Wage:	2259.78		Soc Sec #:	XXX-XX-5560	Department	70
Period End:	09/19/2020	Net Pay:	1754.64		Fed Filing:	Married	St Filing:	
Period Begin:	09/06/2020	Check Amt:	1754.64		Fed Exemptions:	1	St Exemptions:	0
Payroll Run #:	5	Check #:	10062		Fed Additional:		St Additional:	
				UTMC				

The next section contains **Earnings or Memos, Deductions** and **Taxes**. These figures include the current pay hours or dollars and the YTD hours or dollars. It also includes the current and taxable wages in the Tax section for each type of tax listed.

Earnings & Memos*					Deductions			Taxes				
	Curr Hours	Curr Dollars	YTD Hours	YTD Dollars		Curr Dollars	YTD Dollars		Curr Dollars	Curr Wages	YTD Dollars	YTD Wages
Regular	86.67	2500.00	338.68	9769.24	Pretax Medical	19.55	58.65	SOC SEC EE	153.79	2480.45	634.13	10227.88
Overtime			2.00	86.53				MED EE	35.96	2480.45	148.30	10227.88
Bonus				200.00				FEDERAL WH	342.59	2480.45	1437.70	10227.88
PDO			8.00	230.76				OHIO WH	73.37	2480.45	305.40	10227.88
Miles Reimburse		55.25		165.75				CLEVELAND	62.01	2480.45	255.69	10227.88

Help Docs

There are three sections on the bottom of the pay stub. They include the **Current Period Leave Accruals**. This may be blank if your employer has blocked this service or may not be using isolved to process their accruals. This is what it will look like if the accruals are processed by the system.

Current Period Leave Accruals			
	Start Balance	Used	Avail. Balance
PTO	12.00	0.00	16.00

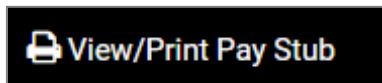
The second section at the bottom of the pay stub is your **Direct Deposit** information, if applicable. It will list any direct deposit accounts along with the amount deposited into each account.

Direct Deposit		
	Account	Deposit Amount
Checking	####7171	1439.26
Savings	####8888	100.00
Savings	####9709	50.00

The bottom left side of the pay stub includes the current dollars and taxable wages and the YTD dollars and taxable wages for any **Employer Taxes** paid on your behalf.

Employer Taxes				
	Curr Dollars	Curr Wages	YTD Dollars	YTD Wages
SOC SEC ER	171.05	2758.89	629.22	10148.65
MED ER	40.01	2758.89	147.16	10148.65
FUTA ER			42.00	7000.00
OHIO SUI ER	43.48	1610.24	243.00	9000.00

You can view or print your pay stub in a .pdf version by clicking on the **View/Print Pay Stub** on the blue action line.



This copy can be used for your records or as proof of income.

Help Docs

W2/ACA/1099 Forms

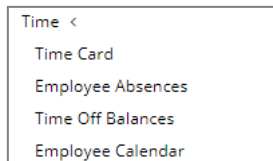
W2/ACA/1099 Forms can be used to obtain a .PDF copy of either your W2, ACA 1095 Form or a 1099 Form, if applicable. The Tax Year will appear, and when selected, you can view the PDF version and print if needed.

W2/ACA/1099 Forms isolved University					
⊕ Tax Year	⊕ Document Description	⊕ Document Type	⊕ Document Name	View Document	View Instructions
2018	W-2	YE Tax Form	2018 W-2.pdf	View Document	View Instructions
2018	ACA-1095	YE Tax Form	2018 1095.pdf	View Document	View Instructions
2017	W-2	YE Tax Form	2017 W-2.pdf	View Document	View Instructions
2017	ACA-1095	YE Tax Form	2017 1095.pdf	View Document	View Instructions

- Forms will be available for any years that isolved produced the forms.
- Employee Self-Service will not normally post the current year form until near the deadline (January 31st).
- You can receive a physical copy of the forms from your employer.

Time

If you are using isolved Time as your time-keeping system, you will have this menu item. Expand the menu item in order to see the **Time** items available.

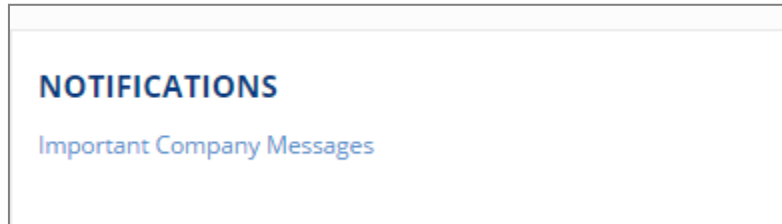


If you need further assistance on using any of these menu items, please refer to the article titled **isolved Time Employee Guide** in the Learning Center.

Help Docs

Employee Messages

If your employer has posted a message for you, an alert will appear on your home page under **Notifications**.



- Click on **Important Company Messages**.
- You will be directed to the **Employee Message** menu item.
- A document or link may be attached.



Your employer can ask for an acknowledgement from you that you have read the message. View the message or document, read the materials and click on the acknowledgement button.

Company Information

The menu item called **Company Information** can contain many documents or links depending on the needs of your employer. Many employers may post such things as their company handbook, benefit information, links to benefit sites or any other documentation they may wish you to view. Again, this documentation may need your acknowledgement.

Benefit Summary

If your employer is using isolved Benefit services, several other menu items may appear. These include:

- **Benefit Summary:** A list of Benefits and your elections for each along with the cost per-pay.
- **Benefit Plan Details:** A list of coverage levels for each plan, and the start date.
- **Life Events Wizard:** If you have a change in personal status or circumstances such as a birth of a child, divorce, marriage, you can use the wizard to make changes and upload any documents needed.
- **Life Event History:** Reviews all your life events.

Help Docs

- **Open Enrollment:** This is used during the period your company has indicated as a benefit selection period either as a new hire or yearly. This screen will walk you through your benefit selections and you are able to select the applicable plans for your needs.
- **Benefit Updates:** This may be available if the plan is set up for plan updates. You can set up plan updates for Deferred Compensation, HSA updates, Beneficiary and Primary Care Physician updates.

Documents

Your employer may load documents in the system such as your W4, state withholding form, I9, employment documents and more for your view or access. Here is an example of what you will see.

The screenshot shows a web interface titled "Documents". At the top, there are filters for "Document Type" (set to "All") and "Upload Date" (with a calendar icon). Below the filters are several tabs: "Personnel", "Payroll", "I-9", "Confidential PHI", "Confidential - Other" (which is selected and highlighted with a blue bar), "Signed Acknowledgements", "Other", and "EE Uploads". The main content is a table with the following data:

Document Type	Document Description	Document Name	Document Upload Date	View Document	Edit	Delete
Federal Reporting Data	Disability	DisabilitySelfidentification.pdf	1/18/2021	View Document		
Federal Reporting Data	EEO	EEOSelfidentification.pdf	1/18/2021	View Document		
Federal Reporting Data	VETS	VETSSelfidentification.pdf	1/18/2021	View Document		

Click on "View Document" to open and review the document loaded.

Name/Contact Information Updates

Anytime you see a menu item with the word "Updates," it means you can change the information on that menu item. It may need an approval from your HR department or manager prior to becoming effective, however you will receive a system generated email when it is approved.

On **Name/Contact Updates** you can change your address.

Employee Address

A change of address may cause a change in taxes.

Address: 1527 West Main Street

* Zip Code: 44854

H: AUBURN TOWNSHIP OH (CRAWFORD COUNTY)
 City: CHATFIELD TOWNSHIP OH (CRAWFORD COUNTY)
 State: CRANBERRY TOWNSHIP OH (CRAWFORD COUNTY)
 Taxable School District: LIBERTY TOWNSHIP OH (CRAWFORD COUNTY)
 NEW WASHINGTON OH (CRAWFORD COUNTY)
 RICHMOND TOWNSHIP OH (HURON COUNTY)
 SANDUSKY TOWNSHIP OH (CRAWFORD COUNTY)
 VENICE TOWNSHIP OH (SENECA COUNTY)

- Enter the new street address and proper zip code.
- When entering a zip code, you may get a drop-down menu with multiple towns listed.
- Choose the proper city or town because they may affect your taxation.
- Click on **Save**.

Note: A change of address may cause a change in taxes.

Tax Updates Wizard

If you have access to **Tax Updates Wizard**, you can change your withholding information for any Federal, state or local jurisdictions in which you are paying taxes. Here are some of your options.

Tax Updates Wizard

Please select which sections you would like to complete:

Note: Opting out of jurisdictions, to which you may be liable, may result in not enough taxes from being withheld or your employer to withhold at a higher rate.

Federal

I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me
 I wish to NOT complete forms for this jurisdiction at this time

Pennsylvania Resident

I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me
 I wish to NOT complete forms for this jurisdiction at this time

Help Docs

For W-4 Employee Withholding Certificate, follow the instruction below:

- Click **Start**
- Select the Form you want to complete
 - Federal, state or local forms based on your tax location will be listed
 - Select I want to skip this section is no changes on a particular tax
- Click Continue
- Complete the Survey (if applicable to jurisdiction)
- Click Next
- Click Start
- Respond to any questions asked
- Select a Filing Status (if applicable)
- Respond to any questions or use the worksheet
- Review information or return to previous page to make changes
- Submit Form
 - Scroll down to see the completed form and review
 - Enter the last 4 digits of your Social Security Number
 - Click Under penalties of perjury, "I declare this certificate to the best of my knowledge and belief is true, correct and complete"
 - Click Submit Form

For 2020 W-4 Employee's Withholding Certificate, the new 2020 W-4 will be available. For help with completing the form, go to www.irs.gov and review the [Frequently Asked Questions](#).

There is also a [Tax Withholding Estimator](#) available on the IRS website to assist with the completion of the form.

Jobs

When you see a menu item without the word "Update," it is probably a view-only screen. An example is that is **Jobs**. Your employer determines your access.

View-only means that you can view the information your employer has in the system. You can check for accuracy at any time. If your employer makes a change, the change will be reflected in your view. However, your screen will not include an **Edit**, **Add** or **Save** button.

Here is an example of a view-only screen:



Employee Profile Picture

If you have a menu item called **Employee Profile Picture**, you can upload a picture of yourself into the system. Managers, Supervisors and administrators of the system will also be able to see your picture. Please check with your company policy on the types of pictures that are acceptable.



- In order to upload a picture, click on the ellipsis icon (box with the three dots).
- It will open a location on your computer.
- Find the location where your picture is saved.
- Click on the picture and select **Open**.
- Click on the **Save** icon.

Help Docs

More Menu Items

Remember, when you log into Employee Self-Service (ESS) you may see more or less menu items than described in this document. If you do not see a menu item, it means your employer has not granted access, or is not using that screen for information. If you see a menu item without the word "Update," you can just view the information. It is always best to view any information for accuracy. If the menu item has the word update, you can change the information on that screen.

Some other menu items you may have access to in either a "View" or "Update" capacity are:

- Company Assets
- Awards
- Prior Employment
- Training
- Skills
- Education
- Certifications
- Direct Deposit
- Salary
- Personal
- Employee Contacts
- Performance Reviews, which can include Pending Reviews and Review History
- Open Enrollment
- Benefits

Recap

The information stored in Employee Self-Service could be entered by your employer's HR department, Payroll department, Manager or Supervisor however you will always see the most up to date information when you log into your account. Please remember to check your information and report any discrepancies to your employer.