Modern HR
Perfecting the Art of Human Resources

iConnect

USER GUIDE FOR MANAGERS

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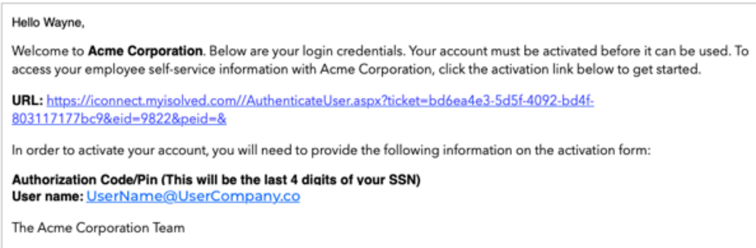
LET'S SET YOU UP

Welcome! Before you can begin using iConnect you need to complete initial set up.

As soon as you are enrolled on the system, you will receive an email containing a link which looks like this:



Hello Wayne,

Welcome to **Acme Corporation**. Below are your login credentials. Your account must be activated before it can be used. To access your employee self-service information with Acme Corporation, click the activation link below to get started.

URL: https://iconnect.myisolved.com//AuthenticateUser.aspx?ticket=bd6ea4e3-5d5f-4092-bd4f-803117177bc9&eid=9822&peid=&

In order to activate your account, you will need to provide the following information on the activation form:

Authorization Code/Pin (This will be the last 4 digits of your SSN)
User name: UserName@UserCompany.co

The Acme Corporation Team

Simply click on the link and you will be taken to a set up page:

Your **User Name** is the email address provided to you by your employer. If you don't have a work email address, a personal email address may be used. This will be your User Name every time you log 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: RachelCam@testsetup.com
Client Code: 1000
Company Name: Acme Corporation
Employee Name: Rachel Test

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.

rm 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:
Registering a cell phone number will give you the option to have login Authorization Codes texted to you.

Continue Cancel

You must enter an **authorization PIN**. This is the last 4 digits of your Social

Passwords must be a minimum of 12 characters, at least one lower case letter (a-z), one upper case letter (A-Z) then one special character. You can use spaces!

Set your **challenge question** and answer and confirm your answer.

PRO TIP: Add your cell phone number so you can be sent verification texts if you access iConnect from a different IP address (the system needs to verify it's you!)

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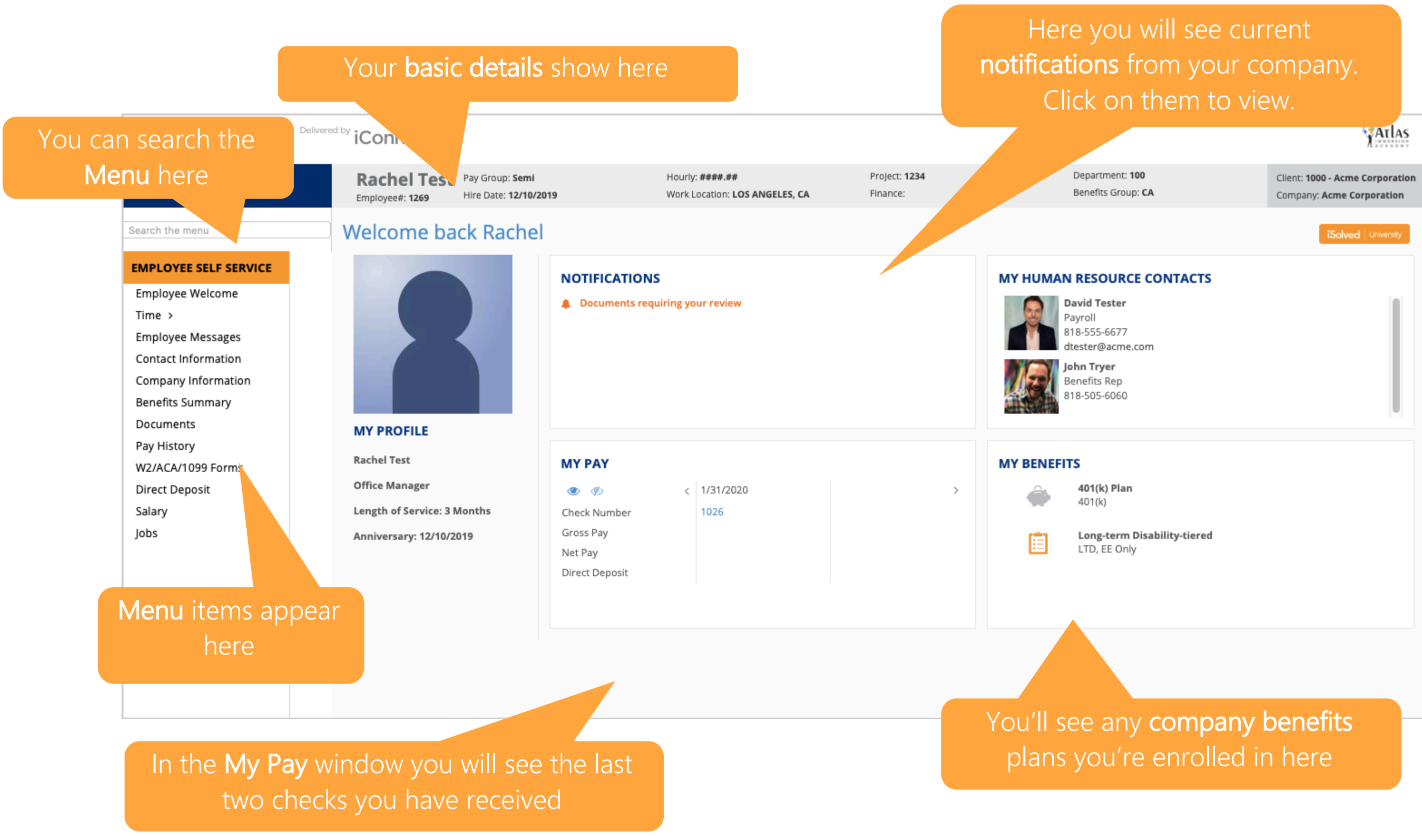
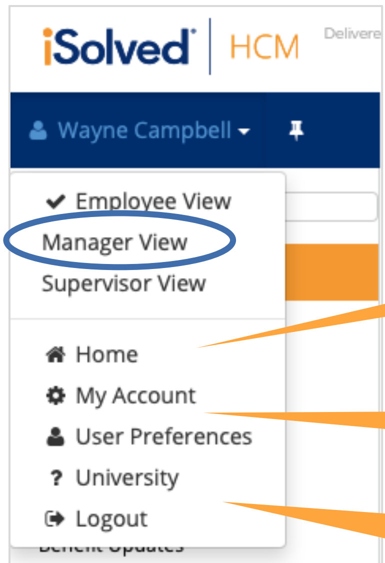
FIRST TIME LOGIN

Once you have completed set up, you can click CONTINUE. For your first time you will be logged in to the EMPLOYEE view of iConnect. Your home screen will look like this.





To switch your view to **Manager**, go to the drop-down menu which you will find under your name on the left side of the screen.

Home takes you back to your **Welcome page**

In **My Account** you can add or change your cell phone number, change your password and change your security question and answer

Click on the **University** link to create an account for access to fantastic help, information and videos about the iConnect system

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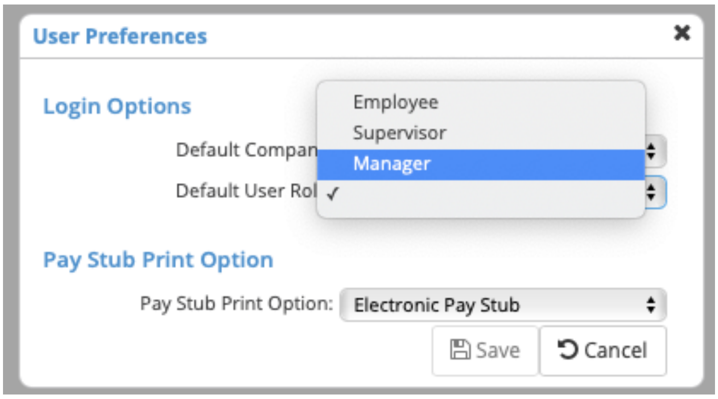
- Click on **User Preferences** and select **Manager** as the **User Role**. This enables you to see the right iConnect view for your role every time you sign in. **Default Company** will automatically be filled with the name of your company.



Here you can also opt out – or in – to receiving printed pay stubs. If you select **Electronic Pay Stub** you will still be able to see all your past pay stubs - and download them – by [SWITCHING YOUR VIEW]() to Employee and going to your own **Pay History**.

PRO TIP: Be sure to save the **iConnect URL** to your FAVORITES or bookmark the page!

FUTURE LOGIN

It's really straightforward. Go to the Sign In page and access the system using the details you set up originally.

If you enter an incorrect password 5 times, you will be locked out of the system for 10 minutes. Once 10 minutes has passed use the **Forgot Password** link to reset.

PRO TIP: Click on Forgot Password after your 4th attempt so you don't get locked out of the system.

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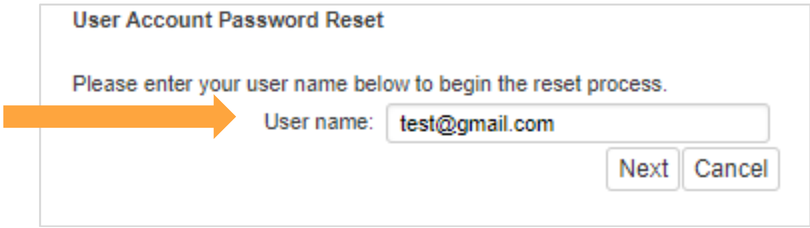
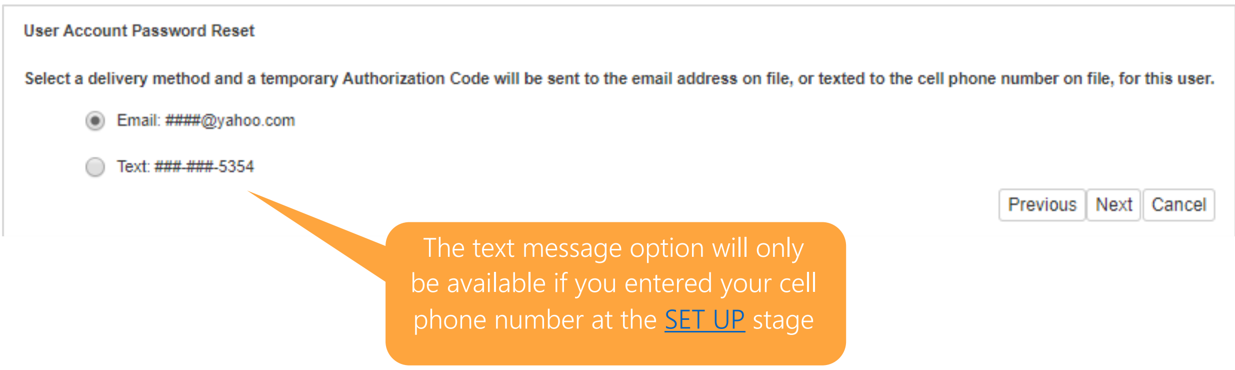
RESETTING YOUR PASSWORD

If you need to reset your password, simply click **Forgot Password** and enter your email address:



You will be given the option of having your **temporary authentication code** sent in either an email or text. Click on the option you prefer and then select **Next.**



Then simply:

- Verify the answer to your **Challenge Question**
- Create a new **Password**
- Confirm your new **Password**
- Click **Next** and log on using your new password

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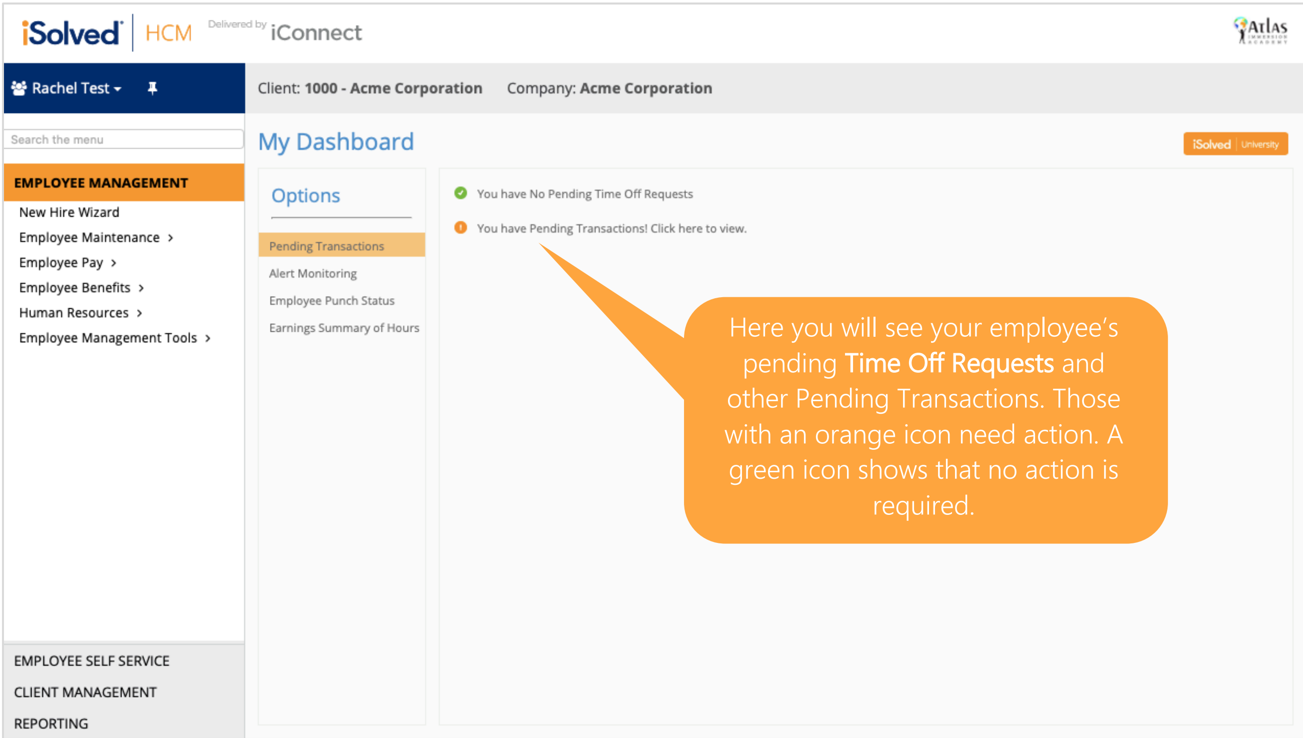
EMPLOYEE MANAGEMENT

MY DASHBOARD

When you've switched to the **Manager** view of iConnect and you sign in again your screen will look like this:



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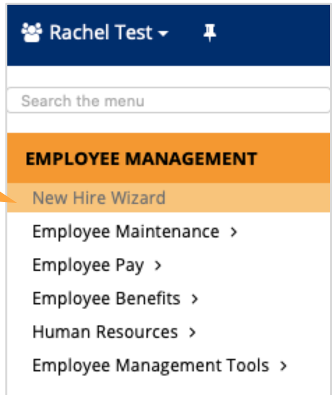
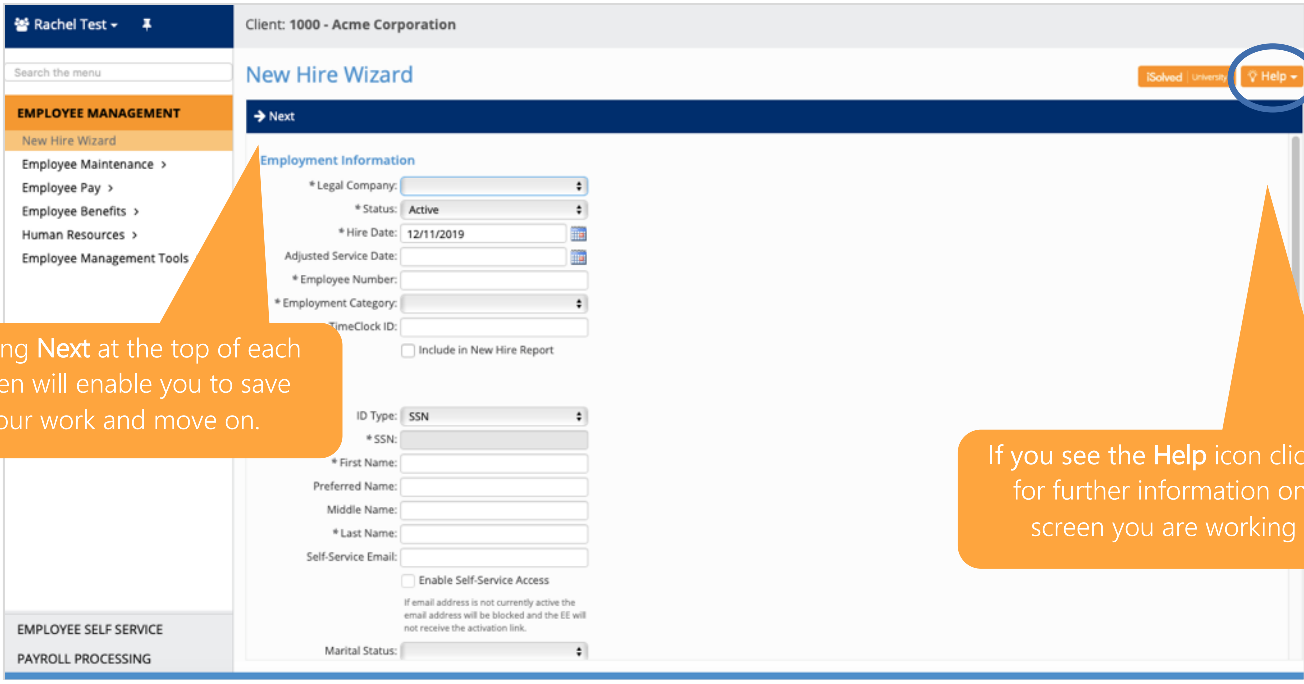
NEW HIRE WIZARD

You will find the **New Hire Wizard** under **EMPLOYEE MANAGEMENT** in the main menu on the left of your screen



New Hire Wizard offers a step-by-step approach for adding a new hire to iConnect. It ensures you capture all the employee data needed to create a full employee file.



Clicking **Next** at the top of each screen will enable you to save your work and move on.

If you see the **Help** icon click on it for further information on the screen you are working on

There are six sections to complete:

1. Employment & General Information
2. Personal Information
3. Salary and Job
4. Tax Location
5. Organization Fields
6. Direct Deposit

PRO TIP: To onboard, remember to [INITIATE NEW HIRE] for the employee. Once they complete you can do the New Hire Wizard and I-9 verification.

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You must have all of the required information on hand to complete the New Hire Wizard. If you stop before completing all of the screens, you must begin again. Next, we explain more about each screen.

PRO TIP: Whenever you see the HELP icon in the top right corner of your screen, further information on how to use that element of the system is available

Let's go through each section of the New Hire Wizard:

EMPLOYMENT AND GENERAL INFORMATION

Fields marked with an asterisk (*) are mandatory and must be completed.

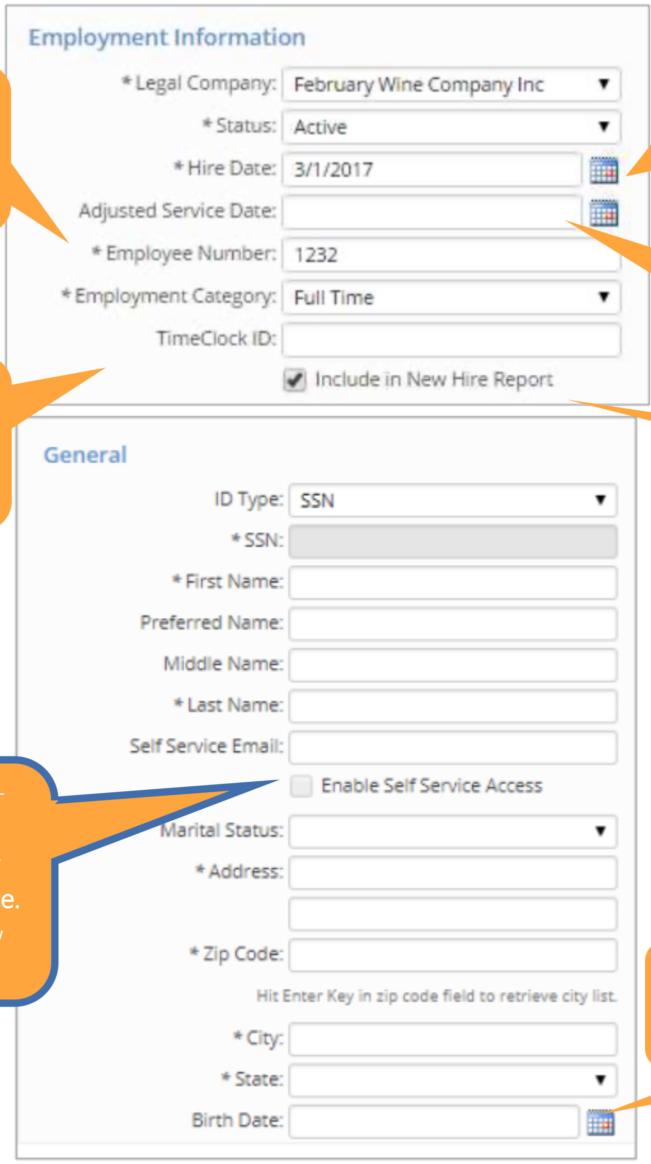
Employee Number will default to the next available employee number – you can change it if needed

Hire Date will default to the current date – you can change it if needed

Adjusted Service Date is used when an employer has a grandfathered seniority date.

Timeclock ID should be added if you use iConnect for time and attendance. Otherwise use the Employee Number

If you check **Include in New Hire Report** the New Hire will be included in the corresponding [REPORT]



IMPORTANT! Select Enable Self-Service Access if you want your new hire to have access to their own view of **Employee Self Service.** An email will be sent to the new hire with log on instructions

The **City and State** will automatically populate based on the Zip code entered

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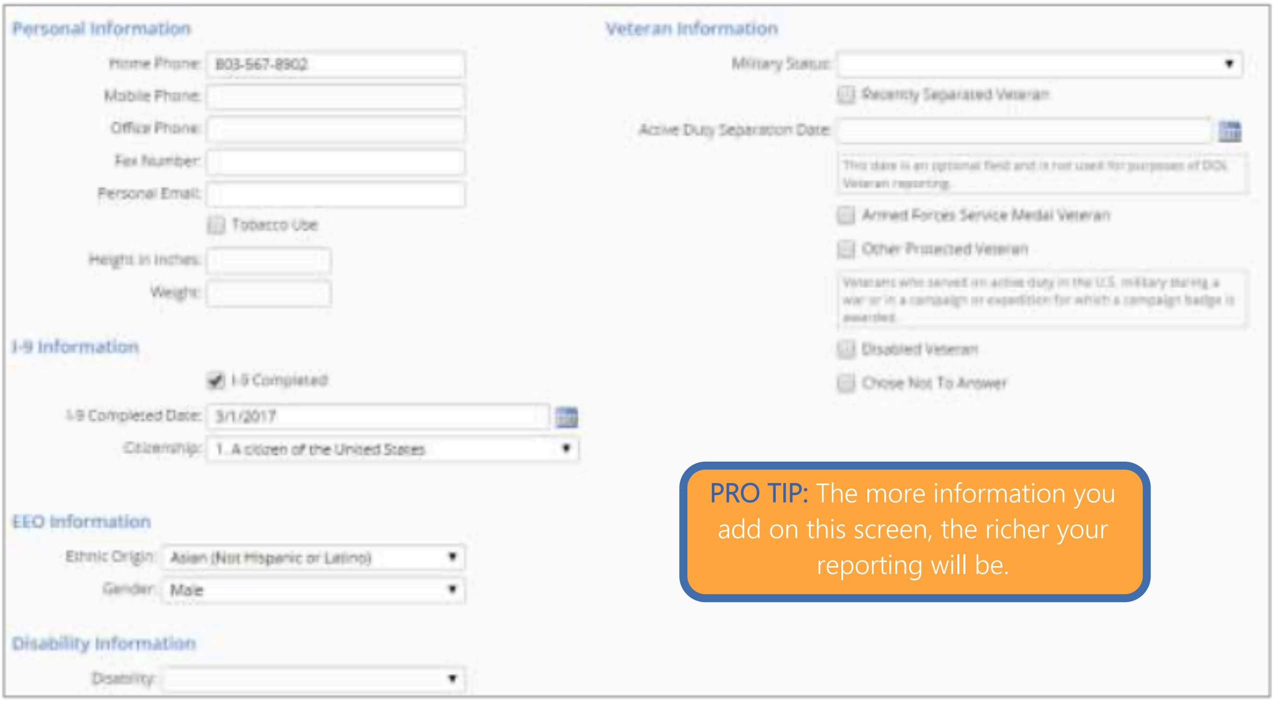
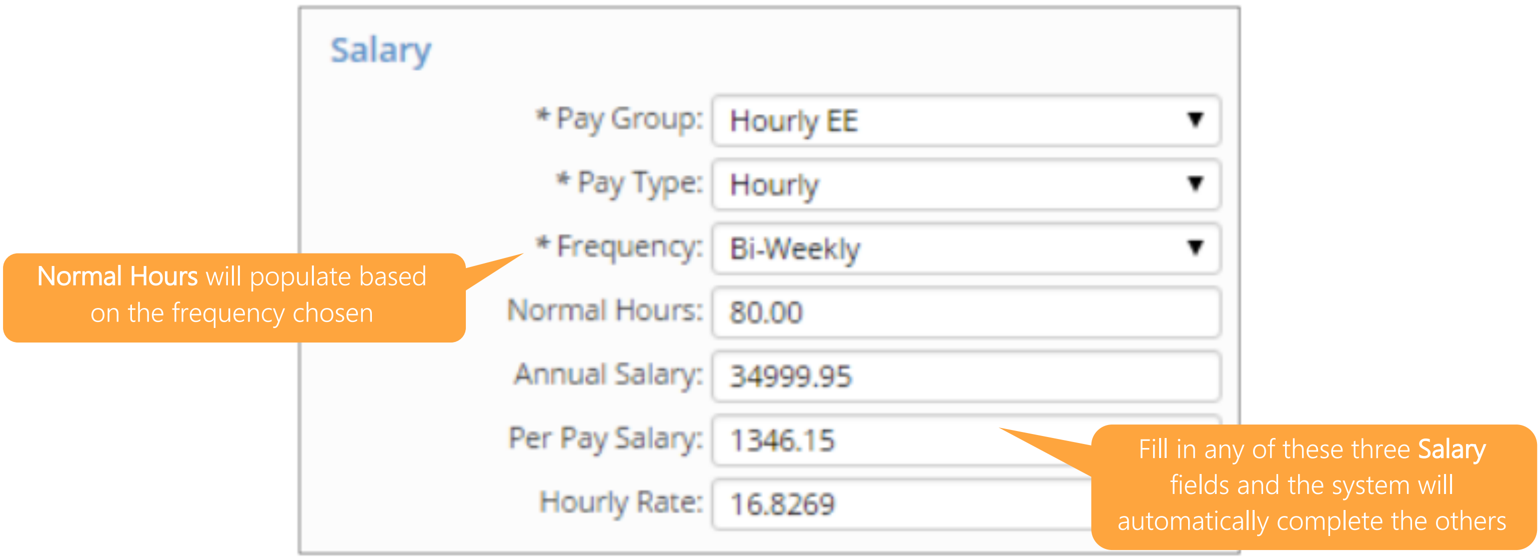
PERSONAL INFORMATION

Anything you are able to add on this screen will be useful but **none of the fields are mandatory**. If you don't have this detail, you can move straight on to the next screen.



SALARY

All pay groups for your company will be available in the first drop-down box.



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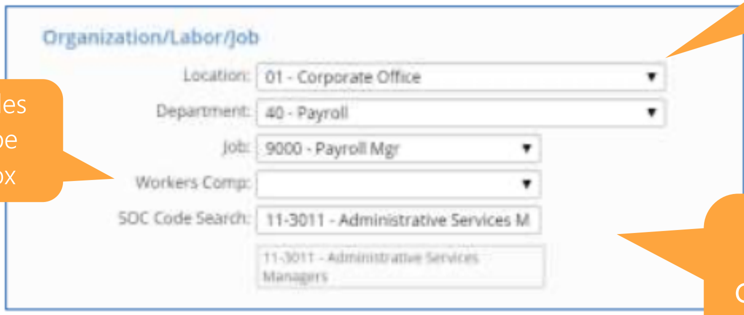
JOB

Add **Location**, **Department** and **Job** details in these fields

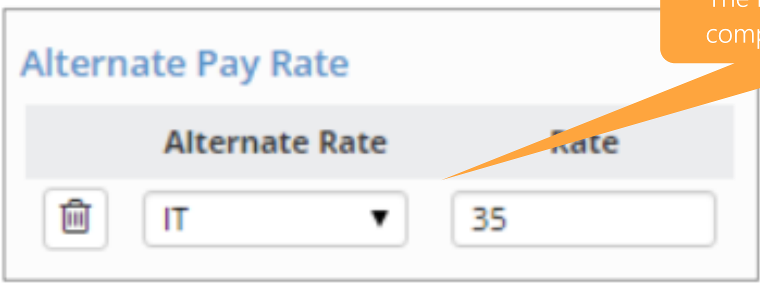
All **Workers Compensation** codes set up for your company will be available in the drop-down box



Key in the beginning of the relevant **Standard Occupational Classification (SOC)** code and the system will generate matching options

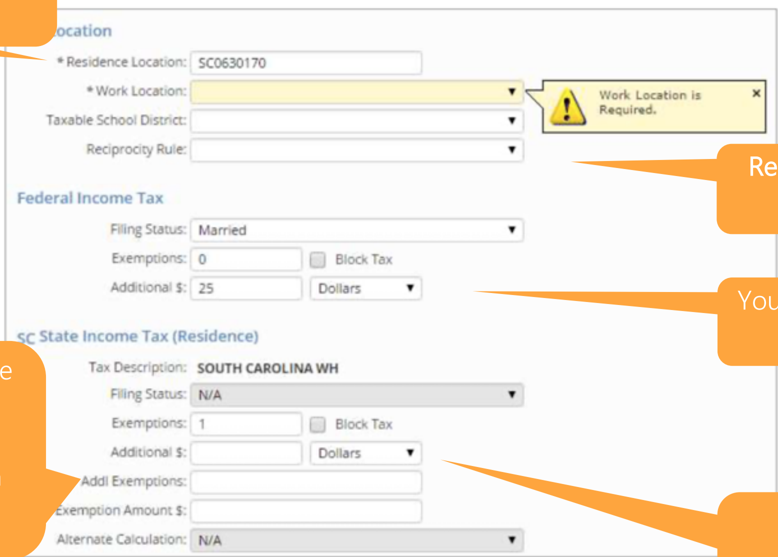
ALTERNATE PAY RATE

The **Pay Rates** relevant to your company will be available here



TAX LOCATION

Residence Location will populate based on the Zip code entered earlier



Reciprocity Rule can be left blank or resident state used

You'll find **Federal Income Tax** data on the employee's W-4

Tax Exemption is relevant if the employee's wages are not taxable due to special exemption. Chose a selection that applies.

Additional amounts can be entered in either dollars or percentages

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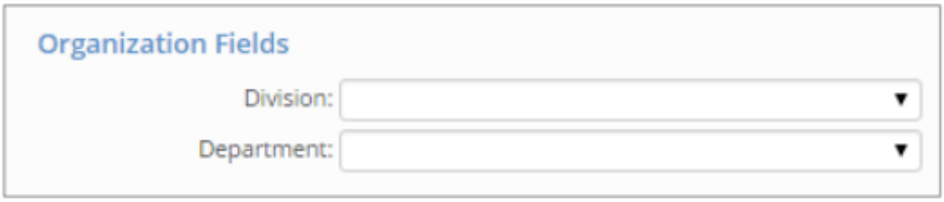
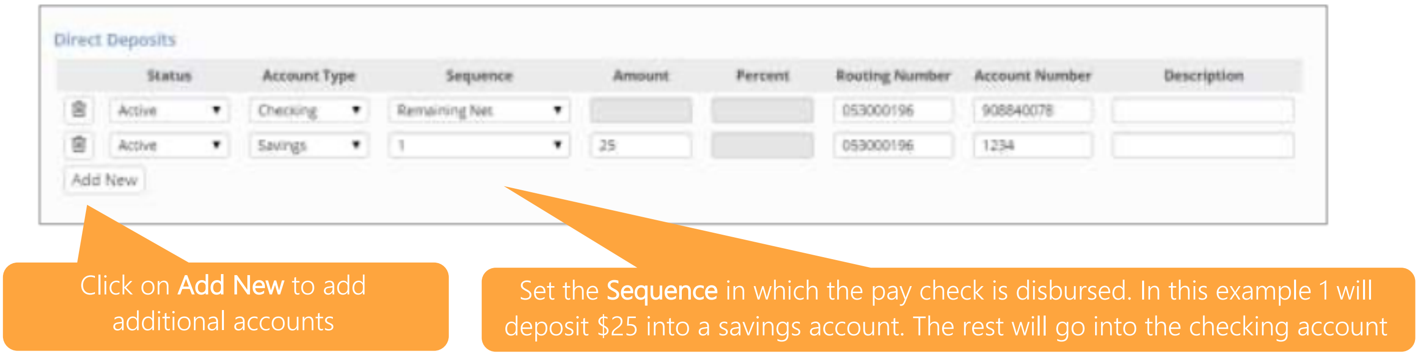
ORGANIZATION

Select the appropriate options to assign the new hire with your organizational structure.



DIRECT DEPOSIT

Employees can have as many **direct deposit accounts** as they would like.



To delete an account click the **trash can** icon at the beginning of each record.

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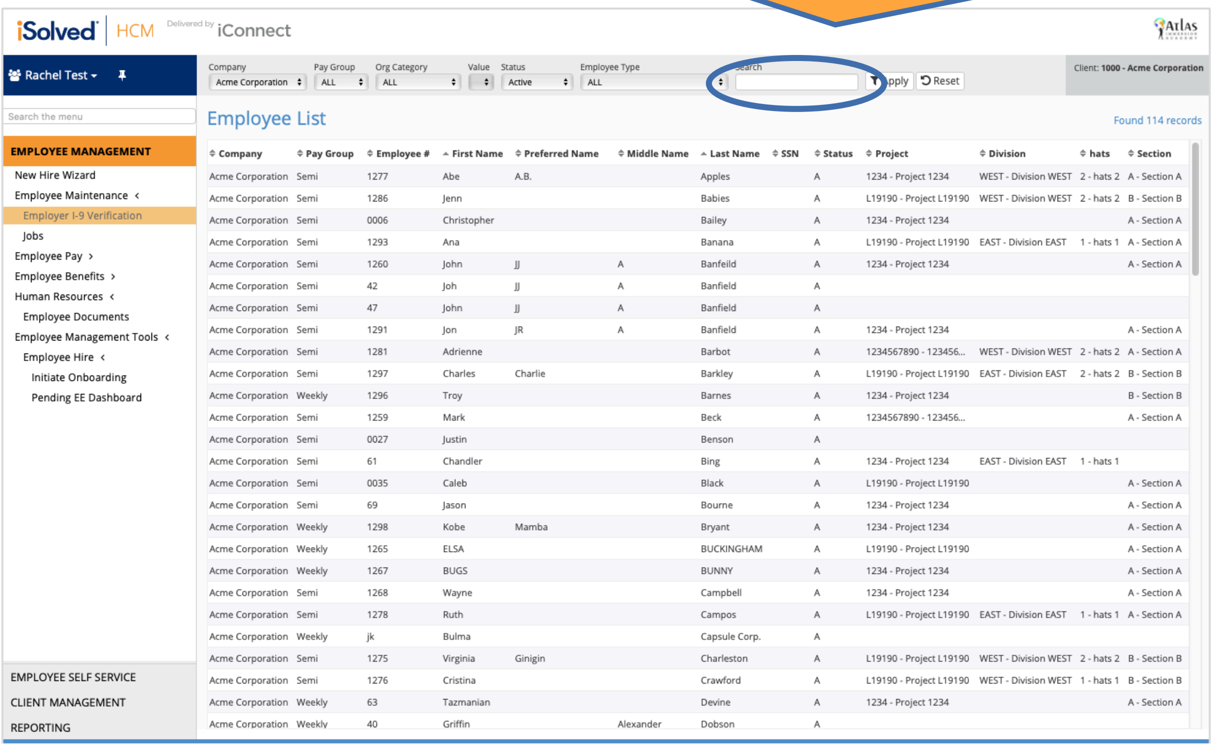
EMPLOYEE MAINTENANCE

When you first access this area of iConnect you will see a **list of your employees**. From here you can click on any individual and see a variety of information relating to them as you move through the different menu options.

Take a look at the grey search bar at the top of the screen.

There are a variety of search fields you can use to find and group employees, as well as a free form **Search** function. Be sure to always click on **Apply** once you've set your search criteria.



PRO TIP: By clicking on any of the headers, you can sort the data accordingly

When you click on an individual employee record the view changes and the grey bar at the top shows you a summary of that employee's details:

Here you can return to your **main employee list** or search for a specific employee by last name

These are the basic details for the employee currently selected

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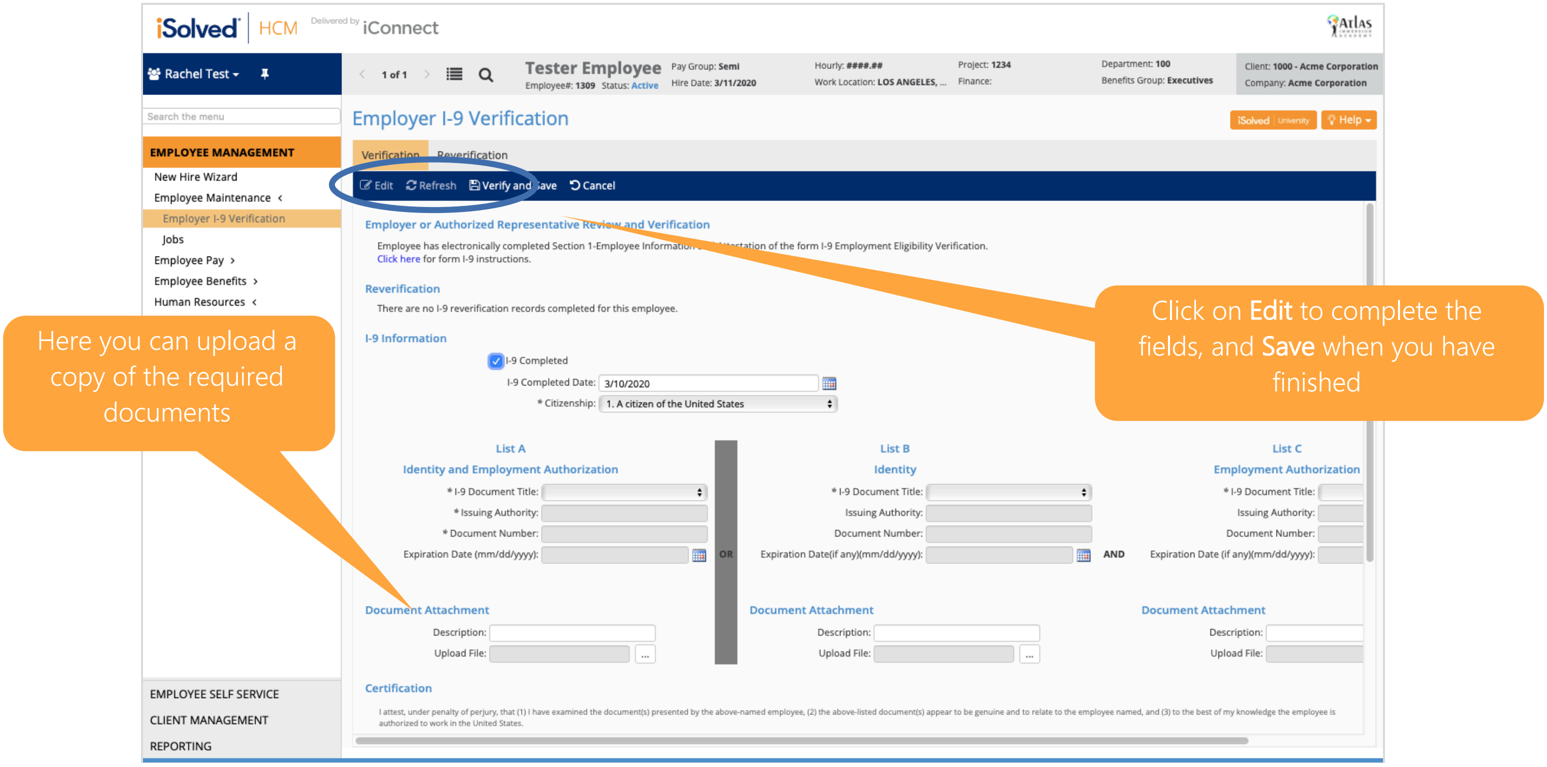
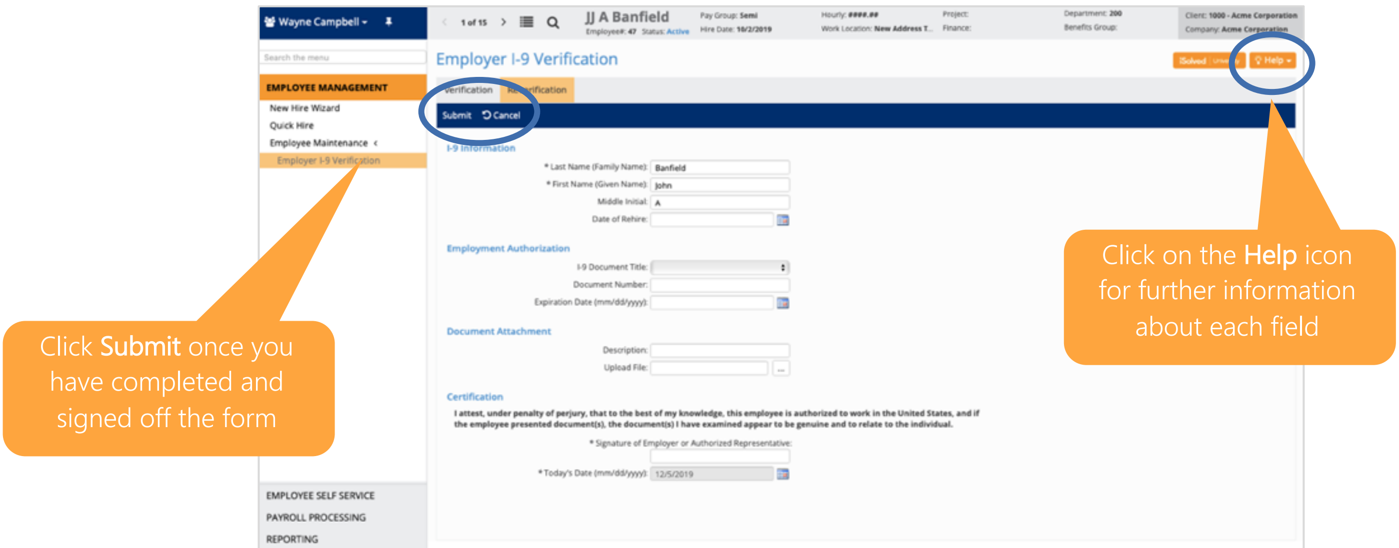
I-9 VERIFICATION

In the **I-9 Verification** section of **Employee Management** you are able to add details of a new employee's identity and employment authorization. You can also upload the required documentation to the system.



You'll notice that there's a **Reverification** tab on this screen. This is only for use in very specific circumstances relating to non-US citizen work permit changes and residency status changes. Speak to your Payroll Account Manager.



To view all documents relating to the employee go to [DOCUMENTS]() on the menu.

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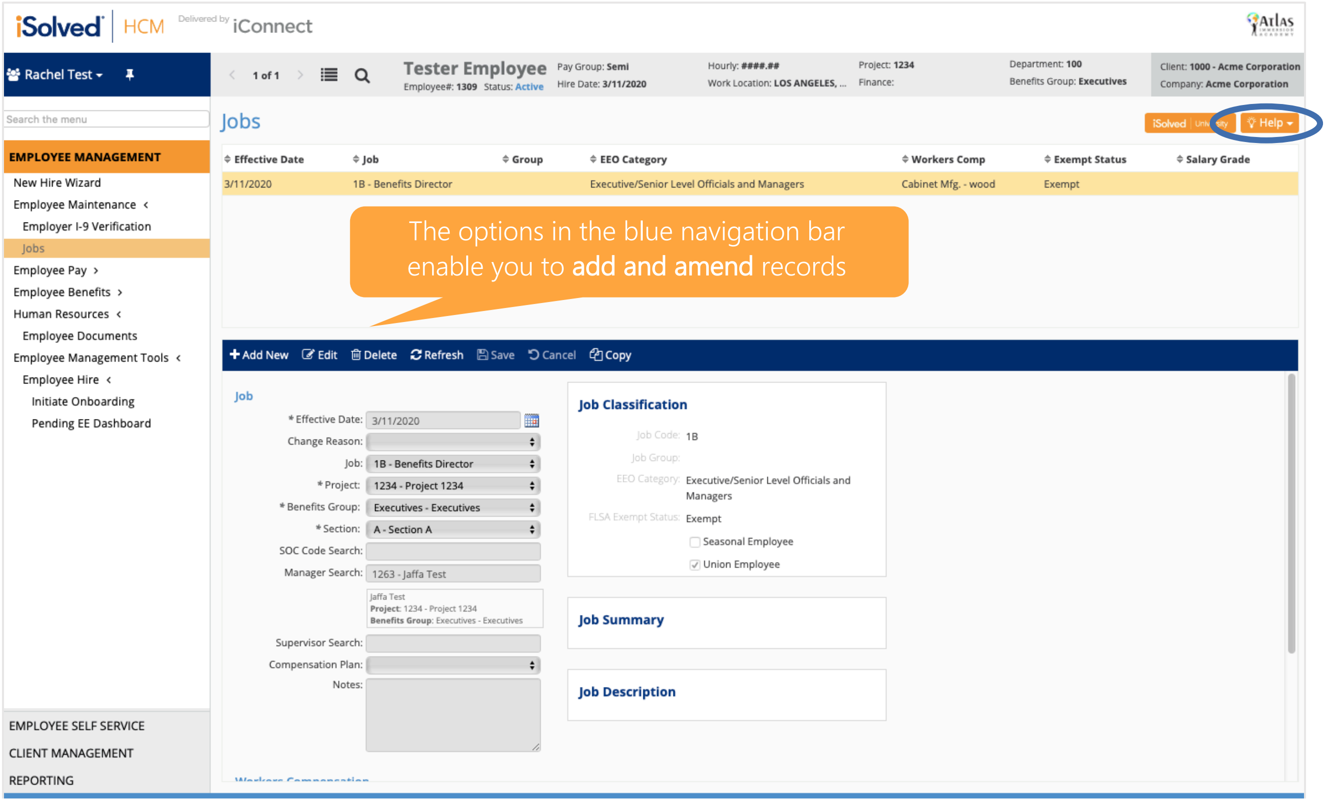
JOBS

This section enables you to add, edit and delete jobs for the employee selected. Click on the **Help** icon for details about each field.



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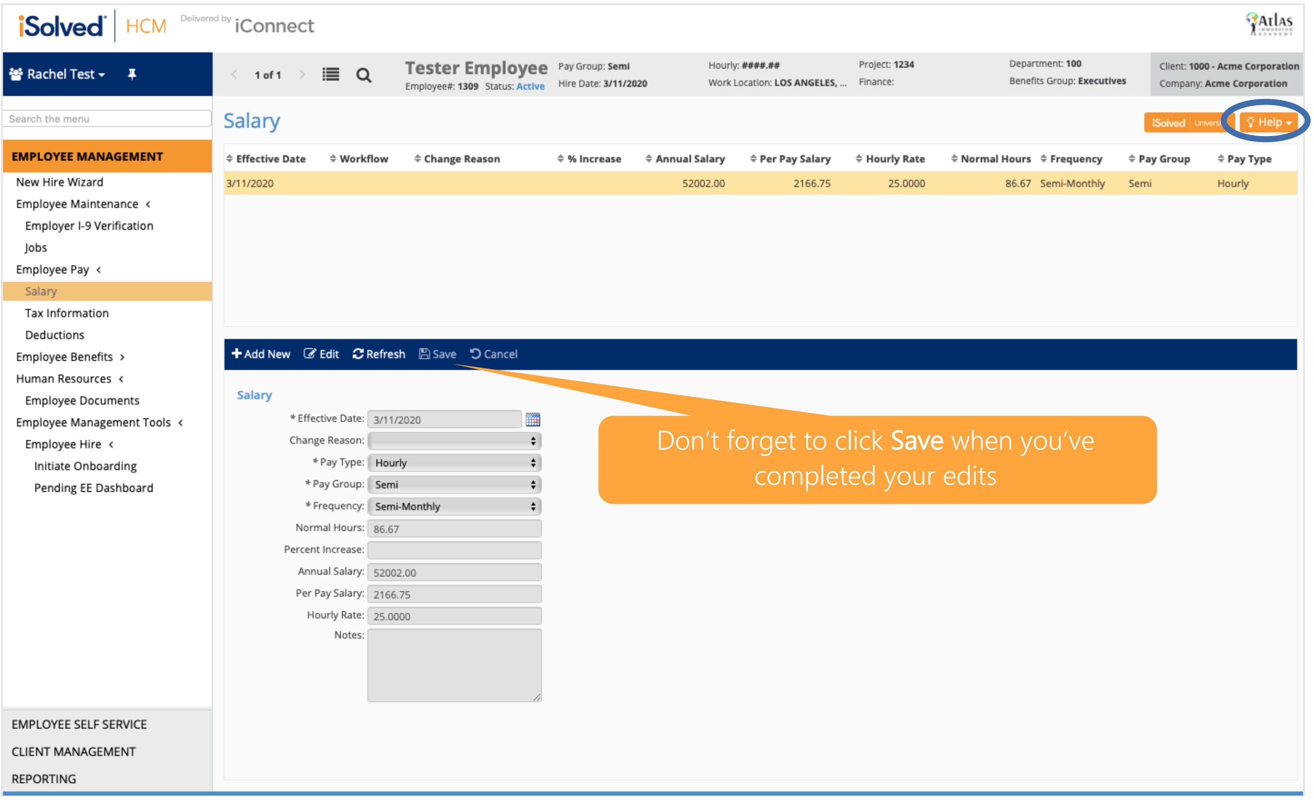
EMPLOYEE PAY

SALARY

The **Salary** screen allows you to view current and past salary information, add a new salary record, calculate an employee's rate increase and add future rate changes that will take effect automatically when the **effective date** arrives.

Click on the **Help** icon for details about each field.



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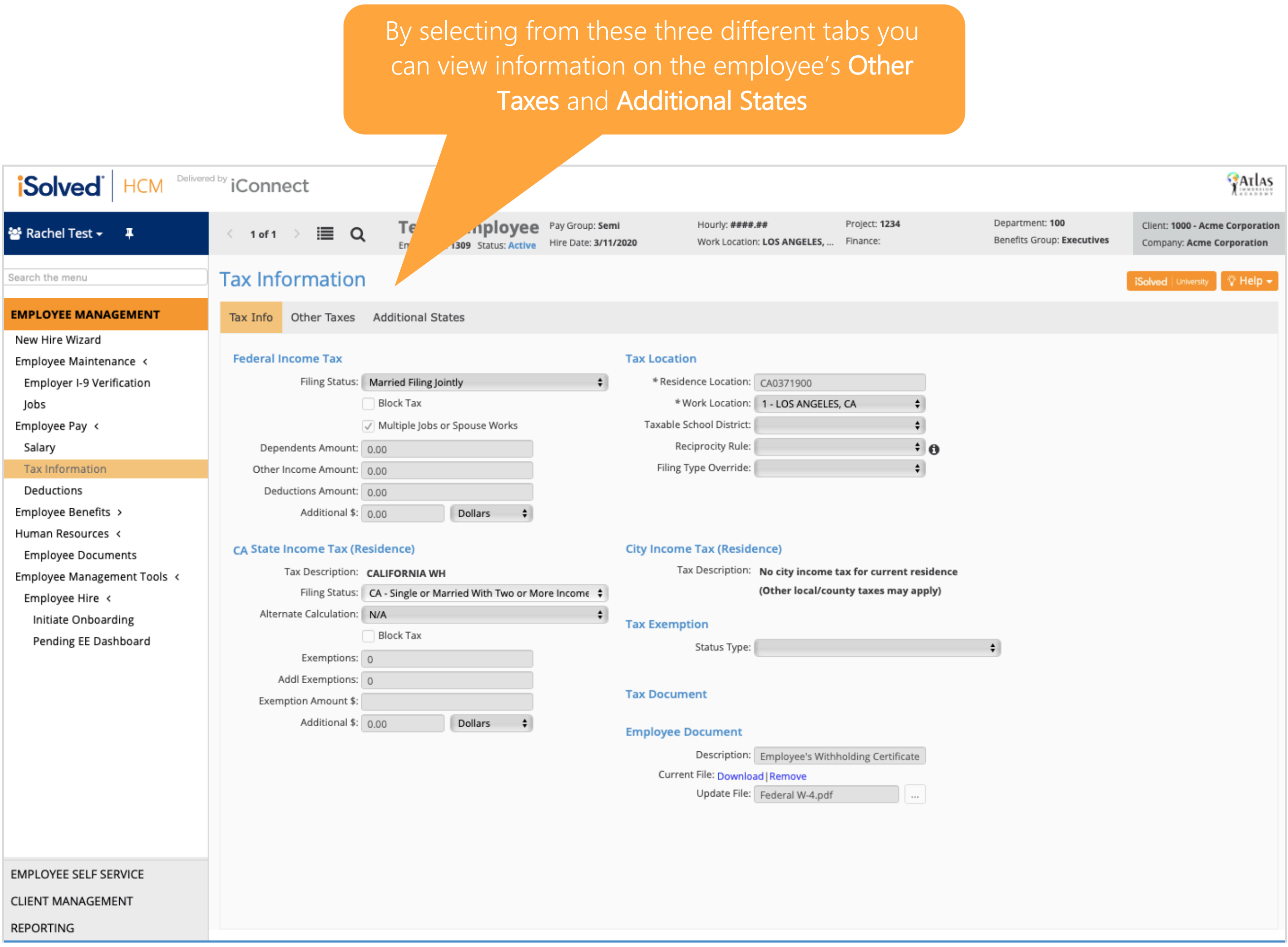
TAX INFORMATION

This screen enables you to view the **Tax Information** for the selected employee.

When the work location is added in the system via the [QUICK HIRE WIZARD](), the appropriate taxes will be set up based on the city and state. The resident taxes will automatically be determined based on the employee's Zip code.



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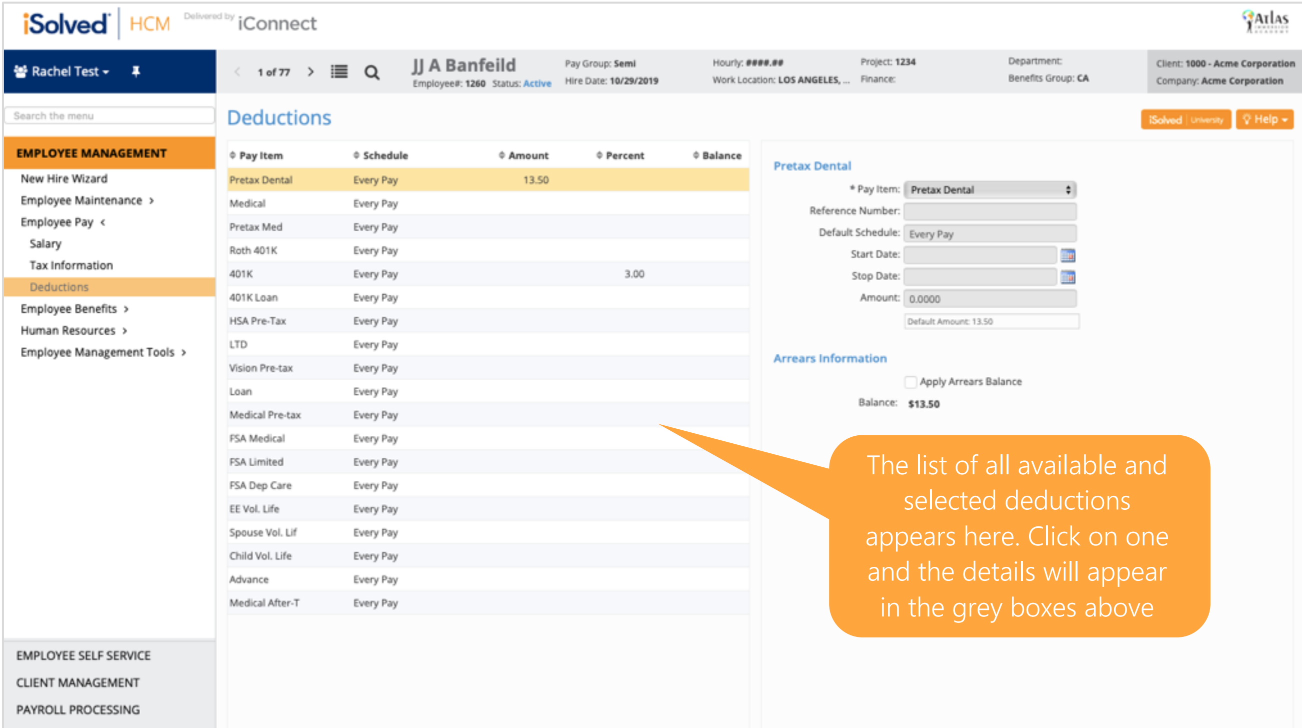
DEDUCTIONS

This screen enables you to view the selected employee's **Deductions**.

If an employee has insufficient net pay to take a deduction, iConnect will automatically track the balance.



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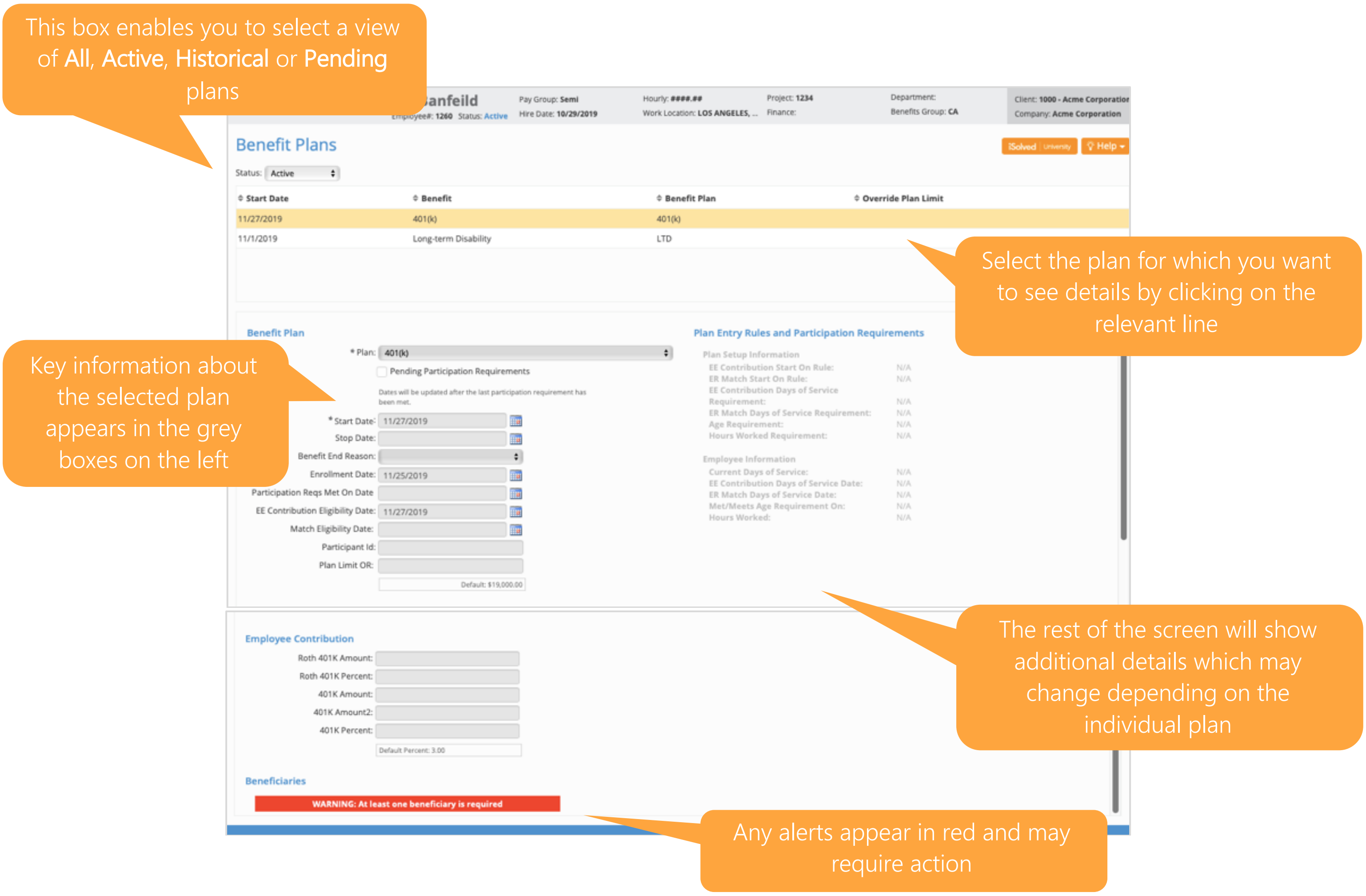
EMPLOYEE BENEFITS

BENEFITS PLANS

The **Benefits Plans** screen shows the selected employee's current, past and pending benefits.



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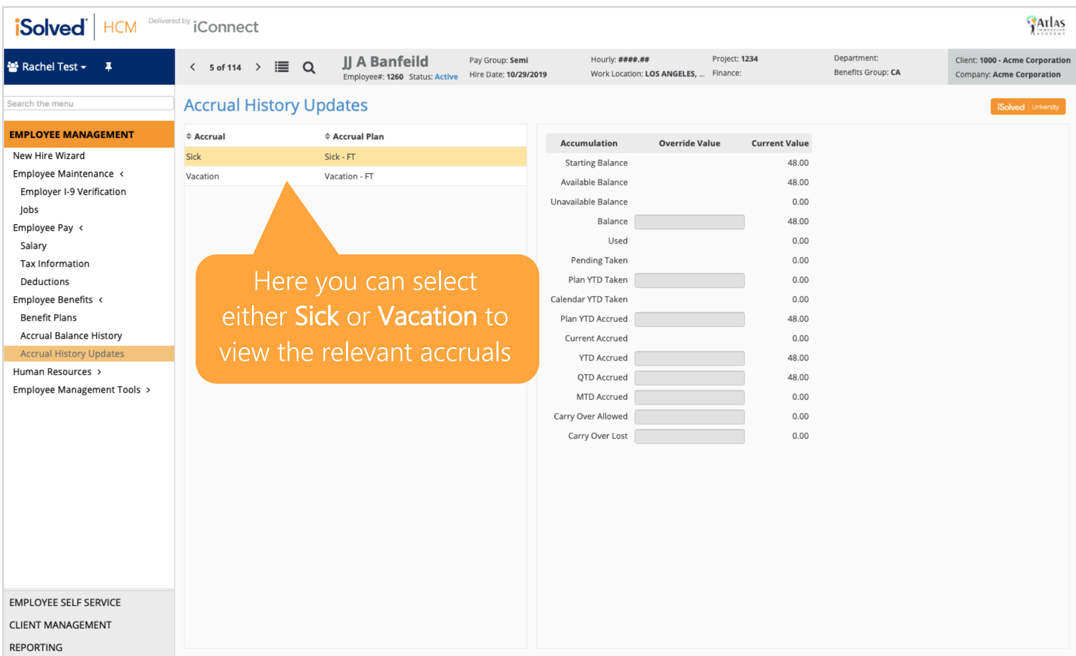
ACCRUAL BALANCE HISTORY

The employee **Accrual Balance History** screen displays the leave accrual history for every accrual plan for each payroll.

ACCRUAL HISTORY UPDATES

The **Accrual History Updates** screen enables you to view the selected employee's sick and vacation balances and see and make changes.



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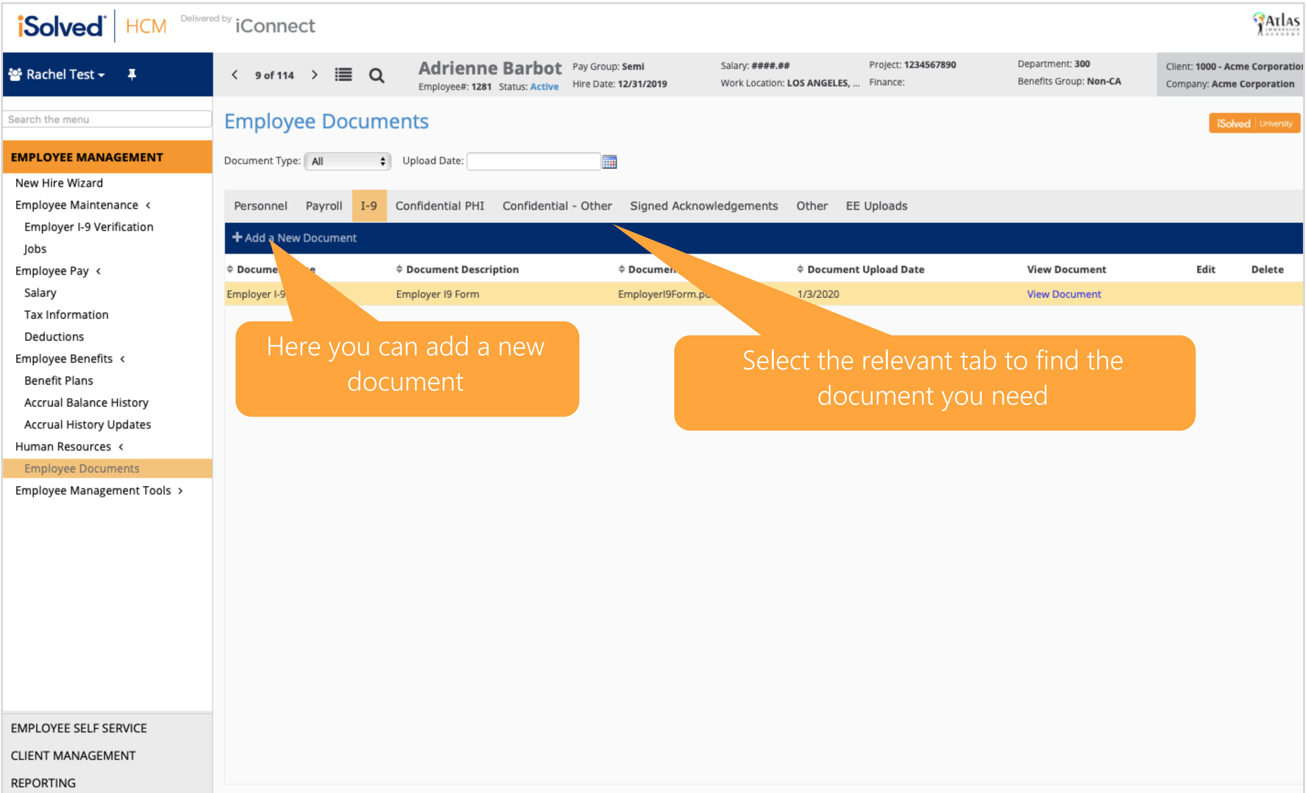
EMPLOYEE DOCUMENTS

Here you are able to view and upload **key employee documents** such as the selected employee's I-9 and W4.



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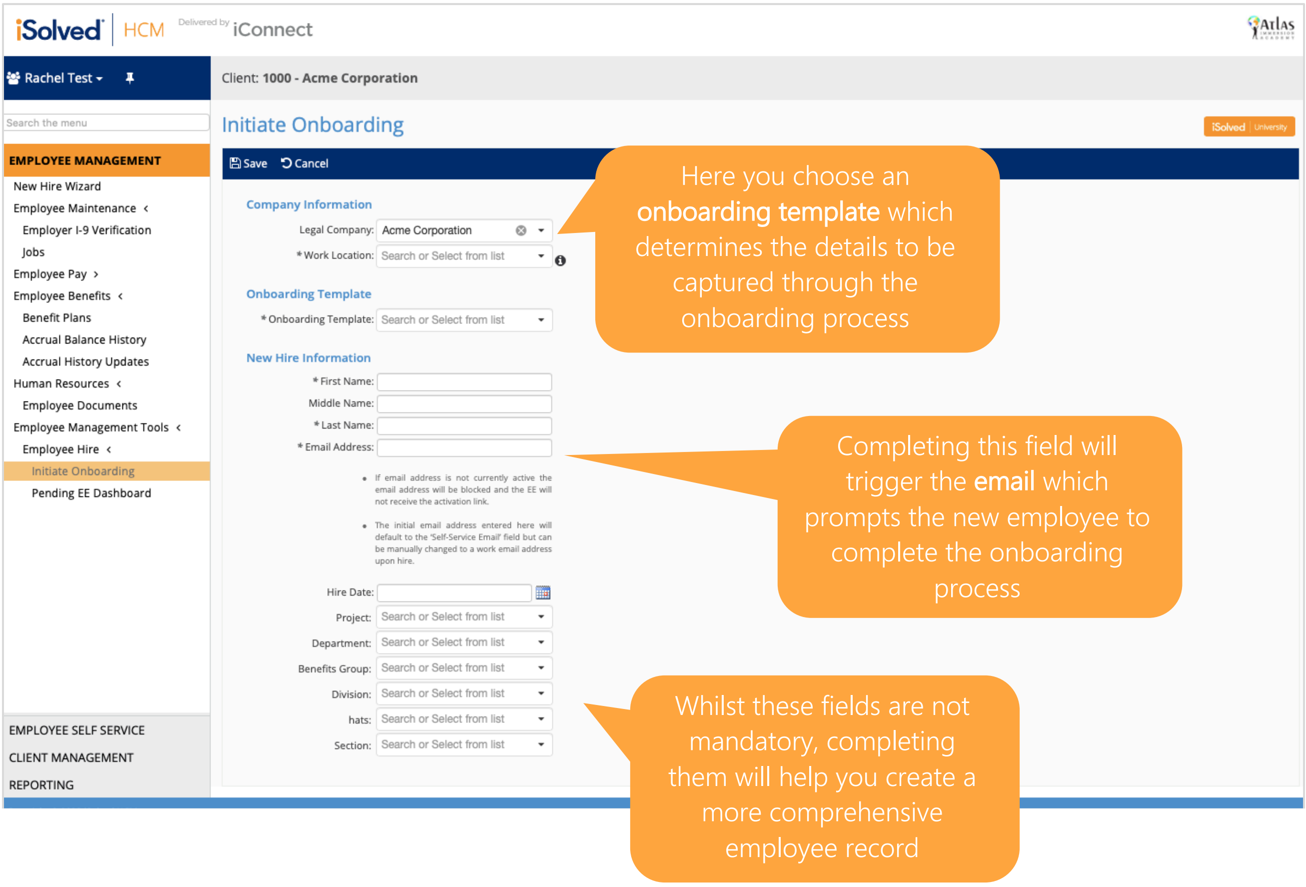
EMPLOYEE MANAGEMENT TOOLS

EMPLOYEE HIRE

INITIATE ONBOARDING

Here you are able to initiate the onboarding process for a new employee.

The critical field on this screen is **Email Address**. Once entered and saved, this triggers an email to the new hire which prompts them to complete the onboarding process.



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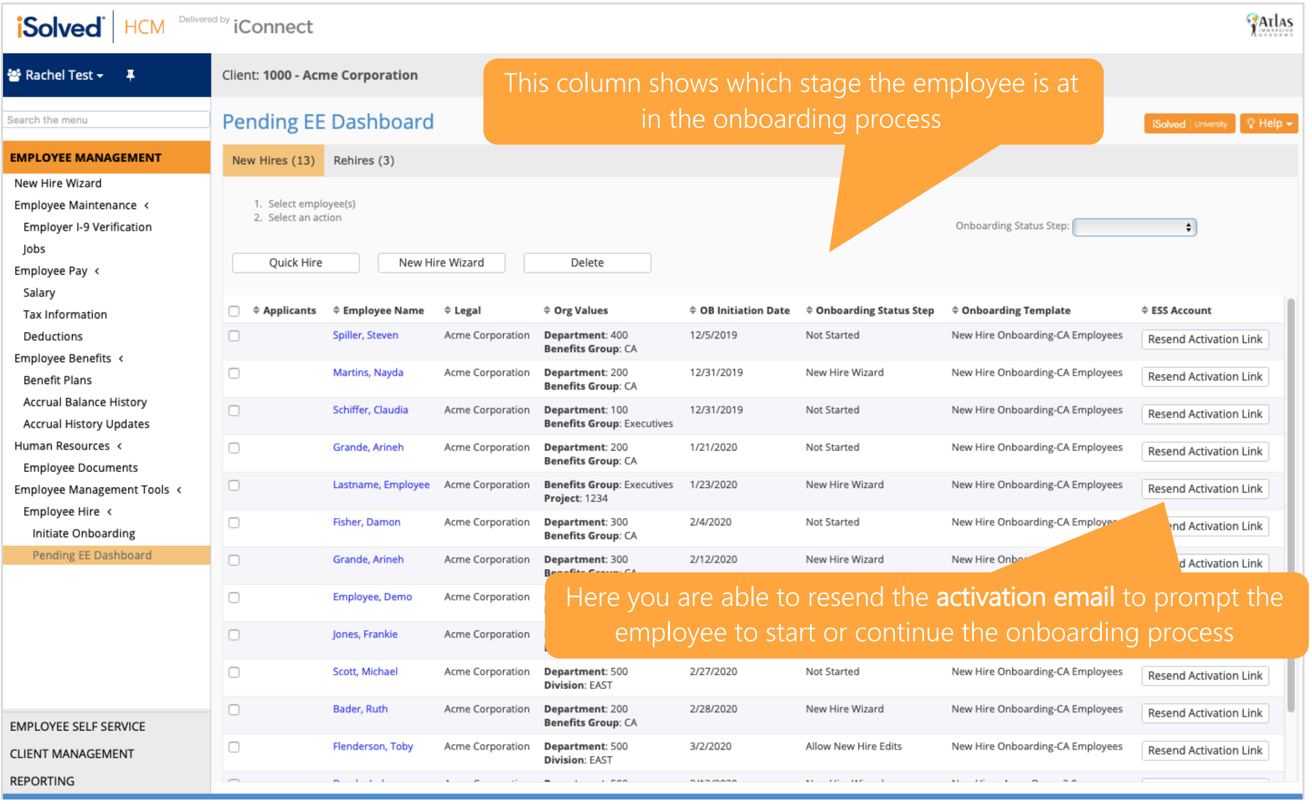
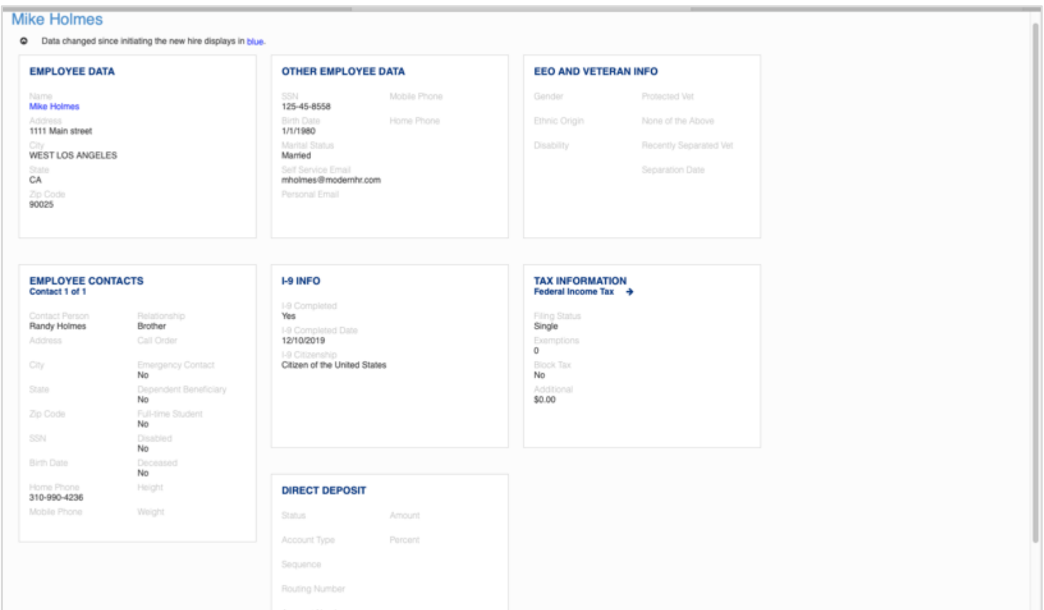
PENDING EE DASHBOARD

On this screen you can see new employees in the queue for **onboarding completion**.



When you click on the name of a new employee, if they have started the onboarding process, you will be able to see a summary of their progress. Data changed since initiating the new hire will appear in blue font.



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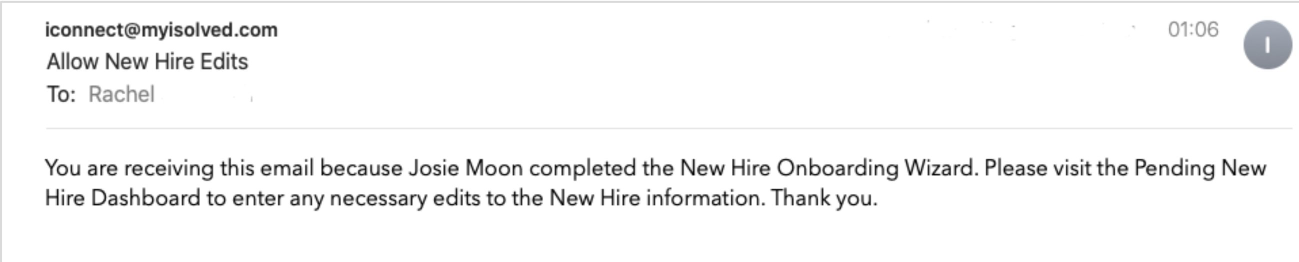
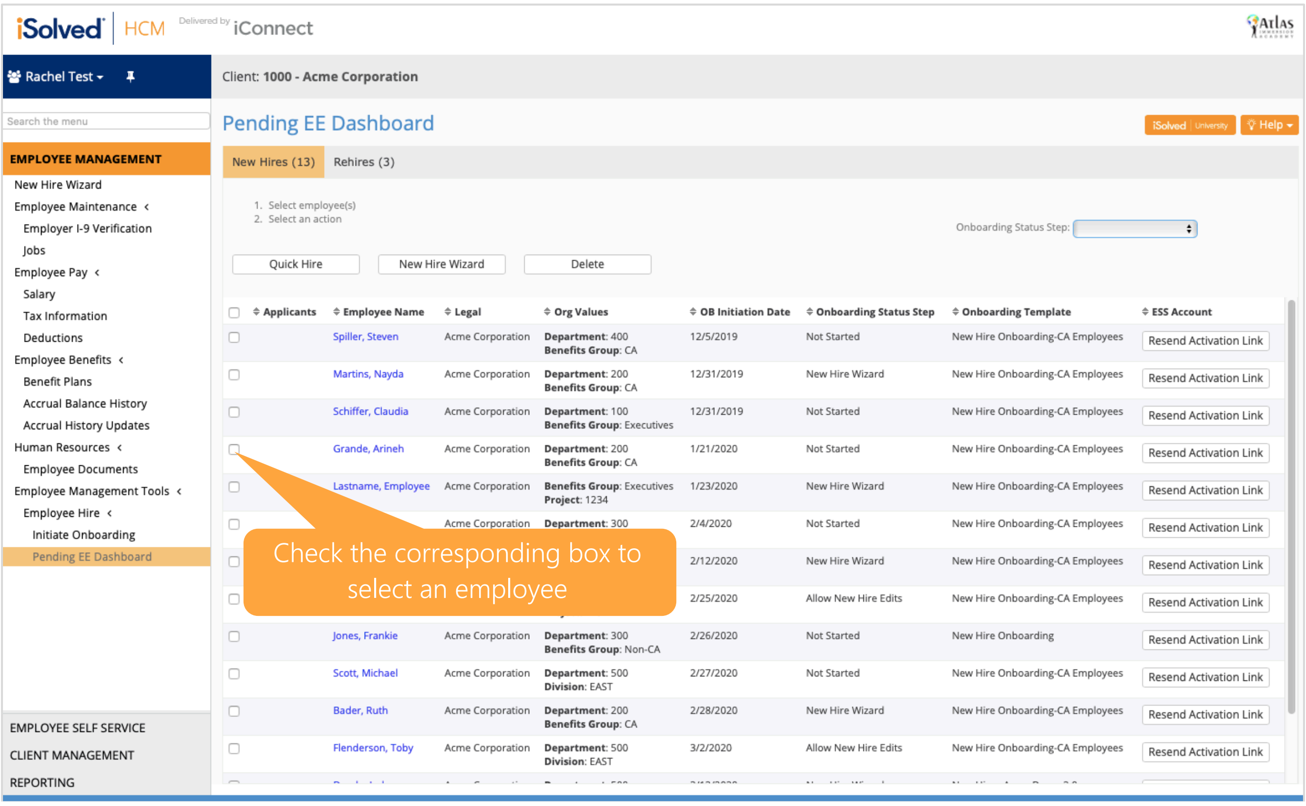
When your new hire completes their side of the process you will receive emails notifying you.


iconnect@myisolved.com
Allow New Hire Edits
To: Rachel
01:06

You are receiving this email because Josie Moon completed the New Hire Onboarding Wizard. Please visit the Pending New Hire Dashboard to enter any necessary edits to the New Hire information. Thank you.

To finish the onboarding process and add any missing data, select the relevant employee using the check box and click [NEW HIRE WIZARD] which will walk you through the rest of the onboarding process and enable you to fill in any gaps.



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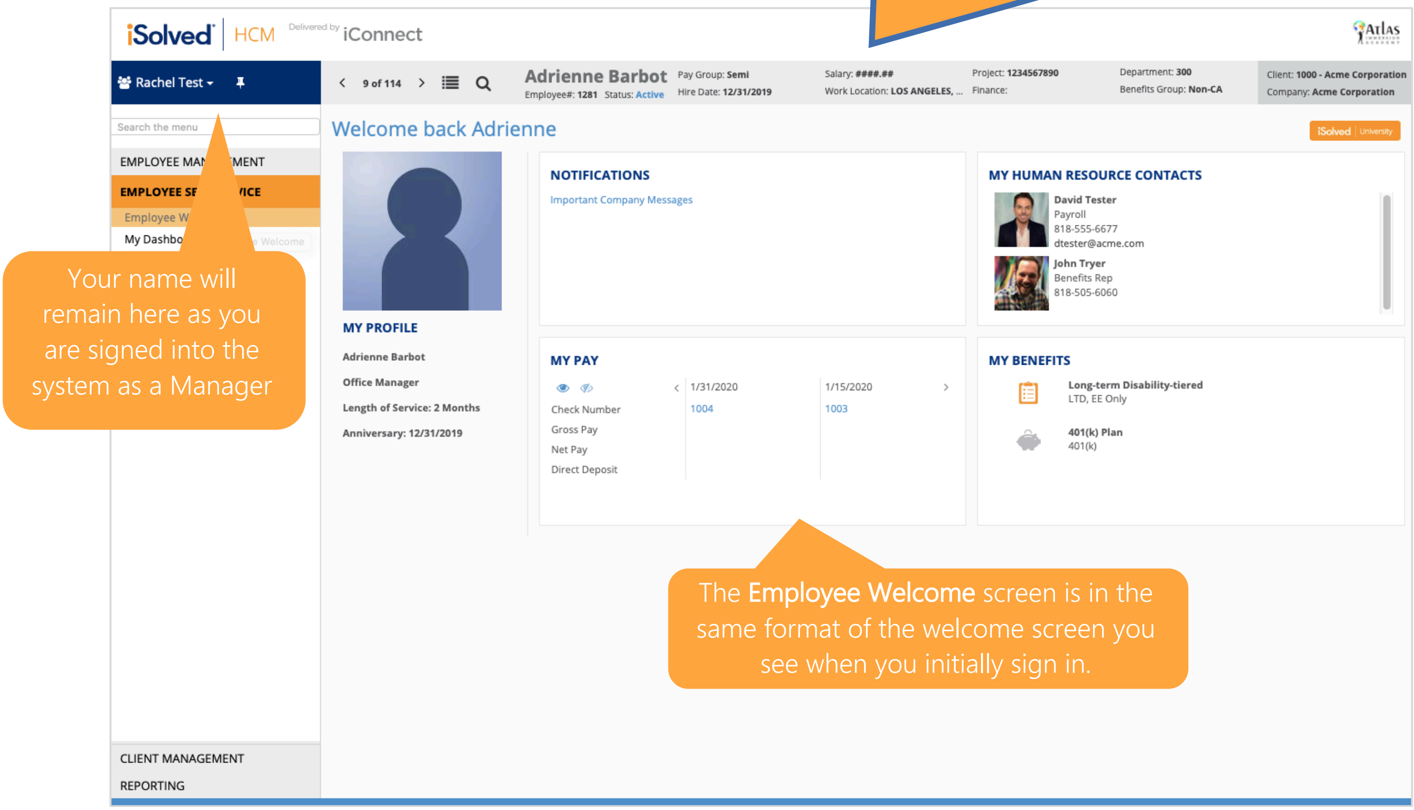
EMPLOYEE SELF SERVICE

Here you can view the **self-service screens for the selected employee**. Let's run through each.

EMPLOYEE WELCOME

Using the grey bar, you can move forwards and back through individual records using the < and > arrows, search by clicking the magnifying glass and return to the grid list by clicking on



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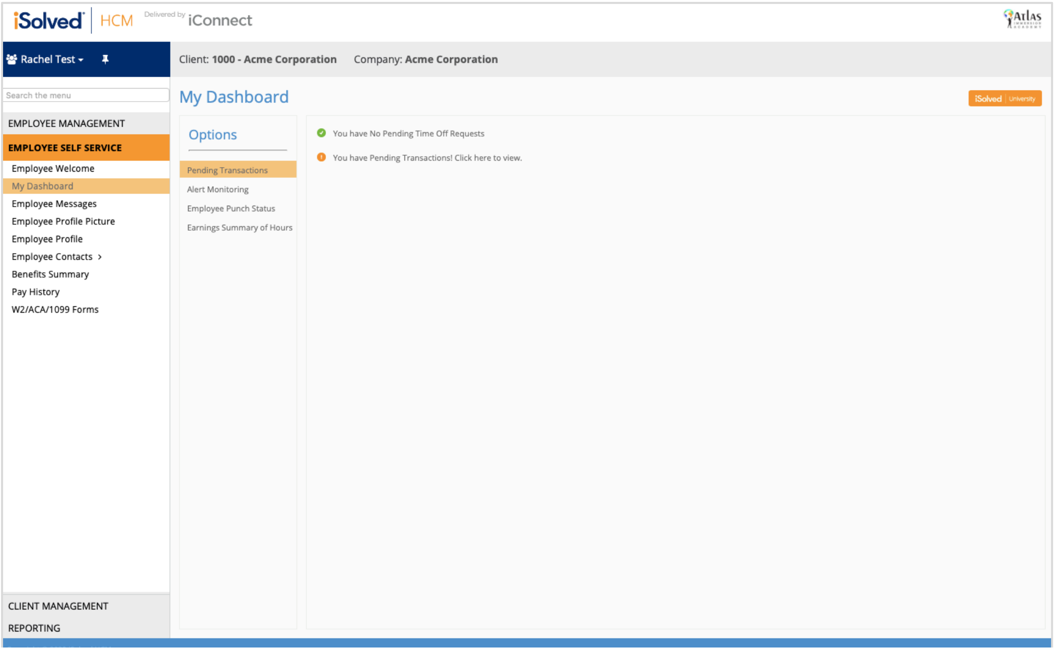
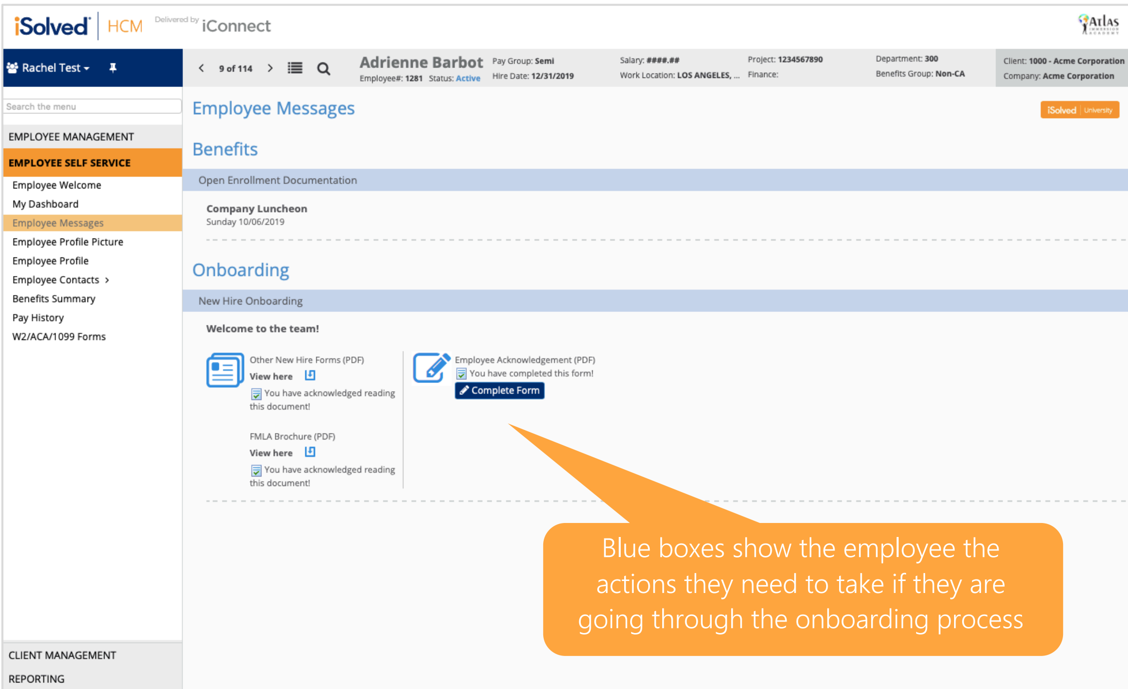
MY DASHBOARD

Here you can see the **selected employee's dashboard.** This screen is very similar to the dashboard you see when you first sign in.



EMPLOYEE MESSAGES

Here you can view the **message**s the employee has been sent. Any messages posted will result in an alert appearing on their welcome page under **Notifications.** You can also see whether the employee has read and acknowledged messages for which a response is required.



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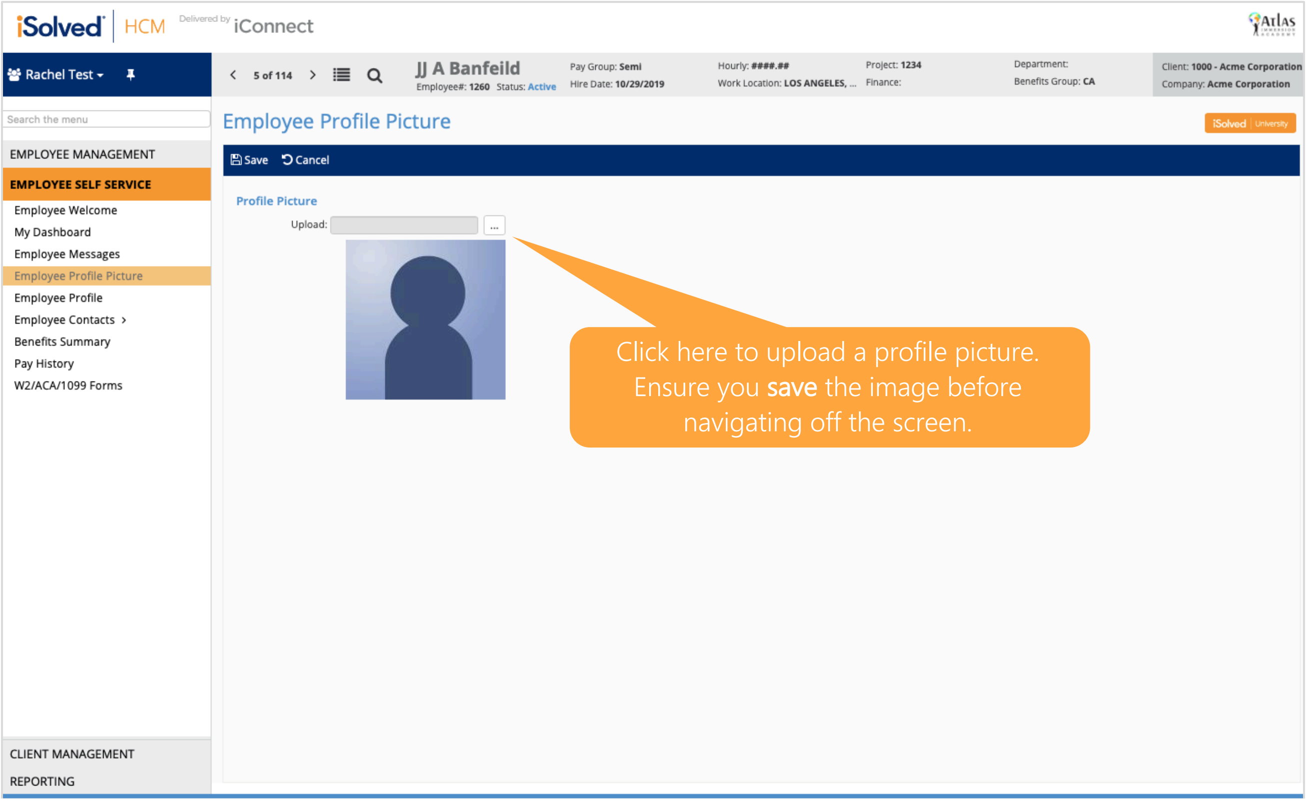
EMPLOYEE PROFILE PICTURE

Here you are able to upload a profile picture for the selected employee – simply click on the small, white square with three dots next to the upload field. Ensure you click **Save**.



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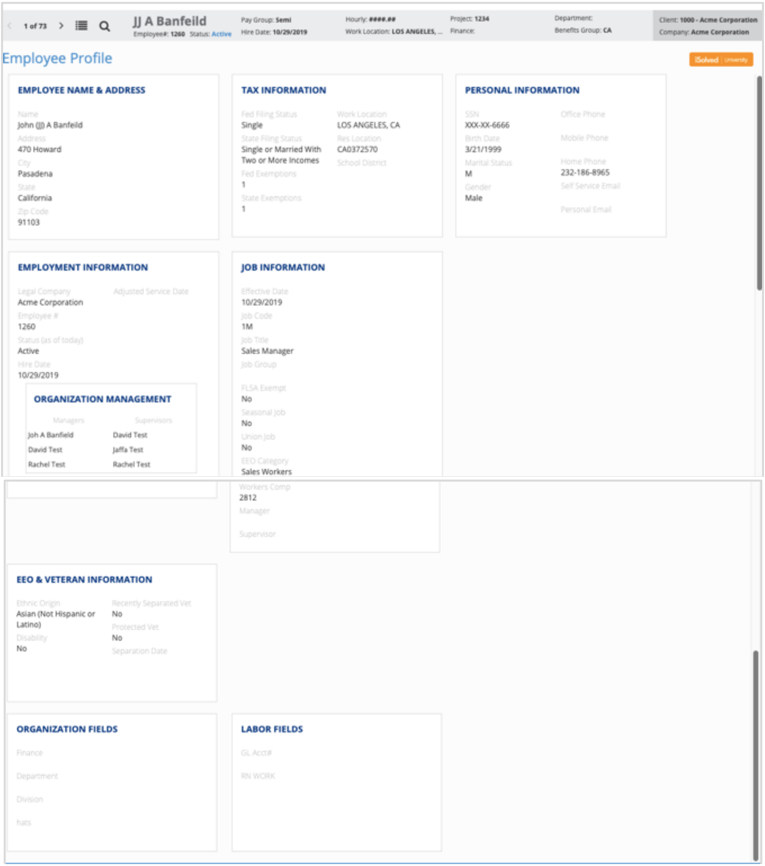
EMPLOYEE PROFILE

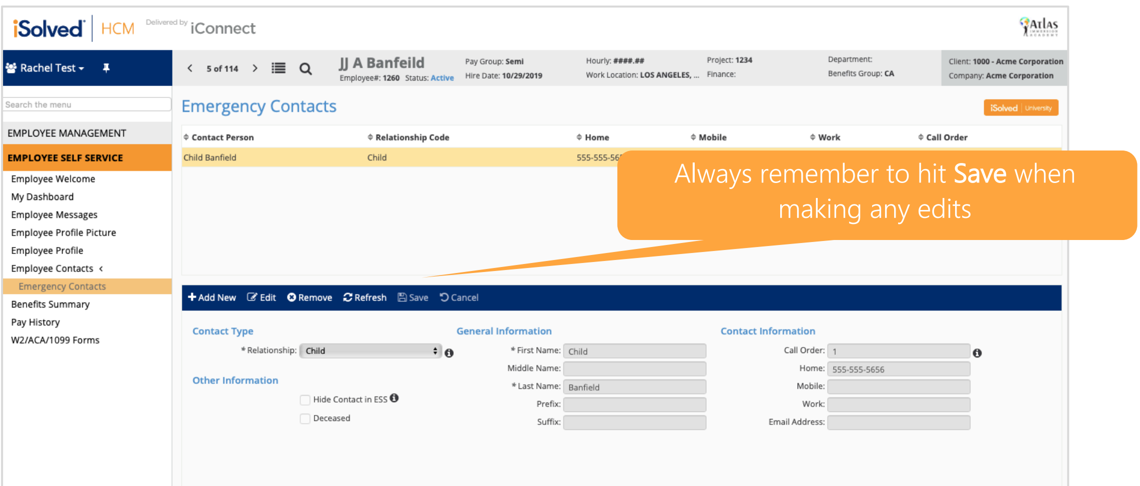
This screen brings you a summary of **all available information** for the selected employee.



EMPLOYEE CONTACTS

EMERGENCY CONTACTS

Here you can **view, add and edit** the selected employee's emergency contacts.



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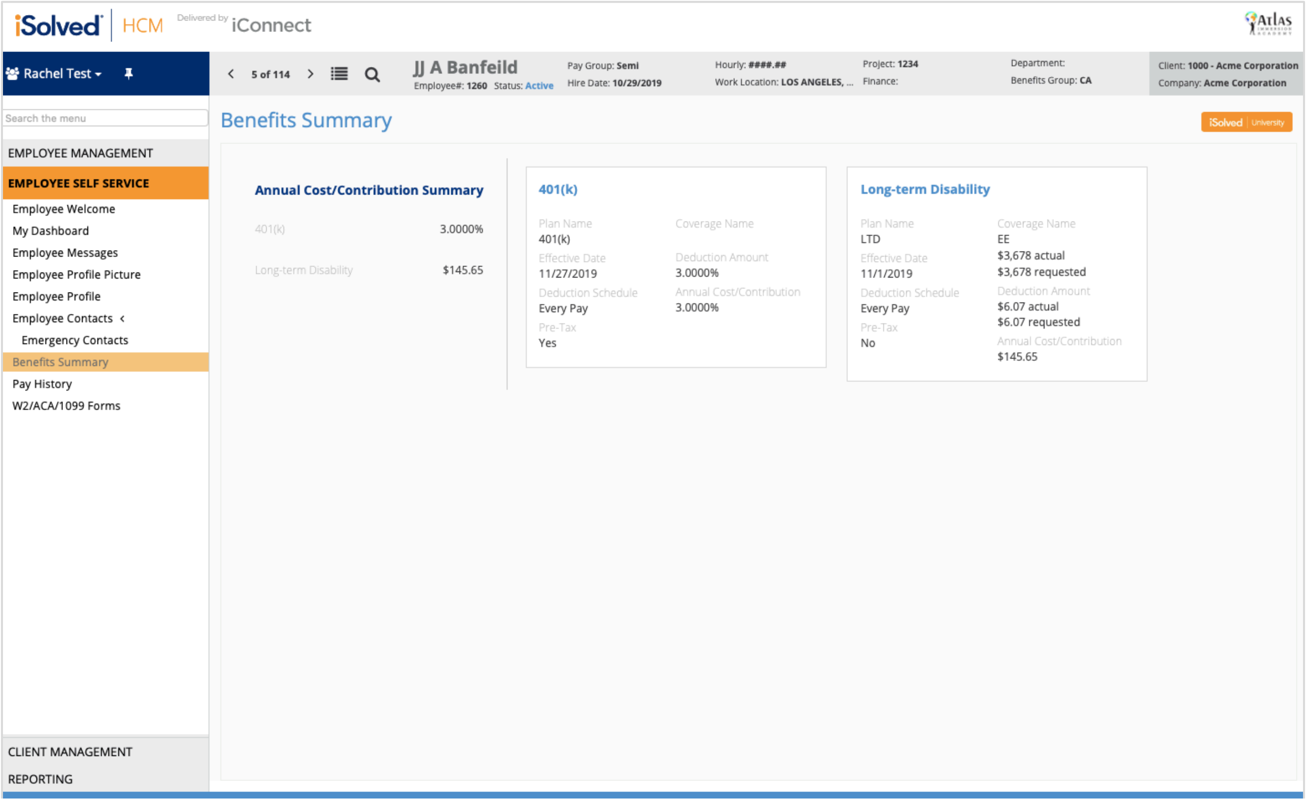
BENEFITS SUMMARY

The **Benefits Summary** screen shows what the employee sees when they view their benefits:



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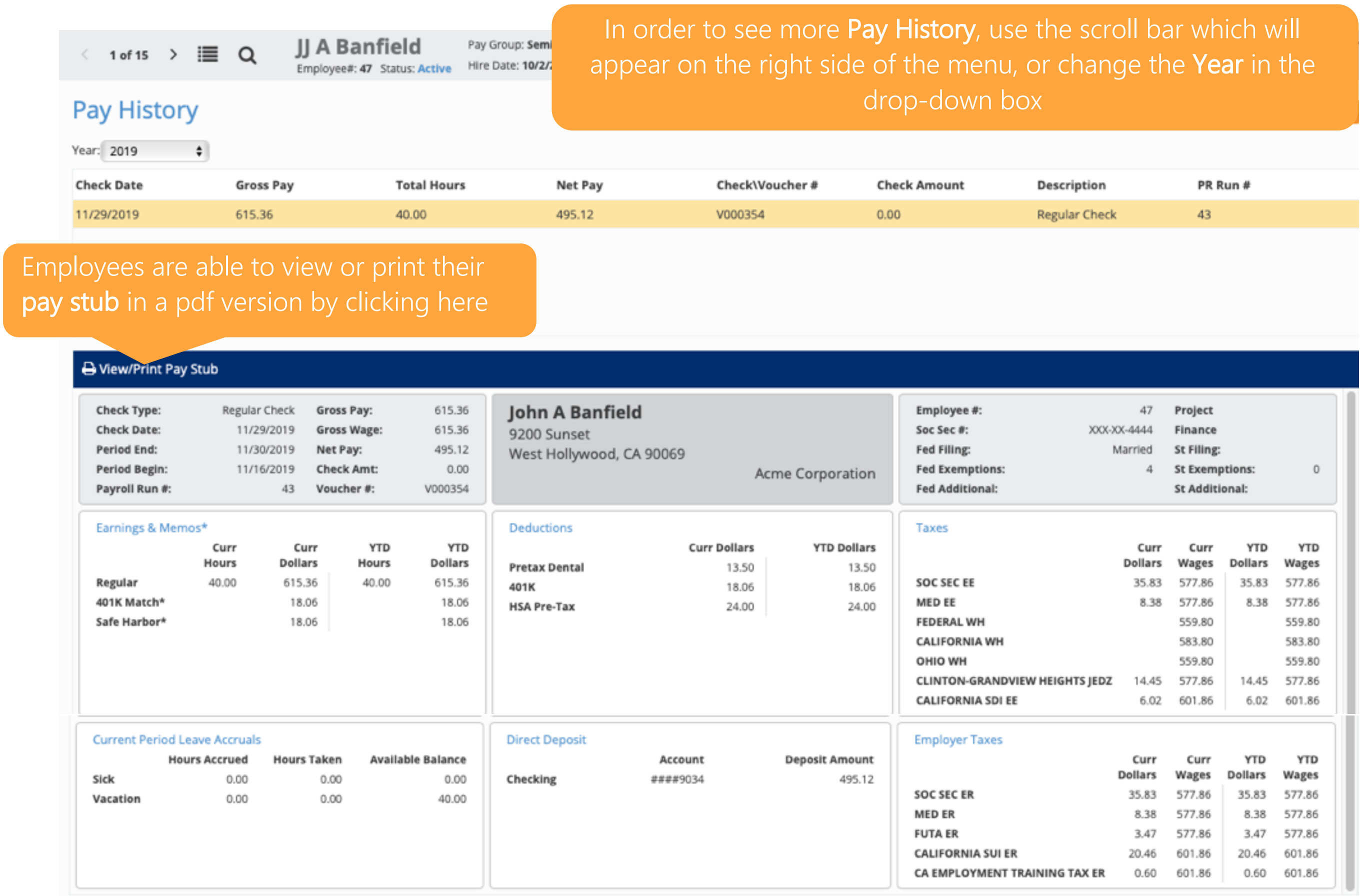
PAY HISTORY

Pay History is a record of the details which make up the employee's Gross to Net Pay, along with other useful information.



On this screen you can see:

- **The employee's most recent pay stub**: Which you can print if you need to
- **Check Date**: When the funds were available, either through a live check or direct deposit
- **Gross Pay**: The total cash wages paid, prior to taxes and deductions
- **Total Hours**: Hours reported in the payroll process
- **Net Pay**: The employee's take home pay.
- **Check/ Voucher #:** If receiving a live check, this is the number on the check. If direct deposit, this is the number which identifies the direct deposit transaction.
- **Description**: The type of payroll processed.
- **PR Run #**: A system-generated number to identify the payroll transaction.

Don't forget the **Help** icon is there for further information if you need it.

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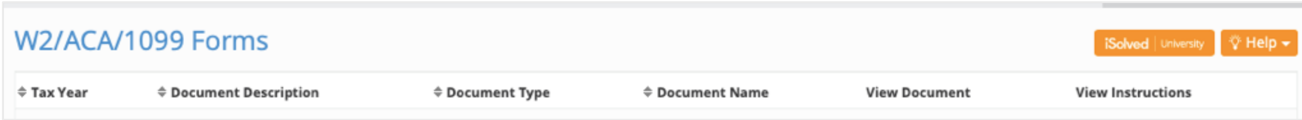
W2/ ACA/ 1099 FORMS

Here you will find any **W2, ACA (1095 Form) or 1099 Forms** that are applicable to the selected employee.



The column headings on the screen will include:

- **Tax Year:** The year the information refers to
- **Document Description**: This description can include W2/1099 or ACA1095
- **Document Type**: Defaults to "YE Tax Form."
- **Document Name**: The document file name
- **View Document**: Click on this link to view and/or print the form
- **View Instructions**: Only be available if the employee gave consent for electronic forms

If they are receiving a W2 and/or 1099 both documents will be found under the same link.

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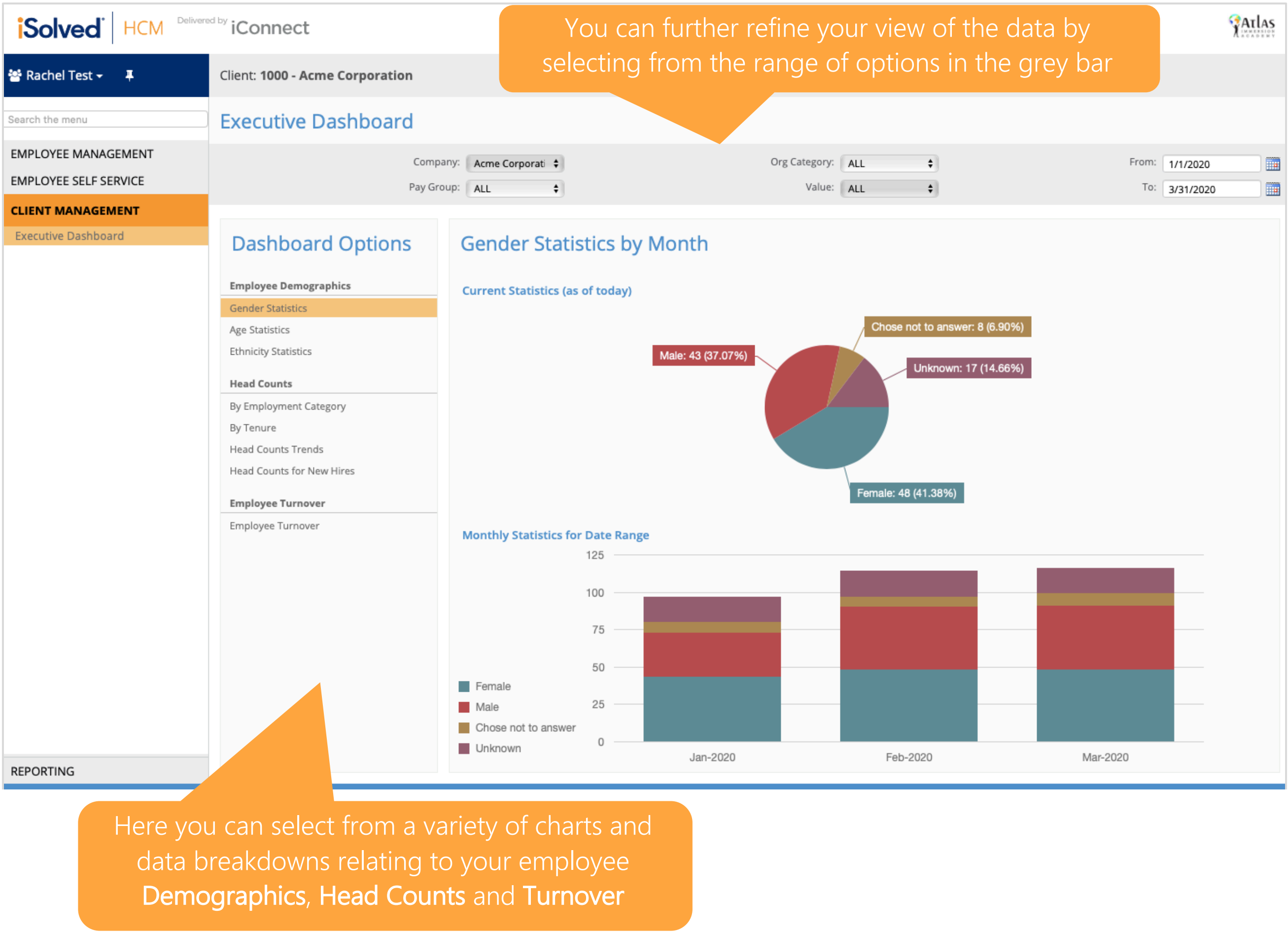
CLIENT MANAGEMENT

EXECUTIVE DASHBOARD

Your **Executive Dashboard** gives you an illustrated view of key data relating to your **Employee Demographics, Head Counts and Employee Turnover**.



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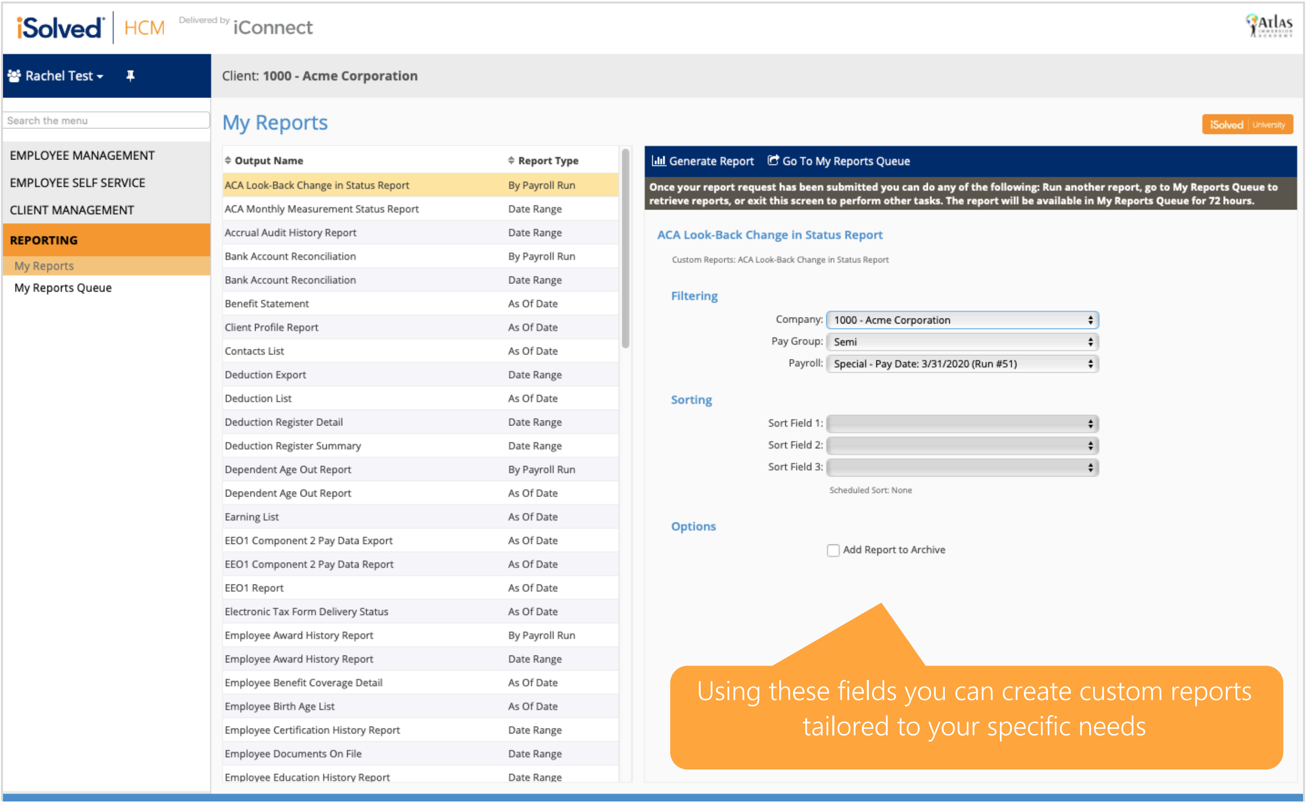
REPORTING

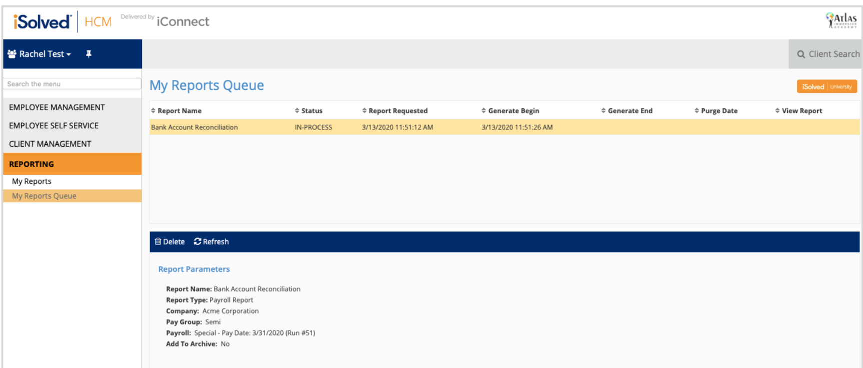
MY REPORTS

This screen enables you to access and generate a variety of useful **reports**.



MY REPORTS QUEUE

This screen will show you the reports you have currently compiling and will give you a status as to when they will be available to view. Click refresh to update the status.



ANY QUESTIONS?

Please contact help@my-iconnect.com if you have any further questions which need answering.

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YOUR RESPONSIBILITIES

While iConnect simplifies the New Hire process for you and your new employee it does not check that the information entered is accurate.

When utilising iConnect it is your responsibility to accurately input the correct data for each new hire and to review each form your new employee submits for accuracy and completeness. Your e-signature verifies that you have reviewed and approved all documentation.

OUR PRIVACY POLICY

Please note that all information, names and other data contained within this reference guide are for illustrative purposes only.

For full information on our Privacy Policy please CLICK HERE.

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