



Modern^{HR}
Perfecting the Art of Human Resources



USER GUIDE

FOR

EMPLOYEES



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LET'S SET YOU UP

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

Your employer will send you an email containing a link:

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=8>

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

When you click on the link you will be taken to a sign on page:

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:

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

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.

You must add an **Authorization PIN**. This is the last 4 digits of your Social Security Number.

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 a 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**. This will automatically log you in to iConnect Employee Self Service. Your home screen will look this:

The screenshot shows the iConnect Employee Self Service home screen for Rachel Test. The interface includes a top navigation bar with user information, a left sidebar menu, and a main content area with several sections. Callouts provide additional context for each section:

- You can search the Menu here:** Points to the search bar in the left sidebar.
- Your basic details show here:** Points to the top header area containing user name, employee ID, hire date, work location, department, and benefits group.
- Here you will see current notifications from your company. Click on them to view:** Points to the 'NOTIFICATIONS' section showing 'Documents requiring your review'.
- Menu items appear here:** Points to the 'EMPLOYEE SELF SERVICE' menu in the left sidebar.
- In the My Pay window you will see the last two checks you have received:** Points to the 'MY PAY' section showing check number 1026.
- You'll see any company benefits plans you're enrolled in here:** Points to the 'MY BENEFITS' section showing '401(k) Plan' and 'Long-term Disability-tiered'.

Under your name on the left hand side is a drop-down menu:

The screenshot shows the drop-down menu under the user name 'Rachel Test'. The menu options are: Home, My Account, User Preferences, University, and Logout. Callouts provide additional context for each option:

- In My Account you can add or change your cell phone number, change your password and change your security questions:** Points to the 'My Account' option.
- Home takes you back to your Welcome page:** Points to the 'Home' option.
- Click on the University link to create an account for access to fantastic help, information and videos about the iConnect system:** Points to the 'University' option.
- Logout – for when you're finished!:** Points to the 'Logout' option.

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- ✓ Click on **User Preferences** and select 'Employee' as your User Role. This enables you to see the iConnect view most relevant to you every time you log in. **Default Company** will automatically be filled with the name of your company.

The screenshot shows a 'User Preferences' window with a close button (X) in the top right corner. Under the 'Login Options' heading, there are two dropdown menus. The first, 'Default Company:', is set to 'Acme Corporation'. The second, 'Default User Role:', is set to 'Employee', which is highlighted with a blue background and a checkmark. Below these, under the 'Pay Stub Print Option' heading, there is a partially visible dropdown menu. At the bottom right of the window are two buttons: 'Save' with a floppy disk icon and 'Cancel' with a circular arrow icon.

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

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FUTURE LOGIN

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

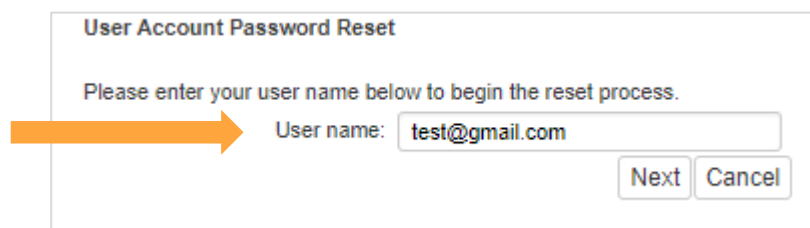
The image shows the iSolved Sign in page. At the top is the iSolved logo. Below it is the text "Sign in". There are two input fields: the first contains "JMtraining" and the second contains a masked password ".....". Below these is an orange "Login" button. Under the button are two links: "Secure Cloud Logon" with a lock icon and "Forgot Password?". At the bottom is the iConnect logo.

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.

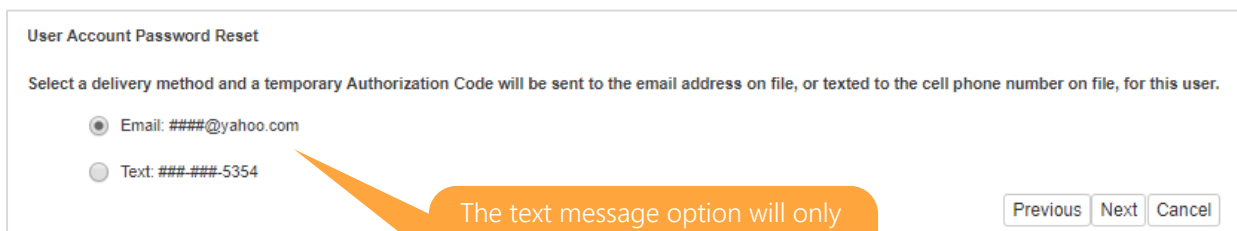
PRO TIP: Click on Forgot Password after your 4th attempt so you don't get locked out of the system.

RESETTING YOUR PASSWORD

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

The image shows a "User Account Password Reset" form. It has the title "User Account Password Reset" and the instruction "Please enter your user name below to begin the reset process." Below this is a "User name:" label followed by a text input field containing "test@gmail.com". To the left of the input field is a large orange arrow pointing right. At the bottom right of the form are two buttons: "Next" and "Cancel".

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**.

The image shows the "User Account Password Reset" form with delivery method options. It has the title "User Account Password Reset" and the instruction "Select a delivery method and a temporary Authorization Code will be sent to the email address on file, or texted to the cell phone number on file, for this user." Below this are two radio button options: "Email: ####@yahoo.com" (which is selected) and "Text: ###-###-5354". At the bottom right are three buttons: "Previous", "Next", and "Cancel".

The text message option will only be available if you entered your cell phone number at the [AUTHENTICATION](#) stage

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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 SELF SERVICE

EMPLOYEE WELCOME

The menu detailing your self-service options is on the left-hand side of your [WELCOME PAGE](#):

iSolved HCM Delivered by iConnect

Rachel Test Pay Group: Semi Employee: 1269 Hire Date: 12/10/2019 Hourly: ##### Work Location: LOS ANGELES, CA Project: 1234 Finance: Department: 100 Benefits Group: CA Client: 1000 - Acme Corporation Company: Acme Corporation

Search this page

EMPLOYEE SELF SERVICE

- Employee Welcome
- Time >
- Employee Messages
- Contact Information
- Company Information
- Benefits Summary
- Documents
- Pay History
- W2/ACA/1099 Forms
- Direct Deposit
- Salary
- Jobs

Welcome back Rachel!

MY PROFILE

Rachel Test
Office Manager
Length of Service: 3 Months
Anniversary: 12/10/2019

NOTIFICATIONS

Documents requiring your review

MY HUMAN RESOURCE CONTACTS

David Tester
Payroll
818-555-6677
dtester@acme.com

John Tryer
Benefits Rep
818-505-6060

MY PAY

1/31/2020

Check Number: 1026

Gross Pay
Net Pay
Direct Deposit

MY BENEFITS

401(k) Plan
401(k)

Long-term Disability-tiered
LTD, EE Only

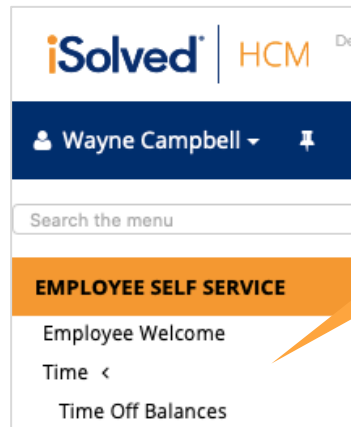
You may not have all self service functions available, only those your employer has chosen to enable.



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

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TIME



Expand the Time option and you will see your Time Off Balances option. In Time off Balances you can view information about any accrual policy you have assigned to you.

TIME OFF BALANCES

The screens will show you both Sick and Vacation balances and the corresponding detail.

Time Off Balances

Sick Current Balance as of : 48.00

Plan Details Sick
Plan Year: Anniversary
Award Schedule: First Pay of Year
Accrual Rate: 48.0000
Last Award Date:
Service Date: 12/10/2019
Length of Service: 0 Years, 0 Months (0 Months)

As of Last Pay Period End
Accrued: 0.00
Taken: 0.00
YTD Accrued: 0.00
YTD Taken: 0.00
Balance: 48.00

Current Pay Period 12/1/2019 - 12/15/2019
Projected Accrued: 0.00
Projected Taken: 0.00
Projected YTD Accrued: 0.00
Projected YTD Taken: 0.00
Time Off Requests-Pending Approval: 0.00
Projected Balance: 48.00

Current Plan Year Plan year ends 12/15/2019
Projected Ending Balance: 48.00
Projected Accrued:
Time Off Requests-Approved:
Time Off Requests-Pending Approval:
Projected Balance: 48.00

Next Plan Year 12/16/2019 - 11/30/2020
Carryover from Previous Plan Year: 48.00
Projected Accrued: 0.00
Time Off Requests-Approved: 0.00
Time Off Requests-Pending Approval: 0.00
Projected Balance: 48.00

*Note: Time Off Requests-Pending Approval amounts do not count against projected balances

Vacation Current Balance as of : 40.00*

Plan Details Vacation
Plan Year: Anniversary
Award Schedule: Every Pay
Accrual Rate: 0.0000
Last Award Date:
Service Date: 12/10/2019
Length of Service: 0 Years, 0 Months (0 Months)

As of Last Pay Period End
Accrued: 0.00
Taken: 0.00
YTD Accrued: 0.00
YTD Taken: 0.00
Balance: 40.00*

Current Pay Period 12/1/2019 - 12/15/2019
Projected Accrued: 0.00
Projected Taken: 0.00
Projected YTD Accrued: 0.00
Projected YTD Taken: 0.00
Time Off Requests-Pending Approval: 0.00
Projected Balance: 40.00

Current Plan Year Plan year ends 12/15/2019
Projected Ending Balance: 40.00
Projected Accrued:
Time Off Requests-Approved:
Time Off Requests-Pending Approval:
Projected Balance: 40.00

Next Plan Year 12/16/2019 - 11/30/2020
Carryover from Previous Plan Year: 40.00
Projected Accrued: 20.00
Time Off Requests-Approved: 0.00
Time Off Requests-Pending Approval: 0.00
Projected Balance: 60.00

*Note: Time Off Requests-Pending Approval amounts do not count against projected balances

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EMPLOYEE MESSAGES

Here you can view your messages. When you are sent a message from your employer an alert will also appear on your [WELCOME PAGE](#) under **Notifications**.

The screenshot shows the iSolved HCM iConnect interface. The top header includes the iSolved HCM logo, the text "Delivered by iConnect", and the Atlas logo. Below the header, a navigation bar displays the user's name "Rachel Test" and a search icon. The main content area is titled "Employee Messages" and includes a sub-section for "Benefits". The "Benefits" section lists "Open Enrollment Documentation" and "Company Luncheon" (dated Sunday 10/06/2019). The "Onboarding" section is titled "New Hire Onboarding" and contains a "Welcome to the team!" message. This message includes two document links: "Other New Hire Forms (PDF)" and "Employee Acknowledgement (PDF)". The "Other New Hire Forms (PDF)" link has a "View here" button and a status indicator showing "You have acknowledged reading this document!". The "Employee Acknowledgement (PDF)" link has a "View here" button and a "Complete Form" button. Below these links, there is a section for "FMLA Brochure (PDF)" with a "View here" button and a status indicator showing "I acknowledge that I have read and understood this document." and a "Sign Acknowledgement" button.

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

The screenshot shows a "Company Picnic" message. The title is "Company Picnic". The main heading is "Annual Company Picnic". The date and time are "Adams Grove Sunday September 10th 1-5 PM". Below this, there is a document icon and the text "Annual Co Picnic (DOCX)". There is a "View here" button with a document icon. Below the button, there is a status indicator showing "You have acknowledged reading this document!".

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CONTACT INFORMATION

Here you can change your personal **Contact Information**.

Simply complete the fields applicable to your change. You'll see that some of the fields are mandatory, others are optional.

If your employer wishes to approve or reject any changes you may receive an email confirming or denying the change.

When keying in your **Zip code** a list of city names may appear, select the correct name.

If no box appears, the **City** and **State** fields will automatically update when the **Zip Code** is entered. Confirm these fields populate correctly before saving.

Changing your **marital status** does not change your withholding for tax purposes. Please contact your employer for withholding changes.

ed by iConnect

Wayne Campbell, Semi
Employee#: 1268 Hire Date: 12/2/2019 Salary: Work L

Contact Information

Employee Name

* First Name: Wayne
Preferred Name:
Middle Name:
* Last Name: Campbell
Prefix:
Suffix:

Employee Address

A change of address may cause a change in taxes.

Address: 7590 S. Glenoaks
* Zip Code: 91352
Hit Enter Key in zip code field to retrieve city list.
City: SUN VALLEY
State: California
Marital Status:

Contact Information

Home Phone:
Mobile Phone:
Work Phone:
Fax Number:
Personal Email:

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COMPANY INFORMATION

The **Company Information** menu item can contain a range of documents or links depending on the needs of your employer.

This is where your employer may post their company handbook, benefit information, links to benefit sites or any other documents they want to share. Again, this documentation may require your acknowledgement.

BENEFITS SUMMARY

If you have a company benefits program this is where you will find the details.

The screenshot shows the 'Benefits Summary' page for employee JJ A Banfeild. The header includes employee details: Employee#: 1260, Status: Active, Hire Date: 10/29/2019, Work Location: LOS ANGELES, ..., Project: 1234, Department: CA, and Client: 1000 - Acme Corporation. The page is divided into three main sections: 'Annual Cost/Contribution Summary', '401(k)', and 'Long-term Disability'. The 'Annual Cost/Contribution Summary' table shows 401(k) at 3.0000% and Long-term Disability at 145.65. The '401(k)' section details the Plan Name (401(k)), Effective Date (11/27/2019), Deduction Amount (3.0000%), Deduction Schedule (Every Pay), and Pre-Tax status (Yes). The 'Long-term Disability' section details the Plan Name (LTD), Effective Date (11/1/2019), Deduction Amount (6.07 actual, 6.07 requested), and Pre-Tax status (No).

Annual Cost/Contribution Summary	
401(k)	3.0000%
Long-term Disability	145.65

401(k)	
Plan Name	Coverage Name
401(k)	
Effective Date	Deduction Amount
11/27/2019	3.0000%
Deduction Schedule	Annual Cost/Contribution
Every Pay	3.0000%
Pre-Tax	
Yes	

Long-term Disability	
Plan Name	Coverage Name
LTD	EE
Effective Date	3678.00 actual
11/1/2019	3678.00 requested
Deduction Schedule	Deduction Amount
Every Pay	6.07 actual
	6.07 requested
Pre-Tax	Annual Cost/Contribution
No	145.65

DOCUMENTS

Your employer may load documents in the system such as your **W4, state withholding form, I9, employment documents** and more for you to access or view:

The screenshot shows the 'Documents' page with a filter for 'Personnel' and a table of document types. The table has columns for Document Type, Document Description, Document Name, Document Upload Date, and View Document. The 'Personnel' tab is selected, showing a list of document types including Payroll, I-9, Confidential PHI, Confidential - Other, Signed Acknowledgements, Other, and EE Uploads.

Document Type	Document Description	Document Name	Document Upload Date	View Document
Personnel				
Payroll				
I-9				
Confidential PHI				
Confidential - Other				
Signed Acknowledgements				
Other				
EE Uploads				

Click on **View Document** to open and review individual documents.

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PAY HISTORY

Pay History is a record of the details which make up your Gross to Net Pay, along with other useful information. You will only see the pay history that your employer has loaded within iConnect.

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.

Pay History

Year: 2018

Check Date	Gross Pay	Total Hours	Net Pay	Check/Voucher #	Check Amount	Description	PR Run #
9/28/2018	565.00	20.00	245.23	V007785	0.00	Regular Check	55
9/14/2018	1776.79	303.01	1320.90	V007761	0.00	Regular Check	54
8/3/2018	1641.27	84.56	1130.96	7163	1130.96	Adjustment	35
7/20/2018	1512.00	80.00	1036.47	7142	1036.47	Adjustment	33
7/12/2018	1,675.00	87.55	1,080.10	7131	1,080.10	Adjustment	31

View/Print Pay Stub

You are able to **view** or **print** your **pay stub** in a /pdf version by clicking here.

On this screen you can see:

- **Check Date:** When the funds were available to you, 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:** Your take home pay.
- **Check/ Voucher #:** If receiving a live check, this is the number on the check. If direct deposit, this is a system-generated identifying number of the direct deposit transaction.
- **Description:** The type of payroll processed.
- **PR Run #:** A system-generated number to identify the payroll transaction.

You will also see a view of your most recent pay stub which will look like this:

View or print your pay stub in a pdf version by clicking here.

View/Print Pay Stub

Check Type: Regular Check Check Date: 11/29/2019 Period End: 11/30/2019 Period Begin: 11/16/2019 Payroll Run #: 43	Gross Pay: 615.36 Gross Wage: 615.36 Net Pay: 495.12 Check Amt: 0.00 Voucher #: V000354	John A Banfield 9200 Sunset West Hollywood, CA 90069 Acme Corporation	Employee #: 47 Soc Sec #: XXX-XX-4444 Fed Filing: Married Fed Exemptions: 4 Fed Additional:	Project Finance St Filing: St Exemptions: 0 St Additional:
---	--	---	--	---

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W2/ ACA/ 1099 FORMS

Here you will find any **W2, ACA (1095 Form) or 1099 Forms** that are applicable to you and your company. If you agreed to electronic consent for electronic W2/ ACA forms, these will be the only copies you receive. If you have not agreed to electronic consent you will receive a physical copy from your employer.

W2/ACA/1099 Forms					
<div>iSolved University Help</div>					
Tax Year	Document Description	Document Type	Document Name	View Document	View Instructions

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 available if you gave electronic consent for electronic forms

If you are receiving a W2 and/ or 1099 from your employer both documents will be under the same link.

DIRECT DEPOSIT

Click on the **Direct Deposit** option to view the information about your direct deposit account(s).

Direct Deposit							
<div>iSolved University Help</div>							
Status	Account Type	Sequence	Frequency	Amount	Percent	Routing Number	Account Number
Description							

If you have multiple direct deposits, click on the account you want to review.

DIRECT DEPOSIT DETAILS

Status: Active
Account Type: Checking
Sequence: Remaining Net
Frequency: Every Pay
Amount:
Percent:
Routing Number: 041000124
Account Number: ###2236
Description:

Since this is a view only screen you are unable to make any changes. Contact your Employer to add or change a direct deposit account

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SALARY

This section enables you to view detail on your **salary, pay frequency and hours**.

SALARY DETAILS

Effective Date: 12/10/2019
Change Reason:
Pay Type: Hourly
Pay Group: Semi
Pay Frequency: Semi-Monthly
Normal Hours: 86.67
Annual Salary: 60000.00
Hourly Rate: 28.85
Per Pay Salary: 2500.00
Seasons:
Notes:

JOBS

This section enables you to view the detail on your current and past jobs including duration, Job Title, Job Code, Job Family, Manager and/ or Supervisor.

Jobs iSolved University

Effective Date	Job Title	Job Code	Group
12/2/2019	Office Manager	2M	Union

JOB DETAILS

Effective Date: 12/2/2019
Job Title: Office Manager
Job Code: 2M
Job Family: Union
Manager: David Dooly
Supervisor:
Union Employee: No
Seasonal Employee: No
Notes:

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NEED MORE HELP?

If you need more help, please contact help@my-iconnect.com

YOUR RESPONSIBILITIES

When utilising iConnect it is your responsibility to accurately input the correct data and to review each form 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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