CPEHR

iConnect

USER GUIDE

FOR

EMPLOYEES

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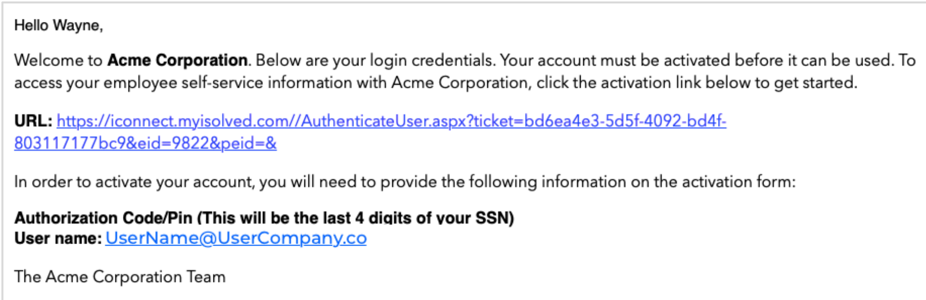
LET'S SET YOU UP

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=&

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: 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.

* C ew 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

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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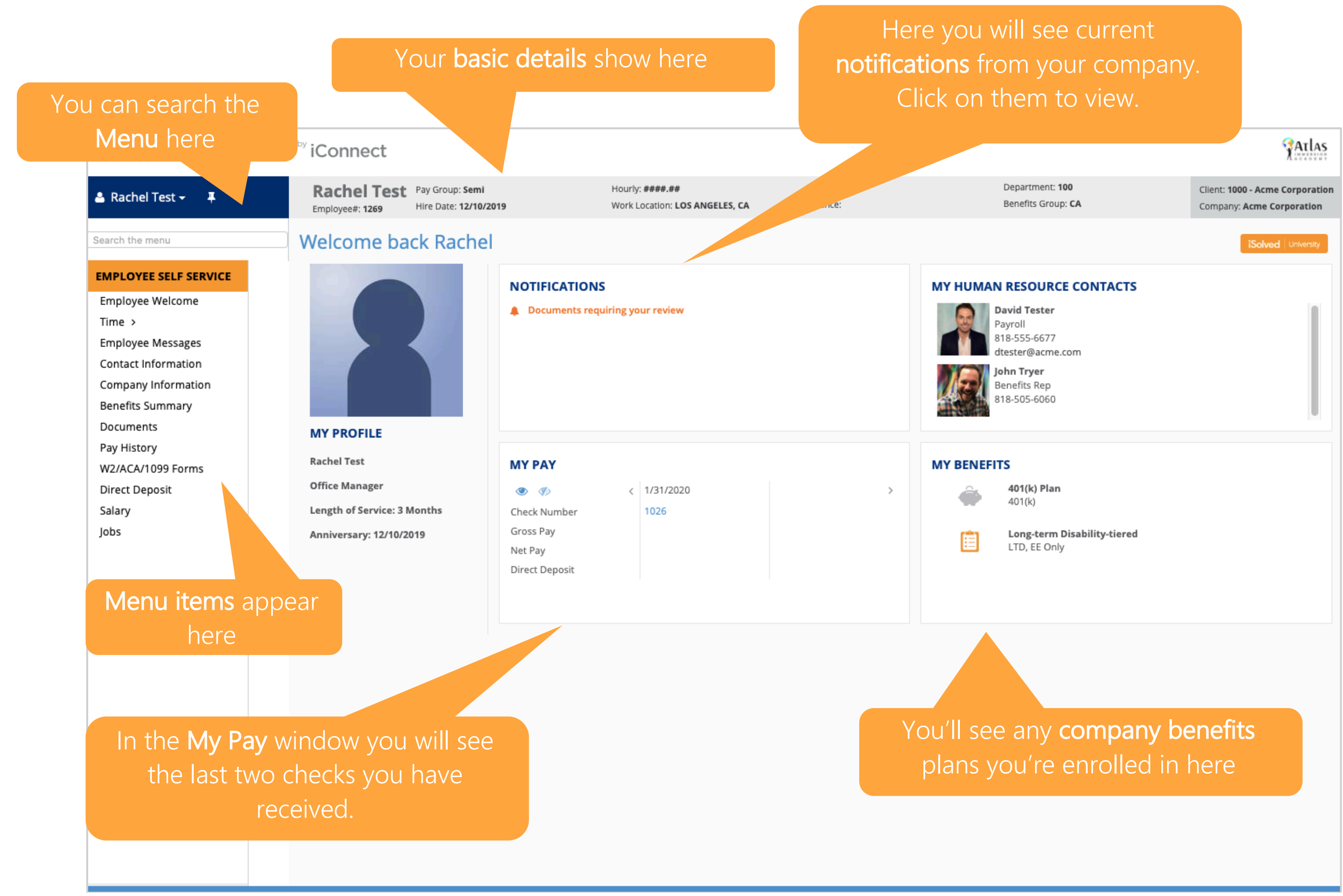
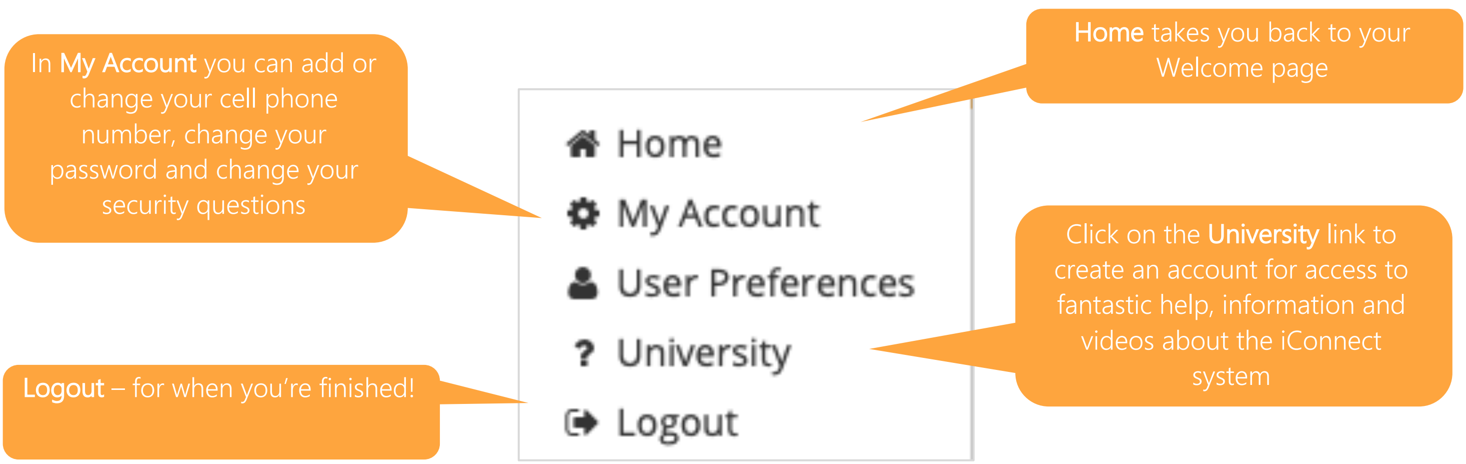
FIRST TIME LOGIN

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:



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



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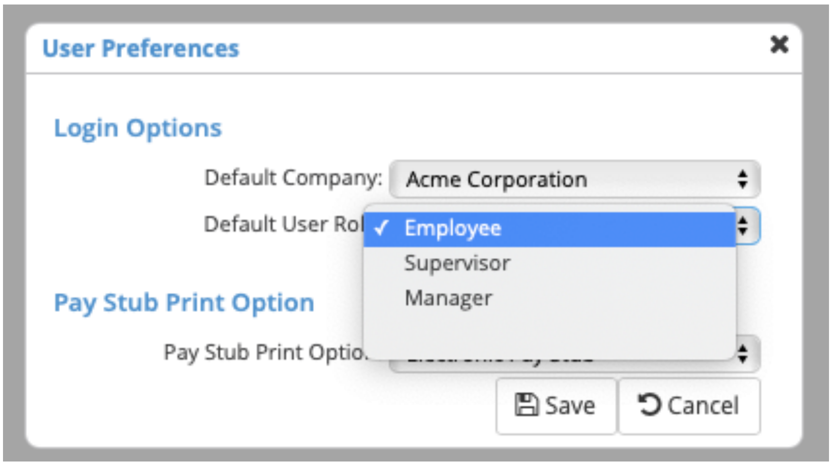
- Click on **User Preferences** and select 'Employee' as your User Role. This enables you to see the iConnect view most relevant to you every time you log in. **Default Company** will automatically be filled with the name of your company.



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

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FUTURE LOGIN

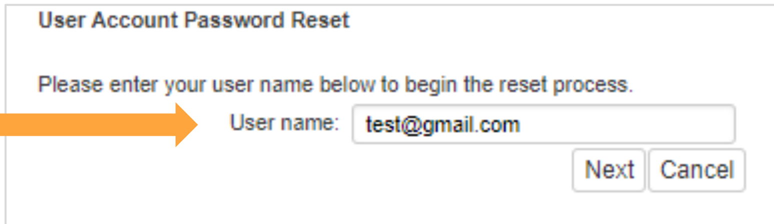
It's really straightforward. Simply go to the **Sign In** page and access the system using the details you set up originally.

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.

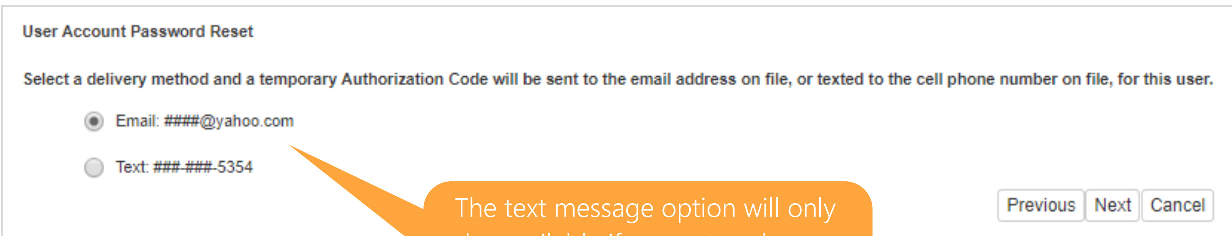
PRO TIP: Click on Forgot Password after your 4th attempt so you don't get locked out of the system.

RESETTING YOUR PASSWORD

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



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 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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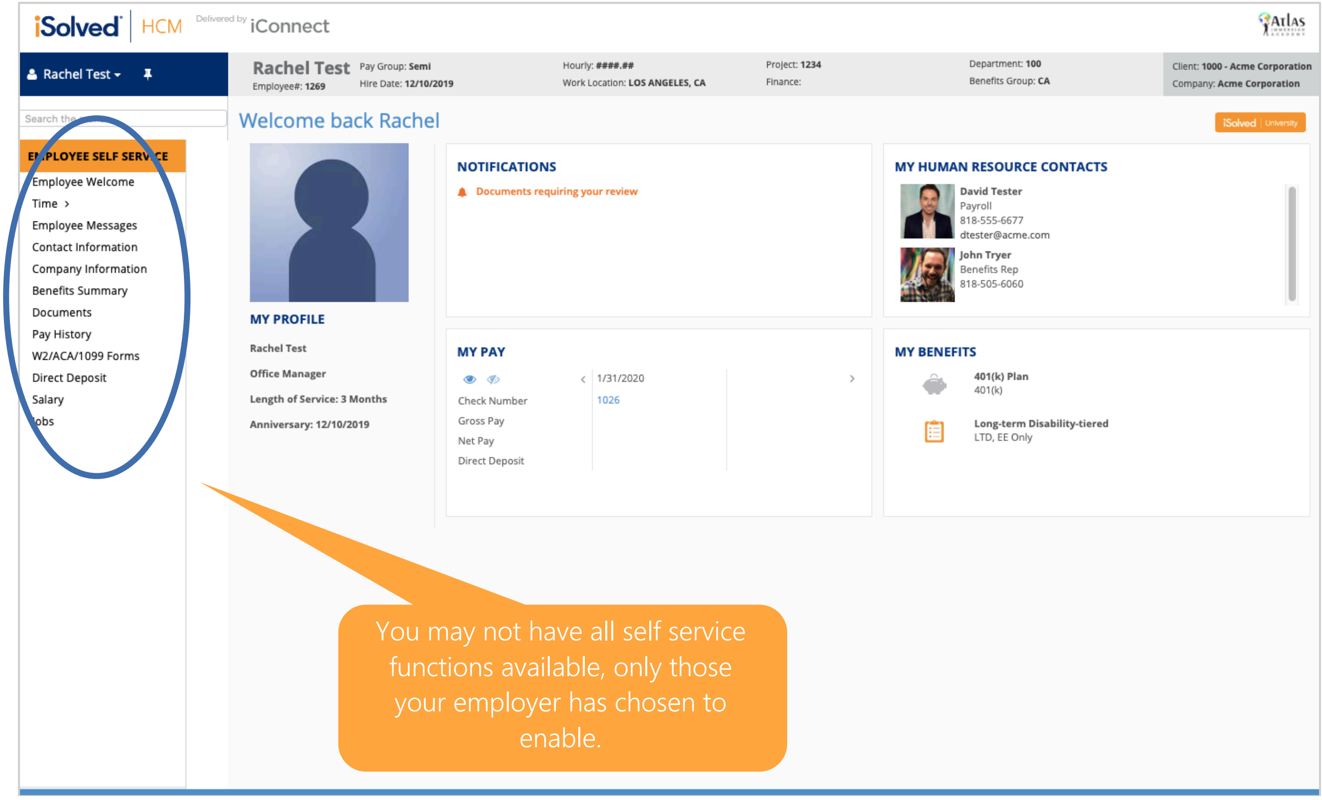
EMPLOYEE SELF SERVICE

EMPLOYEE WELCOME

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



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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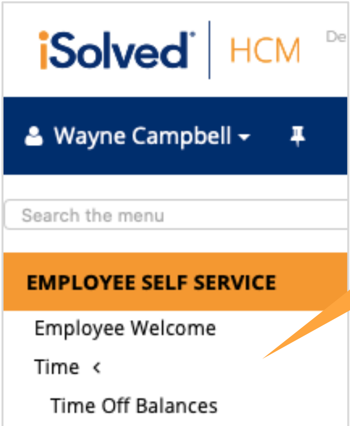
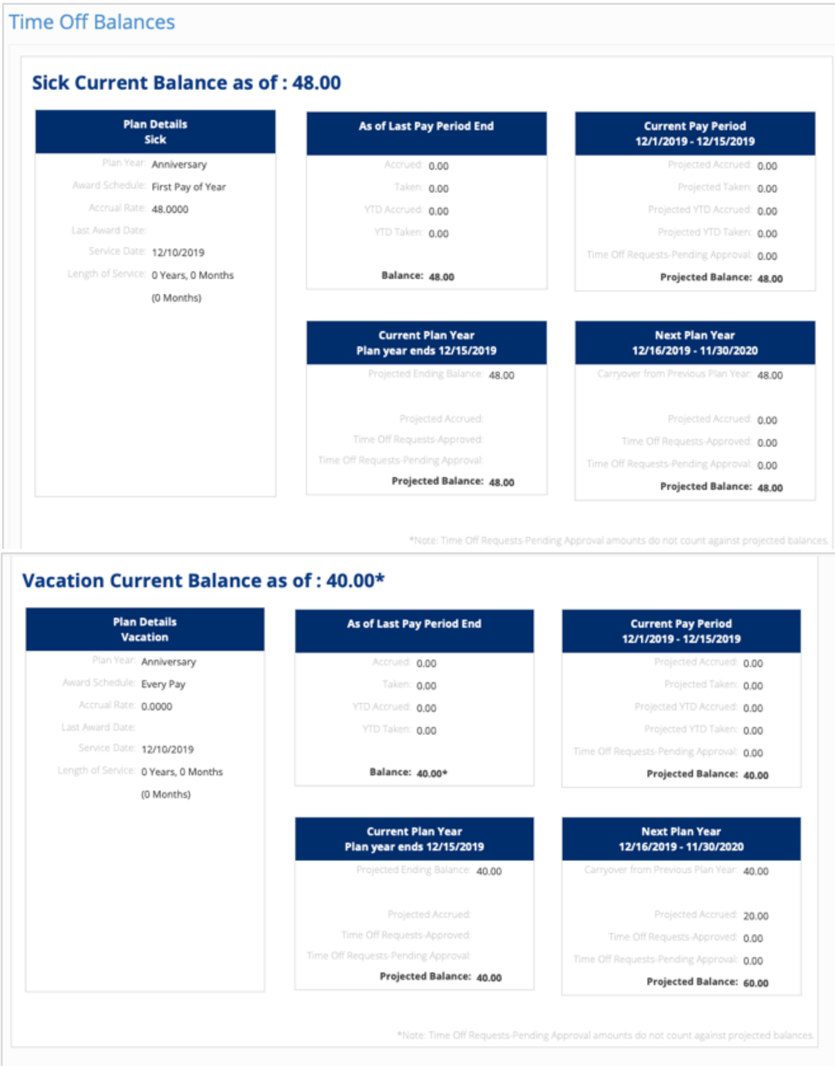
TIME



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.



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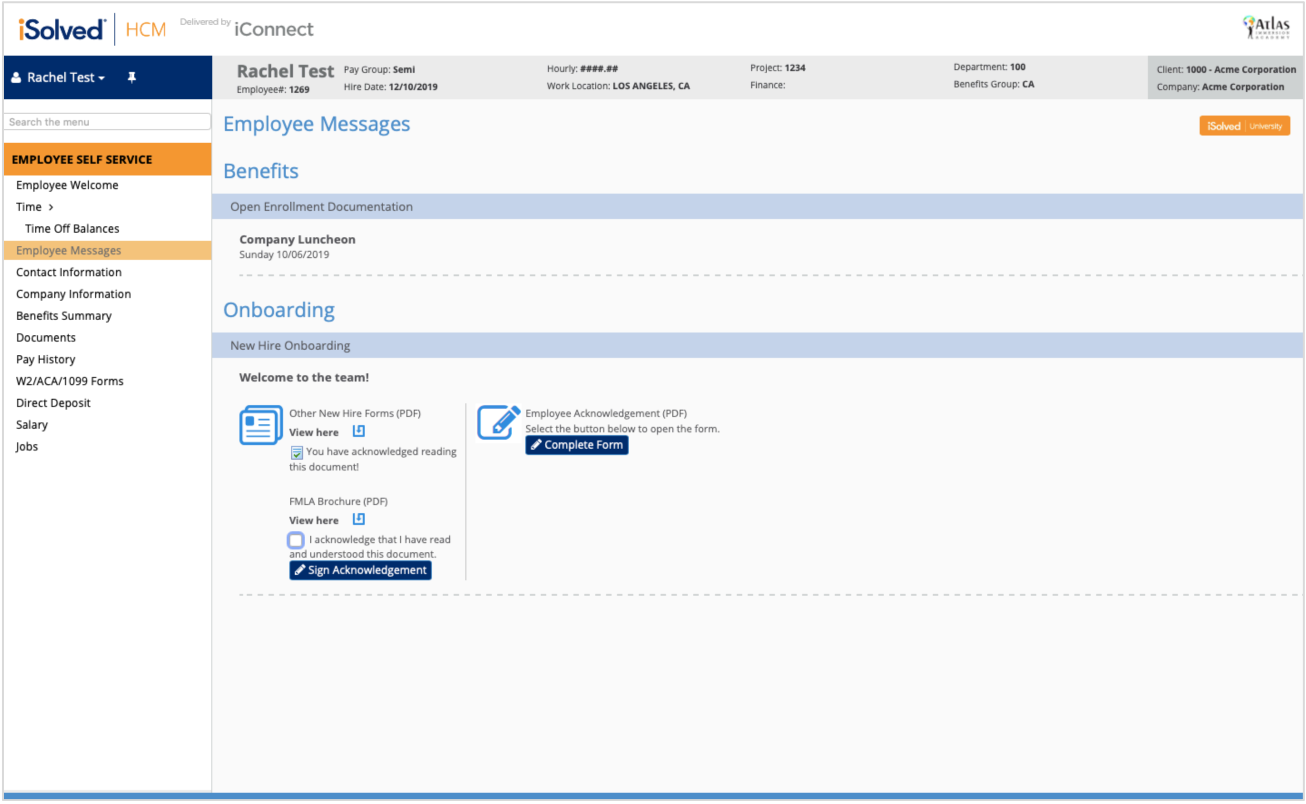
EMPLOYEE MESSAGES

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**.



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

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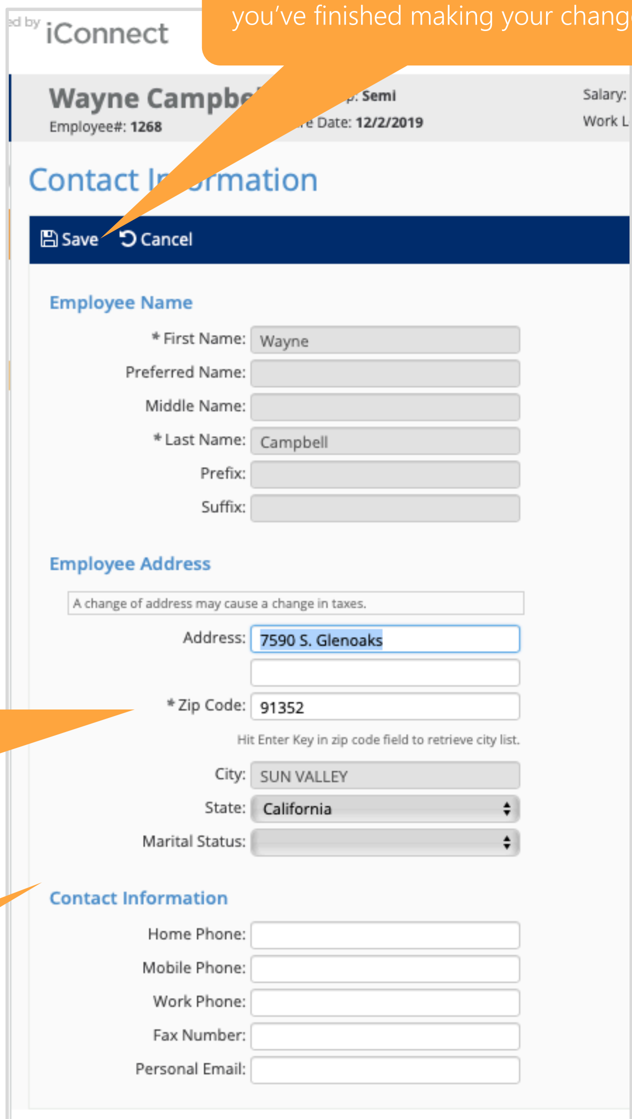
CONTACT INFORMATION

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.

Don't forget to click on **Save** when you've finished making your changes.



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.

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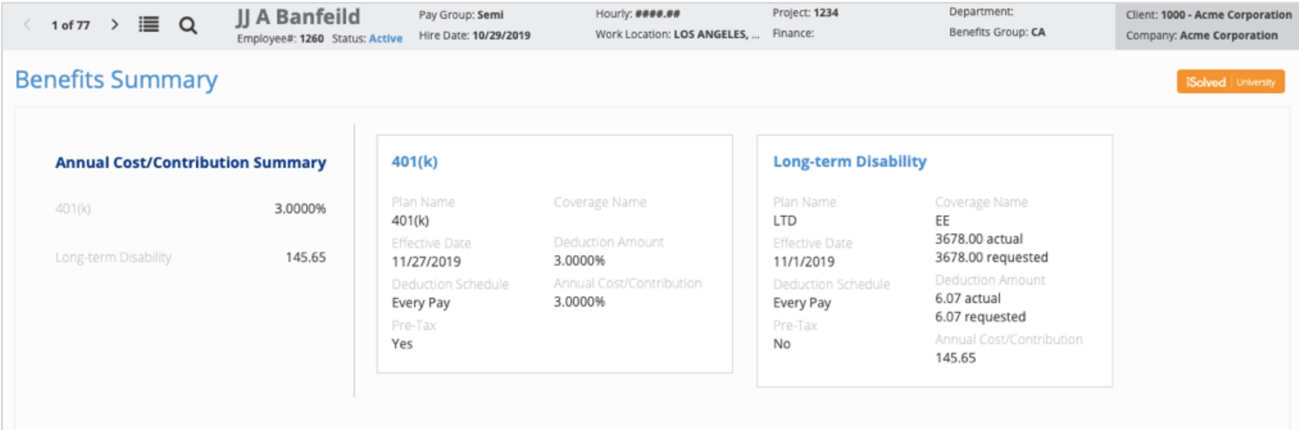
COMPANY INFORMATION

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.

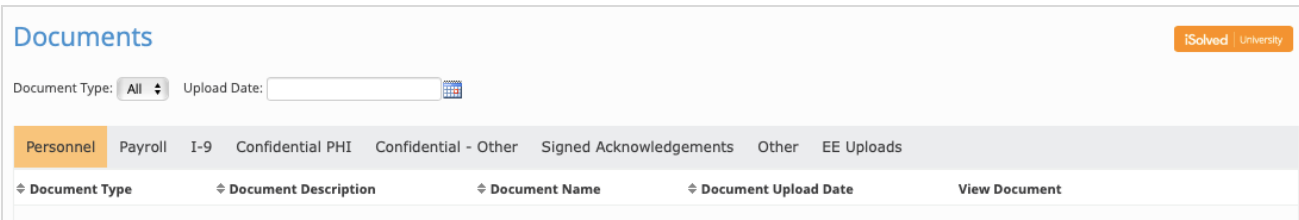
BENEFITS SUMMARY

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



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:



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

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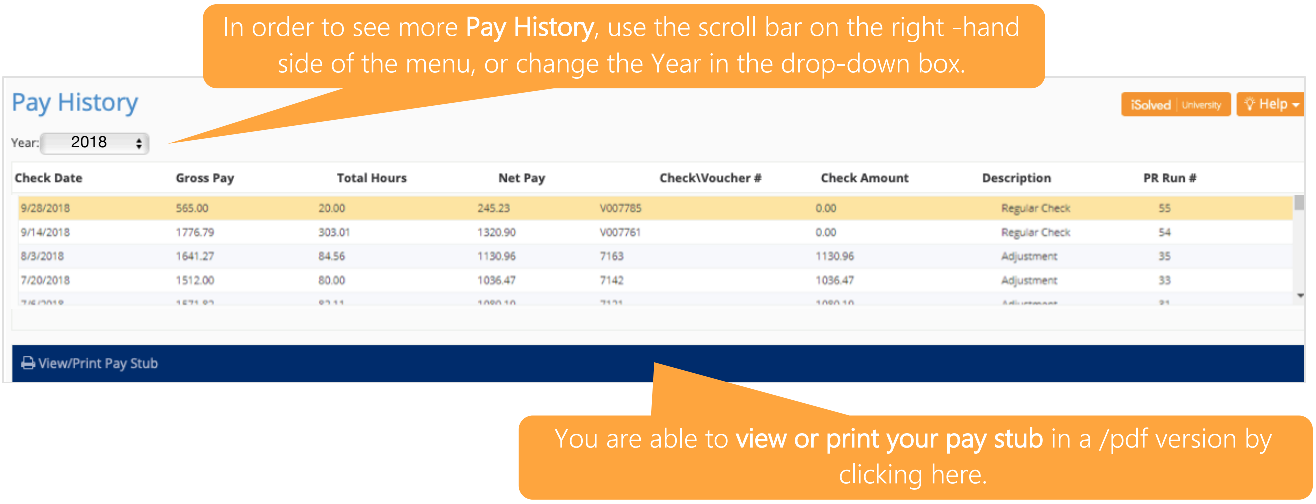
PAY HISTORY

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.



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:

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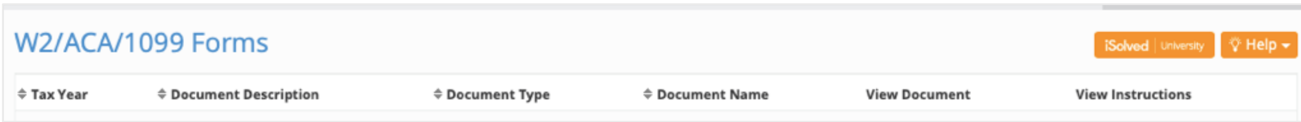
W2/ ACA/ 1099 FORMS

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.



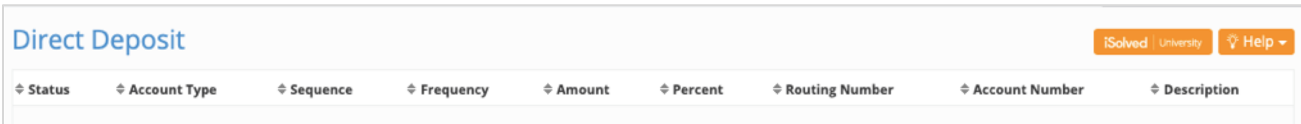
The column headings on the screen will include:

- **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

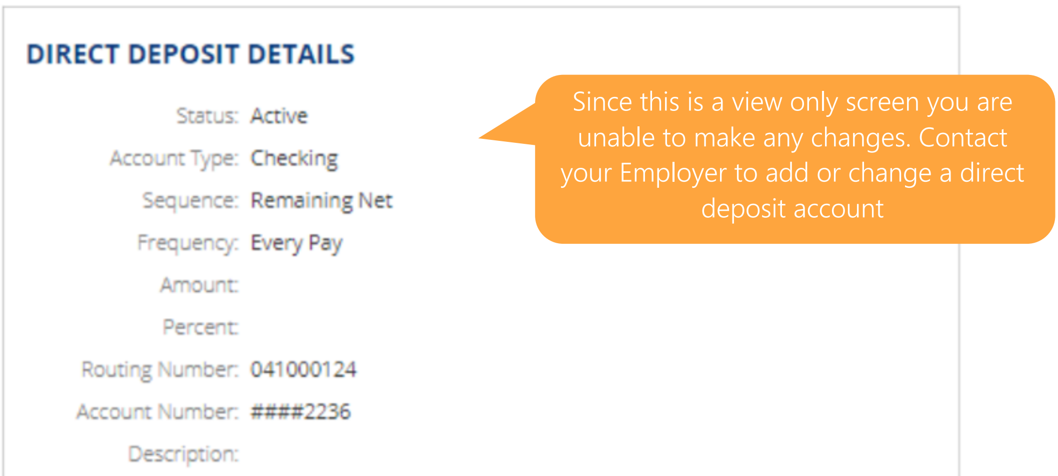
If you are receiving a W2 and/ or 1099 from your employer both documents will be under the same link.

DIRECT DEPOSIT

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



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



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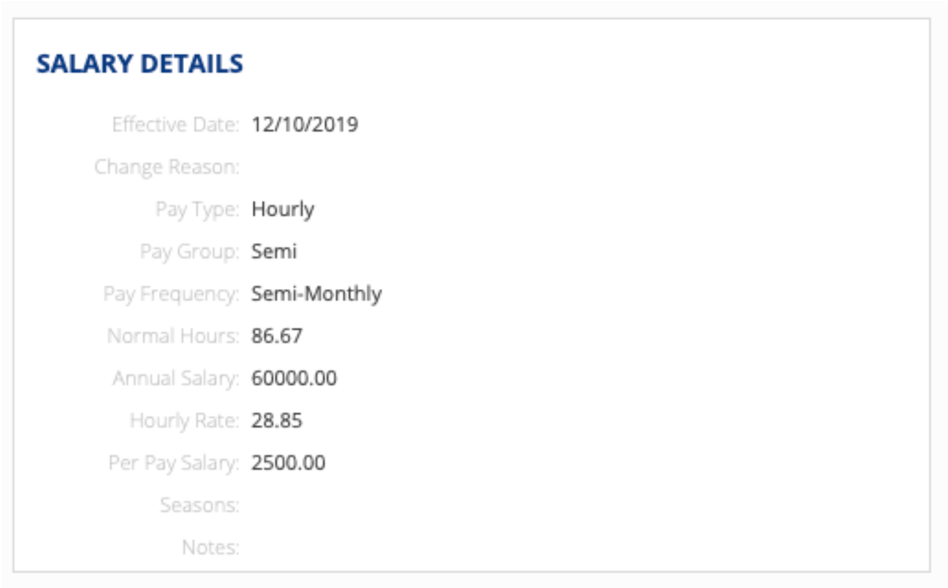
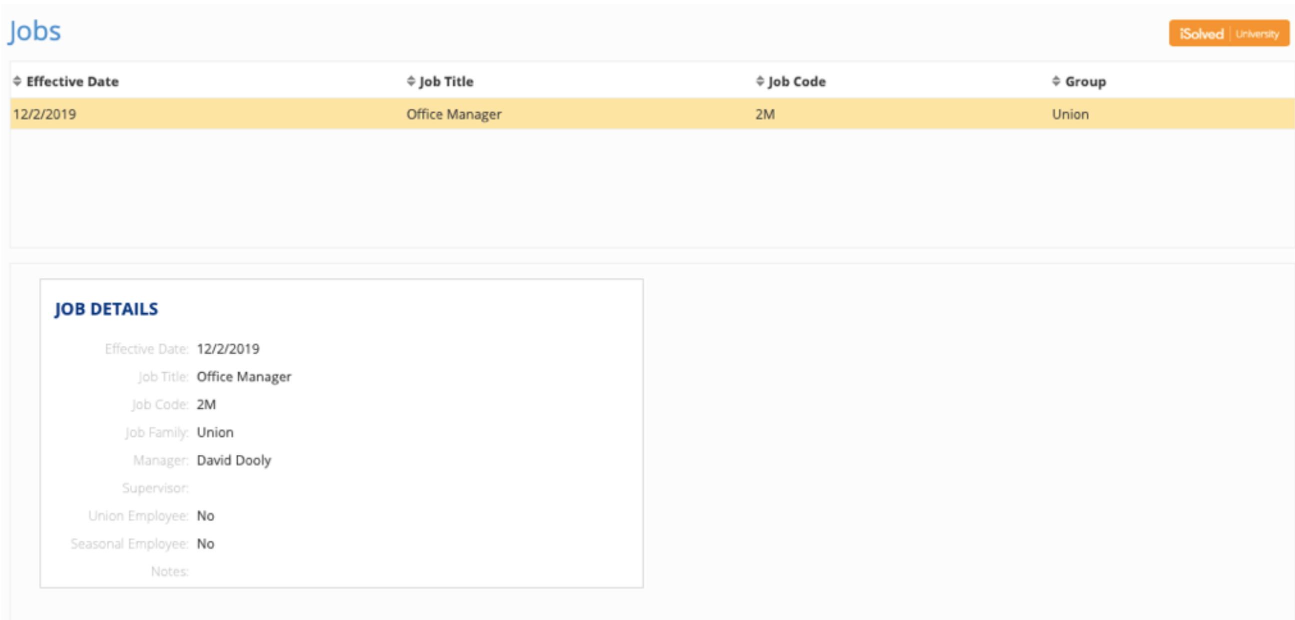
SALARY

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



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.



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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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