



# USER GUIDE

FOR

# EMPLOYEES



# CONTENTS

|                               |    |
|-------------------------------|----|
| LET'S SET YOU UP.....         | 2  |
| FIRST TIME LOGIN.....         | 3  |
| FUTURE LOGIN.....             | 5  |
| RESETTING YOUR PASSWORD ..... | 5  |
| EMPLOYEE SELF SERVICE.....    | 7  |
| EMPLOYEE WELCOME.....         | 7  |
| TIME.....                     | 8  |
| TIME OFF BALANCES .....       | 8  |
| EMPLOYEE MESSAGES .....       | 9  |
| CONTACT INFORMATION .....     | 10 |
| COMPANY INFORMATION .....     | 11 |
| BENEFITS SUMMARY .....        | 11 |
| DOCUMENTS.....                | 11 |
| PAY HISTORY.....              | 12 |
| WC2/ ACA/ 1099 FORMS.....     | 13 |
| DIRECT DEPOSIT.....           | 13 |
| SALARY .....                  | 14 |
| JOBS.....                     | 14 |
| NEED MORE HELP? .....         | 15 |
| YOUR RESPONSIBILITIES .....   | 15 |
| OUR PRIVACY POLICY.....       | 15 |

## 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:

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.

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!

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

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!)

[RETURN TO CONTENTS](#)

## 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-hand menu, and a main content area with several sections: My Profile, My Pay, My Benefits, Notifications, and My Human Resource Contacts. Callout boxes provide the following information:

- You can search the Menu here:** Points to the search bar in the left-hand menu.
- Your basic details show here:** Points to the My Profile section, which displays Rachel Test's name, title (Office Manager), length of service (3 Months), and anniversary (12/10/2019).
- Here you will see current notifications from your company. Click on them to view.** Points to the Notifications section, which shows a document requiring review.
- Menu items appear here:** Points to the list of menu items in the left-hand menu, such as Employee Welcome, Time, Employee Messages, etc.
- In the My Pay window you will see the last two checks you have received.** Points to the My Pay section, which shows a check number (1026) and date (1/31/2020).
- You'll see any company benefits plans you're enrolled in here:** Points to the My Benefits section, which lists a 401(k) Plan and Long-term Disability-tiered LTD.

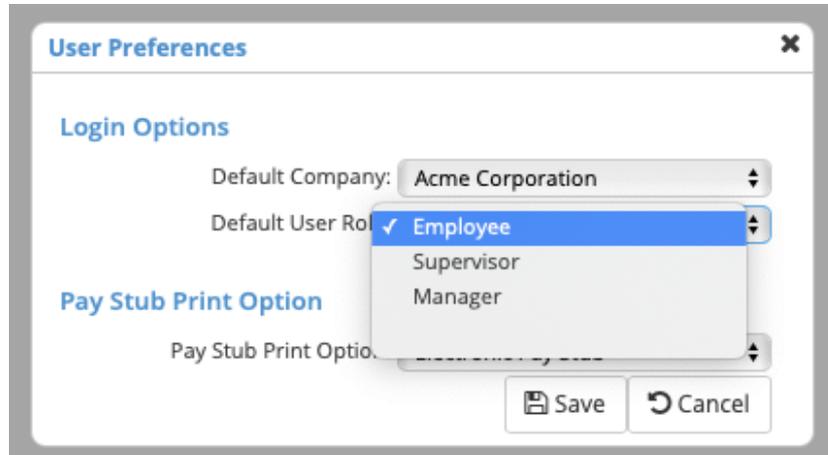
Under your name on the left land side is a drop-down menu:

The screenshot shows a drop-down menu with the following options: Home, My Account, User Preferences, University, and Logout. Callout boxes provide the following information:

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

[RETURN TO CONTENTS](#)

- ✓ 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!

[RETURN TO CONTENTS](#)

## FUTURE LOGIN

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

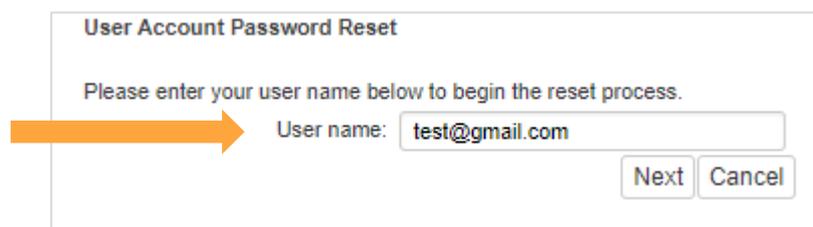


If you enter an incorrect password 5 times, you will be locked out of the system for 10 minutes. Once 10 minutes has passed use the **Forgot Password** link to reset.

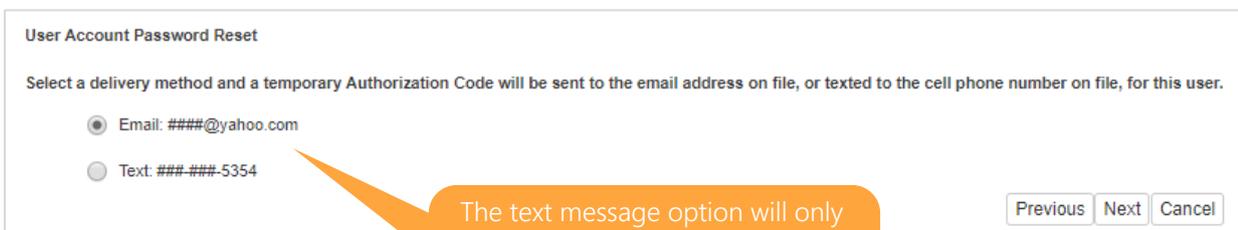
**PRO TIP:** Click on **Forgot Password** after your 4<sup>th</sup> attempt so you don't get locked out of the system.

## 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

[RETURN TO CONTENTS](#)

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

[RETURN TO CONTENTS](#)

# EMPLOYEE SELF SERVICE

## EMPLOYEE WELCOME

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

**MY PROFILE**

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

**MY PAY**

1/31/2020  
Check Number: 1026  
Gross Pay  
Net Pay  
Direct Deposit

**MY HUMAN RESOURCE CONTACTS**

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

John Tryer  
Benefits Rep  
818-505-6060

**MY BENEFITS**

401(k) Plan  
401(k)

Long-term Disability-tiered  
LTD, EE Only

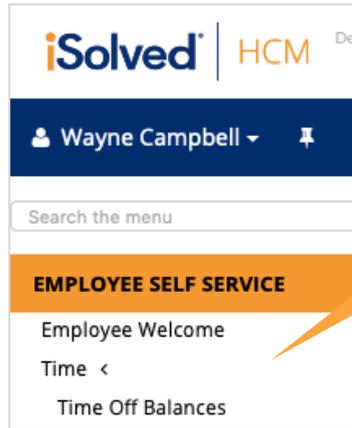
Documents requiring your review

Help

**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

[RETURN TO CONTENTS](#)

# 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<br>Sick  | As of Last Pay Period End  | Current Pay Period<br>12/1/2019 - 12/15/2019  |
|---|--|---|
| <b>Plan Year:</b> Anniversary<br><b>Award Schedule:</b> First Pay of Year<br><b>Accrual Rate:</b> 48.0000<br><b>Last Award Date:</b><br><b>Service Date:</b> 12/10/2019<br><b>Length of Service:</b> 0 Years, 0 Months (0 Months) | Accrued: 0.00<br>Taken: 0.00<br>YTD Accrued: 0.00<br>YTD Taken: 0.00<br><b>Balance: 48.00</b>  | Projected Accrued: 0.00<br>Projected Taken: 0.00<br>Projected YTD Accrued: 0.00<br>Projected YTD Taken: 0.00<br>Time Off Requests-Pending Approval: 0.00<br><b>Projected Balance: 48.00</b> |
|   | <b>Current Plan Year</b><br>Plan year ends 12/15/2019  | <b>Next Plan Year</b><br>12/16/2019 - 11/30/2020  |
|   | Projected Ending Balance: 48.00<br>Projected Accrued:<br>Time Off Requests-Approved:<br>Time Off Requests-Pending Approval:<br><b>Projected Balance: 48.00</b> | Carryover from Previous Plan Year: 48.00<br>Projected Accrued: 0.00<br>Time Off Requests-Approved: 0.00<br>Time Off Requests-Pending Approval: 0.00<br><b>Projected Balance: 48.00</b>      |

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

#### Vacation Current Balance as of : 40.00\*

| Plan Details<br>Vacation   | As of Last Pay Period End  | Current Pay Period<br>12/1/2019 - 12/15/2019  |
|--|--|---|
| <b>Plan Year:</b> Anniversary<br><b>Award Schedule:</b> Every Pay<br><b>Accrual Rate:</b> 0.0000<br><b>Last Award Date:</b><br><b>Service Date:</b> 12/10/2019<br><b>Length of Service:</b> 0 Years, 0 Months (0 Months) | Accrued: 0.00<br>Taken: 0.00<br>YTD Accrued: 0.00<br>YTD Taken: 0.00<br><b>Balance: 40.00*</b>   | Projected Accrued: 0.00<br>Projected Taken: 0.00<br>Projected YTD Accrued: 0.00<br>Projected YTD Taken: 0.00<br>Time Off Requests-Pending Approval: 0.00<br><b>Projected Balance: 40.00</b> |
|  | <b>Current Plan Year</b><br>Plan year ends 12/15/2019  | <b>Next Plan Year</b><br>12/16/2019 - 11/30/2020  |
|  | Projected Ending Balance: 40.00<br>Projected Accrued:<br>Time Off Requests-Approved:<br>Time Off Requests-Pending Approval:<br><b>Projected Balance: 40.00</b> | Carryover from Previous Plan Year: 40.00<br>Projected Accrued: 20.00<br>Time Off Requests-Approved: 0.00<br>Time Off Requests-Pending Approval: 0.00<br><b>Projected Balance: 60.00</b>     |

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

[RETURN TO CONTENTS](#)

## 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 interface for user Rachel Test. The top navigation bar includes the iSolved logo, HCM, and iConnect. The user's profile information is displayed: Rachel Test, Employee: 1269, Hire Date: 12/10/2019, Pay Group: Semi, Hourly: #####, Work Location: LOS ANGELES, CA, Project: 1234, Finance, Department: 100, Benefits Group: CA, Client: 1000 - Acme Corporation, Company: Acme Corporation. The main content area is titled "Employee Messages" and is divided into sections: "Benefits" (Open Enrollment Documentation, Company Luncheon on Sunday 10/06/2019), "Onboarding" (New Hire Onboarding), and "Welcome to the team!". Under "Welcome to the team!", there are two document items: "Other New Hire Forms (PDF)" with a "View here" link and a confirmation message "You have acknowledged reading this document!"; and "FMLA Brochure (PDF)" with a "View here" link and a confirmation message "I acknowledge that I have read and understood this document." with a "Sign Acknowledgement" button. To the right, there is an "Employee Acknowledgement (PDF)" with a "Select the button below to open the form." instruction and a "Complete Form" 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 message titled "Company Picnic" with the sub-heading "Annual Company Picnic" and the details "Adams Grove Sunday September 10th 1-5 PM". Below this is a document icon labeled "Annual Co Picnic (DOCX)" with a "View here" link. A confirmation message below the document icon reads "You have acknowledged reading this document!" with a checkmark icon.

[RETURN TO CONTENTS](#)

## 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.

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

sd by iConnect

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

### Contact Information

Save Cancel

**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:

[RETURN TO CONTENTS](#)

## 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 main content is divided into three sections:

- Annual Cost/Contribution Summary:** A table showing 401(k) at 3.0000% and Long-term Disability at 145.65.
- 401(k):** Details for a 401(k) plan, including Plan Name (401(k)), Effective Date (11/27/2019), Deduction Amount (3.0000%), Deduction Schedule (Every Pay), and Pre-Tax status (Yes).
- Long-term Disability:** Details for an LTD plan, including Plan Name (LTD), Effective Date (11/1/2019), Deduction Amount (3678.00 actual, 3678.00 requested), Deduction Schedule (Every Pay), and Pre-Tax status (No).

## 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 'Document Type' set to 'All'. Below the filter is a horizontal menu with categories: Personnel, Payroll, I-9, Confidential PHI, Confidential - Other, Signed Acknowledgements, Other, and EE Uploads. Below the menu is a table with the following columns: Document Type, Document Description, Document Name, Document Upload Date, and View Document.

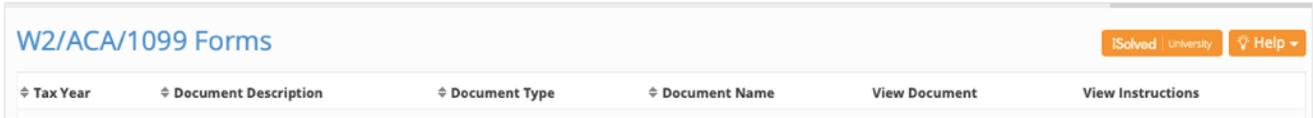
Click on **View Document** to open and review individual documents.

[RETURN TO CONTENTS](#)



## 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 screenshot shows a table titled "W2/ACA/1099 Forms" with a header row containing the following columns: Tax Year, Document Description, Document Type, Document Name, View Document, and View Instructions. The interface includes a search bar and a help icon.

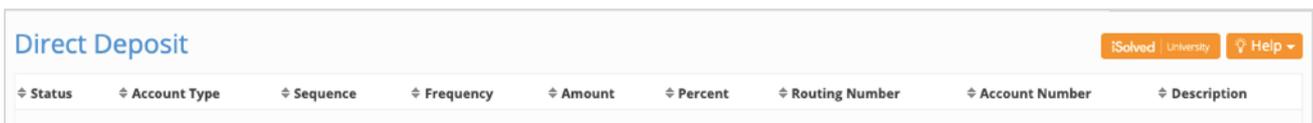
The column headings on the screen will include:

- **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.

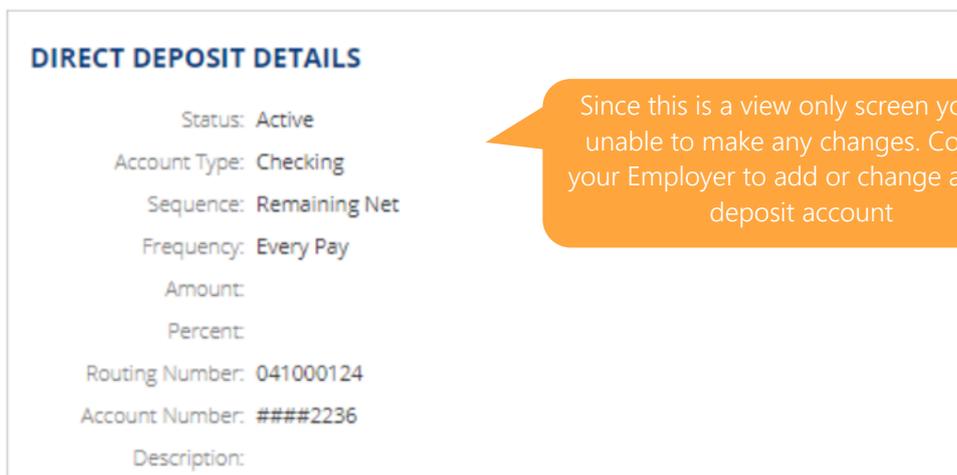
## DIRECT DEPOSIT

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



The screenshot shows a table titled "Direct Deposit" with a header row containing the following columns: Status, Account Type, Sequence, Frequency, Amount, Percent, Routing Number, Account Number, and Description. The interface includes a search bar and a help icon.

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



The screenshot shows a "DIRECT DEPOSIT DETAILS" form with the following information:

- 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

[RETURN TO CONTENTS](#)

## 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:

[RETURN TO CONTENTS](#)

## NEED MORE HELP?

If you need more help, please contact [help@my-icconnect.com](mailto:help@my-icconnect.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](#).

[RETURN TO CONTENTS](#)