



USER GUIDE FOR MANAGERS



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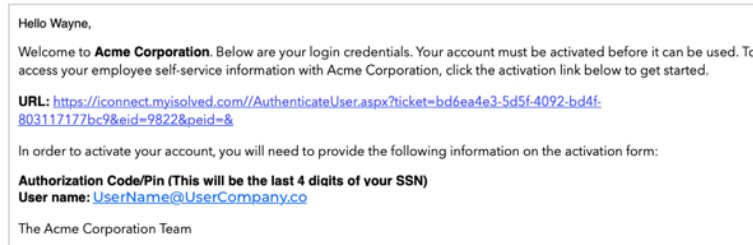
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LET'S SET YOU UP

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:



Simply click on the link and you will be taken to a set up 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 enter an **authorization PIN**. This is the last 4 digits of your Social

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.

You can search the Menu here

Your basic details show here

Here you will see current notifications from your company. Click on them to view.

Menu items appear here

In the My Pay window you will see the last two checks you have received

You'll see any company benefits plans you're enrolled in here

The screenshot shows the iConnect Employee Self Service interface. At the top, it says "Welcome back Rachel" and displays her profile information: Rachel Test, Office Manager, Length of Service: 3 Months, Anniversary: 12/10/2019. The left sidebar contains a search bar and a list of menu items under "EMPLOYEE SELF SERVICE". The main content area is divided into four sections: NOTIFICATIONS (Documents requiring your review), MY PAY (Check Number 1026, Gross Pay, Net Pay, Direct Deposit), MY HUMAN RESOURCE CONTACTS (David Tester, John Tryer), and MY BENEFITS (401(k) Plan, Long-term Disability-tiered LTD, EE Only).

The screenshot shows the iSolved HCM user menu. The user is Wayne Campbell. The menu options are: Employee View (checked), Manager View (circled), Supervisor View, Home, My Account, User Preferences, University, and Logout.

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.

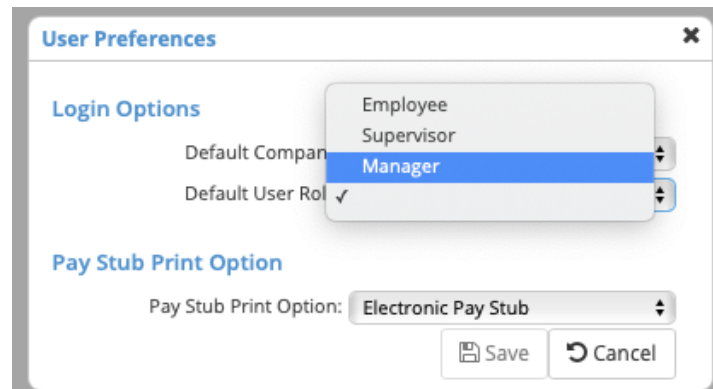
Home takes you back to your Welcome page

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.



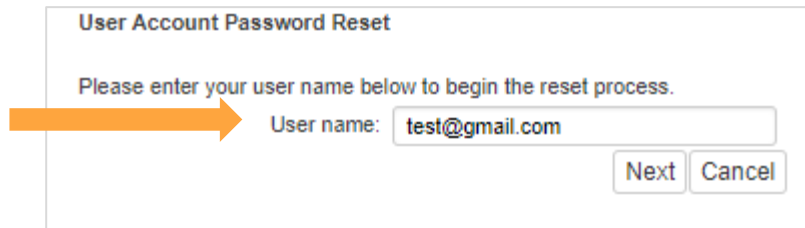
If you enter an incorrect password 5 times, you will be locked out of the system for 10 minutes. Once 10 minutes has passed use the **Forgot Password** link to reset.

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

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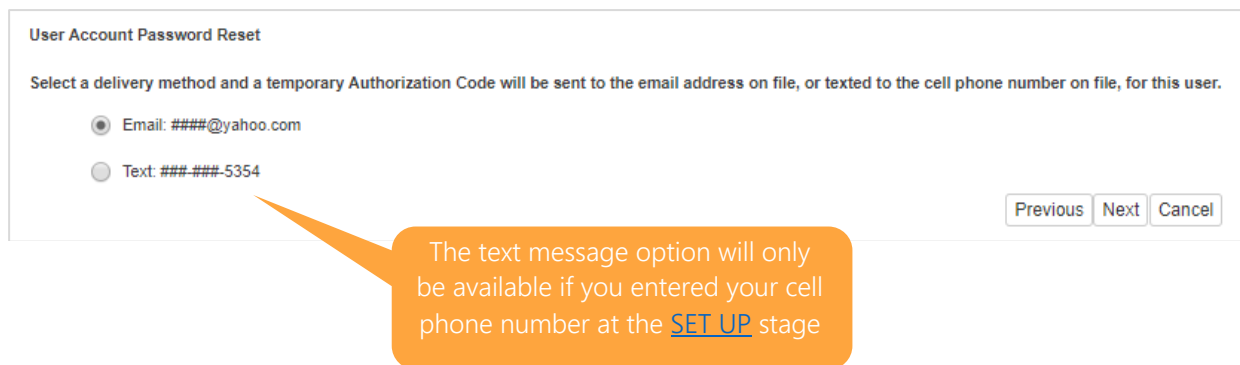
RESETTING YOUR PASSWORD

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



The screenshot shows a web form titled "User Account Password Reset". Below the title is the instruction "Please enter your user name below to begin the reset process." There is a text input field labeled "User name:" containing the text "test@gmail.com". An orange arrow points from the left towards this input field. To the right of the input field 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 screenshot shows the second step of the "User Account Password Reset" process. The title is "User Account Password Reset". The instruction reads: "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." There are two radio button options: "Email: ###@yahoo.com" (which is selected) and "Text: ###-###-5354". An orange callout bubble points to the "Text" option with the text: "The text message option will only be available if you entered your cell phone number at the [SET UP](#) stage". At the bottom right are three buttons: "Previous", "Next", and "Cancel".

Then simply:

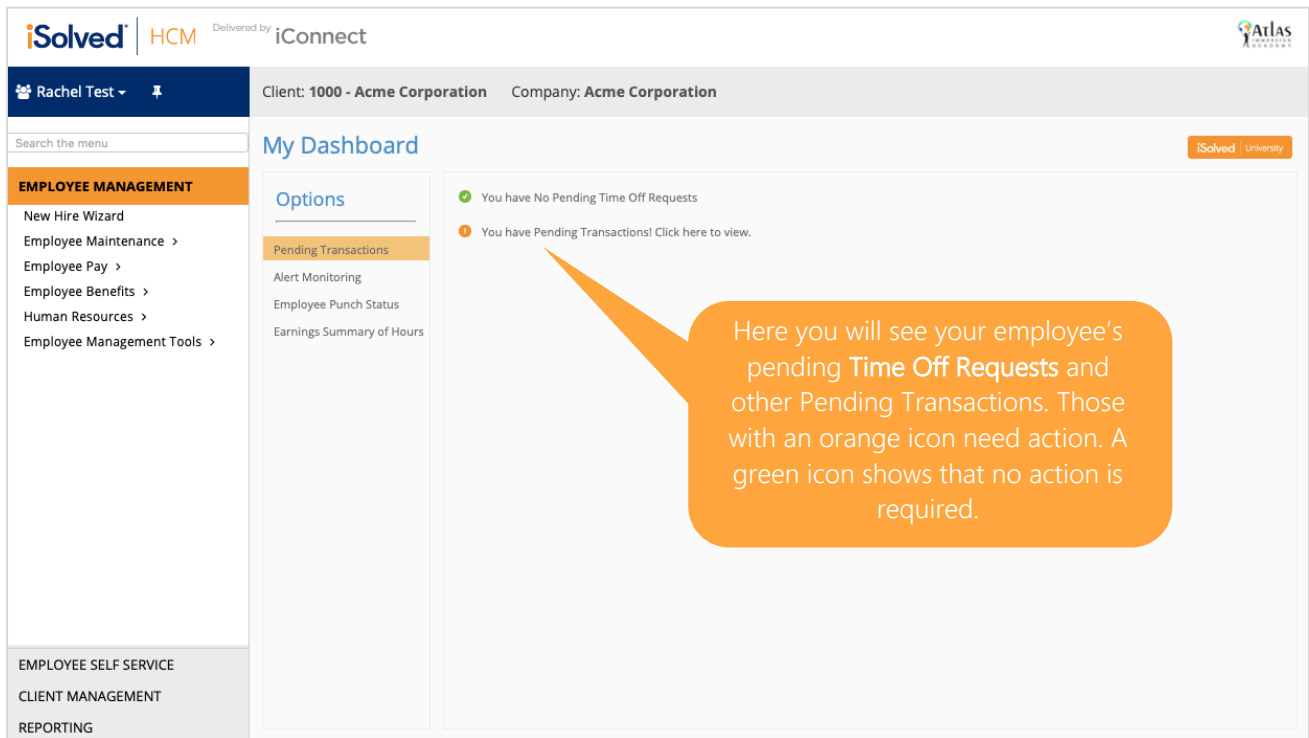
- ✓ Verify the answer to your **Challenge Question**
- ✓ Create a new **Password**
- ✓ Confirm your new **Password**
- ✓ Click **Next** and log on using your new password

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EMPLOYEE MANAGEMENT

MY DASHBOARD

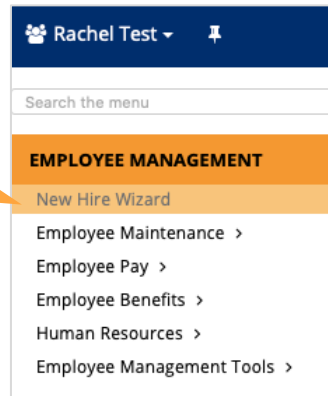
When you've switched to the **Manager** view of iConnect and you sign in again your screen will look like this:



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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.

A screenshot of the 'New Hire Wizard' form. The top header shows 'Client: 1000 - Acme Corporation' and a 'New Hire Wizard' title. A 'Next' button is visible at the top of the form. The form is divided into sections: 'EMPLOYEE MANAGEMENT' (left sidebar), 'EMPLOYEE SELF SERVICE', and 'PAYROLL PROCESSING'. The main content area is titled 'Employment Information' and contains fields for: 'Legal Company' (dropdown), 'Status' (dropdown, set to 'Active'), 'Hire Date' (calendar icon, set to '12/11/2019'), 'Adjusted Service Date' (calendar icon), 'Employee Number' (dropdown), 'Employment Category' (dropdown), 'TimeClock ID' (text field), 'Include in New Hire Report' (checkbox), 'ID Type' (dropdown, set to 'SSN'), 'SSN' (text field), 'First Name' (text field), 'Preferred Name' (text field), 'Middle Name' (text field), 'Last Name' (text field), 'Self-Service Email' (text field), 'Enable Self-Service Access' (checkbox), and 'Marital Status' (dropdown). A 'Help' icon is circled in the top right corner of the form.

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

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

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 screenshot shows a web form titled "New Hire Wizard" with two main sections: "Employment Information" and "General".

Employment Information section:

- * Legal Company: February Wine Company Inc (dropdown)
- * Status: Active (dropdown)
- * Hire Date: 3/1/2017 (calendar icon)
- Adjusted Service Date: (calendar icon)
- * Employee Number: 1232
- * Employment Category: Full Time (dropdown)
- TimeClock ID: (text field)
- ☒ Include in New Hire Report

General section:

- ID Type: SSN (dropdown)
- * SSN: (text field)
- * First Name: (text field)
- Preferred Name: (text field)
- Middle Name: (text field)
- * Last Name: (text field)
- Self Service Email: (text field)
- ☐ Enable Self Service Access
- Marital Status: (dropdown)
- * Address: (text field)
- * Zip Code: (text field)
- Hit Enter Key in zip code field to retrieve city list.
- * City: (text field)
- * State: (dropdown)
- Birth Date: (calendar icon)

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.

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

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.

The screenshot shows a form titled "Personal Information" with several sections:

- Personal Information:** Fields for Home Phone (803-567-8902), Mobile Phone, Office Phone, Fax Number, Personal Email, Tobacco Use (checkbox), Height in Inches, and Weight.
- Veteran Information:** Military Status (dropdown), Active Duty Separation Date, and checkboxes for Recently Separated Veteran, Armed Forces Service Medal Veteran, Other Protected Veteran, Disabled Veteran, and Chose Not To Answer. A note states: "This date is an optional field and is not used for purposes of DOI Veteran reporting."
- I-9 Information:** I-9 Completed (checkbox), I-9 Completed Date (3/1/2017), and Citizenship (A citizen of the United States).
- EEO Information:** Ethnic Origin (Asian (Not Hispanic or Latino)) and Gender (Male).
- Disability Information:** Disability (dropdown).

A blue callout box on the right side of the form contains the text: "PRO TIP: The more information you add on this screen, the richer your reporting will be."

SALARY

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

The screenshot shows a form titled "Salary" with the following fields:

- * Pay Group: Hourly EE
- * Pay Type: Hourly
- * Frequency: Bi-Weekly
- Normal Hours: 80.00
- Annual Salary: 34999.95
- Per Pay Salary: 1346.15
- Hourly Rate: 16.8269

Two orange callout boxes provide additional information:

- A callout box on the left states: "Normal Hours will populate based on the frequency chosen".
- A callout box on the right states: "Fill in any of these three Salary fields and the system will automatically complete the others".

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JOB

The screenshot shows the 'Organization/Labor/Job' form with the following fields and values:

- Location: 01 - Corporate Office
- Department: 40 - Payroll
- Job: 9000 - Payroll Mgr
- Workers Comp: (empty)
- SOC Code Search: 11-3011 - Administrative Services Managers

Callouts:

- Top right: Add Location, Department and Job details in these fields
- Left: All Workers Compensation codes set up for your company will be available in the drop-down box
- Bottom right: Key in the beginning of the relevant Standard Occupational Classification (SOC) code and the system will generate matching options

ALTERNATE PAY RATE

The screenshot shows the 'Alternate Pay Rate' form with the following fields and values:

- Alternate Rate: IT
- Rate: 35

Callout: The Pay Rates relevant to your company will be available here

TAX LOCATION

Residence Location will populate based on the Zip code entered earlier

The screenshot shows the 'Tax Location' form with the following fields and values:

- * Residence Location: SC0630170
- * Work Location: (empty)
- Taxable School District: (empty)
- Reciprocity Rule: (empty)
- Filing Status: Married
- Exemptions: 0
- Additional \$: 25
- Dollars: (selected)
- Tax Description: SOUTH CAROLINA WH
- Filing Status: N/A
- Exemptions: 1
- Additional \$: (empty)
- Dollars: (selected)
- Exemption Amount \$: (empty)
- Alternate Calculation: N/A

Callouts:

- Top left: Residence Location will populate based on the Zip code entered earlier
- Top right: Work Location is Required. (Warning icon)
- Bottom right: Reciprocity Rule can be left blank or resident state used
- Bottom right: You'll find Federal Income Tax data on the employee's W-4
- Bottom right: Additional amounts can be entered in either dollars or percentages

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

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ORGANIZATION

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

Organization Fields
Division:
Department:

DIRECT DEPOSIT

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

Direct Deposits

	Status	Account Type	Sequence	Amount	Percent	Routing Number	Account Number	Description
	Active	Checking	Remaining Net			053000196	908840078	
	Active	Savings	1	25		053000196	1234	

Add New

Click on **Add New** to add additional accounts

Set the **Sequence** in which the pay check is disbursed. In this example 1 will deposit \$25 into a savings account. The rest will go into the checking account

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.

Company	Pay Group	Employee #	First Name	Preferred Name	Middle Name	Last Name	SSN	Status	Project	Division	hats	Section
Acme Corporation	Semi	1277	Abe	A.B.		Apples	A		1234 - Project 1234	WEST - Division WEST	2 - hats 2	A - Section A
Acme Corporation	Semi	1286	Jenn			Babies	A		L19190 - Project L19190	WEST - Division WEST	2 - hats 2	B - Section B
Acme Corporation	Semi	0006	Christopher			Bailey	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	1293	Ana			Banana	A		L19190 - Project L19190	EAST - Division EAST	1 - hats 1	A - Section A
Acme Corporation	Semi	1260	John	JJ	A	Banfield	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	42	Joh	JJ	A	Banfield	A					
Acme Corporation	Semi	47	John	JJ	A	Banfield	A					
Acme Corporation	Semi	1291	Jon	JR	A	Banfield	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	1281	Adrienne			Barbot	A		1234567890 - 123456...	WEST - Division WEST	2 - hats 2	A - Section A
Acme Corporation	Semi	1297	Charles	Charlie		Barkley	A		L19190 - Project L19190	EAST - Division EAST	2 - hats 2	B - Section B
Acme Corporation	Weekly	1296	Troy			Barnes	A		1234 - Project 1234			B - Section B
Acme Corporation	Semi	1259	Mark			Beck	A		1234567890 - 123456...			A - Section A
Acme Corporation	Semi	0027	Justin			Benson	A					
Acme Corporation	Semi	61	Chandler			Bling	A		1234 - Project 1234	EAST - Division EAST	1 - hats 1	
Acme Corporation	Semi	0035	Caleb			Black	A		L19190 - Project L19190			A - Section A
Acme Corporation	Semi	69	Jason			Bourne	A		1234 - Project 1234			A - Section A
Acme Corporation	Weekly	1298	Kobe	Mamba		Bryant	A		1234 - Project 1234			A - Section A
Acme Corporation	Weekly	1265	ELSA			BUCKINGHAM	A		L19190 - Project L19190			A - Section A
Acme Corporation	Weekly	1267	BUGS			BUNNY	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	1268	Wayne			Campbell	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	1278	Ruth			Campos	A		L19190 - Project L19190	EAST - Division EAST	1 - hats 1	A - Section A
Acme Corporation	Weekly	jk	Bulma			Capsule Corp.	A					
Acme Corporation	Semi	1275	Virginia	Ginigin		Charleston	A		L19190 - Project L19190	WEST - Division WEST	2 - hats 2	B - Section B
Acme Corporation	Semi	1276	Cristina			Crawford	A		L19190 - Project L19190	WEST - Division WEST	1 - hats 1	B - Section B
Acme Corporation	Weekly	63	Tazmanian			Devine	A		1234 - Project 1234			A - Section A
Acme Corporation	Weekly	40	Griffin		Alexander	Dobson	A					

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:

< 1 of 73 >	 	JJ A Banfield Employee#: 1260 Status: Active	Pay Group: Semi Hire Date: 10/29/2019	Hourly: ##### Work Location: LOS ANGELES, ...	Project: 1234 Finance:	Department: Benefits Group: CA	Client: 1000 - Acme Corporation Company: Acme Corporation
-------------	---	--	--	--	---------------------------	-----------------------------------	--

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.

The screenshot shows the 'Employer I-9 Verification' form for 'Tester Employee'. The form is divided into several sections: 'Verification' (with 'Edit', 'Refresh', 'Verify and Save', and 'Cancel' buttons), 'Reverification', 'I-9 Information', 'List A: Identity and Employment Authorization', 'List B: Identity', 'List C: Employment Authorization', 'Document Attachment', and 'Certification'. The 'I-9 Information' section shows 'I-9 Completed' with a date of 3/10/2020 and citizenship as '1. A citizen of the United States'. The 'List A' section has fields for 'I-9 Document Title', 'Issuing Authority', 'Document Number', and 'Expiration Date'. The 'List B' and 'List C' sections have similar fields. The 'Document Attachment' section has a 'Description' and 'Upload File' field. The 'Certification' section has a text area for the employer's attestation and a 'Signature' field.

Here you can upload a copy of the required documents

Click on **Edit** to complete the fields, and **Save** when you have finished

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.

The screenshot shows the 'Employer I-9 Verification' form for 'JJ A Banfield'. The form is divided into several sections: 'Verification' (with 'Submit' and 'Cancel' buttons), 'Reverification', 'I-9 Information', 'Employment Authorization', 'Document Attachment', and 'Certification'. The 'I-9 Information' section has fields for 'Last Name (Family Name)', 'First Name (Given Name)', 'Middle Initial', and 'Date of Birth'. The 'Employment Authorization' section has fields for 'I-9 Document Title', 'Document Number', and 'Expiration Date'. The 'Document Attachment' section has a 'Description' and 'Upload File' field. The 'Certification' section has a text area for the employer's attestation and a 'Signature' field.

Click **Submit** once you have completed and signed off the form

Click on the **Help** icon for further information about each field

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.

iSolved HCM Delivered by iConnect

Tester Employee Pay Group: Semi Hourly: ####.## Project: 1234 Department: 100 Client: 1000 - Acme Corporation
Employee#: 1309 Status: Active Hire Date: 3/11/2020 Work Location: LOS ANGELES, ... Finance: Benefits Group: Executives Company: Acme Corporation

Jobs

Effective Date	Job	Group	EEO Category	Workers Comp	Exempt Status	Salary Grade
3/11/2020	1B - Benefits Director		Executive/Senior Level Officials and Managers	Cabinet Mfg. - wood	Exempt	

The options in the blue navigation bar enable you to add and amend records

Job

* Effective Date: 3/11/2020
Change Reason:
Job: 1B - Benefits Director
* Project: 1234 - Project 1234
* Benefits Group: Executives - Executives
* Section: A - Section A
SOC Code Search:
Manager Search: 1263 - Jaffa Test
Supervisor Search:
Compensation Plan:
Notes:
Jaffa Test
Project: 1234 - Project 1234
Benefits Group: Executives - Executives

Job Classification

Job Code: 1B
Job Group:
EEO Category: Executive/Senior Level Officials and Managers
FLSA Exempt Status: Exempt
☐ Seasonal Employee
☒ Union Employee

Job Summary

Job Description

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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.

The screenshot shows the iSolved HCM interface. The top navigation bar includes the iSolved logo, HCM, and iConnect. The user is logged in as Rachel Test. The main header displays the employee's name, ID (1309), status (Active), hire date (3/11/2020), and other details. The left sidebar lists various management tools, with 'Salary' highlighted under 'Employee Pay'. The main content area shows a table of salary records with columns for Effective Date, Workflow, Change Reason, % Increase, Annual Salary, Per Pay Salary, Hourly Rate, Normal Hours, Frequency, Pay Group, and Pay Type. A modal form for editing a salary record is open, showing fields for Effective Date, Change Reason, Pay Type, Pay Group, Frequency, Normal Hours, Percent Increase, Annual Salary, Per Pay Salary, Hourly Rate, and Notes. An orange callout box points to the 'Save' button in the modal, stating: 'Don't forget to click Save when you've completed your edits'.

Effective Date	Workflow	Change Reason	% Increase	Annual Salary	Per Pay Salary	Hourly Rate	Normal Hours	Frequency	Pay Group	Pay Type
3/11/2020				52002.00	2166.75	25.0000	86.67	Semi-Monthly	Semi	Hourly

Don't forget to click **Save** when you've completed your edits

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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.

By selecting from these three different tabs you can view information on the employee's **Other Taxes** and **Additional States**

The screenshot shows the iSolved HCM interface for Employee 1309. The left sidebar contains navigation links for Employee Management (New Hire Wizard, Employee Maintenance, Employer I-9 Verification, Jobs, Employee Pay, Salary, Tax Information, Deductions, Employee Benefits, Human Resources, Employee Documents, Employee Management Tools, Employee Hire, Initiate Onboarding, Pending EE Dashboard), Employee Self Service, Client Management, and Reporting. The main content area is titled 'Tax Information' and has three tabs: 'Tax Info' (selected), 'Other Taxes', and 'Additional States'. The 'Tax Info' tab displays the following information:

- Federal Income Tax:** Filing Status: Married Filing Jointly; Block Tax: ☐; Multiple Jobs or Spouse Works: ☒; Dependents Amount: 0.00; Other Income Amount: 0.00; Deductions Amount: 0.00; Additional \$: 0.00; Dollars: .
- CA State Income Tax (Residence):** Tax Description: CALIFORNIA WH; Filing Status: CA - Single or Married With Two or More Income; Alternate Calculation: N/A; Block Tax: ☐; Exemptions: 0; Addl Exemptions: 0; Exemption Amount \$: 0.00; Additional \$: 0.00; Dollars: .
- Tax Location:** * Residence Location: CA0371900; * Work Location: 1 - LOS ANGELES, CA; Taxable School District: ; Reciprocity Rule: ; Filing Type Override: .
- City Income Tax (Residence):** Tax Description: No city income tax for current residence (Other local/county taxes may apply).
- Tax Exemption:** Status Type: .
- Employee Document:** Description: Employee's Withholding Certificate; Current File: Download | Remove; Update File: Federal W-4.pdf.

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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.

Delivered by iConnect

Rachel Test

JJ A Banfeild
 Employee: 1260 Status: Active

Pay Group: Semi
 Hire Date: 10/29/2019

Hourly: #####
 Work Location: LOS ANGELES, ...

Project: 1234
 Finance:

Department:
 Benefits Group: CA

Client: 1000 - Acme Corporation
 Company: Acme Corporation

Search the menu

Deductions

Employee Management

- New Hire Wizard
- Employee Maintenance >
- Employee Pay <
 - Salary
 - Tax Information
 - Deductions
- Employee Benefits >
- Human Resources >
- Employee Management Tools >

Pay Item	Schedule	Amount	Percent	Balance
Pretax Dental	Every Pay	13.50		
Medical	Every Pay			
Pretax Med	Every Pay			
Roth 401K	Every Pay			
401K	Every Pay		3.00	
401K Loan	Every Pay			
HSA Pre-Tax	Every Pay			
LTD	Every Pay			
Vision Pre-tax	Every Pay			
Loan	Every Pay			
Medical Pre-tax	Every Pay			
PSA Medical	Every Pay			
PSA Limited	Every Pay			
PSA Dep Care	Every Pay			
EE Vol. Life	Every Pay			
Spouse Vol. Lif	Every Pay			
Child Vol. Life	Every Pay			
Advance	Every Pay			
Medical After-T	Every Pay			

Pretax Dental

* Pay Item: Pretax Dental

Reference Number:

Default Schedule: Every Pay

Start Date:

Stop Date:

Amount: 0.0000

Default Amount: 13.50

Arrears Information

☐ Apply Arrears Balance

Balance: \$13.50

The list of all available and selected deductions appears here. Click on one and the details will appear in the grey boxes above

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EMPLOYEE BENEFITS

BENEFITS PLANS

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

This box enables you to select a view of All, Active, Historical or Pending plans

Employee: Seanfeild Pay Group: Semi Hourly: ##### Project: 1234 Department: Benefits Group: CA Client: 1000 - Acme Corporation
Employee: 1260 Status: Active Hire Date: 10/29/2019 Work Location: LOS ANGELES, ... Finance: Company: Acme Corporation

Benefit Plans

Status: Active

Start Date	Benefit	Benefit Plan	Override Plan Limit
11/27/2019	401(k)	401(k)	
11/1/2019	Long-term Disability	LTD	

Benefit Plan

* Plan: 401(k)

☐ Pending Participation Requirements

Dates will be updated after the last participation requirement has been met.

* Start Date: 11/27/2019

Stop Date:

Benefit End Reason:

Enrollment Date: 11/25/2019

Participation Reqs Met On Date:

EE Contribution Eligibility Date: 11/27/2019

Match Eligibility Date:

Participant Id:

Plan Limit OR:

Default: \$19,000.00

Plan Entry Rules and Participation Requirements

Plan Setup Information

EE Contribution Start On Rule: N/A

ER Match Start On Rule: N/A

EE Contribution Days of Service Requirement: N/A

ER Match Days of Service Requirement: N/A

Age Requirement: N/A

Hours Worked Requirement: N/A

Employee Information

Current Days of Service: N/A

EE Contribution Days of Service Date: N/A

ER Match Days of Service Date: N/A

Met/Meets Age Requirement On: N/A

Hours Worked: N/A

Employee Contribution

Roth 401K Amount:

Roth 401K Percent:

401K Amount:

401K Amount2:

401K Percent:

Default Percent: 3.00

Beneficiaries

WARNING: At least one beneficiary is required

Select the plan for which you want to see details by clicking on the relevant line

Key information about the selected plan appears in the grey boxes on the left

The rest of the screen will show additional details which may change depending on the individual plan

Any alerts appear in red and may require action

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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.

You can select the relevant accrual plan in the drop-down provided

PRO TIP: Don't forget, wherever you see the HELP icon, more information on that screen is available!

Run #	Starting Balance	Accrued	Taken	Ending Balance	Unavailable	MTD Accrued	QTD Accrued	Plan YTD Accrued	Run Date
46	0.00	48.00	0.00	48.00	False	48.00	48.00	48.00	1/20/2020
47	48.00	0.00	0.00	48.00	False	48.00	48.00	48.00	2/4/2020
49	48.00	0.00	0.00	48.00	False	0.00	48.00	48.00	2/18/2020
51	48.00	0.00	0.00	48.00	False	0.00	48.00	48.00	2/20/2020

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.

Here you can select either Sick or Vacation to view the relevant accruals

Accumulation	Override Value	Current Value
Starting Balance		48.00
Available Balance		48.00
Unavailable Balance		0.00
Balance		48.00
Used		0.00
Pending Taken		0.00
Plan YTD Taken		0.00
Calendar YTD Taken		0.00
Plan YTD Accrued		48.00
Current Accrued		0.00
YTD Accrued		48.00
QTD Accrued		48.00
MTD Accrued		0.00
Carry Over Allowed		0.00
Carry Over Lost		0.00

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HUMAN RESOURCES

EMPLOYEE DOCUMENTS

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

The screenshot shows the iSolved HCM interface for Employee Documents. The top header includes the iSolved HCM logo, user information (Rachel Test), and employee details for Adrienne Barbot (Employee #: 1281, Status: Active, Hire Date: 12/31/2019). The left sidebar lists various HR functions under 'EMPLOYEE MANAGEMENT' and 'EMPLOYEE SELF SERVICE'. The main content area is titled 'Employee Documents' and features a tabbed interface with categories like Personnel, Payroll, I-9, Confidential PHI, Confidential - Other, Signed Acknowledgements, Other, and EE Uploads. The 'I-9' tab is selected, showing a table of documents. An orange callout points to the '+ Add a New Document' button, stating 'Here you can add a new document'. Another orange callout points to the 'I-9' tab, stating 'Select the relevant tab to find the document you need'.

EMPLOYEE DOCUMENTS

Document Type: All Upload Date: [Calendar Icon]

Personnel Payroll **I-9** Confidential PHI Confidential - Other Signed Acknowledgements Other EE Uploads

+ Add a New Document

Document ID	Document Description	Document Upload Date	View Document	Edit	Delete
Employer I-9	Employer I9 Form	1/3/2020	View Document		

Here you can add a new document

Select the relevant tab to find the document you need

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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.

The screenshot shows the 'Initiate Onboarding' screen in the iSolved HCM system. The interface includes a left-hand navigation menu with categories like 'EMPLOYEE MANAGEMENT', 'EMPLOYEE SELF SERVICE', 'CLIENT MANAGEMENT', and 'REPORTING'. The main content area is titled 'Initiate Onboarding' and contains several sections: 'Company Information', 'Onboarding Template', and 'New Hire Information'. Three orange callout boxes provide additional context: the first points to the 'Legal Company' dropdown, stating it chooses an onboarding template; the second points to the 'Email Address' field, noting it triggers an email; the third points to the 'Hire Date' and other organizational fields, stating they help create a comprehensive record.

Company Information

Legal Company:

* Work Location:

Onboarding Template

* Onboarding Template:

New Hire Information

* First Name:

Middle Name:

* Last Name:

* Email Address:

- If email address is not currently active the email address will be blocked and the EE will not receive the activation link.
- The initial email address entered here will default to the 'Self-Service Email' field but can be manually changed to a work email address upon hire.

Hire Date:

Project:

Department:

Benefits Group:

Division:

hats:

Section:

Callouts:

- Here you choose an **onboarding template** which determines the details to be captured through the onboarding process
- Completing this field will trigger the **email** which prompts the new employee to complete the onboarding process
- Whilst these fields are not mandatory, completing them will help you create a more comprehensive employee record

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PENDING EE DASHBOARD

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

iSolved HCM Delivered by iConnect **Atlas**

Client: 1000 - Acme Corporation

Pending EE Dashboard

New Hires (13) Rehires (3)

1. Select employee(s)
2. Select an action

Quick Hire New Hire Wizard Delete

Onboarding Status Step: [Dropdown]

Applicants	Employee Name	Legal	Org Values	OB Initiation Date	Onboarding Status Step	Onboarding Template	ESS Account
<input type="checkbox"/>	Spiller, Steven	Acme Corporation	Department: 400 Benefits Group: CA	12/5/2019	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Martins, Nayda	Acme Corporation	Department: 200 Benefits Group: CA	12/31/2019	New Hire Wizard	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Schiffer, Claudia	Acme Corporation	Department: 100 Benefits Group: Executives	12/31/2019	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Grande, Arineh	Acme Corporation	Department: 200 Benefits Group: CA	1/21/2020	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Lastname, Employee	Acme Corporation	Benefits Group: Executives Project: 1234	1/23/2020	New Hire Wizard	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Fisher, Darnon	Acme Corporation	Department: 300 Benefits Group: CA	2/4/2020	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Grande, Arineh	Acme Corporation	Department: 300 Benefits Group: CA	2/12/2020	New Hire Wizard	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Employee, Demo	Acme Corporation					Resend Activation Link
<input type="checkbox"/>	Jones, Frankie	Acme Corporation					Resend Activation Link
<input type="checkbox"/>	Scott, Michael	Acme Corporation	Department: 500 Division: EAST	2/27/2020	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Bader, Ruth	Acme Corporation	Department: 200 Benefits Group: CA	2/28/2020	New Hire Wizard	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Flenderson, Toby	Acme Corporation	Department: 500 Division: EAST	3/2/2020	Allow New Hire Edits	New Hire Onboarding-CA Employees	Resend Activation Link

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 displays in blue.

Mike Holmes

Data changed since initiating the new hire displays in blue.

EMPLOYEE DATA

Name: Mike Holmes

Address: 1111 Main street
City: WEST LOS ANGELES
State: CA
Zip Code: 90025

OTHER EMPLOYEE DATA

SSN: 125-45-8558

Birth Date: 1/1/1980

Marital Status: Married

Self Service Email: mholmes@modemhr.com

Personal Email:

EEO AND VETERAN INFO

Gender: Protected Vet

Ethnic Origin: None of the Above

Disability: Recently Separated Vet

Separation Date:

EMPLOYEE CONTACTS

Contact 1 of 1

Contact Person: Randy Holmes

Relationship: Brother

Address:

City:

State:

Zip Code:

SSN:

Birth Date:

Street Phone: 310-990-4236

Mobile Phone:

Emergency Contact:

Independent Beneficiary:

Full-time Student:

Disabled:

Deceased:

Height:

Weight:

I-9 INFO

I-9 Completed: Yes

I-9 Completed Date: 12/10/2019

I-9 Comments: Citizen of the United States

TAX INFORMATION

Federal Income Tax: [Federal Income Tax](#)

Filing Status: Single

Exemptions: 0

Stock Tax: No

Additional: \$0.00

DIRECT DEPOSIT

Status:

Amount:

Account Type:

Percent:

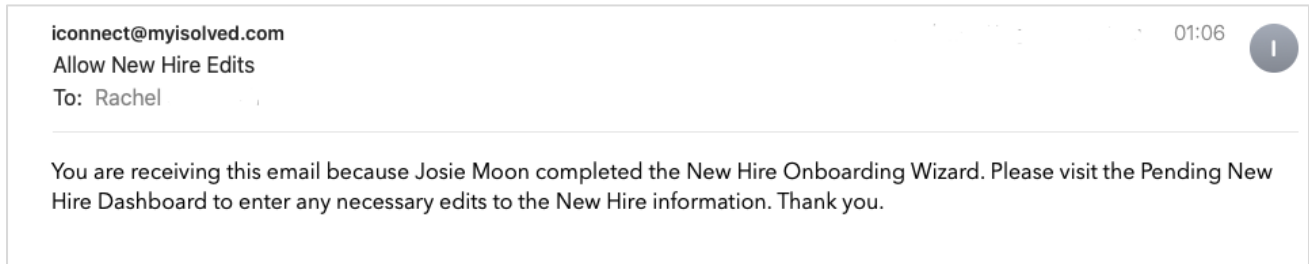
Sequence:

Routing Number:

Account Information:

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

Client: 1000 - Acme Corporation

Pending EE Dashboard

New Hires (13) Rehires (3)

1. Select employee(s)
2. Select an action

Onboarding Status Step: [Dropdown]

Quick Hire New Hire Wizard Delete

<input type="checkbox"/>	Applicants	Employee Name	Legal	Org Values	OB Initiation Date	Onboarding Status Step	Onboarding Template	ESS Account
<input type="checkbox"/>		Spiller, Steven	Acme Corporation	Department: 400 Benefits Group: CA	12/5/2019	Not Started	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>		Martins, Nayda	Acme Corporation	Department: 200 Benefits Group: CA	12/31/2019	New Hire Wizard	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>		Schiffer, Claudia	Acme Corporation	Department: 100 Benefits Group: Executives	12/31/2019	Not Started	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>		Grande, Arineh	Acme Corporation	Department: 200 Benefits Group: CA	1/21/2020	Not Started	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>		Lastname, Employee	Acme Corporation	Benefits Group: Executives Project: 1234	1/23/2020	New Hire Wizard	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>			Acme Corporation	Department: 300	2/4/2020	Not Started	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>					2/12/2020	New Hire Wizard	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>					2/25/2020	Allow New Hire Edits	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>		Jones, Frankie	Acme Corporation	Department: 300 Benefits Group: Non-CA	2/26/2020	Not Started	New Hire Onboarding	Resend Activation Link
<input type="checkbox"/>		Scott, Michael	Acme Corporation	Department: 500 Division: EAST	2/27/2020	Not Started	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>		Bader, Ruth	Acme Corporation	Department: 200 Benefits Group: CA	2/28/2020	New Hire Wizard	New Hire Onboarding: CA Employees	Resend Activation Link
<input type="checkbox"/>		Flenderson, Toby	Acme Corporation	Department: 500 Division: EAST	3/2/2020	Allow New Hire Edits	New Hire Onboarding: CA Employees	Resend Activation Link


Check the corresponding box to select an employee

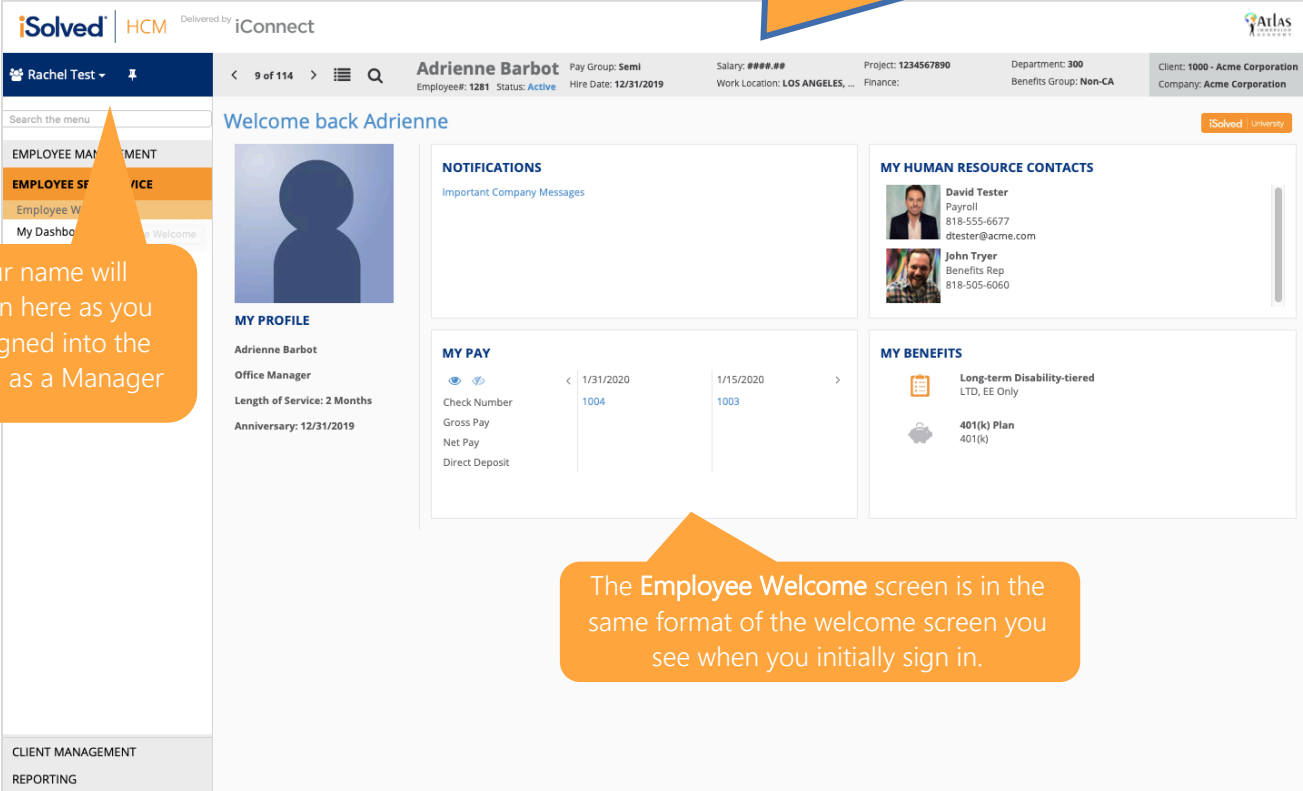
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EMPLOYEE SELF SERVICE

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 



Your name will remain here as you are signed into the system as a Manager

The Employee Welcome screen is in the same format of the welcome screen you see when you initially sign in.

Employee Welcome Screen Details:

- Header:** iSolved HCM | Delivered by iConnect | Atlas
- User:** Rachel Test
- Employee:** Adrienne Barbot (Employee #: 1281, Status: Active, Hire Date: 12/31/2019)
- Pay Group:** Semi
- Salary:** #####
- Project:** 1234567890
- Department:** 300
- Client:** 1000 - Acme Corporation
- Work Location:** LOS ANGELES, ...
- Finance:**
- Benefits Group:** Non-CA
- Company:** Acme Corporation

Welcome back Adrienne

MY PROFILE

- Adrienne Barbot
- Office Manager
- Length of Service: 2 Months
- Anniversary: 12/31/2019

NOTIFICATIONS

Important Company Messages

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	1/15/2020 >
Check Number	1004	1003
Gross Pay		
Net Pay		
Direct Deposit		

MY BENEFITS

- Long-term Disability-tiered LTD, EE Only
- 401(k) Plan 401(k)

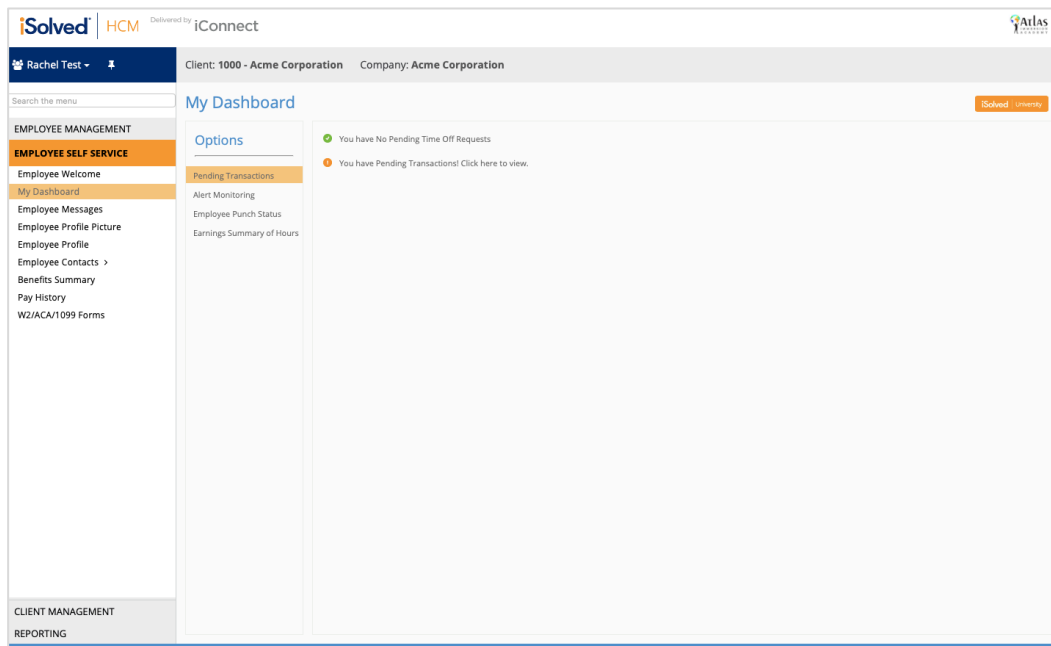
CLIENT MANAGEMENT

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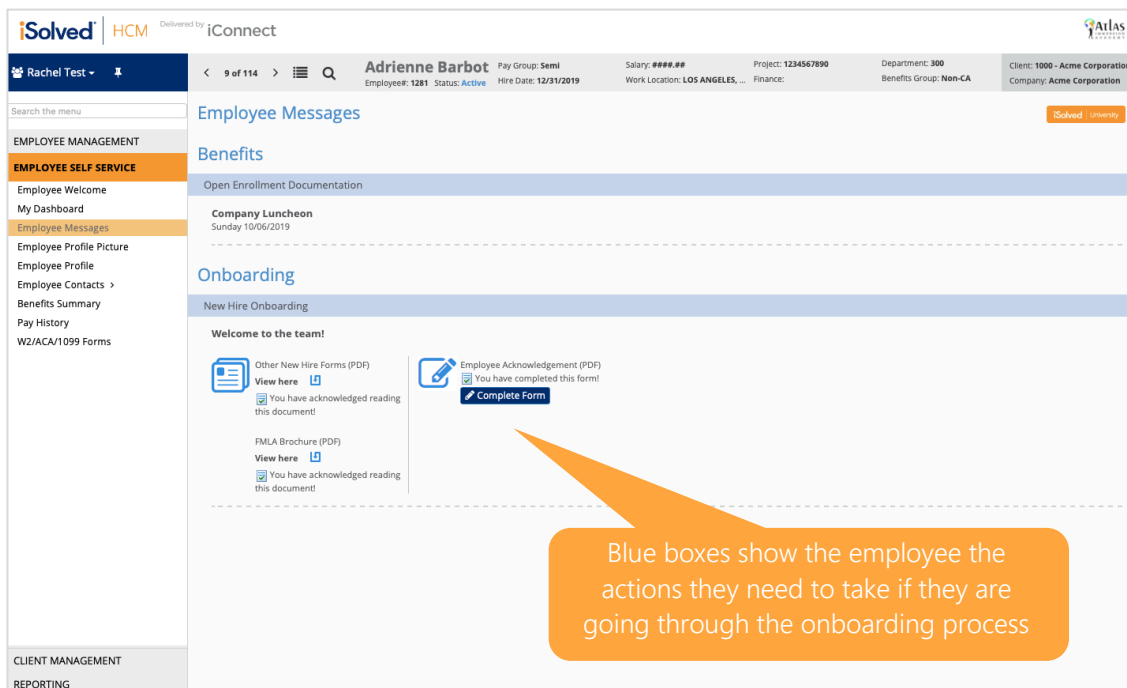
MY DASHBOARD

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 **messages** 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**.

The screenshot displays the iSolved HCM iConnect interface. The top navigation bar includes the iSolved HCM logo, the user name 'Rachel Test', and a search icon. The main header shows the employee's name 'JJ A Banfeild' with details: Employee#: 1260, Status: Active, Hire Date: 10/29/2019, Pay Group: Semi, Hourly: ###.##, Project: 1234, Department: Benefits Group: CA, and Client: 1000 - Acme Corporation. The left sidebar lists navigation options under 'EMPLOYEE MANAGEMENT' and 'EMPLOYEE SELF SERVICE'. The main content area is titled 'Employee Profile Picture' and features an 'Upload:' field with a small white square containing three dots. An orange callout box points to this square with the text: 'Click here to upload a profile picture. Ensure you **save** the image before navigating off the screen.' Below the upload field is a placeholder image of a person's silhouette.

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EMPLOYEE PROFILE

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

The Employee Profile screen displays a comprehensive overview of an employee's information. The header includes navigation icons, a search bar, and key details for JJ A Banfield (Employee # 1260, Status: Active, Hire Date: 10/29/2019). The main content area is organized into several sections:

- EMPLOYEE NAME & ADDRESS:** Name (John A Banfield), Address (470 Howard, Pasadena, California 91103).
- TAX INFORMATION:** Filing Status (Single), Work Location (LOS ANGELES, CA), Res Location (CA0372570), School District, and State Exemptions (1).
- PERSONAL INFORMATION:** SSN (XXX-XX-6666), Office Phone, Birth Date (3/21/1999), Mobile Phone, Marital Status (M), Home Phone (232-186-8965), Gender (Male), Self Service Email, and Personal Email.
- EMPLOYMENT INFORMATION:** Legal Employer (Acme Corporation), Adjusted Service Date, Employee # (1260), Status (Active), Hire Date (10/29/2019), and Organization Management (Managers: John A Banfield, David Test, Rachel Test; Supervisors: David Test, jella Test, Rachel Test).
- JOB INFORMATION:** Effective Date (10/29/2019), Job Code (1M), Job Title (Sales Manager), Job Group, PLOA Exempt (No), Seasonal Job (No), Union Job (No), EEO Category (Sales Workers), and Managers (2812, Manager, Supervisor).
- EEO & VETERAN INFORMATION:** Ethnic Origin (Asian (Not Hispanic or Latino)), Recently Separated Vet (No), Protected Vet (No), Disability (No), and Separation Date.
- ORGANIZATION FIELDS:** Finance, Department, Division, and Rate.
- LABOR FIELDS:** GL Acct# and RN WORK.

EMPLOYEE CONTACTS

EMERGENCY CONTACTS

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

The Emergency Contacts screen allows users to manage emergency contacts for the selected employee. The header shows navigation icons, a search bar, and key details for JJ A Banfield. The main content area includes a table of existing contacts and a form to add or edit one.

Contact Person	Relationship Code	Home	Mobile	Work	Call Order
Child Banfield	Child	555-555-5656			

Always remember to hit Save when making any edits




Form Fields:


- Contact Type:** Relationship (Child)
- Other Information:** Hide Contact in ESS (checkbox), Deceased (checkbox)
- General Information:** First Name (Child), Middle Name, Last Name (Banfield), Prefix, Suffix
- Contact Information:** Call Order (1), Home (555-555-5656), Mobile, Work, Email Address



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BENEFITS SUMMARY


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



Delivered by




 Rachel Test
 

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 **A Banfeild**
 Employee#: 1260 Status: Active

Pay Group: Semi
 Hire Date: 10/29/2019

Hourly: #####
 Work Location: LOS ANGELES, ...

Project: 1234
 Finance:

Department:
 Benefits Group: CA

Client: 1000 - Acme Corporation
 Company: Acme Corporation

EMPLOYEE MANAGEMENT

EMPLOYEE SELF SERVICE

Employee Welcome
 My Dashboard
 Employee Messages
 Employee Profile Picture
 Employee Profile
 Employee Contacts <
 Emergency Contacts

Benefits Summary

Pay History

W2/ACA/1099 Forms

Benefits Summary

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	\$3,678 actual
11/1/2019	\$3,678 requested
Deduction Schedule	Deduction Amount
Every Pay	\$6.07 actual
Pre-Tax	\$6.07 requested
No	Annual Cost/Contribution
	\$145.65

CLIENT MANAGEMENT

REPORTING

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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.

< 1 of 15 >

JJ A Banfield
Employee #: 47 Status: Active Hire Date: 10/2/2019

Pay Group: Sem

Pay History

Year: 2019

Check Date	Gross Pay	Total Hours	Net Pay	Check/Voucher #	Check Amount	Description	PR Run #
11/29/2019	615.36	40.00	495.12	V000354	0.00	Regular Check	43

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:

Earnings & Memos*

	Curr Hours	Curr Dollars	YTD Hours	YTD Dollars
Regular	40.00	615.36	40.00	615.36
401K Match*		18.06		18.06
Safe Harbor*		18.06		18.06

Deductions

	Curr Dollars	YTD Dollars
Pretax Dental	13.50	13.50
401K	18.06	18.06
HSA Pre-Tax	24.00	24.00

Taxes

	Curr Dollars	Curr Wages	YTD Dollars	YTD Wages
SOC SEC EE	35.83	577.86	35.83	577.86
MED EE	8.38	577.86	8.38	577.86
FEDERAL WH		559.80		559.80
CALIFORNIA WH		583.80		583.80
OHIO WH		559.80		559.80
CLINTON-GRANDVIEW HEIGHTS JEDZ	14.45	577.86	14.45	577.86
CALIFORNIA SDI EE	6.02	601.86	6.02	601.86

Current Period Leave Accruals

	Hours Accrued	Hours Taken	Available Balance
Sick	0.00	0.00	0.00
Vacation	0.00	0.00	40.00

Direct Deposit

	Account	Deposit Amount
Checking	###9034	495.12

Employer Taxes

	Curr Dollars	Curr Wages	YTD Dollars	YTD Wages
SOC SEC ER	35.83	577.86	35.83	577.86
MED ER	8.38	577.86	8.38	577.86
FUTA ER	3.47	577.86	3.47	577.86
CALIFORNIA SUI ER	20.46	601.86	20.46	601.86
CA EMPLOYMENT TRAINING TAX ER	0.60	601.86	0.60	601.86

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

Employees are able to view or print their pay stub in a pdf version by clicking here

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.

W2/ACA/1099 Forms						iSolved University	Help
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 be available if the employee gave consent for electronic forms

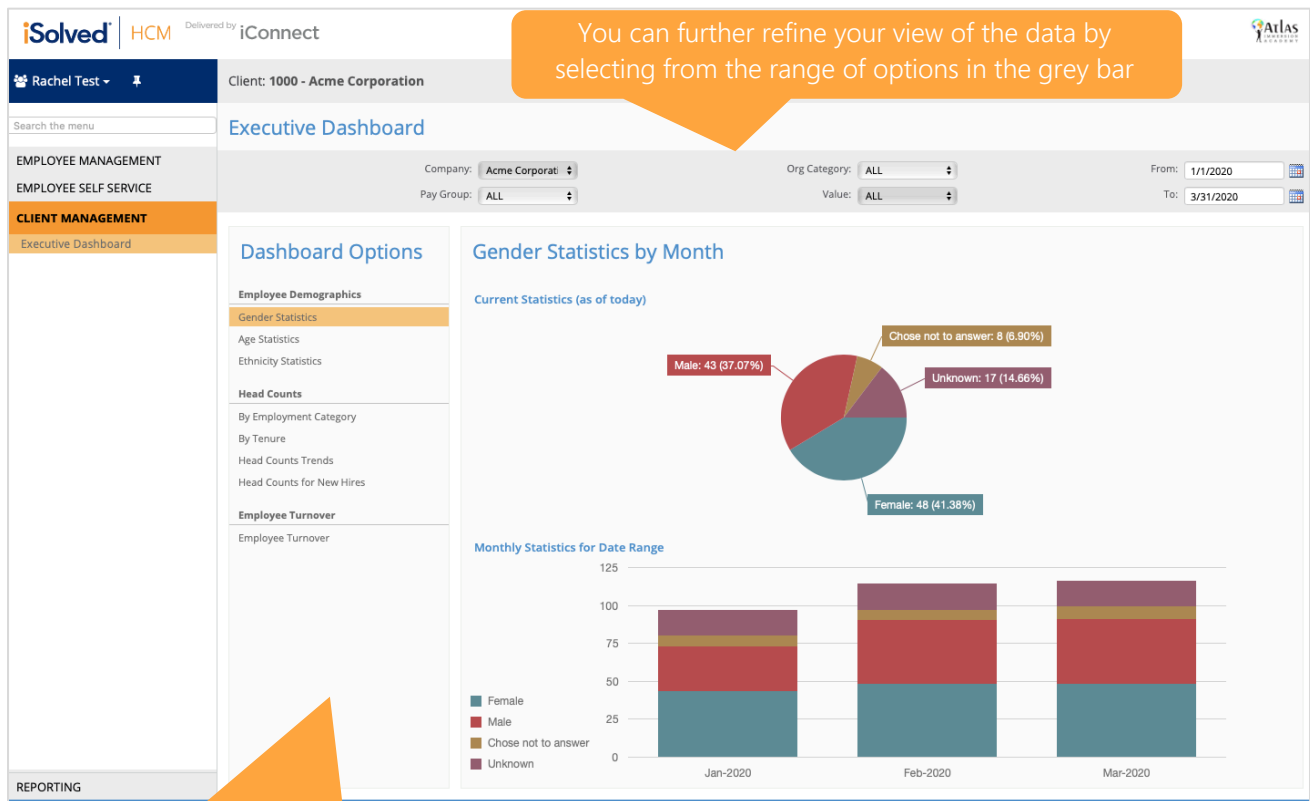
If they are receiving a W2 and/or 1099 both documents will be found under the same link.

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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**.



Here you can select from a variety of charts and data breakdowns relating to your employee Demographics, Head Counts and Turnover

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REPORTING

MY REPORTS

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

The screenshot shows the 'My Reports' interface for 'Client: 1000 - Acme Corporation'. On the left is a navigation menu with 'REPORTING' and 'My Reports Queue' highlighted. The main area displays a table of reports:

Output Name	Report Type
ACA Look-Back Change in Status Report	By Payroll Run
ACA Monthly Measurement Status Report	Date Range
Accrual Audit History Report	Date Range
Bank Account Reconciliation	By Payroll Run
Bank Account Reconciliation	Date Range
Benefit Statement	As Of Date
Client Profile Report	As Of Date
Contacts List	As Of Date
Deduction Export	Date Range
Deduction List	As Of Date
Deduction Register Detail	Date Range
Deduction Register Summary	Date Range
Dependent Age Out Report	By Payroll Run
Dependent Age Out Report	As Of Date
Earning List	As Of Date
EO1 Component 2 Pay Data Export	As Of Date
EO1 Component 2 Pay Data Report	As Of Date
EO1 Report	As Of Date
Electronic Tax Form Delivery Status	As Of Date
Employee Award History Report	By Payroll Run
Employee Award History Report	Date Range
Employee Benefit Coverage Detail	As Of Date
Employee Birth Age List	As Of Date
Employee Certification History Report	Date Range
Employee Documents On File	Date Range
Employee Education History Report	Date Range

On the right, the 'Generate Report' section includes filters for Company (1000 - Acme Corporation), Pay Group (Semi), and Payroll (Special - Pay Date: 3/31/2020 (Run #51)). It also has sorting options and an 'Add Report to Archive' checkbox. A callout box states: 'Using these fields you can create custom reports tailored to your specific needs'.

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.

The screenshot shows the 'My Reports Queue' interface. It displays a table of reports in progress:

Report Name	Status	Report Requested	Generate Begin	Generate End	Purge Date	View Report
Bank Account Reconciliation	IN PROCESS	3/13/2020 11:51:12 AM	3/13/2020 11:51:26 AM			

Below the table, there is a 'Delete' button and a 'Refresh' button. The 'Report Parameters' section shows details for the selected report:

Report Name: Bank Account Reconciliation
Report Type: Payroll Report
Company: Acme Corporation
Pay Group: Semi
Payroll: Special - Pay Date: 3/31/2020 (Run #51)
Add To Archive: No

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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