

Our NEW iSolved release goes live April 12th!

The following new features and development items are included in the iSolved release. This summary is intended to provide you with a basic overview of the changes made to the system.

HCM Updates

- Employee Contacts
- Health Savings Accounts in Benefit Enrollment and Benefit Updates

Time Updates

- Time-Off Request Employee Calendar Updates
- Manage Teams



HCM Updates

Employee Contacts

Your employees need to enter their contact information in iSolved, as well as their emergency contacts and their dependents or their beneficiaries. Some of the contact information may be private and shouldn't be available to their managers or supervisors. iSolved now provides the ability to maintain each of these contact types separately to control which users have access to the information.

Employee Contacts <
Emergency Contacts
Dependents
Beneficiaries

Emergency Contacts

| Contact Person | Relationship Code | Home | Mobile | Work | Call Order |
|----------------|-------------------|------|--------------|------|------------|
| Spouse Aames | Spouse | | 336-805-1218 | | 1 |
| Mother Aames | Mother | | | | |

+ Add New Edit Remove Refresh Save Cancel

Contact Type
* Relationship: Spouse

Other Information
 Hide Contact in ESS
 Deceased

General Information
* First Name: Spouse
Middle Name:
* Last Name: Aames
Prefix:
Suffix:

Contact Information
Call Order: 1
Home:
Mobile: 336-805-1218
Work:
Email Address:

Dependents

| Contact Person | Relationship Code | Full-time Student | Disabled | Tobacco Use |
|----------------|-------------------|-------------------|----------|-------------|
| Child1 Aames | Step Child | No | No | No |
| Child2 Aames | Child | No | No | No |

+ Add New Edit Remove Refresh Save Cancel

Contact Type
* Relationship: Step Child

Other Information
 Hide Contact in ESS
 Deceased

Dependent Information
 Full-time Student
 Disabled
 Tobacco Use

General Information
* First Name: Child1
Middle Name:
* Last Name: Aames
Prefix:
Suffix:

Personal
SSN: 011-11-1111
Update SSN:
Birth Date: 8/18/1999
* Update Birth Date:
Gender:

Contact Information
Call Order:
Home:
Mobile:
Work:
Email Address:

Address
 Use Employee Address
Street:
Zip Code:
City:
State:

Health Savings Accounts in Benefit Enrollment and Benefit Updates

You now have the option to include the bank account information for HSA enrollment and updates in the employee self-service enrollment process. HSA plans that allow employees to maintain their account at their own bank or open their own account at a specified bank can include the bank account information as part of the employee enrollment.

Selected Plan **HSA updates** text Monthly (PDF) [View here](#) Links [website 2](#)

Deselect

Coverage Options

* Coverage:

Employee Contribution

Schedule Default: **Every Pay**

Amount Per Scheduled Pay:

Amount Per Scheduled Pay:

Payee: EE HSA All - EE HSA All Checking

Update Routing Number:
Current Value: 053000196

Update Account Number:
Current Value: 54964132326

Override Account Type:
Default Value: Checking



Time Updates

Time-Off Request Employee Calendar Updates

A new page in the Time-Off Request Employee Calendar gives your employees options and place restrictions. These include display options for both “My Calendar” and “Team Calendar,” upcoming absence reminder notifications, and restrictions on requesting time off on specific dates or days of the week. You can find the page under Client Management > Time Management > Calendar Rules, as well as Client Management > Benefits > Calendar Rules.

The screenshot shows the 'Calendar Rule Restrictions' configuration page. At the top, there are navigation buttons: '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. The page is divided into two main sections: 'Calendar Rule' and 'Team Calendar'. Under 'Calendar Rule', there is a 'Rule Name' field set to 'Default' and a 'Rule Description' field. Under 'My Calendar', there are checkboxes for 'Display Days Scheduled' and 'Display Holidays', both of which are checked. Under 'Reminders', there is a checkbox for 'Send Time Off Reminders' which is unchecked, and a 'Days Before Time Off' field. Below this, there are three rows for 'Employee', 'Manager', and 'Supervisor', each with a checkbox and a dropdown menu set to 'Email'. Under 'Team Calendar', there are checkboxes for 'Display Team Calendar', 'Display Holidays', 'Display Employee Names', 'Display Absence Names', 'Display Absence Hours', and 'Display Pending Absences', all of which are checked. At the bottom, there is an 'Absences To Display' section with two lists: 'Unselected' (containing FMLA and No Show) and 'Selected' (containing Unpaid, PTO, PTO, Sick UnPaid, Comp Taken, Float, and Scheduled PTO). Navigation arrows '>>' and '<<' are between the lists.

This calendar view also has also been renamed “My Calendar” for employees and displays information pertaining to the selected employee, including approved/pending/processed time-off requests, holidays, restricted days, and schedules. Your employees can now print the full month, week, or day calendar that includes all of the updated functionality.

The screenshot shows the 'Time Off Requests' calendar view for Charlie Brown. The top navigation bar includes the user's name 'Charlie Brown', email 'charlie.brown@wms.com', phone '313.2018', location 'SALT LAKE CITY, UT', department '100', and division. The calendar is for February 2019. The calendar grid shows days from Sunday to Saturday. The calendar is color-coded by day type: green for 'Approved PTO/Comp', blue for 'Approved PTO/Comp', yellow for 'Approved PTO/Comp', and grey for 'Restricted Day'. The calendar also shows 'Approved PTO/Comp' requests for various dates in February.

Manage Teams

A new page also allows you to group your employees into a team based on default organizational values. By setting up a team, members of that team can see one another's time-off requests, which helps them make sure there is adequate coverage, or a certain day has not already been requested off by another team member.

You can find this page and set up a team under Client Management > Time Management > Manage Teams.

Teams

* Team Name:

* Team Description:

* Calendar Rule:

Department Values ⓘ

Unselected Selected

SH - Department SH

100 - Admin
200 - Sales
300 - Marketing
400 - General Labor
500 - Shipping
600 - Coke Plant

[Team Report](#)

With the team update also comes a team calendar, found as a tab on the Time-Off Request Calendar. This calendar can display options enabled such as holidays, employee names, absence names, absence hours, and pending absences.

Time Off Requests

Charlie Brown
My Date: 2/15/2019
My Date: 2/15/2019
Work Location: SALT LAKE CITY, UT
Level: 100
Department: 100
Division: 100
Company: VanderWay Industries (Active)

My Calendar **Team Calendar** Hr Details

February 2019

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----------------------------|-----|-----------------------------|-----------------------------|-----------------------------|-----|
| | Approved 1 Charlie Brown | | Approved 1 Charlie Brown | Approved 1 Charlie Brown | | |
| | | | | | Approved 1 Charlie Brown | |
| | | | Approved 1 Charlie Brown | | | |
| | President's Day | | | Approved 1 Charlie Brown | | |
| | | | Approved 1 Charlie Brown | Approved 1 Charlie Brown | | |

Thank you for taking the time to review the newest iSolved release!
Please contact your Payroll Specialist with any questions you may have, or for assistance with any of the new features.