

Friday, August 20<sup>th</sup>, 2021

## New isolved release: version 7.15

### Highlights

The new isolved version, 7.15, will be available when you log in on Friday, August 20<sup>th</sup>, 2021. It includes a tax compliance update for employers in New Mexico, certified payroll report updates, and improvements for employee and benefit administration.

### Employee Administration

- **Managerial Assignments** now includes organization supervisors and managers so you can review your full reporting structure in one place

### Benefit Administration

- The **Benefit Evaluation Utility** is now easier to use. It includes a new tool to identify employees who are missing required information for benefits processing and carrier integration

### Reporting

- All certified payroll reports have been updated to display the current expiration date

### Tax

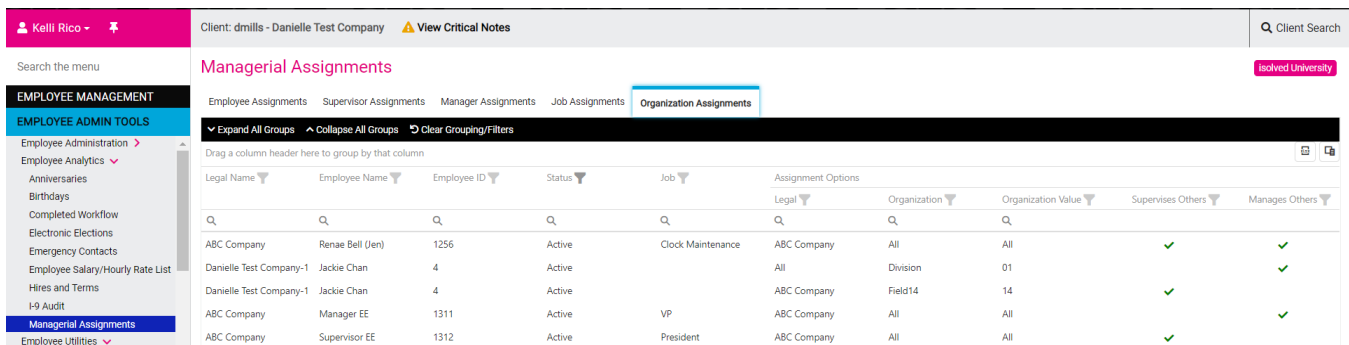
- For clients with work locations in New Mexico, the New Mexico Workers' Compensation Assessment Fee collection has been updated for enhanced compliance

## Employee Administration

### Organization managers and supervisors have been added to the Managerial Assignments dashboard

#### Quickly view all supervisor and manager assignments in one place

A new **Organization Assignments** tab has been added to the Managerial Assignments dashboard so you can see all of your reporting relationships in one place. In Isolved, you can assign managers and supervisors to jobs or organization levels. If you assign managers and supervisors based on jobs, the Employee Assignments, Supervisor Assignments, Manager Assignments, and Job Assignments tabs introduced in the previous Isolved version 7.14 release will show your reporting relationships. If you assign them based on organization levels like department or location, the new Organization Assignments tab will show your reporting structure. If an organization manager or supervisor is terminated, a warning will be displayed until a new leader is assigned.



Legal Name	Employee Name	Employee ID	Status	Job	Assignment Options	Legal	Organization	Organization Value	Supervises Others	Manages Others
ABC Company	Renae Bell (Jen)	1256	Active	Clock Maintenance	ABC Company	All	All		✓	✓
Danielle Test Company-1	Jackie Chan	4	Active		All	Division	01			✓
Danielle Test Company-1	Jackie Chan	4	Active		ABC Company	Field14	14		✓	
ABC Company	Manager EE	1311	Active	VP	ABC Company	All	All			✓
ABC Company	Supervisor EE	1312	Active	President	ABC Company	All	All		✓	

Like other employee analytics dashboards, the new Organization Assignments tab lets you sort, filter, and export your view to Excel by clicking the **Export All Data** button to capture the current information.

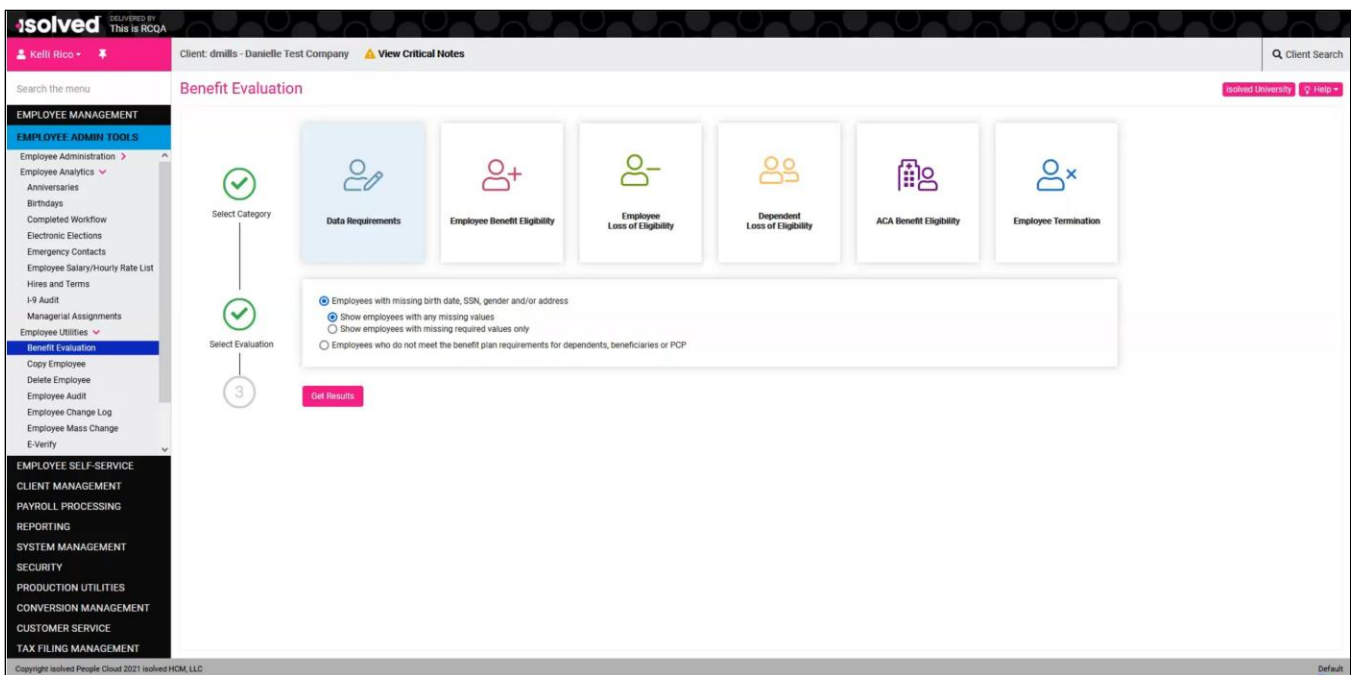
This dashboard is intended to help analyze current assignments. To add or change organization managers and supervisors, you should continue to use the existing Organization Supervisor/Manager screen in Employee Maintenance.

## Benefit Administration

### Identify benefit issues more easily in the revamped Benefit Evaluation Utility

#### The Benefit Evaluation Utility is streamlined and easier to use

The **Benefit Evaluation Utility** has a new look! Each evaluation category is now a tile on the updated screen. You can still run all the same utilities to review benefit eligibility and plan requirements, but the new options use radio buttons for easier selection.



#### The new Data Requirements Evaluation finds employees who are missing critical information

Having complete employee profiles is critical for accurate benefit processing. Many benefit insurance companies require employee birthdates, Social Security Numbers, genders, and addresses to complete enrollment. The **Data Requirements** evaluation identifies employees who are missing these important data elements. These options are available:

- **Employees with missing birth date, SSN, gender and/or address** locates employees who are missing critical employee profile information. Two options are available:
  - **Show employees with any missing values** will search for employees who are missing their birthdate, Social Security Number, gender, or resident address

- **Show employees with missing required values** only will search for missing information based on the employee profile, dependent, and beneficiary requirements you specified during implementation. You can choose to require the following information:

Type	Fields you can require:
Employee	<ul style="list-style-type: none"> <li>• Birthdate</li> <li>• Gender</li> <li>• Resident Address</li> <li>• <i>Social Security Number is always required</i></li> </ul>
Dependent	<ul style="list-style-type: none"> <li>• Birthdate</li> <li>• Gender</li> <li>• Social Security Number</li> </ul>
Beneficiary	<ul style="list-style-type: none"> <li>• Birthdate</li> <li>• Social Security Number</li> </ul>

Contact your Payroll Specialist if you would like to change your required information.

- **Employees who do not meet the benefit plan requirements for dependents, beneficiaries, or PCP** reviews your benefit plan requirements and locates benefit records missing covered dependents, beneficiaries, or primary care physician (PCP) elections.

Once you click **Get Results**, employees are listed who meet the criteria. Columns indicate which data element is missing and you can hover over the icon for more information.

**Benefit Evaluation** Isolved University | Help

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Employees with missing birth date, SSN, gender and/or address Download Results

Company Name	EE Number	Employee Name	Birth Date	SSN	Gender	Address
ABC Company	2588	Alexander, Ethen	Missing			
ABC Company	2586	Andrews, Elisa	Missing			
ABC Company	2575	Austin, Jaslyn	Missing			
ABC Company	2623	Austin, Philip	Missing			
ABC Company	2574	Bautista, Belen	Missing			
ABC Company	2587	Beard, Delilah	Missing			
ABC Company	2649	Blankenship, Leanna	Missing			
ABC Company	2566	Booth, Quintin	Missing			
ABC Company	1232	Boy, Tommy	Missing			
ABC Company	2578	Brooks, Lindsay	Missing			
ABC Company	2584	Butler, Roderick	Missing			
ABC Company	2553	Cameron, Dania	Missing			
ABC Company	2606	Cannon, Antwan	Missing			
ABC Company	2609	Carson, Mireya	Missing			
ABC Company	2562	Casey, Reece	Missing			
ABC Company	2591	Chavez, Israel	Missing			
ABC Company	2624	Church, Carley	Missing			
ABC Company	2557	Cisneros, Albert	Missing			
ABC Company	2590	Cobb, Deegan	Missing			
ABC Company	2612	Cole, Leonard	Missing			
ABC Company	2601	Conway, Jazlene	Missing			
ABC Company	2641	Cooley, Roland	Missing			
ABC Company	2556	Crawford, Leanna	Missing			
ABC Company	2628	Crosby, Phoenix	Missing			
ABC Company	2636	Curtis, Jameson	Missing			
ABC Company	2571	Davenport, Beckett	Missing			
ABC Company	1541	Dolan, William	Missing			

Click the **Download Results** button to export the results to Excel.

For more information, the [Benefit Evaluation Utility](#) topic has been updated in isolved University.

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## Reporting

### Compliance update for Certified Payroll Reports

#### Federal and state certified payroll reports have updated with the current expiration date

All certified payroll reports have been evaluated for compliance with the current formats and the Expiration Date has been updated to reflect the latest version. The following federal reports have been updated:

- Biweekly Certified Payroll Report
- Certified Payroll Register
- Certified Payroll Report
- Certified Payroll Report with Deductions
- Certified Payroll with Alt Rates

## Tax

### Improved compliance for New Mexico employers

#### Employers will be automatically charged for the NM Workers' Compensation Assessment Fee if the required tax cannot be deducted from the employee

Employers with work locations in New Mexico are required to pay \$4.30 per employee per calendar quarter for the New Mexico Workers' Compensation Assessment Fee. The employer normally contributes \$2.30 per employee per quarter, and the remaining \$2.00 is deducted from the employee on the last working day of the quarter. However, if the employee does not get paid in the last payroll of the quarter, their portion cannot be deducted. The employer is still responsible for remitting \$4.30 for each employee by the last day of the month following the end of the quarter. Since Insperity collects and remits the New Mexico Workers' Compensation Assessment Fees on your behalf, if the employee portion cannot be deducted, it will automatically revert to an employer fee and be collected in the last payroll of the quarter to ensure compliance.