

Friday, October 15, 2021

## New isolved release: version 7.19

### Highlights

isolved version 7.19 will be available when you log in on Friday, October 15, 2021. In this release, isolved continues to modernize the user experience with updates to the employee **ACA Measurement Period** and **ACA Report Overrides** screens. **Document Subcategories** have been introduced so administrators can categorize employee documents.

### Employee Management

- You can now categorize your employee documents! They will be displayed in the categories you define on the **Employee Documents** and **ESS Documents** screens.

### Employee Benefits

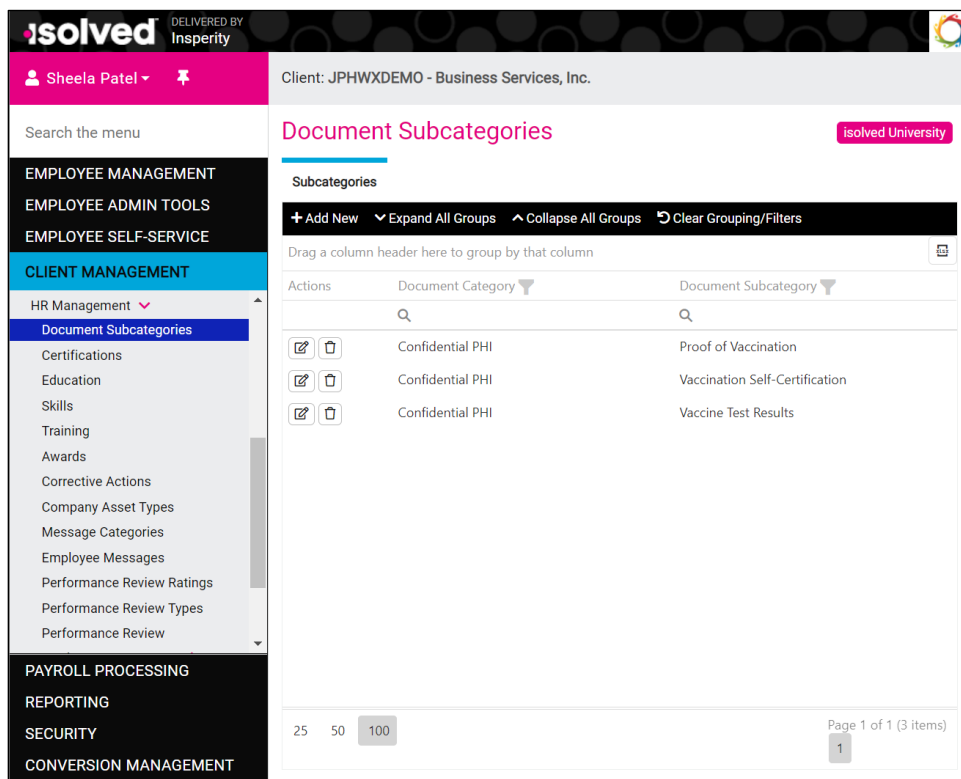
- The employee **ACA Measurement Period** and **ACA Report Overrides** screens have been streamlined to provide the most relevant information at a glance

## Employee Management

You can now categorize employee documents

**New Document Subcategories** let you store employee documents logically so you can find the information you need faster

A new **Document Subcategories** screen has been added so you can create your own structure to store employee documents. You can find the new screen on the **Human Resources** menu under **Client Management**.



**isolved** DELIVERED BY Insperity

Client: JPHWXDEMO - Business Services, Inc.







Search the menu

**Document Subcategories** isolved University

Subcategories

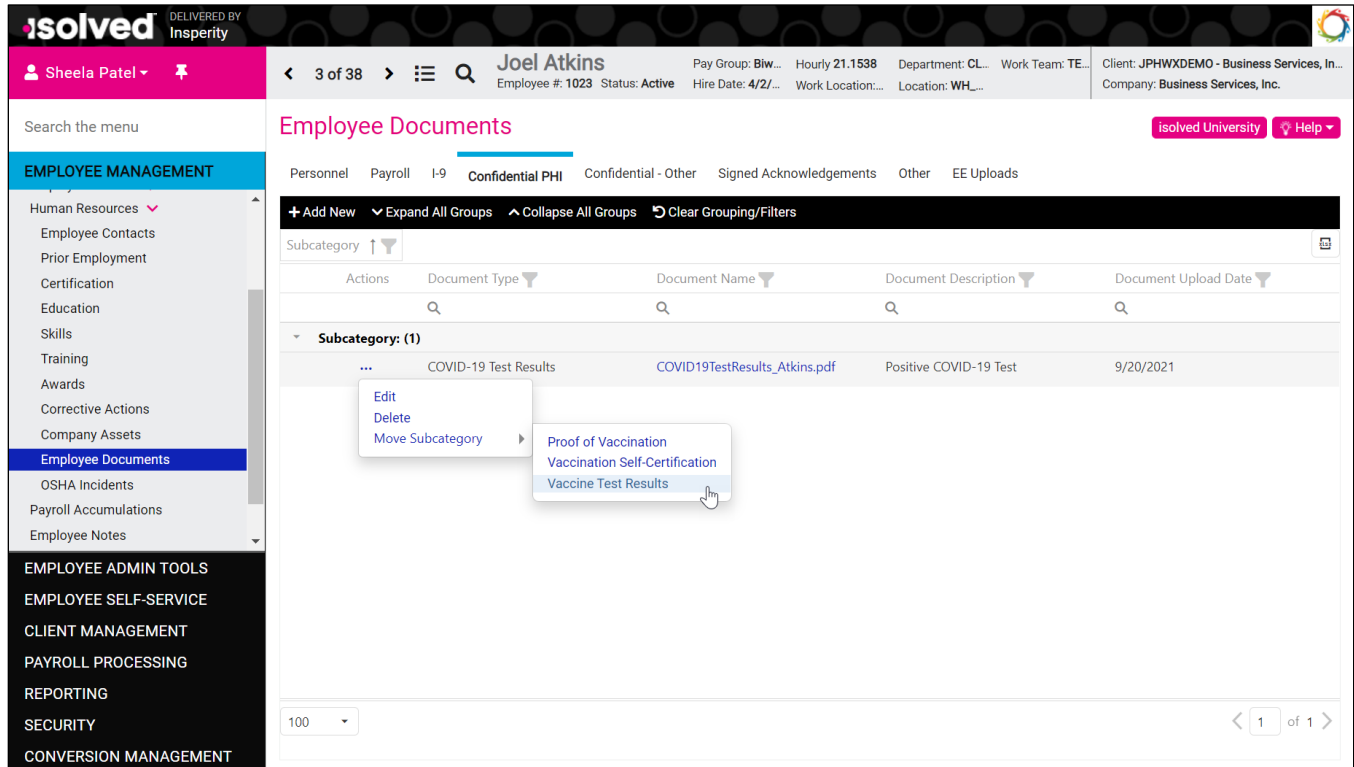
+ Add New Expand All Groups Collapse All Groups Clear Grouping/Filters

Drag a column header here to group by that column

Actions	Document Category	Document Subcategory
 	Confidential PHI	Proof of Vaccination
 	Confidential PHI	Vaccination Self-Certification
 	Confidential PHI	Vaccine Test Results

25 50 100 Page 1 of 1 (3 items)

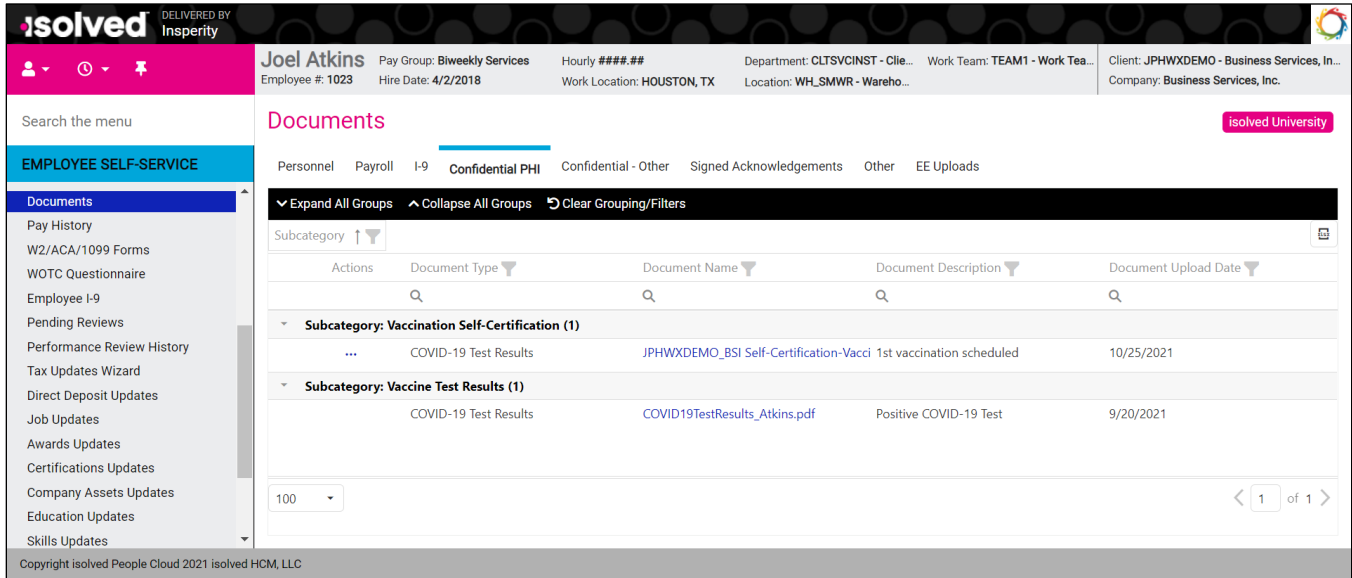
Once you've defined your subcategories, you can move employee documents into them. On the **Employee Documents** screen in Employee Management > Human Resources, or in the **Documents** screen in Employee Self-Service, administrators with access to edit employee documents can click the ... button to move documents into document subcategories.



The screenshot shows the 'Employee Documents' page for employee Joel Atkins. The interface includes a navigation sidebar on the left with categories like 'EMPLOYEE MANAGEMENT' and 'EMPLOYEE ADMIN TOOLS'. The main content area displays a table of documents. A context menu is open over a document row, showing options to 'Edit', 'Delete', or 'Move Subcategory'. The 'Move Subcategory' option is expanded, showing a list of available subcategories: 'Proof of Vaccination', 'Vaccination Self-Certification', and 'Vaccine Test Results'.

Actions	Document Type	Document Name	Document Description	Document Upload Date
...	COVID-19 Test Results	COVID19TestResults_Atkins.pdf	Positive COVID-19 Test	9/20/2021

Categorized documents will then appear beneath the subcategory headings where they've been placed.



The screenshot shows the 'insolved' HR system interface. At the top, it displays the employee's name 'Joel Atkins' and various details like 'Pay Group: Biweekly Services', 'Hourly #####', 'Department: CLTSVCINST - Cile...', 'Work Team: TEAM1 - Work Tea...', 'Client: JPHWXDEMO - Business Services, In...', 'Employee #: 1023', 'Hire Date: 4/2/2018', 'Work Location: HOUSTON, TX', and 'Location: WH\_SMW - Wareho...'. The main section is titled 'Documents' and has a subcategory filter set to 'Confidential PHI'. Below this, there are options to 'Expand All Groups', 'Collapse All Groups', and 'Clear Grouping/Filters'. A table lists documents under two subcategories: 'Vaccination Self-Certification (1)' and 'Vaccine Test Results (1)'. The table has columns for 'Actions', 'Document Type', 'Document Name', 'Document Description', and 'Document Upload Date'. The first document is 'COVID-19 Test Results' with the name 'JPHWXDEMO\_BSI Self-Certification-Vacci' and description '1st vaccination scheduled', uploaded on 10/25/2021. The second document is 'COVID-19 Test Results' with the name 'COVID19TestResults\_Atkins.pdf' and description 'Positive COVID-19 Test', uploaded on 9/20/2021. The interface also shows a search bar, a 'Documents' menu item, and a footer with copyright information.

## New roles limit access to sensitive documents

### Ensure only authorized client administrators can see employee documents

Since these updates are designed to help businesses who need to track employee vaccination status and other health documents as part of their return to work strategy, controlling access to protected health information is critical. Prior to this release, access to employee documents was bundled into general Human Resources roles. The following client user roles granted access to Employee Documents previously:

- **Manage Employee Human Resources** granted access so administrators could add, edit, and delete employee documents.
- **View Employee Human Resources** granted read-only access so administrators could view employee documents.

These roles will continue to grant access to the rest of the items on the Human Resources menu but will no longer grant access to the **Employee Documents** screen.

For client administrators who should continue to see employee documents, you can assign new roles. Choose from the following new roles to grant the right access to your internal administrators:

- **Client Document Administration** should be assigned to administrators who will create and manage the new **Document Subcategories** screen
- **Manage Employee Documents** should be assigned to administrators who can add, edit, delete, and recategorize employee documents in the Employee Management view

- **Manage ESS Documents** should be assigned to administrators who can add, edit, delete, and recategorize employee documents in the Employee Self-Service view
- **View Employee Documents** should be assigned to administrators who can view but not modify employee documents in the Employee Management view
- **View ESS Documents** should be assigned to administrators who can view but not modify employee documents in the Employee Self-Service view

You can continue to control employee, manager, and supervisor access to documents in Employee Self-Service by modifying the permissions on the individual documents.

**Edit Document**

*Category:	Confidential PHI		Read Only	Full Access	Not Permitted
Subcategory:	Vaccination Self-Certification	Employee Access	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
*Document Type:	COVID-19 Test Results	Manager Access	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Description:	1st vaccination scheduled	Supervisor Access	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
*Upload File:	JPHWXDEMO_BSI Self-Cert ...				

Contact your Payroll HCM Specialist if you do not see the new roles or need assistance assigning them to your client users.

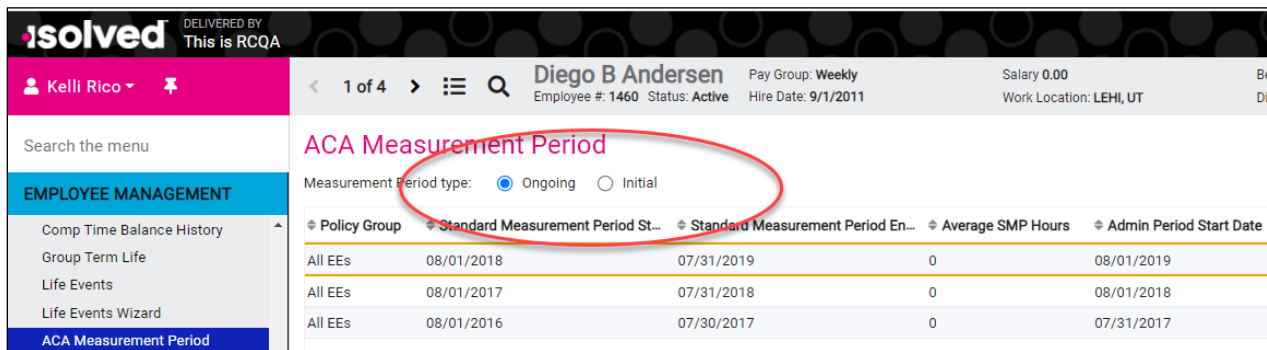
## Employee Benefits

**Streamlined employee ACA screens provide the most relevant information at a glance**

### Employee ACA Measurement Period has been updated

On the Employee Management > Employee Benefits > **ACA Measurement Period** screen, the **Measurement Period Type** has been changed from a list to buttons. The screen will now default to the ongoing measurement period for all employees. If the employee is still in their new hire measurement cycle, select the Initial button to see their current ACA status.

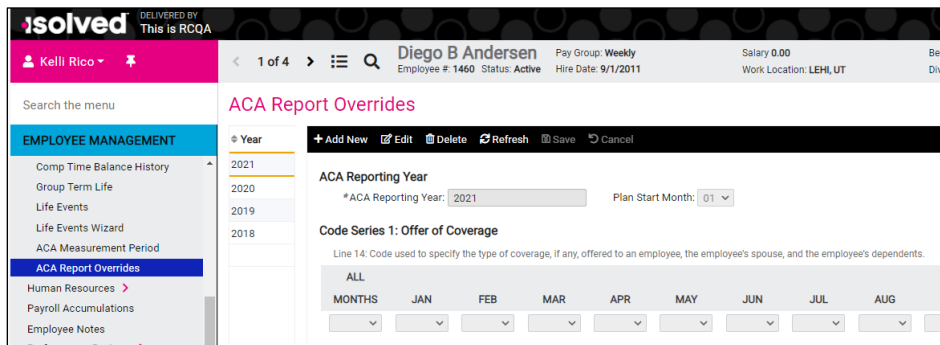
The **As of Date Filter** has been removed so all measurement periods will be displayed. You no longer have to toggle between historical, current, and future periods.



Policy Group	Standard Measurement Period Start	Standard Measurement Period End	Average SMP Hours	Admin Period Start Date
All EEs	08/01/2018	07/31/2019	0	08/01/2019
All EEs	08/01/2017	07/31/2018	0	08/01/2018
All EEs	08/01/2016	07/30/2017	0	07/31/2017

### ACA Report Overrides has been updated

On the Employee Management > Employee Benefits > **ACA Report Overrides** screen, the most recent reporting year will be selected by default, since you would be entering overrides for the current reporting year. You can still see overrides that were entered in previous years for the employee by selecting the previous reporting year from the list.



Contact your Benefits HCM Specialist if you have questions when using these updated employee ACA screens.