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Friday, April 8<sup>th</sup>, 2022

## New isolved release: version 8.06

### Highlights

The hiring process has been redesigned in isolved version 8.06 to automate the steps for new employees. A configurable new hire wizard allows you to create workflows that delegate tasks to supervisors, managers, or administrative teams. You can now include tasks like I-9 completion, leave accrual assignment, and scheduling performance reviews in your new hire wizard for onboarded employees.

As part of the continued effort to improve the isolved experience, the Employee and Client menus have been revamped to make it easier to find the screens you need. These changes will be available when you log in on Friday, April 8<sup>th</sup>, 2022.

### Employee Administration

- The full hiring process can be automated with enhanced workflows that allow tasks to be delegated to administrators, managers, and supervisors to ensure all steps are completed for new employees
- New options for employers when completing *Form I-9, Employment Eligibility Verification*

### Navigation

- Employee and Client Management menus have been updated to make it easier to find the screens you need

### Payroll and Tax

- To eliminate issues with states that do not accept future hire dates, New Hire Reporting has been updated to only include employees when their hire date occurs
- The **Payroll Register** will display tax exemptions for employees who completed their W-4 before 2020
- The **Time Entry Grid** properly displays unit pay

### HR

- Automatically send email notifications when corrective actions are taken
- Enhanced occurrence tracking is coming soon


## Employee Administration


### Combine onboarding and hiring for a streamlined new employee process

#### The configurable New Hire Wizard allows you to delegate tasks to ensure critical hiring tasks are completed

Employee onboarding has been combined with a powerful new hire wizard that allows you to customize the steps that internal users need to complete to successfully bring a new employee into your organization. If you use onboarding, you'll see these changes with the 8.06 release:

#### Pending Employees

- The new **Pending Employees** screen consolidates onboarding and hiring processes into one streamlined experience with controlled access, so administrators see just the pending employees who meet their security rules
- New hires and rehires are no longer separated on different tabs, so it's easier to see the status of all employees in the onboarding and hiring process. Instead, all employees are listed together with a returning employee icon  to indicate a rehire
- The new Pending Employees screen has two views:
  - The **focused view** shows a quick summary of the current and next steps in the hiring process for each employee

Pending Employees						isolated University
+ Initiate Onboarding    v Expand All Groups    ^ Collapse All Groups    ↻ Clear Grouping/Filters						
Drag a column header here to group by that column						Search...
Actions	Employee	Legal	Onboarding Template	Current Step	Status	
> ...	Heather Garcia essuser121@gmail.com	University Training Management Comp Philadelphia, PA	Onboarding 2022	Client Onboarding Wizard Assigned To: Client User - Onboarding	Assigned to Me	
> ...	JOHN T ABLE	Mount Laurel, NJ			Available to Hire	
> ...	Anne P Stevens  csummey91308@gmail.com	University Training Management Comp Philadelphia, PA	New Hires 2022 v 2	Employee Onboarding Wizard Assigned To: Multiple	Waiting on Employee	
> ...	Sanara Langdon kshoemaker@infinisource.net	University Training Management Comp Philadelphia, PA	New Hires 2022	Employee Onboarding Wizard Assigned To: Multiple	Waiting on Employee	

- The **detailed view** lets you drill down for more information. The detailed view is similar to the layout of the Pending Employee Dashboard that existed prior to the 8.06 release.

**Pending Employees** isolved University

+ Initiate Onboarding  
 ▼ Expand All Groups  
 ^ Collapse All Groups  
 ↺ Clear Grouping/Filters

Drag a column header here to group by that column

Actions	Employee Na...	Rehire	Email Address	Hire Date	Legal Name	Onboarding T...	Initiated By	Initiation Date	Current Step	
	Q	Q	Q	Q	Q	Q	Q	Q	Name	Assigned User
...	Anne P Stevens	Yes	csummey91308...	3/24/2022	University Traini...	New Hires 2022 v 2	csummey	3/24/2022	Employee Onbo...	Multiple
...	Heather Garcia		essuser121@g...	3/25/2022	University Traini...	Onboarding 2022	karentraining	3/25/2022	Client Onboardin...	Client User - Onbo...
...	JOHN T ABLE			5/26/2022			kshoemaker	3/25/2022		
...	Sanara Langdon		kshoemaker@in...	3/18/2022	University Traini...	New Hires 2022	karentraining	3/18/2022	Employee Onbo...	Multiple

## Onboarding Administration

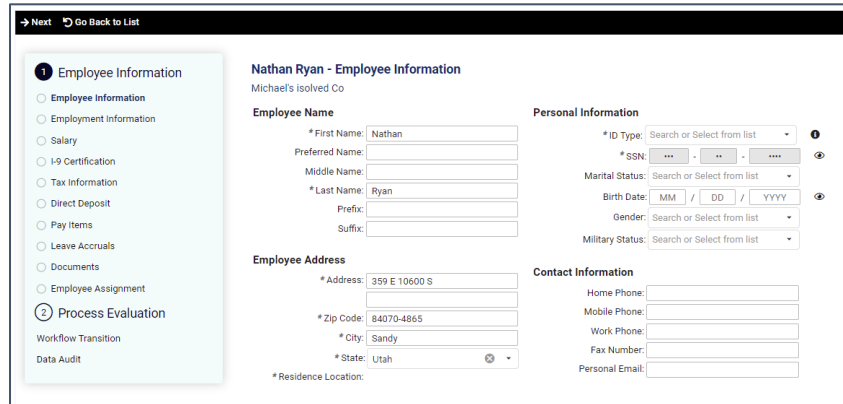
- Initiate new employees from the **Initiate Onboarding** button on the **Pending Employees** screen to streamline workflow, instead of navigating to a separate screen. The updated screen captures the same information to initiate onboarding, but the fields are rearranged to be easier to enter from left to right, without having to scroll.

- For rehired employees, the **Rehire with Reboarding** option is still available from the employee's General screen when you click the **Rehire** button
- Although the administrative features for onboarding have been enhanced, the Onboarding Wizard in ESS has not changed with this release

## Hiring

For employees who have completed onboarding or who were initiated through *isolved* Attract & Hire, you can now design a hiring workflow that delegates critical tasks to administrators, managers, and supervisors. You can include these steps in your new, customizable hiring workflow:

- **Employee Information** – basic demographic information like employee name, address, SSN, and contact information. This section is required.



**Nathan Ryan - Employee Information**  
Michaels Isolved Co

**Employee Name**

\* First Name: Nathan  
Preferred Name: \_\_\_\_\_  
Middle Name: \_\_\_\_\_  
\* Last Name: Ryan  
Prefix: \_\_\_\_\_  
Suffix: \_\_\_\_\_

**Employee Address**

\* Address: 359 E 10600 S  
\* Zip Code: 84070-4865  
\* City: Sandy  
\* State: Utah  
\* Residence Location: \_\_\_\_\_

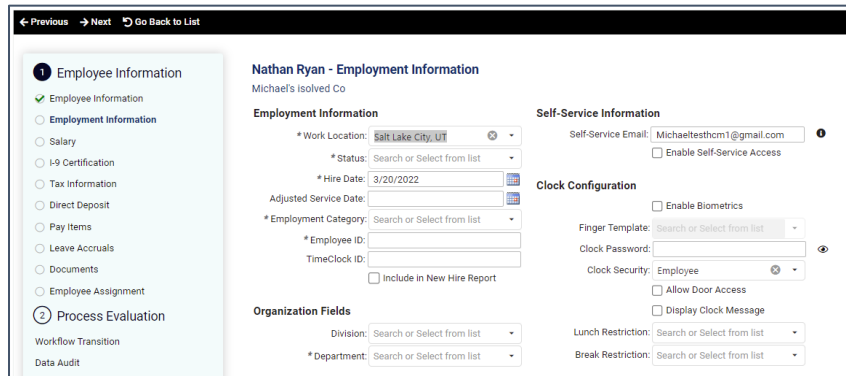
**Personal Information**

\* ID Type: Search or Select from list  
\* SSN: \_\_\_\_\_  
Marital Status: Search or Select from list  
Birth Date: MM / DD / YYYY  
Gender: Search or Select from list  
Military Status: Search or Select from list

**Contact Information**

Home Phone: \_\_\_\_\_  
Mobile Phone: \_\_\_\_\_  
Work Phone: \_\_\_\_\_  
Fax Number: \_\_\_\_\_  
Personal Email: \_\_\_\_\_

- **Employment Information** – employment details like hire date, employment category, work location, organization fields, self-service email, and timeclock identification details. This section is required.



**Nathan Ryan - Employment Information**  
Michaels Isolved Co

**Employment Information**

\* Work Location: Salt Lake City, UT  
\* Status: Search or Select from list  
\* Hire Date: 3/20/2022  
Adjusted Service Date: \_\_\_\_\_  
\* Employment Category: Search or Select from list  
\* Employee ID: \_\_\_\_\_  
TimeClock ID: \_\_\_\_\_  
 Include in New Hire Report

**Self-Service Information**

Self-Service Email: Michaeltesthcm1@gmail.com  
 Enable Self-Service Access

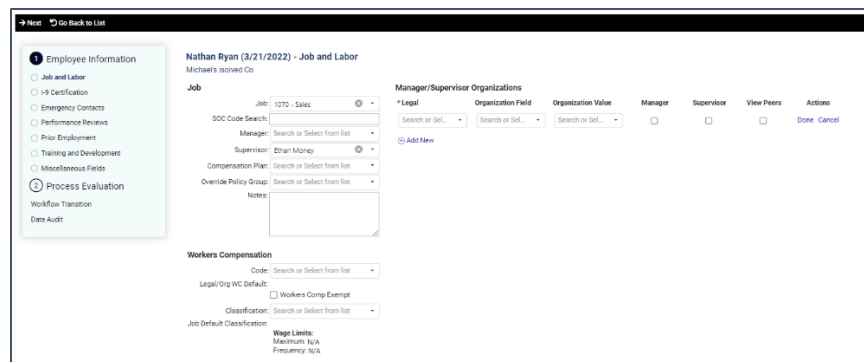
**Clock Configuration**

Enable Biometrics  
Finger Template: Search or Select from list  
Clock Password: \_\_\_\_\_  
Clock Security: Employee  
 Allow Door Access  
 Display Clock Message  
Lunch Restriction: Search or Select from list  
Break Restriction: Search or Select from list

**Organization Fields**

Division: Search or Select from list  
\* Department: Search or Select from list

- **Job and Labor** – position information like job, worker's compensation, and managerial assignments. This section is required.



**Nathan Ryan (3/21/2022) - Job and Labor**  
Michaels Isolved Co

**Job**

Job: 1070 - Sales  
SOC Code Search: \_\_\_\_\_  
Manager: Search or Select from list  
Supervisor: Ethan Mahney  
Compensation Plan: Search or Select from list  
Override Policy Group: Search or Select from list  
Notes: \_\_\_\_\_

**Manager/Supervisor Organizations**

*Legal	Organization Field	Organization Value	Manager	Supervisor	View Peers	Action
Search or Sel...	Search or Sel...	Search or Sel...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Done Cancel

[Add New](#)

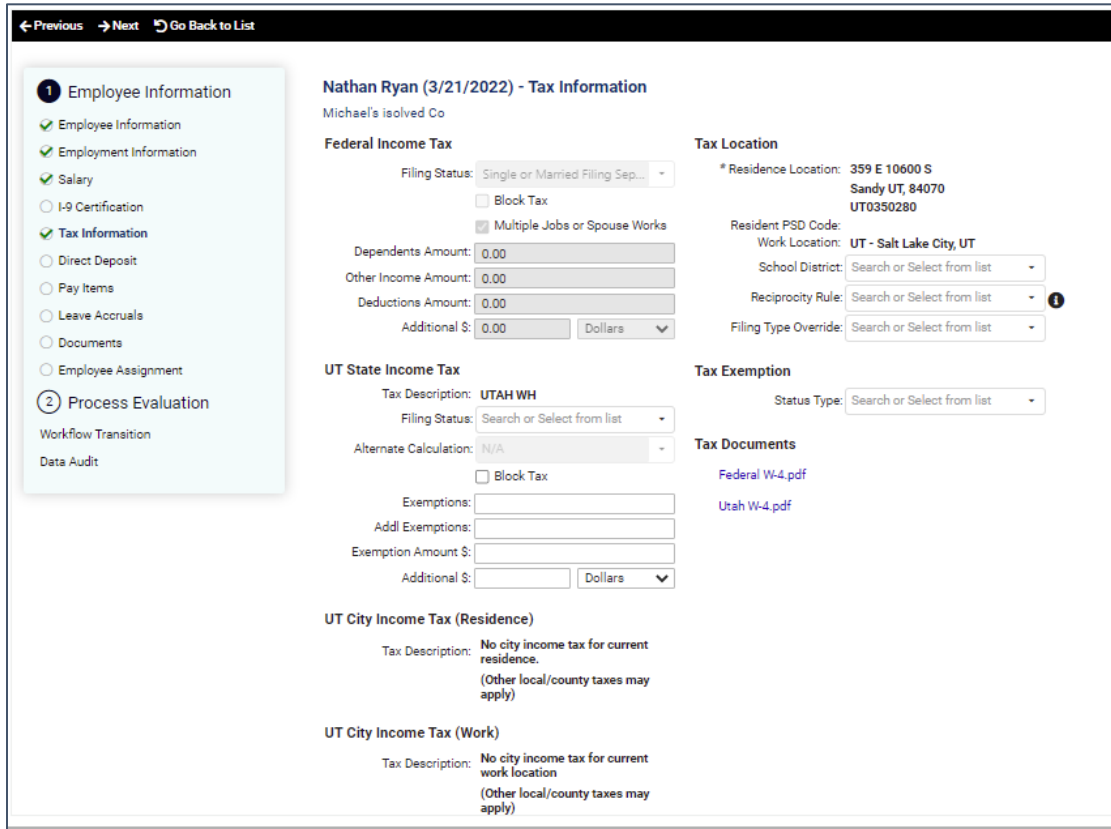
**Workers Compensation**

Code: Search or Select from list  
Legal/Orig WC Default:  Workers Comp Exempt  
Classification: Search or Select from list  
Job Default Classification: \_\_\_\_\_  
Wage Limits: Maximum: N/A, Frequency: N/A

- **Salary** – employee pay details including pay type, pay frequency, hourly rate and annual salary for base pay, and additional rates. This section is required.

- **I-9 Certification** <sup>NEW</sup> – ensure timely completion of the employer I-9 sections by including it in the New Hire Wizard. Managers or supervisors in the field can also be tasked with reviewing documentation and completing this section.

- **Tax Information** – Review federal, state, and local employee tax elections. If employees completed their tax forms during onboarding, this section will be read-only in the New Hire Wizard.



**Nathan Ryan (3/21/2022) - Tax Information**  
Michael's isolved Co

**Federal Income Tax**  
 Filing Status:   
 Block Tax  
 Multiple Jobs or Spouse Works  
 Dependents Amount:   
 Other Income Amount:   
 Deductions Amount:   
 Additional \$:  Dollars

**Tax Location**  
 \* Residence Location: 359 E 10600 S  
 Sandy UT, 84070  
 UT0350280  
 Resident PSD Code:  
 Work Location: **UT - Salt Lake City, UT**  
 School District:   
 Reciprocity Rule:   
 Filing Type Override:

**UT State Income Tax**  
 Tax Description: **UTAH WH**  
 Filing Status:   
 Alternate Calculation:   
 Block Tax  
 Exemptions:   
 Addtl Exemptions:   
 Exemption Amount \$:   
 Additional \$:  Dollars

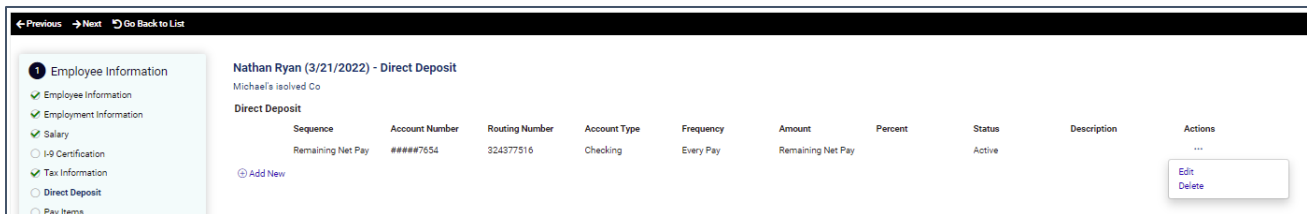
**Tax Exemption**  
 Status Type:

**Tax Documents**  
[Federal W-4.pdf](#)  
[Utah W-4.pdf](#)

**UT City Income Tax (Residence)**  
 Tax Description: No city income tax for current residence.  
 (Other local/county taxes may apply)

**UT City Income Tax (Work)**  
 Tax Description: No city income tax for current work location.  
 (Other local/county taxes may apply)

- **Direct Deposit** – Review employee bank account information for direct deposit

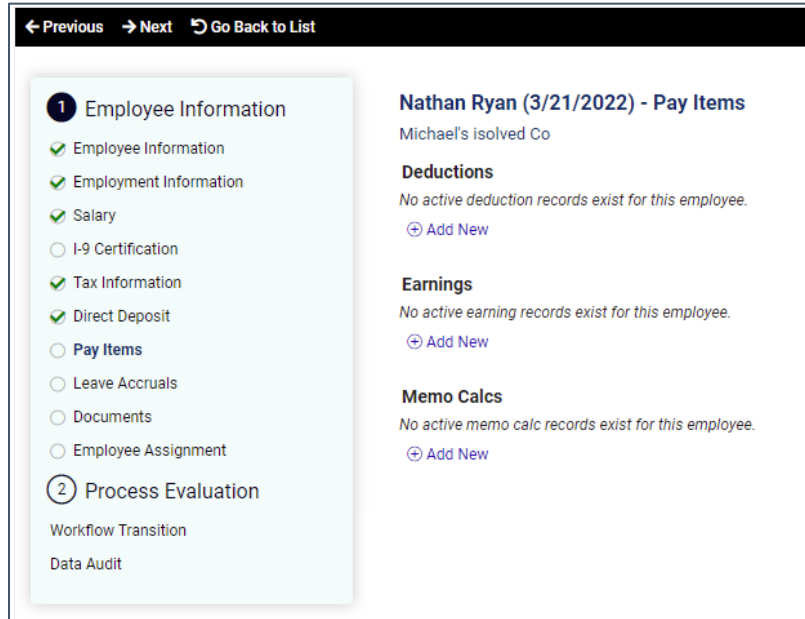


**Nathan Ryan (3/21/2022) - Direct Deposit**  
Michael's isolved Co

Sequence	Account Number	Routing Number	Account Type	Frequency	Amount	Percent	Status	Description	Actions
1	Remaining Net Pay	####7654	324377516	Checking	Every Pay	Remaining Net Pay	Active		...

[Add New](#) Edit Delete

- **Pay Items** <sup>NEW</sup> – enter recurring earnings, deductions, or employer-paid memos



← Previous → Next ↻ Go Back to List

**1 Employee Information**

- Employee Information
- Employment Information
- Salary
- I-9 Certification
- Tax Information
- Direct Deposit
- Pay Items**
- Leave Accruals
- Documents
- Employee Assignment

**2 Process Evaluation**

- Workflow Transition
- Data Audit

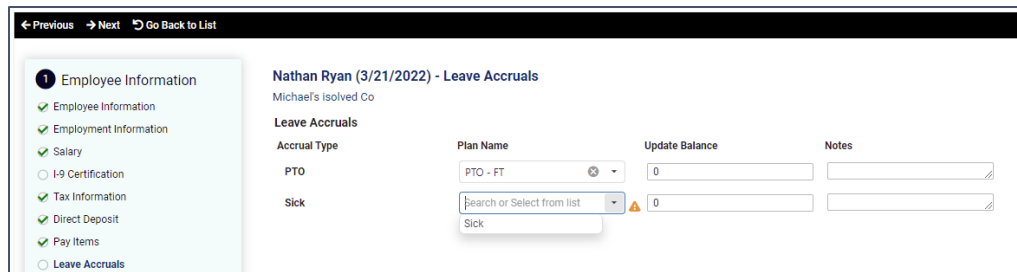
**Nathan Ryan (3/21/2022) - Pay Items**  
Michael's Isolved Co

**Deductions**  
No active deduction records exist for this employee.  
[+ Add New](#)

**Earnings**  
No active earning records exist for this employee.  
[+ Add New](#)

**Memo Calcs**  
No active memo calc records exist for this employee.  
[+ Add New](#)

- **Leave Accruals** <sup>NEW</sup> – assign employees to the correct PTO plans, update their starting balances, or enter a note for their eligible leave plans



← Previous → Next ↻ Go Back to List

**1 Employee Information**

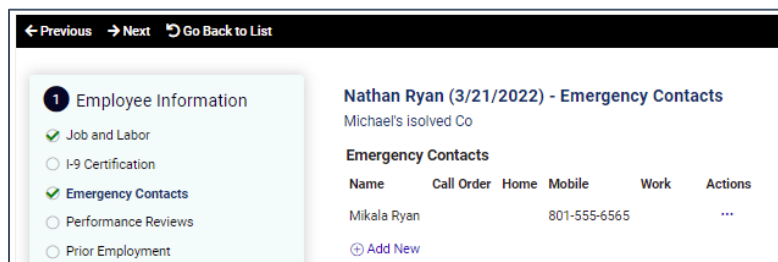
- Employee Information
- Employment Information
- Salary
- I-9 Certification
- Tax Information
- Direct Deposit
- Pay Items
- Leave Accruals**

**Nathan Ryan (3/21/2022) - Leave Accruals**  
Michael's Isolved Co

**Leave Accruals**

Accrual Type	Plan Name	Update Balance	Notes
PTO	PTO - FT	0	
Sick	Search or Select from list Sick	0	

- **Emergency Contacts** <sup>NEW</sup> – ensure you've collected all necessary emergency contact information



← Previous → Next ↻ Go Back to List

**1 Employee Information**

- Job and Labor
- I-9 Certification
- Emergency Contacts**
- Performance Reviews
- Prior Employment

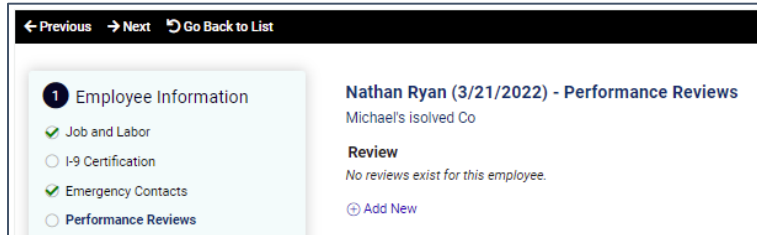
**Nathan Ryan (3/21/2022) - Emergency Contacts**  
Michael's Isolved Co

**Emergency Contacts**

Name	Call Order	Home	Mobile	Work	Actions
Mikala Ryan			801-555-6565		...

[+ Add New](#)

- **Performance Reviews** <sup>NEW</sup> – schedule future performance reviews



← Previous → Next ↻ Go Back to List

**1 Employee Information**

- ✓ Job and Labor
- I-9 Certification
- ✓ Emergency Contacts
- Performance Reviews

**Nathan Ryan (3/21/2022) - Performance Reviews**  
Michael's Isolved Co

**Review**  
No reviews exist for this employee.

[Add New](#)

- **Assets** <sup>NEW</sup> – Track the hardware and other company assets issued to employees, like laptops, badges, cell phones, and equipment



→ Next ↻ Go Back to List

**1 Employee Information**

- Assets
- 2 Process Evaluation**
- Workflow Transition
- Data Audit

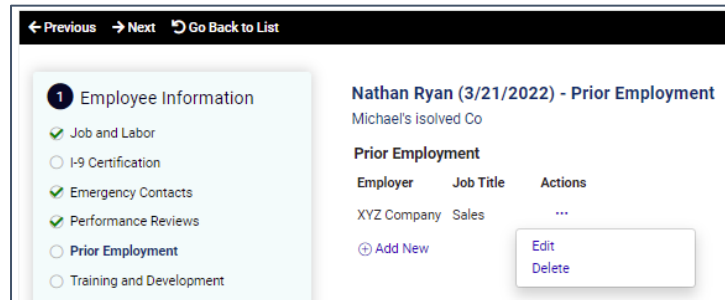
**Nathan Ryan (3/21/2022) - Assets**  
Michael's Isolved Co

**Assets**

* Type	Make	Model	Serial Number	Equipment Number	Date Assigned	Description	Actions
Laptop	Lenovo			1365789	3/21/2022		Done Cancel

[Add New](#)

- **Prior Employment** <sup>NEW</sup> – track where employees worked before joining your company



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**1 Employee Information**

- ✓ Job and Labor
- I-9 Certification
- ✓ Emergency Contacts
- ✓ Performance Reviews
- Prior Employment**
- Training and Development

**Nathan Ryan (3/21/2022) - Prior Employment**  
Michael's Isolved Co

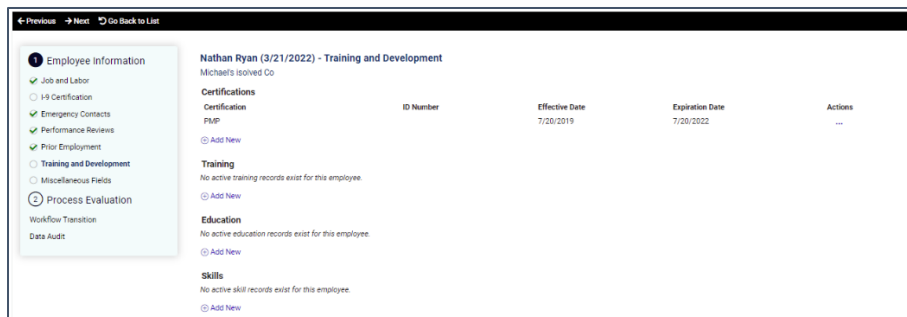
**Prior Employment**

Employer	Job Title	Actions
XYZ Company	Sales	...

[Add New](#)

Edit  
Delete

- **Training and Development** <sup>NEW</sup> – track required job credentials in certifications, completed training courses, education, and skills



← Previous → Next ↻ Go Back to List

**1 Employee Information**

- ✓ Job and Labor
- I-9 Certification
- ✓ Emergency Contacts
- ✓ Performance Reviews
- ✓ Prior Employment
- Training and Development
- Miscellaneous Fields
- 2 Process Evaluation**
- Workflow Transition
- Data Audit

**Nathan Ryan (3/21/2022) - Training and Development**  
Michael's Isolved Co

**Certifications**

Certification	ID Number	Effective Date	Expiration Date	Actions
PMP		7/20/2019	7/20/2022	...

[Add New](#)

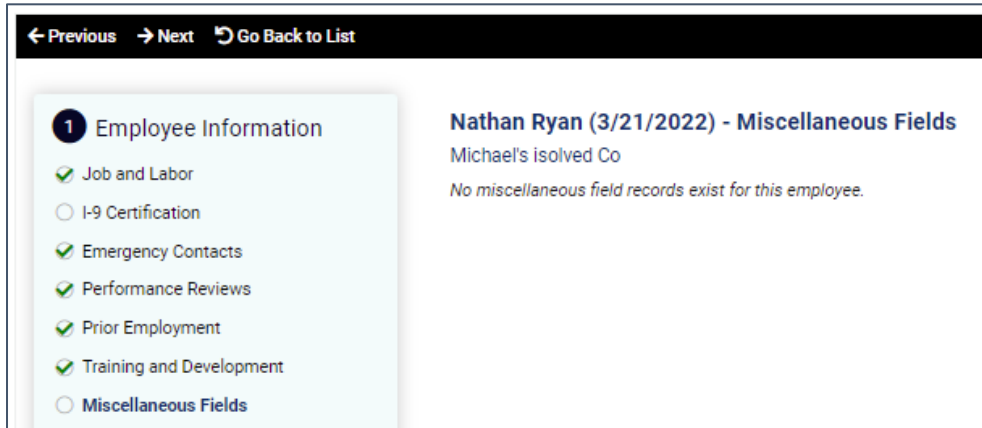
**Training**  
No active training records exist for this employee.  
[Add New](#)

**Education**  
No active education records exist for this employee.  
[Add New](#)

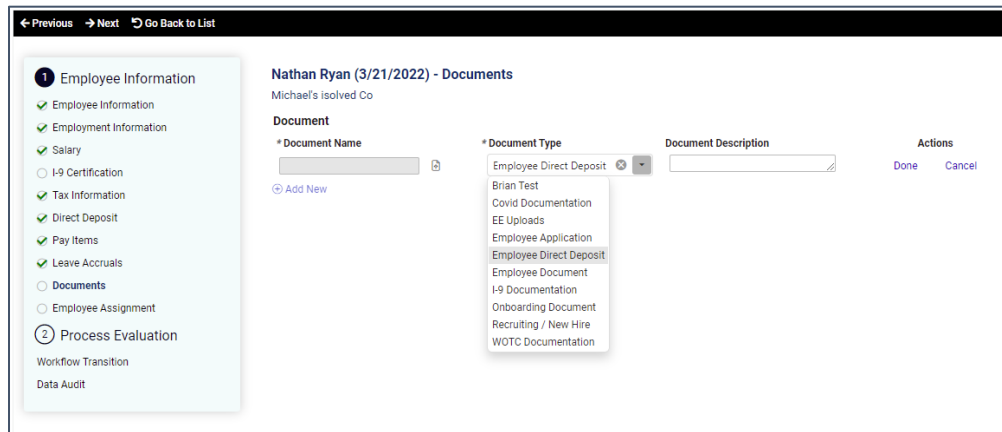
**Skills**  
No active skill records exist for this employee.  
[Add New](#)



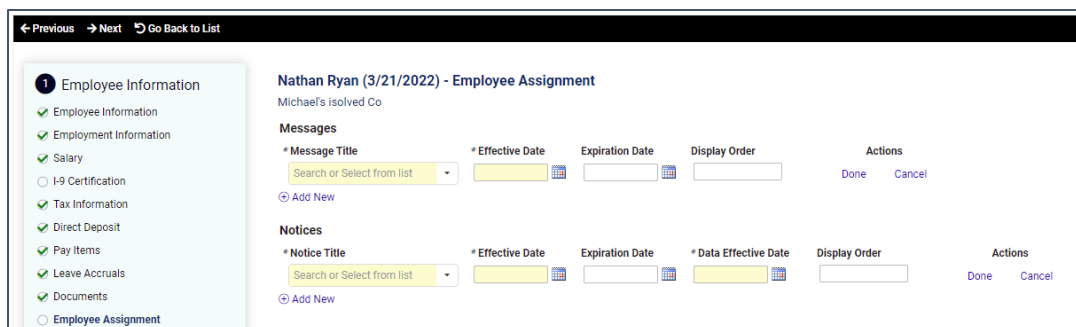
- **Miscellaneous Fields** <sup>NEW</sup> – define miscellaneous fields to track company-specific information like uniform sizing and capture those details in the New Hire Wizard



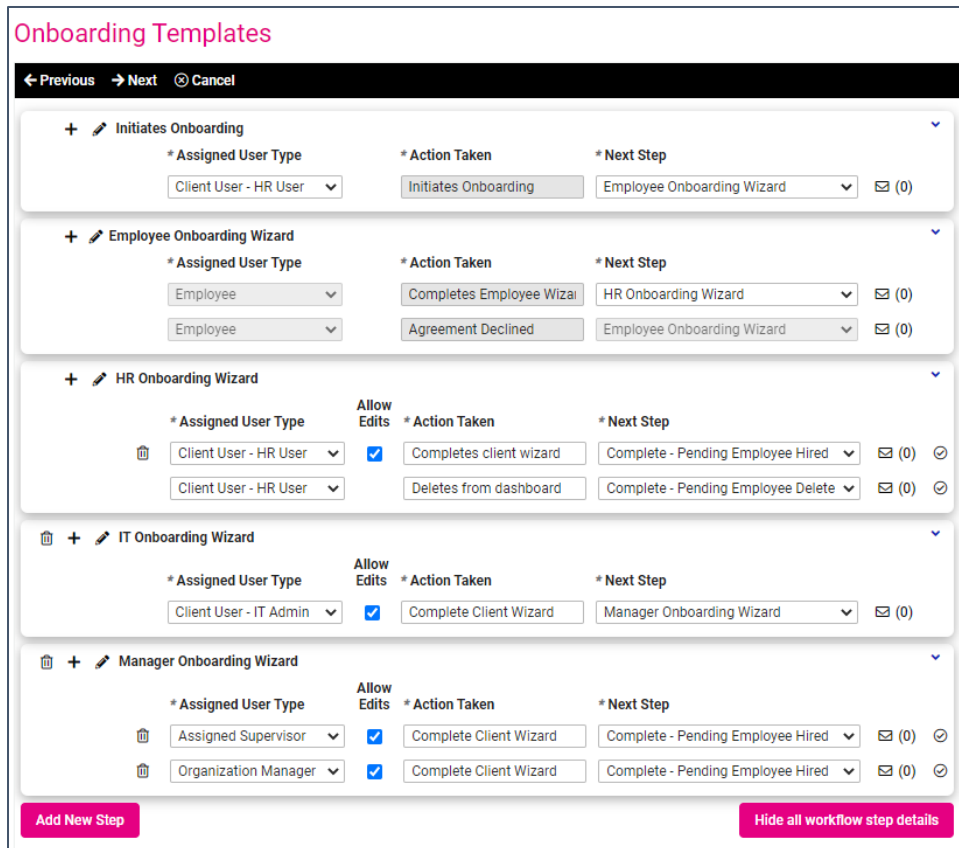
- **Documents** <sup>NEW</sup> – review the supporting documents that employees provided in onboarding or upload paper forms they completed in your office



- **Employee Assignment** <sup>NEW</sup> – assign wage notices for employees in states that mandate pay rate notifications for new hires or send preconfigured messages



Once you've defined the information that needs to be collected for new employees, designate users to complete each section in the New Hire Workflow tab of the onboarding template.



Step Name	Assigned User Type	Action Taken	Next Step	Allow Edits	Additional Info
Initiates Onboarding	Client User - HR User	Initiates Onboarding	Employee Onboarding Wizard		(0)
Employee Onboarding Wizard	Employee	Completes Employee Wiza	HR Onboarding Wizard		(0)
	Employee	Agreement Declined	Employee Onboarding Wizard		(0)
HR Onboarding Wizard	Client User - HR User	Completes client wizard	Complete - Pending Employee Hired	<input checked="" type="checkbox"/>	(0) Ⓞ
	Client User - HR User	Deletes from dashboard	Complete - Pending Employee Delete		(0) Ⓞ
IT Onboarding Wizard	Client User - IT Admin	Complete Client Wizard	Manager Onboarding Wizard	<input checked="" type="checkbox"/>	(0)
Manager Onboarding Wizard	Assigned Supervisor	Complete Client Wizard	Complete - Pending Employee Hired	<input checked="" type="checkbox"/>	(0) Ⓞ
	Organization Manager	Complete Client Wizard	Complete - Pending Employee Hired	<input checked="" type="checkbox"/>	(0) Ⓞ

- You can allow administrative users, managers, or supervisors to complete steps on the employee's behalf by defining an employee bypass option in the workflow

**With the version 8.06 release, the Employee Information, Employment Information, Job and Labor sections will automatically be included in your New Hire Wizard for onboarded employees. If you would like to include additional sections and customize your workflow, contact your Payroll Specialist.**

For organizations who do not leverage onboarding, the existing New Hire Wizard will no longer be accessible after the version 8.10 release on June 3, 2022. The Employee Quick Hire wizard will continue to be available.

- To ensure compliant processes, the information that employees must complete themselves has been removed from the hiring wizards. Federal reporting rules require employees to self-identify their gender, ethnicity, disability, and veteran status. USCIS rules require employees to complete **Section 1**,

**Employee Information and Attestation**, of *Form I-9, Employment Eligibility Verification*. isolved makes collecting this information easy by including the Federal Reporting Data and Employee I-9 screens in onboarding or and Employee Self-Service (ESS).

## I-9 Updates

### Enhancements have been made to the I-9 Screens

As part of the focus on the hiring process in version 8.06, the screens used to complete *Form I-9, Employment Eligibility Verification*, have been updated to mirror the form for easier entry. You'll notice these enhancements:

- Employees can preview the form once they complete Section 1, Employee Information and Attestation, in onboarding, core ESS, or the adaptive employee experience (AEX)
- Employers can preview the form when they complete Section 2, Employer Review and Attestation for new employees or Section 3, Reverification and Rehires, for returning employees
- The employer portions of the I-9 can be included in the enhanced New Hire Wizard
- If a translator helped the employee complete the form, they can now complete the Preparer and/or Translator Certification portion of Section 1
- More than one list A document can be used
- Notes can be added to the additional information box in Section 2
- The address for a specific work location can be used in place of the primary employer address

**Ellie Perez (3/18/2022) - I-9 Certification**  
TAD Frog Co

Read instructions carefully before completing this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

**Section 2. Employer or Authorized Representative Review and Verification**  
(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")

<b>Employee Info from Section 1</b>	<b>Last Name (Family Name)</b>	<b>First Name (Given Name)</b>	<b>M.I.</b>	<b>Citizenship / Immigration Status</b>
	Perez	Ellie	M	1 - Citizen of the United States

<b>List A</b>	<b>OR</b>	<b>List B</b>	<b>AND</b>	<b>List C</b>
<b>Identity and Employment Authorization</b>		<b>Identity</b>		<b>Employment Authorization</b>

<p>* Document Title <input type="text"/></p> <p>* Issuing Authority <input type="text"/></p> <p>Document Number <input type="text"/></p> <p>Expiration Date (if any) (mm/dd/yyyy) MM / DD / YYYY</p> <p>* Document Title <input type="text"/></p> <p>* Issuing Authority <input type="text"/></p> <p>Document Number <input type="text"/></p> <p>Expiration Date (if any) (mm/dd/yyyy) MM / DD / YYYY</p> <p>* Document Title <input type="text"/></p> <p>* Issuing Authority <input type="text"/></p>	<p>* Document Title <input type="text"/></p> <p>* Issuing Authority <input type="text"/></p> <p>Document Number <input type="text"/></p> <p>Expiration Date (if any) (mm/dd/yyyy) MM / DD / YYYY</p> <p>Additional Information <div style="border: 1px solid gray; height: 100px; width: 100%;"></div></p>	<p>* Document Title <input type="text"/></p> <p>* Issuing Authority <input type="text"/></p> <p>Document Number <input type="text"/></p> <p>Expiration Date (if any) (mm/dd/yyyy) MM / DD / YYYY</p>
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Certification: I attest, under penalty of perjury that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment (mm/dd/yyyy): 03/18/2022 (See instructions for exemptions)

\* Signature of Employer or Authorized Representative \_\_\_\_\_ \* Today's Date (mm/dd/yyyy) 03/21/2022 \* Title of Employer or Authorized Representative \_\_\_\_\_

\* Last Name of Employer or Authorized Representative \_\_\_\_\_ \* First Name of Employer or Authorized Representative \_\_\_\_\_ \* Employer's Business or Organization Name TAD Frog Co

\* Employer's Business or Organization Address (Street Number and Name) 155 N Hawthorne Road \* City or Town Winston Salem \* State NC \* ZIP Code 27104

**Verify and Sign Form**

**Section 3. Reverification and Rehires (To be completed and signed by employer or authorized representative.)**

**A. New Name (if applicable)**

Last Name (Family Name) \_\_\_\_\_ First Name (Given Name) \_\_\_\_\_ M.I. \_\_\_\_\_

**B. Date of Rehire (if applicable)**

Date MM / DD / YYYY

**C. If the employee's previous grant of employment authorization has expired, provide the input of the document or receipt that establishes continuing employment authorization in the space provided below.**

Document Title \_\_\_\_\_ Issuing Authority \_\_\_\_\_ Expiration Date (if any) (mm/dd/yyyy) MM / DD / YYYY

I attest, under penalty of perjury, that to the best of my knowledge, this employee is authorized to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.

\* Signature of Employer or Authorized Representative \_\_\_\_\_ \* Today's Date (mm/dd/yyyy) \_\_\_\_\_ \* Name of Employer or Authorized Representative \_\_\_\_\_

Sign Reverification

### Reboarding I-9 Updates

Because the I-9 verification is a critical part of employee hire process, has also been revamped. When rehiring an employee using reboarding, you will now have the option to ask the employee to complete a new Form I-9, or ask the employer to reverify the information the employee has on the previous I-9 submitted.

**Rehire**

Rehire

Rehire using Reboarding

\* Rehire Date: 3/3/2021

\* Onboarding Template: Onboarding

Complete new form I-9

Complete form I-9 reverification

\* Self-Service Email: weaver12@gmail.com

If email address is not currently active the email address will be blocked and the EE will not receive the activation link.

\* Work Location: BELLEROSE, NY

Department: 50 - Human Resources

Review the updated Reboarding article on the University [here](#).

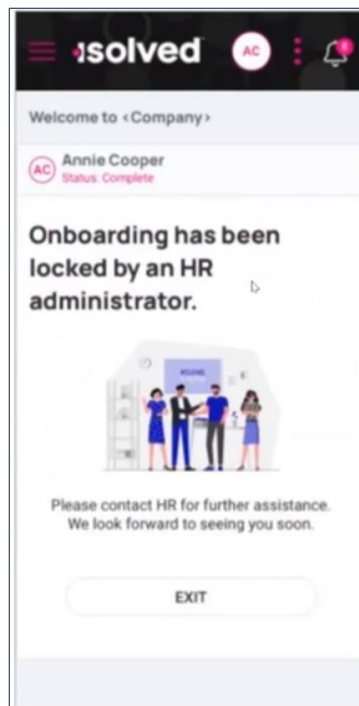
### Adaptive Employee Experience I-9 Updates

If you are using the new Adaptive Employee Experience for employee self-service, the I-9 process was updated to allow a preparer/translator to complete Section 1 for the employee, and to allow the employee to preview the completed form prior to submitting it. Information entered on the form is now maintained separately from Personal Information to comply with guidance issued by the Department of Homeland Security.

Additionally, client administrators have the option to bypass the onboarding wizard for a specific employee. If an administrator has chosen to bypass onboarding, the employee will not be able to access onboarding. Instead, the employee will see the message:

**Onboarding has been locked by an HR administrator. Please contact HR for further assistance. We look forward to seeing you soon.**

Administrators, managers, and supervisors will have access to complete the employee portion of the I-9 on the new hire's behalf.



## Navigation

### Menu Changes

#### New Client Management and Employee Management menus

Menu items within the Client Management and Employee Management sections have been updated to allow for a better client experience. If you had access to these menu items previously through your client user role, you will continue to have access to the renamed and moved menu items. The **table below** shows current vs after this 8.06 release.

#### Employee Management Menu Changes

- Payroll Accumulations have moved under the Employee Pay menu
- Accruals have been moved under Employee Benefits > Accruals
- A new submenu for Performance has been added for
  - Awards
  - Occurrences
  - Corrective Actions
  - Add Review
  - Schedule Review
  - Review History
- A new submenu for Regulatory has been created and will have the following underneath it
  - Federal Reporting Data
  - OSHA Incidents
  - WOTC Certifications
- A new submenu for Training and Development has been created and will have the following underneath it
  - Certifications
  - Education
  - Skills
  - Training

Employee Management menu prior to version 8.06	Employee Management menu after version 8.06
Employee Assignments	Human Resources > Employee Assignments
Employee Notes	Human Resources > Employee Notes
Payroll Accumulations	Employee Pay > Payroll Accumulations
Quick Hire	Employee Quick Hire
Employee Benefits > Accrual Balance History	Employee Benefits > Accruals > Accrual Balance History
Employee Benefits > Accrual History Updates	Employee Benefits > Accruals > Accrual History Updates
Employee Benefits > Comp Time Balance History	Employee Benefits > Accruals > Comp Time Balance History
Employee Benefits > Leave Accruals	Employee Benefits > Accruals > Leave Accruals

Employee Maintenance > Employer I-9 Verification	Employee Admin Tools > Employee Administration > I-9 Management > I-9 Form
Employee Maintenance > Informational I-9 Data	Employee Administration > I-9 Management > Informational I-9 Data
Employee Maintenance > Federal Reporting Data	Human Resources > Regulatory > Federal Reporting Data
Employee Maintenance > WOTC Certification	Human Resources > Regulatory > WOTC Certification
Human Resources > Awards	Human Resources > Performance > Awards
Human Resources > Certifications	Human Resources > Training and Development > Certifications
Human Resources > Corrective Actions	Human Resources > Performance > Corrective Actions
Human Resources > Education	Human Resources > Training and Development > Education
Human Resources > OSHA Incidents	Human Resources > Regulatory > OSHA Incidents
Human Resources > Skills	Human Resources > Training and Development > Skills
Human Resources > Training	Human Resources > Training and Development > Training
Performance Reviews > Add Review	Human Resources > Performance > Add Review
Performance Reviews > Review History	Human Resources > Performance > Review History
Performance Reviews > Schedule Review	Human Resources > Performance > Schedule Review

### Employee Admin Tools Menu Changes

All I-9 screens are now included on the **I-9 Management** menu in Employee Admin Tools.

Employee Admin Tools menu prior to version 8.06	Employee Admin Tools menu after version 8.06
Employee Administration > Initiate Onboarding	Employee Administration > Pending Employees (Initiate Onboarding button)
Employee Administration > Pending EE Dashboard	Pending Employees
Employee Analytics > I-9 Audit	Employee Administration > I-9 Management > I-9 Audit

### Client Management Menu Changes

Client Management menus have also been reconfigured to make it easier to find configuration screens. New submenus have been added for HR Administration, Performance, and Training and Development to group information better.

- A new **HR Administration** submenu has been added for client forms and messages
- A new submenu for **Performance** has been added for:
  - Awards



- Corrective Actions
- Performance Review Ratings
- Performance Review Types
- Performance Review
- A new submenu for **Training and Development** has been added for:
  - Certifications
  - Education
  - Skills
  - Training

Client Management menu prior to version 8.06	Client Management menu after version 8.06
HR Management > Document Subcategories	HR Management > HR Administration > Document Subcategories
HR Management > Certifications	HR Management > Training and Development > Certifications
HR Management > Education	HR Management > Training and Development > Education
HR Management > Skills	HR Management > Training and Development > Skills
HR Management > Training	HR Management > Training and Development > Training
HR Management > Awards	HR Management > Performance > Awards
HR Management > Corrective Actions	HR Management > Performance > Corrective Actions
HR Management > Message Categories	HR Management > HR Administration > Message Categories
HR Management > Client Forms	HR Management > HR Administration > Client Forms
HR Management > Client Notices	HR Management > HR Administration > Client Notices
HR Management > Employee Messages	HR Management > HR Administration > Employee Messages
HR Management > Performance Review Ratings	HR Management > Performance > Performance Review Ratings
HR Management > Performance Review Types	HR Management > Performance > Performance Review Types
HR Management > Performance Review	HR Management > Performance > Performance Review

Refer to the [Menu Item Changes](#) article in Insperity University for details.

## Payroll & Tax



### New Hire Reporting Updates

#### Reporting employees whose hire date is in the future

The federal Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA) requires companies to report to the state when a new employee is hired. New hire reporting services are included in Workforce Acceleration.

For more information about New Hire Reporting, please visit the [Insperity Help Center](#).

Updates have been made to verify a new employee's hire date and exclude future hires from the file. If the new hire is future-dated, the record is picked up in a later new hire file. This will prevent states from rejecting the files.

**Employment Information**  
\*Legal Company: B Heating & Air Conditioning In ▾  
\*Status: Active ▾  
\*Hire Date: 2/17/2021   
Adjusted Service Date:   
\*Employee Number: 2050  
\*Employment Category: Full Time ▾  
TimeClock ID:   
 Include in New Hire Report

### Payroll Register changes for W-4 Exemptions

#### Display exemptions for employees who completed their W-4 before 2020

The Payroll Register will now display federal exemptions for an employee if they are still assigned the Single or Married filing status from versions of *Form W-4, Employees Withholding Certificate*, prior to 2020.

### Time Entry Grid Updates

#### Support for earnings based on units

The Time Entry Grid has been updated to accommodate earnings that are configured to track units instead of hours. The **Hours** column heading will change to **Hours/Units** and the **Total Hours** column and check box will change to **Total Hrs/Units** if an earning in the selected time entry template is based on units.

For more information about unit pay, review the [Payroll Reporting section of the 8.04 release](#).

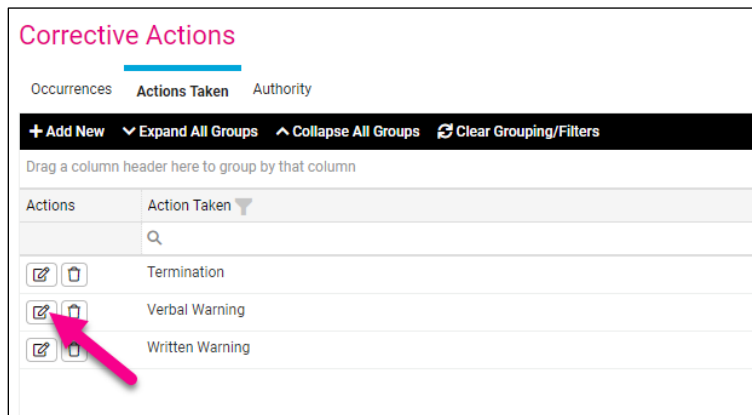
## HR

### Corrective Action Email Alerts

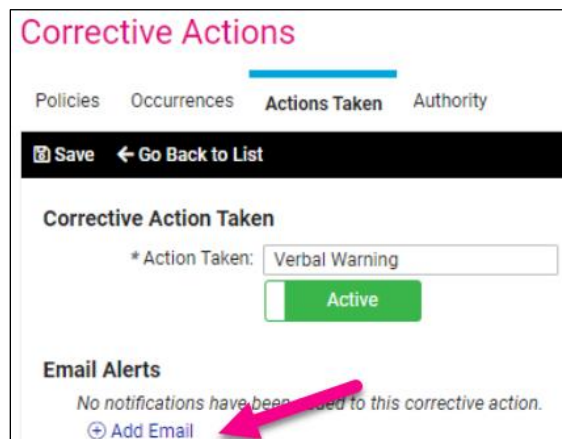
#### Use Email alerts to notify users when corrective actions are taken

For clients using **Corrective Actions** to track disciplinary issues, you can now add email alerts to the **Actions Taken** tab to generate notifications to impacted employees, administrators, managers, or supervisors.

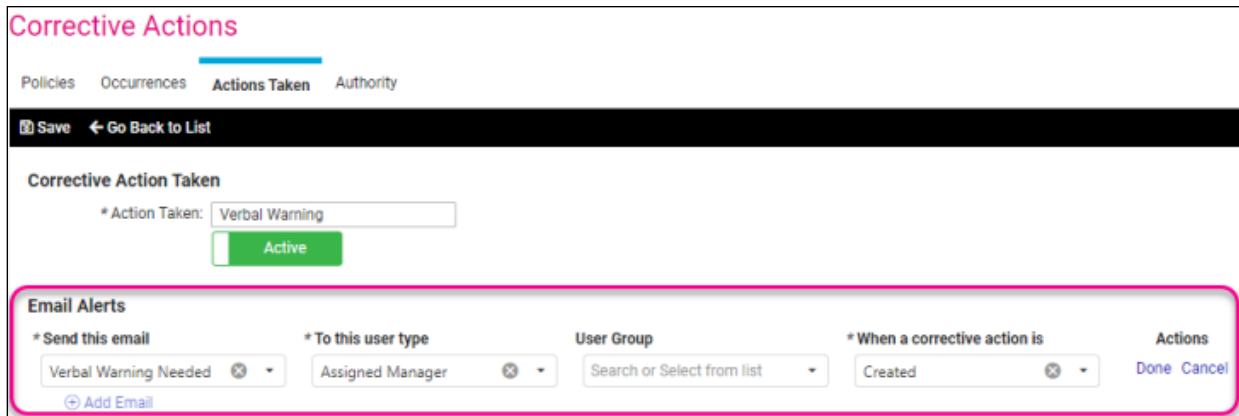
Navigate to Client Management > HR Management > **Corrective Actions** and click the **Actions Taken** tab. Select the Edit icon to modify an existing corrective action:



In the new **Email Alerts** section, click **+ Add Email** to define notifications for that alert type.



Chose the email template and user type who will receive the notification. You can configure multiple notifications for each corrective action taken.



1. \* **Send this email:** Select the email template to send
2. \* **To this user type:** Chose the type of user who will receive the email. Options are:
  - a. Employee
  - b. Assigned Manager
  - c. Assigned Supervisor
  - d. Organization Manager
  - e. Organization Supervisor
3. **User Group:** If you specify a client user group, they will receive a copy of the email when it's sent.
4. \* **When a corrective action is:** Choose which action will trigger the notification email. Options are:
  - a. Created
  - b. Completed

Review the updated Corrective Actions article in isolved University [here](#).

## Occurrence Tracking

### The new Occurrence Tracking module will provide enhanced disciplinary action tracking

When the Occurrence Tracking module is available, you will be able to assign point values to disciplinary infractions, including attendance issues tracked in isolved Time. When employees reach specified points thresholds, corrective actions will be triggered.

**Contact your Payroll Specialist if you have any questions about the updates in isolved version 8.06.**