
Friday, August 12th, 2022

New isolved release: version 8.15

Highlights

isolved version 8.15 includes an enhancement to the Admin Calendar, a new look for the Employee Benefits screen, rebranding of isolved Hire, and Tax Wizard enhancements.

Employee Administration

- Admin Calendar Enhancements

Benefits Administration

- New look and features for employee benefit plans

System Management

- isolved Hire is rebranding to Applicant Tracking

HR

- Tax Wizard enhancements: Form W-4

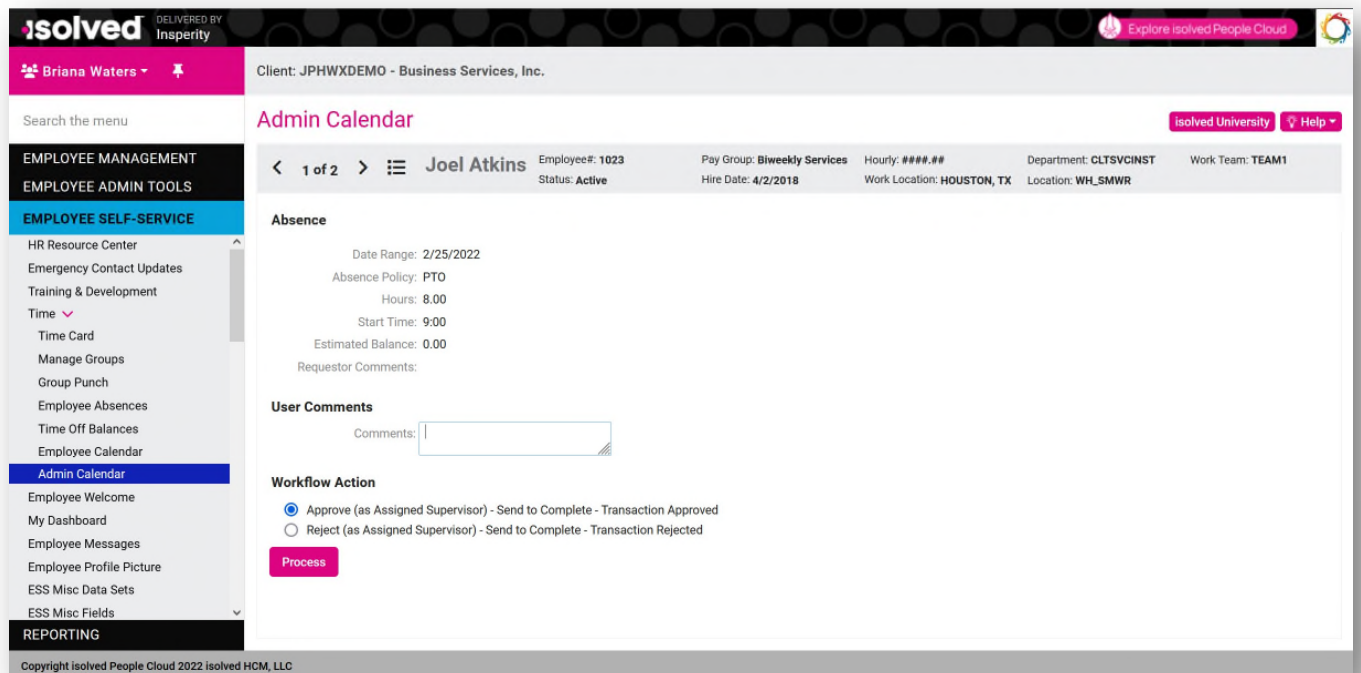
Employee Administration

Admin Calendar Enhancements

The Admin Calendar will now show an Estimated Balance for Time Off

For clients tracking Paid Time Office in isolved, the approve/reject details form will now show the “Estimated Balance,” which reflects the “Actual Balance” and the “Available Balance,” factoring in “YTD Taken” limit.

The balance will now show on this screen:



The screenshot shows the 'Admin Calendar' interface for employee Joel Atkins. The top navigation bar includes the 'isolved' logo, the user name 'Briana Waters', and the client name 'Client: JPHWXDEMO - Business Services, Inc.'. The main content area displays the 'Admin Calendar' for Joel Atkins, showing an absence request for 2/25/2022. The absence details include: Date Range: 2/25/2022, Absence Policy: PTO, Hours: 8.00, Start Time: 9:00, and Estimated Balance: 0.00. Below the absence details is a 'User Comments' section with a text input field. The 'Workflow Action' section contains two radio buttons: 'Approve (as Assigned Supervisor) - Send to Complete - Transaction Approved' (selected) and 'Reject (as Assigned Supervisor) - Send to Complete - Transaction Rejected'. A 'Process' button is located at the bottom of the workflow actions. The left sidebar contains a navigation menu with categories: EMPLOYEE MANAGEMENT, EMPLOYEE ADMIN TOOLS, EMPLOYEE SELF-SERVICE, and REPORTING. The 'Admin Calendar' option is highlighted under EMPLOYEE SELF-SERVICE. The bottom of the screen shows the copyright notice: 'Copyright isolved People Cloud 2022 isolved HCM, LLC'.

Benefits Administration

New employee benefit plan screens

New look and features for employee benefit plans

For client using Benefits Administration within isolved, this release brings a new look and added features to the employee benefit plans screens.

Here is what the current **Benefit Plans** screen looked like:

Benefit Plans

Status: Active ▾

Start Date	Benefit	Benefit Plan
1/1/2021	401(k)	401(k)
1/1/2021	Dental PreTax	Dental
1/1/2021	Medical PreTax	Med HMO
1/1/2021	Vision	Vision

The new Employee Management > Employee Benefits > **Benefit** screen will now have 4 tabs for a more holistic and comprehensive view.

1. Benefit Plans
2. Deferred Comp
3. Benefit Salary Overrides (new feature)
4. Tobacco Use

Benefit

Insolved University

Benefit Plans | Deferred Comp | Benefit Salary Overrides | Tobacco Use

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

Status: ↑ ▾

Benefit Type	Benefit Plan	Plan Dates	Enrollment Dates	Coverage	Premiums	Notes	Actions
Status: Active (3)							
Medical PreTax	Med HMO BCBS	Start Date 01/01/2021 Stop Date	Eligibility Date 04/01/2020 Plan Enrollment Date 01/01/2021	EE ONLY David Blanchard	EE Per Pay Amount \$0.00 ER Per Pay Amount \$0.00		
Dental PreTax	Dental Guardian	Start Date 01/01/2021 Stop Date	Eligibility Date 03/01/2020 Plan Enrollment Date 01/01/2021	EE ONLY David Blanchard	EE Per Pay Amount \$11.54 ER Per Pay Amount \$0.00		
Vision	Vision VSP	Start Date 01/01/2021 Stop Date	Eligibility Date 01/01/2021 Plan Enrollment Date 01/01/2021	EE ONLY David Blanchard	EE Per Pay Amount \$0.00 ER Per Pay Amount \$0.00		
Status: Historical (1)							



The **Benefit Plans** tab shows all pertinent details directly on the screen. The information doesn't change from the old screen; you'll be able to see if the employee has historical and active records, plan information, dates, coverage, and much more at a glance.

In addition, the ability to create salary overrides to be used with employee benefit plans has been added. This allows administrators to add an override to the salary for plans to calculate from. This is used for plans where salary is a factor in rates or calculations, but the salary should include bonuses, commissions, or anything else that is not just the base salary amount. An override can be added so plans that require this alternate salary amount can calculate correctly.

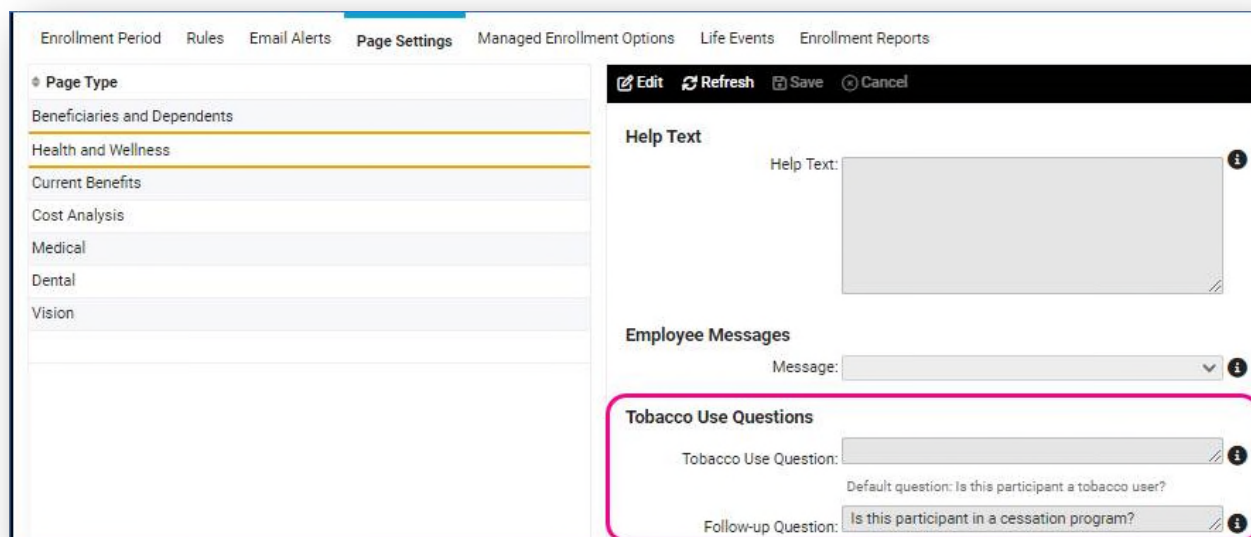
Part of this update also includes some functionality enhancements for the Tobacco Use options. We have a new field on the **Tobacco Use** tab. If an employee or their dependent have a check mark indicating that they are a tobacco user, a Cessation Program option is also displayed. This allows the employee to get the non-tobacco use credit for applicable benefits. This is a great feature that helps to streamline eligibility for the credit.



The screenshot shows the 'Benefits' interface for 'Isolved University'. The 'Tobacco Use' tab is active. The table below lists employee tobacco use information. The 'Cessation Program' column for David Blanchard is highlighted with a pink box.

Name	Relationship Code	Effective Date	Implied Stop Date	Tobacco Use	Cessation Program	Actions
Status: Active (4)						
David Blanchard	Employee	8/1/2022		✓	✓	 

Another related feature to this screen is adding the option for you to ask your employees questions about tobacco use during the benefit enrollment process. This is set up on the Health and Wellness page. Employees are prompted to select Yes or No during the enrollment process. If they select “Yes”, a follow-up question is displayed to capture their answer for if they are enrolled in a cessation program. An example is shown below:



Client administrators with the **Manage Employee Benefits** role will retain access make changes to the updated employee benefits screen. Client administrators with the **View Employee Benefits** role will retain view-only access to the updated employee’s benefits screen.

For more details, please see the University article [Employee Benefits](#).

System Management

isolved Hire is rebranding to Applicant Tracking

Naming convention has changed for isolved Hire

For clients using applicant tracking, the menu item previously known as isolved Hire will now be listed as Applicant Tracking. There is no functionality change, you will still have the exact access to the applicant tracking screens as you do today.

HR

Enhancement to the tax wizard: Form W-4

Form W-4 multiple job worksheet corrected

The Form W-4 will no longer ignore the results of the multiple jobs worksheet when an employee hasn’t completed Step 4 of the W-4.

Form W-4 Department of the Treasury Internal Revenue Service		Employee's Withholding Certificate ▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. ▶ Give Form W-4 to your employer. ▶ Your withholding is subject to review by the IRS.		OMB No. 1545-0074 2022
Step 1: Enter Personal Information	(a) First name and middle initial	Last name		(b) Social security number
	Address			▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.
	City or town, state, and ZIP code			
(c) <input type="checkbox"/> Single or Married filing separately <input type="checkbox"/> Married filing jointly or Qualifying widow(er) <input type="checkbox"/> Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)				
Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App , and privacy.				
Step 2: Multiple Jobs or Spouse Works Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following. (a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or (b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or (c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld . . . ▶ <input type="checkbox"/> TIP: To be accurate, submit a 2022 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.				
Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)				
Step 3: Claim Dependents If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly): Multiply the number of qualifying children under age 17 by \$2,000 ▶ \$ _____ Multiply the number of other dependents by \$500 ▶ \$ _____ Add the amounts above and enter the total here 3 \$ _____				
Step 4 (optional): Other Adjustments (a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income 4(a) \$ _____ (b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here 4(b) \$ _____ (c) Extra withholding. Enter any additional tax you want withheld each pay period . . . 4(c) \$ _____				
Step 5: Sign Here Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete. ▶ _____ ▶ _____ Employee's signature (This form is not valid unless you sign it.) Date				
Employers Only Employer's name and address _____ First date of employment _____ Employer identification number (EIN) _____				
For Privacy Act and Paperwork Reduction Act Notice, see page 3.			Cat. No. 10220Q	Form W-4 (2022)

Contact your Payroll Specialist if you have any questions about the updates in insolved version 8.15