
Friday, January 13th, 2023

New isolved release: version 9.00

Highlights

isolved version 9.00 includes information about a new time card report, updates regarding 2023 tax and tax form updates, Oregon Saves report changes, information about Arizona withholding tax rates, plus a sneak peak of a few upcoming updates.

Benefits

- New Benefit Reconciliation Utility is *coming soon*

Payroll

- 2023 federal, state and local tax updates
- Isolved federal and state tax form updates
- OregonSaves report updates
- Arizona reduced withholding rates

Time and Labor Management

- New Time Card Data with Notes report
- Time card objections are *coming soon*

Benefits

Benefit Reconciliation Utility – *coming soon*

Easily identify variances between schedule premiums and actual contributions




The Benefit Reconciliation Utility will assist in determining any variances between schedule premiums and payroll contributions each month. With upcoming releases, we will include additional sneak peaks into the functionality that will be included in this new employee utility.

With this release you may see a new icon on the Employee Benefits page under Actions. This icon is not functional yet, but when the Benefit Reconciliation Utility is rolled out it will take you to an Allocation Table for that benefit plan.

Benefits Isolved 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 (4)	Medical PreTax	Med PPO BCBS	Start Date 01/01/2023 Stop Date 12/31/2099 *	Eligibility Date 04/01/2020 Plan Enrollment Date	EE+FAM David Blanchard Sarah Blanchard Knelew Blanchard	EE Per Pay Amount \$255.00 ER Per Pay Amount \$175.00		  

The Allocation Table will display the schedule and actual plan employer and employee premium contributions for each month of the plan year and show any variances between the two.

Benefits

Update Allocation Table | Refresh | Go Back to List

Allocation Table

Benefit Plan: Med PPO
Start Date: 01/01/2023
Stop Date: 12/31/2099 *
Coverage: EE+FAM

		2023											
		January	February	March	April	May	June	July	August	September	October	November	December
Schedule allocations	EE	\$510.00	\$510.00	\$510.00	\$510.00	\$510.00	\$510.00	\$510.00	\$510.00	\$510.00	\$510.00	\$510.00	\$510.00
	ER	\$350.00	\$350.00	\$350.00	\$350.00	\$350.00	\$350.00	\$350.00	\$350.00	\$350.00	\$350.00	\$350.00	\$350.00
Schedule allocations Total		\$860.00	\$860.00	\$860.00	\$860.00	\$860.00	\$860.00	\$860.00	\$860.00	\$860.00	\$860.00	\$860.00	\$860.00
Contribution allocations	EE	\$255.00											
	ER	\$175.00											
Contribution allocations Total		\$430.00											
Adjustments	EE												
	ER												
Adjustments Total													
Variances		(\$430.00)	(\$860.00)	(\$860.00)	(\$860.00)	(\$860.00)	(\$860.00)	(\$860.00)	(\$860.00)	(\$860.00)	(\$860.00)	(\$860.00)	(\$860.00)

Payroll

2023 tax changes

Isolved federal, state, and local tax updates

When you process payrolls in isolved with a pay date on or after January 1, 2023, the tax changes included in the [2023 Tax Changes](#) document will automatically take effect.

Isolved tax form updates

Federal and state tax form changes

The tax wizard used in Onboarding and for employee tax updates in the Adaptive Employee Experience (AEX) and Classic View has been updated for 2023. The following tax form changes have been made:

- **Form W-4 – Federal Employee’s Withholding Certificate**
 - The form year was updated from 2022 to 2023
 - The second filing status in Step 1(c) has been updated from “Married filing jointly or Qualifying widow(er)” to “Married filing jointly or Qualifying surviving spouse.”
 - Step 2(a), Step 2(b), and Step 2(c) have been updated, along with the TIP verbiage for this question.
 - Language in Step 3 has been updated along with the step title that now reads “Step 3: Claim Dependent and Other Credits”.
 - In the second line of the deduction worksheet for Step 4(b), the amounts for each filing status have been updated as follows:
 - Married filing jointly or qualifying surviving spouse was updated from \$25,900 to \$27,700
 - Head of household was updated from \$19,400 to \$20,800
 - Single or married filing separately was updated from \$12,950 to \$13,850
 - The dollar amounts have been updated in the tables for the three filing statuses on page 4
 - The form instructions have been updated

Additionally, Forms NM101, ND104, and UT101 have been updated with the changes above since New Mexico, North Dakota, and Utah use the Federal W-4 for state withholding.

View the updated [2023 Form W-4](#) on the IRS website.

- **Colorado Form DR 0004 – Colorado Employee Withholding Certificate**
 - The standard allowances for all filing statuses have changed
 - Box four in worksheet 2: Additional Withholding has been updated to divide by 4.40% instead of 4.55%. This is the amount you will multiply your total additional income by to get your total additional withholding.

View the updated [2023 Form DR 0004](#) on the Colorado Department of Revenue website.

- **Minnesota Form W-4MN – Minnesota Withholding Allowance/Exemption Certificate**
 - Itemized deduction values for all filing status and income thresholds have been updated in the Itemized Deductions and Additional Income Worksheet.

- Line 8 in The Itemized Deductions and Additional Income Worksheet has been updated to divide by \$4,800 from \$4,450.

Itemized Deductions and Additional Income Worksheet	
1	Enter an estimate of your 2023 Minnesota itemized deductions. For 2023, you may have to reduce your itemized deductions if your income is over \$220,650 (\$110,325 for Married Filing Separately).....
2	Enter one of the following based on your filing status:
	a. \$27,650 if Married Filing Jointly
	b. \$20,800 if Head of Household
	c. \$13,825 if Single or Married Filing Separately
3	Subtract step 2 from step 1. If zero or less, enter 0
4	Enter an estimate of your 2023 additional standard deduction (from page 11 of the Form M1 instructions)
5	Add steps 3 and 4
6	Enter an estimate of your 2023 taxable nonwage income
7	Subtract step 6 from step 5. If zero, enter 0. If less than zero, enter the amount in parentheses.....
8	Divide the amount on step 7 by \$4,800. If a negative amount, enter in parentheses. Do not include fractions
9	Enter the number on step F of Section 1 on page 1
10	Add step 8 and 9 and enter the total here. If zero or less, enter 0. Enter this amount on line 1 of page 1

View the updated [2023 Form W-4MN](#) on the Minnesota Department of Revenue website.

- **North Carolina Form NC-4** –Employee’s Withholding Allowance Certificate
 - In Part II on the worksheet, the divisible number has been updated from \$128 to \$122

NC-4 Part II						
1.	Enter your total estimated N.C. itemized deductions from Page 3, Schedule 1..... 1. \$ _____					
2.	Enter the applicable N.C. standard deduction based on your filing status. <table style="display: inline-table; vertical-align: middle;"> <tr> <td rowspan="4" style="font-size: 3em; vertical-align: middle;">}</td> <td>\$12,750 if Single</td> </tr> <tr> <td>\$25,500 if Married Filing Jointly or Surviving Spouse</td> </tr> <tr> <td>\$12,750 if Married Filing Separately</td> </tr> <tr> <td>\$19,125 if Head of Household</td> </tr> </table> 2. \$ _____	}	\$12,750 if Single	\$25,500 if Married Filing Jointly or Surviving Spouse	\$12,750 if Married Filing Separately	\$19,125 if Head of Household
}	\$12,750 if Single					
	\$25,500 if Married Filing Jointly or Surviving Spouse					
	\$12,750 if Married Filing Separately					
	\$19,125 if Head of Household					
3.	Subtract Line 2 from Line 1. If Line 1 is less than Line 2, enter ZERO (0)..... 3. \$ _____					
4.	Enter an estimate of your total N.C. Child Deduction Amount from Page 3, Schedule 2..... 4. \$ _____					
5.	Enter an estimate of your total federal adjustments to income and State deductions from federal adjusted gross income..... 5. \$ _____					
6.	Add Lines 3, 4, and 5..... 6. \$ _____					
7.	Enter an estimate of your nonwage income (such as dividends or interest)..... 7. \$ _____					
8.	Enter an estimate of your State additions to federal adjusted gross income..... 8. \$ _____					
9.	Add Lines 7 and 8..... 9. \$ _____					
10.	Subtract Line 9 from Line 6 (Do not enter less than zero)..... 10. \$ _____					
11.	Divide the amount on Line 10 by \$2,500 . Round down to whole number 11. _____ Ex. \$3,900 ÷ \$2,500 = 1.56 rounds down to 1					
12.	Enter the amount of your estimated N.C. tax credits..... 12. \$ _____					
13.	Divide the amount on Line 12 by \$122. Round down to whole number 13. _____ Ex. \$200 ÷ \$122 = 1.64 rounds down to 1					

- The additional withholding amounts for all filing statuses within the Multiple Jobs section have been updated.

View the updated [2023 Form NC-4](#) on the North Carolina Department of Revenue website.

- **North Carolina Form NC-4 NRA**– Nonresident Alien Employee’s Withholding Allowance Certificate
 - The additional withholding per pay period allowance has been updated

- Weekly has been updated from \$12 to \$13
- Biweekly has been updated from \$24 to \$25
- Semimonthly has been updated from \$26 to \$28
- Monthly has been updated from \$52 to \$55

View the updated [2023 Form NC-4 NRA](#) on the North Carolina Department of Revenue website.

- **Wisconsin Form WT-4A** – Worksheet for Employee Withholding Agreement
 - The standard deduction and tax rate schedules for full-year residents and the explanation have been updated for 2023.

View the updated [2023 Form WT-4A](#) on the State of Wisconsin Department of Revenue.

- The following state forms have been updated to reflect the current year and form number. No other significant changes were made to the forms:
 - **Arizona form changes:**
 - [Form A-4C](#) – Arizona Request for Reduced Withholding to Designate for Tax Credits
 - [Form AZ102](#) – Arizona Employee Withholding Exemption Certificate
 - **Connecticut form changes:**
 - [Form CT-W4](#) - Connecticut Employee's Withholding Certificate
 - [Form CT-W4NA](#) – Connecticut Employee's Withholding Certificate Nonresident Apportionment
 - **Minnesota form change:**
 - [Form MWR](#) – Reciprocity Exemption/Affidavit of Residency for Tax Year 2022
 - **Missouri form change:**
 - [Form MO W-4](#) – Employee's Withholding Certificate
 - **New York form changes:**
 - [Form IT-2014](#) – Employee Withholding Allowance Certificate
 - [Form IT-2104-E](#) – Certificate of Exemption from Withholding
 - [Form IT-2104-SNY](#) – Certificate of Exemption from Withholding for START-UP NY Program

Arizona reduced withholding tax rates

Employees required to complete a new Form A-4

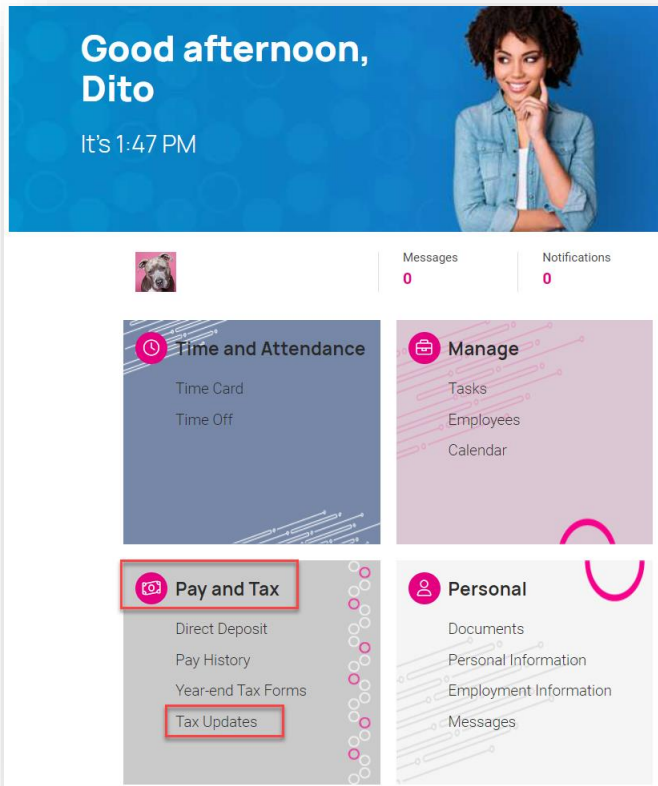
Arizona's individual *Income Tax Withholding Form (Arizona Form A-4)* has been updated to reflect lower individual income tax rates and the rates are available within the isolated Tax Update screen. There are seven new withholding election rates while retaining the zero withholding rate option.

Every Arizona employer is required to make this form available to its Arizona employees by January 31, 2023. A release in late January will remove the old rate options from the Tax Update screen and any existing employees who have not updated their *Form A-4* will have their taxes calculated at the default rate of 2% until they complete a new *Form A-4*.

For more information about Arizona’s withholding tax changes, visit Arizona’s [Department of Revenue](#) website.

NEW 2023 AZ Withholding Rates	Old AZ Withholding Rates
0.0%	0.0%
0.5%	0.8%
1.0%	1.3%
1.5%	1.8%
2.0%	2.7%
2.5%	3.6%
3.0%	4.2%
3.5%	5.1%
2.0% (no state A-4 filed)	2.7% (no state A-4 filed)

Employees can easily complete the A-4 form within insperity.com by following these steps. For those clients taking advantage of the modern Adaptive Employee Experience (AEX), employees can create a new A-4 by selecting the **Tax Updates** option.



Within the Tax Updates page, the employee may access the A-4 by selecting the **Start Wizard** button and then clicking the blue **Start** button on the Employee Withholding Resource Center page that follows.

Tax Withholdings

Tax Updates Wizard

Make changes and updates to your tax withholdings

[START WIZARD](#)

Federal

Filing status: Single

Exemptions: 1

State

Employee Withholding Resource Center

The assistant can guide you to the correct forms. You can also choose which forms you would like to fill out if you're certain

[Start →](#) [✕ Sign out](#)

If the employee is only going to create a new *Form A-4*, they would select the **“I wish to NOT complete forms for this jurisdiction at this time”** under the Federal forms section of the screen. The **“I wish to complete forms for this jurisdiction”** option defaults to selected for the Arizona Resident section of the screen. Clicking on the blue **Continue** button will lead the employee through a series of questions to confirm the *A-4* form applies to their situation and allow them to complete the *A-4* form by clicking the blue **Start** button.

Please select which sections you would like to complete:

Note: Opting out of jurisdictions, to which you may be liable, may result in not enough taxes from being withheld or your employer to withhold at a higher rate.

Federal

I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me

I wish to NOT complete forms for this jurisdiction at this time

Arizona Resident

I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me

I wish to NOT complete forms for this jurisdiction at this time

[← Back](#) [Continue →](#)

Tax Withholdings

🏠 Main Menu

Arizona Resident — Summary

📌 Check my progress

Summary ▶

Based on answers you provided, we have determined the following withholding form(s) may apply to you as a resident of **Arizona**.

	Locality	Name	Title	Status
Start	AZ	A-4	Employee's Arizona Withholding Election	Not completed

◀ Back

For those clients who remain on the Employee Self-Service Classic View, employees can create a new *A-4* by selecting the **Tax Updates Wizard** menu option within the Employee Self-Service menu and then selecting the **Start** button on the Employee Withholding Resource Center page.

Employee Withholding Resource Center

The assistant can guide you to the correct forms. You can also choose which forms you would like to fill out if you're certain

[Start →](#) [✕ Sign out](#)

If the employee is only going to create a new *Form A-4*, they would select the **“I wish to NOT complete forms for this jurisdiction at this time”** under the Federal forms section of the screen. The **“I wish to complete forms for this jurisdiction”** option defaults to selected for the Arizona Resident section of the screen. Clicking on the blue **Continue** button will lead the employee through a series of questions to confirm the *A-4* form applies to their situation and allow them to complete the *A-4* form by clicking the blue **Start** button.

Please select which sections you would like to complete:

Note: Opting out of jurisdictions, to which you may be liable, may result in not enough taxes from being withheld or your employer to withhold at a higher rate.

Federal

- I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me
- I wish to NOT complete forms for this jurisdiction at this time

Arizona Resident

- I wish to complete forms for this jurisdiction. Please help determine which withholding forms apply to me
- I wish to NOT complete forms for this jurisdiction at this time

[← Back](#) [Continue →](#)

Tax Withholdings

[Main Menu](#)

Arizona Resident — Summary

[Check my progress](#)

Summary ▶

Based on answers you provided, we have determined the following withholding form(s) may apply to you as a resident of **Arizona**.

	Locality	Name	Title	Status
Start	AZ	A-4	Employee's Arizona Withholding Election	Not completed

[← Back](#)

Oregon changes service providers for OregonSaves

Isolved OR Retirement Savings Contribution and Census reports updated

OregonSaves was established in 2017 and is the nation’s first automatic-enrollment, payroll deduction IRA program for private sector workers. The state of Oregon recently announced a change in service providers for the OregonSaves program. The switch to the new service provider, Vestwell State Savings, required changes to several of the Client Reports that are used to communicate census and payroll information to the state. Minor format updates were made the reports highlighted below and are available for use:

Client Reports

Report Category: Retirement & Deferred Compen ▾

Search:

Output Name	Report Type
OR Retirement Savings – Contributions	By Payroll Run
OR Retirement Savings – Contributions FTP	By Payroll Run
OR Retirement Savings – Initial Census	As Of Date
OR Retirement Savings – Ongoing Census	By Payroll Run
OR Retirement Savings – Ongoing Census FTP	By Payroll Run

In addition to the change of service provider, the OregonSaves program also recently added an additional group size for businesses to register and established new deadlines. Businesses with 3-4 employees have until March 1, 2023 to enroll in OregonSaves, while employers with 1-2 employees have a deadline to comply of July 31, 2023.

Visit the [OregonSaves website](#) for additional information and FAQs.

Time and Labor Management

New Time Card Data with Notes report

Report on time card data including notes

For those clients taking advantage of isolved's Time and Labor Management module, you now have access to a new report that will display time card information along with any hours or punch notes that were entered on the time card. To access the new Time Card Data with Notes report, navigate to Reporting > Client Reports and filter the Report Category by "Time".

There are many options available that allow you to control the data that the report retrieves so you only see the information that is meaningful to you.

Client Reports

Report Category:

Search:

Output Name	Report Type
Time Card Data with Notes	Date Range

[Generate Report](#) [Go To My Reports Queue](#)

Once your report request has been submitted you can do any of the following: Run another report, Cancel Report, or Re-run Report. The report will be available in My Reports Queue for 72 hours.

Time Card Data with Notes

Timecard with Notes

Filtering

From Date:

To Date:

Legal Company:

Pay Groups:

Employee:

Timecard Policy: Timecard Policies

Organization Level:

- Divison
- Location
- Department
- Work Team
- Pay Type
- grant
- sub grant
- Team

Manager/Supervisor:

Employee Status:

Sorting

Sort Field 1:

Sort Field 2:

Sort Field 3:

Options

Format:

EE: Doss Jr, Charles Andres		Kristen's Demo with Time				Supervisor: White, Jaime				
EEID: 1047		Timecard Data with Notes				Manager: Fischer, Alejandro				
TCID:		- 1/1/2023 to 1/12/2023 -				Pay Group: Biweekly				
Policy Group: Active Hourly FT						Hire Date: 6/22/2022				
Day	Date	Start	End	Department	Hour Notes	Punch Notes	Earning	Hours	Paid	Un Paid
Monday	01/02/2023	08:00:00 AM	04:00:00 PM	ADMIN			Holiday Pay	8.00	8.00	
Thursday	01/12/2023	08:18:00 PM	08:18:00 PM	ADMIN		I changed my schedule today so I'm working from 8-5 rather than 7-4.	Regular Pay	0.00	0.00	
TOTAL								8	8	

Time card objections – *coming soon*

Allow employee objections to time cards

Those clients taking advantage of isolved's Time and Labor Management product will be able to include employee objections to their time card verification process. Employees will have an opportunity to object to their time card and must enter comments as to why they feel the information is not accurate. Supervisors/Managers can be notified by email/AEX so they can address concerns the employee may have.

For more information about the changes in the version 9.00 release, contact your Payroll Specialist.