
Friday, February 10th, 2023

New isolved release: version 9.02

Highlights

isolved version 9.02 includes Open Enrollment menu changes, a new look for the Jobs page, a redesign of labor selection in AEX, additional updates to federal and state withholding forms, Applicant Tracking enhancements, an update to Arizona withholding tax rates, plus a final sneak peak of the Benefit Reconciliation Utility.

Applicant Tracking

- Job numbers allowed in Job Board Job Title field on the Job Listings form
- Text to Apply now includes job location as part of the job title
- Refer.io Opt-in at Quick Apply
- eForm data now available in Report Builder
- Requisitions now shows audit information related to changes
- Reinitiate a denied requisition
- User notification upon applicant status change

Benefits

- Open Enrollment menu options changing to Benefit Enrollment
- New Benefit Reconciliation Utility is *coming soon*

HR

- Jobs page redesigned to display key employee job information in the forefront

Onboarding and Employee Self-Service (ESS)

- Updated 2023 tax withholding forms in the Tax Wizard

Payroll

- Employees required to complete a new Form A-4 by first payroll in March to avoid default 2% withholding

Time and Labor Management

- Redesign of labor selection in Adaptive Employee Experience (AEX)

Applicant Tracking

Newly released features and updates

Job numbers allowed in Job Board Job Title field on the Job Listings form

We will once again allow numbers within the Job Board Job Title field on the Job Listings form. We do not recommend using numbers in the job title field. Doing so will limit your job's visibility on Indeed and other job boards. All pay information should be included in the job ad to avoid hurting your job's visibility on the job boards.

Text to Apply now includes job location as part of the job title

To help Text to Apply applicants apply to the job best suited for them, the job location is now visible as part of the Job Title. Example, applicant applying to a cashier position in Salt Lake City, UT will see "Cashier (Salt Lake City, UT)".

Refer.io Opt-in at Quick Apply

Refer.io is one of the top sources for applicants. We now allow applicants to opt-in to receiving email notifications about new job openings at your company when they apply through the Indeed quick-apply process. In doing so, Refer.io can automatically notify your current talent pool of other job openings within your company as they become available.

eForm data now available in Report Builder

We've added eForm data as an option within the Report Builder. You can create custom reports that include data from your eForm fields.

Requisitions now shows audit information related to changes

When information on a Requisition is changed, the name of the user who changed the information will now show along with the date and time.

Reinitiate a denied requisition

Administrators now can reinitiate a denied Requisition. You can make changes to the denied requisition, and it will go through the approval process again with an email stating the eForm needs to be approved again. A version history will be created for reference.

User notification upon applicant status change

You can now set-up your application statuses to automatically notify users via email when that status is assigned to an applicant

Benefits

Benefit Menu Option Changes




Open Enrollment renamed Benefit Enrollment

The Menu item that is located under **Client Management > Benefits > Open Enrollment Setup** has been renamed to **Benefit Enrollment Setup**. The Menu item in Employee Self-Service Class View for **Open Enrollment** has also been renamed to **Benefit Enrollment**.

Benefit Reconciliation Utility – *coming soon*

Updates to the employee Benefits screen and Benefit Reconciliation Utility functionality

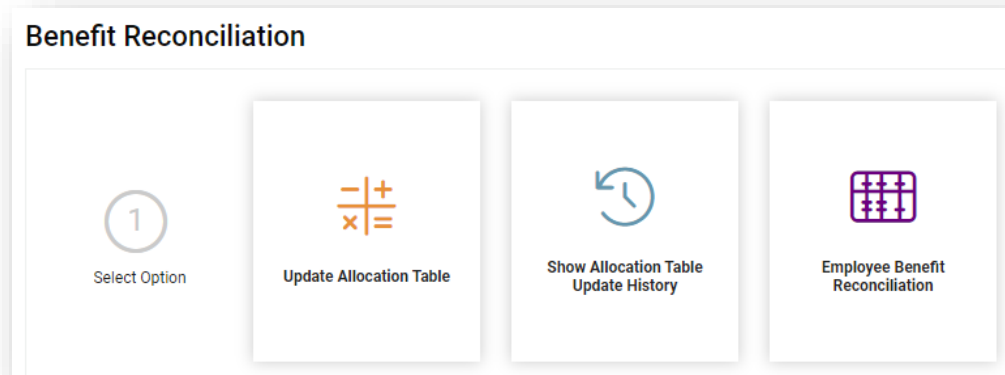
Users with full access to the benefits module will have the ability to modify the Schedule allocations as well as adjust contributions on the employee's Benefits screen.

		▼ 2023			
		January	February	March	April
▼ Schedule allocations 	EE	\$510.00	\$510.00	\$510.00	\$510.00
	ER	\$350.00	\$350.00	\$350.00	\$350.00
Schedule allocations Total		\$860.00	\$860.00	\$860.00	\$860.00
▼ Contribution allocations	▶ EE	\$510.00	\$255.00		
	▶ ER	\$350.00	\$175.00		
Contribution allocations Total		\$860.00	\$430.00		
▼ Contribution adjustments 	EE				
	ER				
Contribution adjustments Total					
Variances 			(\$430.00)	(\$860.00)	(\$860.00)

The Benefit Reconciliation screen will include functionality to include a mass update of the allocation tables and a way to show the history of the mass updates:

- Update Allocation Table – This function creates a mass update of all employee's allocation tables at one time for one or more benefit types or plans. This could be needed if you have made updates to the Scheduled Premium Rules or for employees who do not yet have updated allocation tables.
- Show Allocation Table Update History – This option will display the history for updates going back one year from the current date.

- Employee Benefit Reconciliation – This utility will help you identify and manage any discrepancies between the billed amount and payroll amounts for benefits. When you select this option, you are prompted to select a date range, legal company, pay group, and can select “variances only” to easily identify employees with discrepancies between the scheduled and contribution amounts.



HR

Jobs page redesign

New Job Details card displays key employee job information

The new Job Details card displays current employee job details without a single click of a mouse. The Job Details card is available for all jobs an employee has had but will default to display in expanded form for an employee's current job.

Jobs

Insolved University Help

Effective Date	Job	Job Group	Job Level	Salary Grade	Workers' Comp Code	EEO Category	FLSA Exempt	Actions
2/3/2023	1005 - General Manager					First/Mid Level Officials and Ma...	✓	✎ ☰ ✕

Job Details

MANAGERIAL AND EXPERIENCE	Assigned Supervisor 1024 - Jason Morgan University Training Management Com	Assigned Manager 1028 - William J DeWitt University Training Management Co...	Manager's Manager 1025 - Danielle A Adams University Training Management Co...	Occupation Start	Industry Start	
OTHER DETAILS	Change Reason	SOC Code	Compensation Policy	Override Policy Group	Notes	
WORKERS' COMPENSATION	Default Workers' Comp Code	Workers' Comp Code	Default Classification	Classification	Wage Limit Maximum N/A	Wage Limit Frequency N/A
JOB ORGANIZATION INFORMATION	Department 60		Class			

10/21/2020	1025 - Supervisor					First/Mid Level Officials and Ma...	✓	✎ ☰ ✕
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Onboarding and Employee Self-Service (ESS)

Updated 2023 tax withholding forms in the Tax Wizard

Additional updates to ensure compliance with the latest federal and state withholding forms

Additional federal and state tax forms have been updated in the Tax Wizard in Onboarding and Tax Updates in both Classic View and the modern Adaptive Employee Experience (AEX). The following forms have been updated to support 2023 requirements:

- **Federal W-4(SP)** – Certificado de Retenciones del Empleado (Spanish-language version of the Employee Withholding Certificate)
- **California DE 4** – Employee's Withholding Allowance Certificate
- **Maryland MW 507** – Employee's Maryland Withholding Exemption Certificate
- **Michigan GRW-4** – Employee's Withholding Certificate for Grand Rapids Income Tax
- **Mississippi 89-350** – Mississippi Employee's Withholding Exemption Certificate
- **Rhode Island RI W-4** – Employee's Withholding Allowance Certificate

Payroll

Arizona reduced withholding tax rates

Employees required to complete a new Form A-4

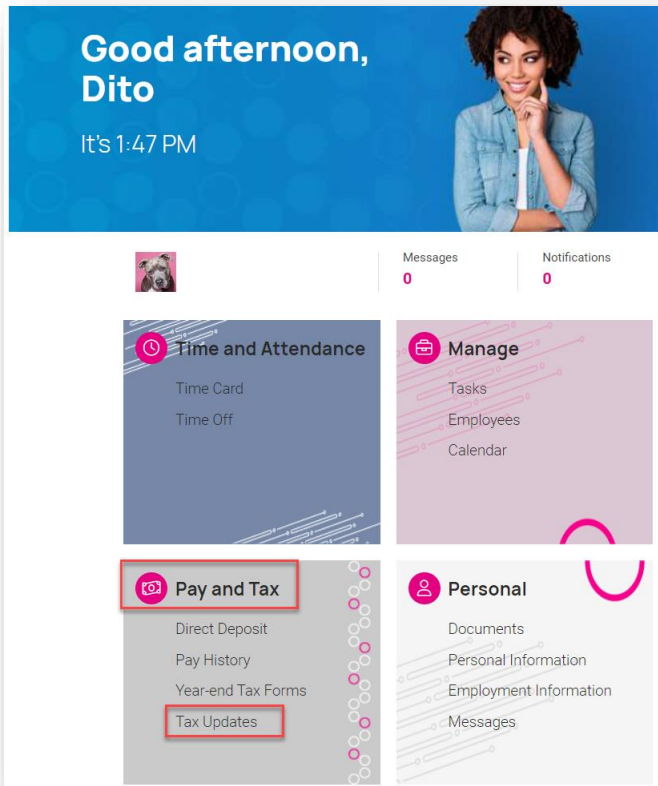
Expired rates are now marked as “inactive” and will not be displayed on any screens which give the user the option to select an alternate calculation. The Tax Information screen will continue to display inactive codes, but only allows active codes to be selected.

Every Arizona employer is required to make the new *Form A-4* available to its Arizona employees by January 31, 2023. Tax screens may still display old rates for employees who have not yet completed a new *Form A-4* and those employees’ state tax will still calculate based on the old percentage. **If an employee still has an old state withholding tax rate on the first payroll in March, their state withholding will be calculated using the default rate of 2% until they complete a new *Form A-4*.** Please have all employees who have Arizona withholding taxes fill out a new 2023 *Form A-4* to ensure the proper tax is withheld.

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**.

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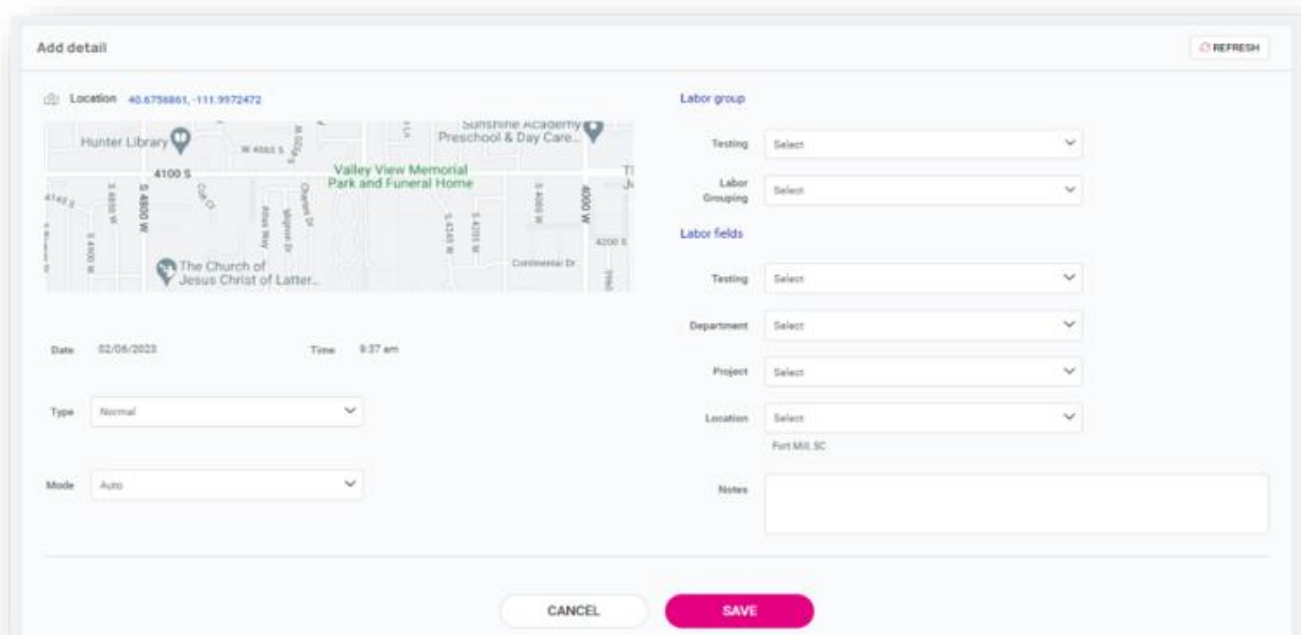
Time and Labor Management

Remodeled labor selection functionality in AEX

Improved usability for employees, supervisors, and managers

The labor selection functionality in isolved has been remodeled in the Adaptive Employee Experience (AEX) to improve usability. The selection of Labor Groups will function as a filter to populate default Labor fields. The Labor Group and associated Labor fields will include a dynamic search feature. The display will list the code and the description for the labor item(s). If an employee has any default labor fields, when the screen loads, the labor fields will display below the labor field box. The employee will be able to see what the default values are and can make any changes by selecting the override value in the Labor field section.

This update will impact the Speed dial for the Detail Punch and Missing Punch. For Managers/Supervisors, this will impact the Create New Punch, Create New Hours, and Create New Adjustment. Group Punch will also have the remodeled functionality, but default Labor is excluded due to multiple people being included in the group punch. For Employees this will impact the Add New Punch, Add New Adjustment and Add New Hours.



Add detail REFRESH

Location 40.6758861, -111.9972472

Hunter Library
4100 S
W 4800 S
Valley View Memorial Park and Funeral Home
The Church of Jesus Christ of Latter...
Sunshine Academy Preschool & Day Care...

Date 02/06/2023 Time 9:37 am

Type Normal

Mode Auto

Labor group

Testing Select

Labor Grouping Select

Labor fields

Testing Select

Department Select

Project Select

Location Select
Fort Mill, SC

Notes

CANCEL SAVE

For more information about the changes in the version 9.02 release, contact your Payroll Specialist.