

Friday, April 7th, 2023

New isolved release: version 9.06

Highlights

isolved version 9.06 includes a big enhancement in Adaptive Employee Experience for managers and supervisors, updated West Virginia income tax rates, new Colorado Secure Savings client reports, a reminder about the California pay data reporting deadline, a new Employee Occurrence report, and the redesign of several pages in Employee Self-Service.

Adaptive Employee Experience

- Tasks have a new look in AEX

Employee Self-Service

- Multiple page redesigns in Employee Self-Service Classic View

HR

- California pay data reporting – *deadline: May 10, 2023*
- New Employee Occurrence Report

Payroll

- West Virginia income tax rate cut
- New Colorado Secure Savings client reports

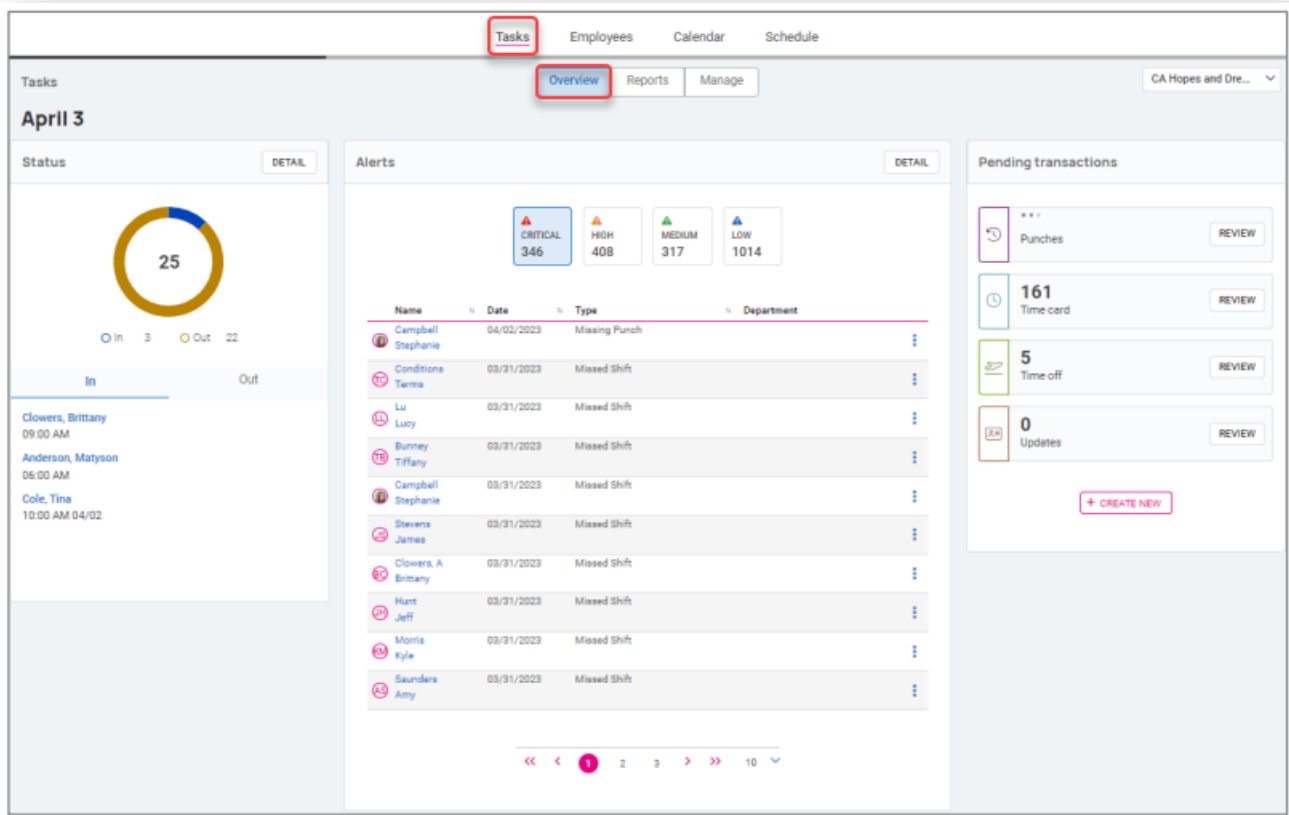
Adaptive Employee Experience

This release of isolved brings enhancements to the Tasks screen which will now include much of the same information supervisors and managers have in My Dashboard in the classic view. You will be able to view pending transactions, monitor alerts, view employee punch statuses, scheduled versus worked hours, and a summary of hours by earning types for employees. Three tabs have been added to the Tasks screen:

- **Overview**
- **Reports**
- **Manage**

Overview

Under the **Manage > Tasks** view, the **Overview** tab displays a summary of current employee punch status, alerts, and pending transactions.



Tasks Overview - April 3

Status (DETAIL)

25 Total Punches
 In: 3 | Out: 22

Alerts (DETAIL)

CRITICAL: 346 | HIGH: 408 | MEDIUM: 317 | LOW: 1014

Name	Date	Type	Department
Campbell, Stephanie	04/02/2023	Missing Punch	
Conditions, Terna	03/31/2023	Missed Shift	
Lu, Lucy	03/31/2023	Missed Shift	
Burney, Tiffany	03/31/2023	Missed Shift	
Campbell, Stephanie	03/31/2023	Missed Shift	
Stevens, James	03/31/2023	Missed Shift	
Clowers, A, Brittany	03/31/2023	Missed Shift	
Hunt, Jeff	03/31/2023	Missed Shift	
Morris, Kyle	03/31/2023	Missed Shift	
Saunders, Amy	03/31/2023	Missed Shift	

Pending transactions

- *** Punches (REVIEW)
- 161 Time card (REVIEW)
- 5 Time off (REVIEW)
- 0 Updates (REVIEW)

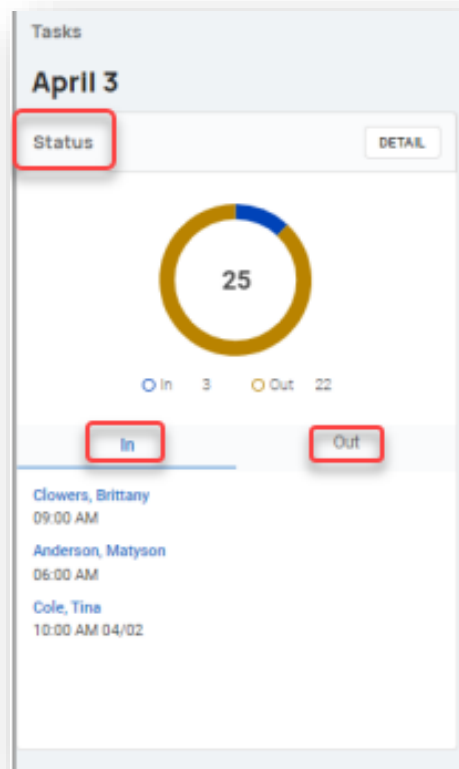
+ CREATE NEW

Overview - Status

On the left side of the **Overview**, you will find the **Status** tile. Toggle between the **In** and **Out** tabs to see current employee punch statuses.

- The **In** tab shows all employees currently clocked in (no out punch) at the time the page loads.
 - Employee names that display are those currently punched in
 - Time of the employee's last punch
 - If the punch is from a previous date, the date is displayed
- The **Out** tab lists all employees not currently clocked in.
 - Employee names show for all employees with an out status

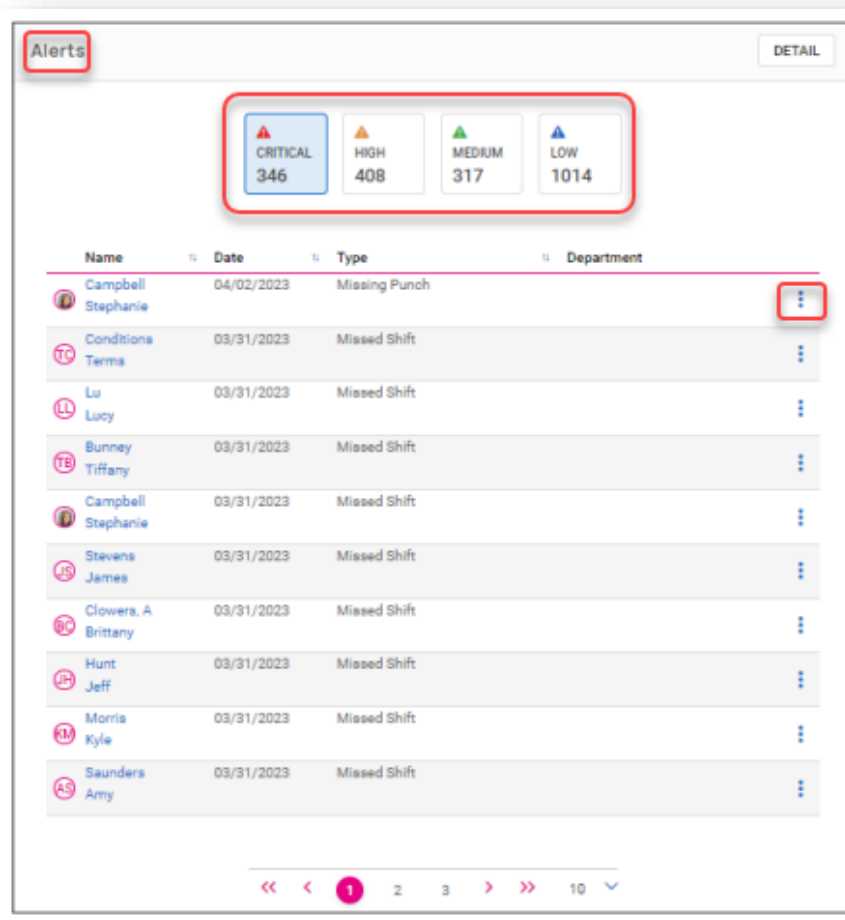
The employee's name is a hyperlink that takes you to a read-only view of the Time Card. The **Detail** button takes you to the **Punch Status report**.



Overview - Alerts

In the middle of the **Overview**, you will find the **Alerts** tile. The top of the card shows alerts filtered by “Critical,” “High,” “Medium,” and “Low.” The number on each card reflects the number of alerts with the severity that is currently pending (has not been reviewed or excused).

- When clicking on a severity block, the data on the tile is filtered to show only pending alerts with the selected severity
- Click on the three dots to the right of an employee’s name to review or excuse an alert



Name	Date	Type	Department
Campbell Stephanie	04/02/2023	Missing Punch	
Conditions Terms	03/31/2023	Missed Shift	
Lu Lucy	03/31/2023	Missed Shift	
Bunney Tiffany	03/31/2023	Missed Shift	
Campbell Stephanie	03/31/2023	Missed Shift	
Stevens James	03/31/2023	Missed Shift	
Clowers, A Brittany	03/31/2023	Missed Shift	
Hunt Jeff	03/31/2023	Missed Shift	
Morris Kyle	03/31/2023	Missed Shift	
Saunders Amy	03/31/2023	Missed Shift	

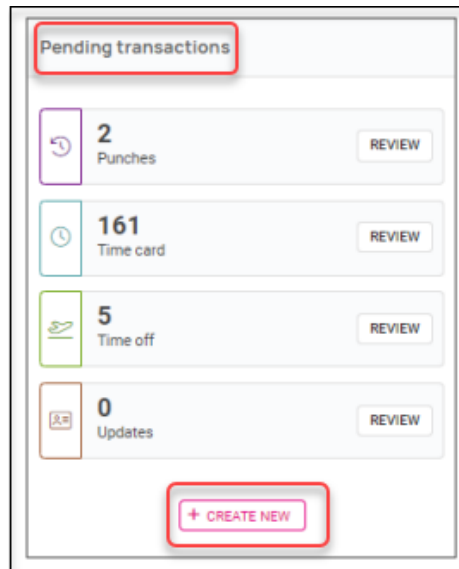
Employee name is a hyperlink that takes you to a read-only view of the Time Card. The **Detail** button takes you to the **Alert Report**.

Overview - Pending Transactions

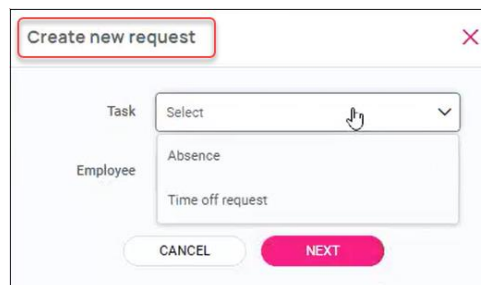
The **Pending Transactions** tile is found on the far right of the **Overview** and will show items that need review:

- Punches – pending missing punch requests
- Time Card – view and approve employee time cards
- Time Off – review employee time off requests
- Updates – employee address and contact information updates

Click on the **Review** button to the right of each pending transaction type to navigate to the **Manage** tab that shows details of each transaction.

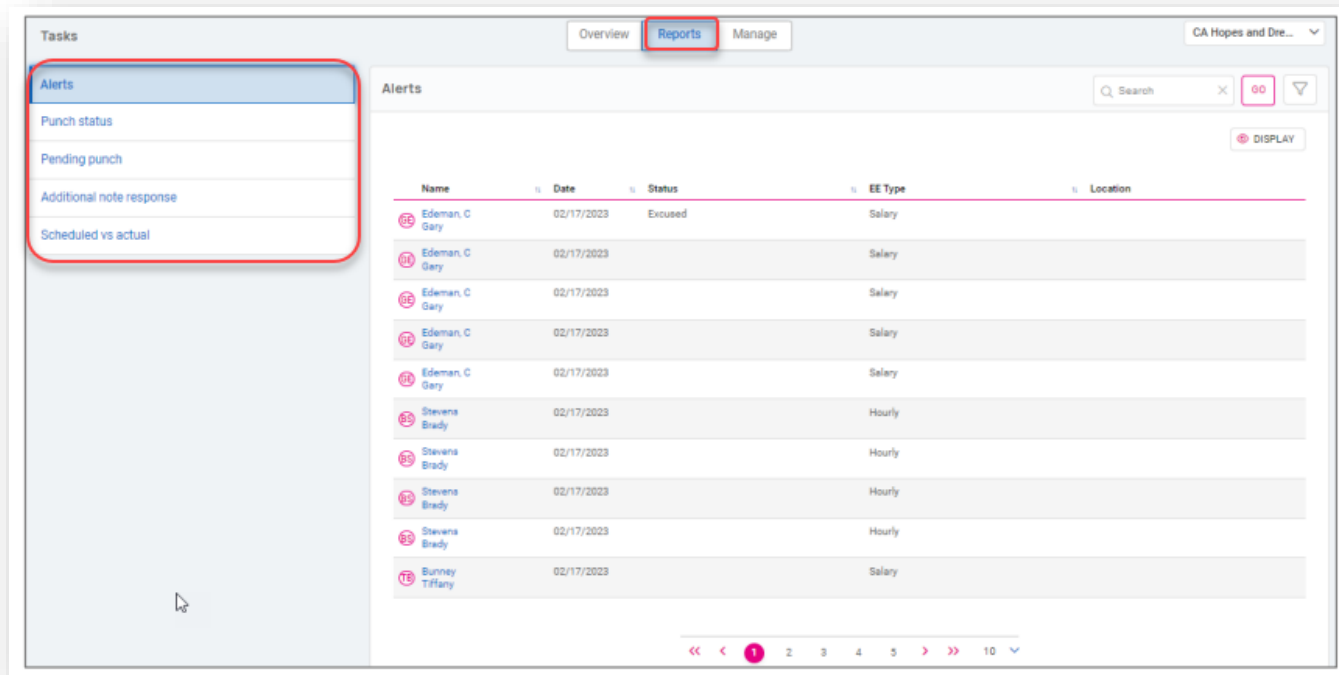


Click on the **Create New** button at the bottom of the card to create a new absence or time off request.



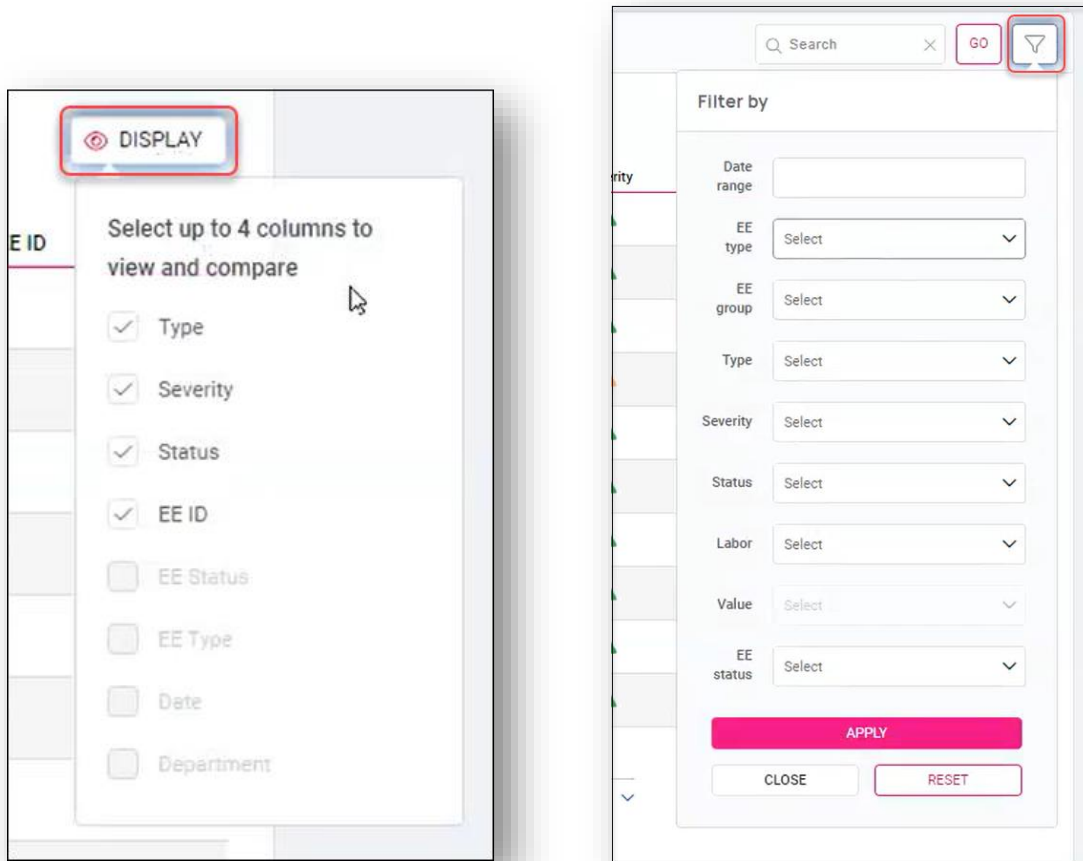
Reports

Under the **Manage > Tasks** view, the **Reports** tab contains the following reports which are like those found in **My Dashboard** in Classic View, with slightly different names:



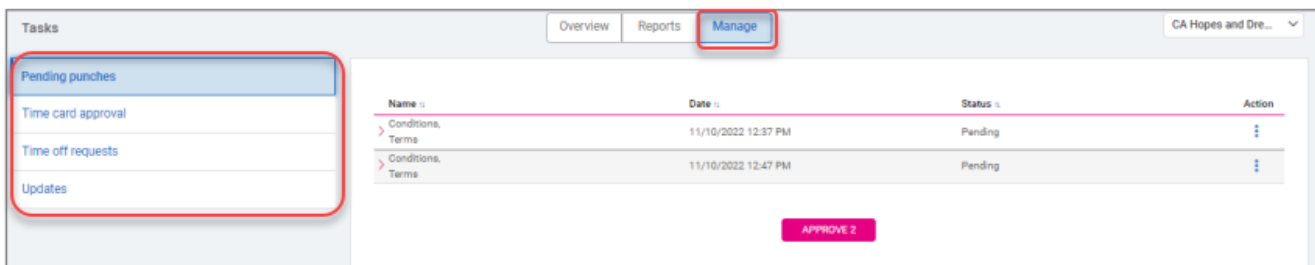
Task Report in AEX	Dashboard Report in Classic View
Alerts	Alert Monitoring
Punch Status	Employee Punch Status
Pending Punch	Pending Punches
Additional Note Response	Punch Note Response
Scheduled vs Actual	Earnings Summary of Hours

You can customize your report by clicking on the **Display** button to choose the columns you would like to include and using the **Filter** button to filter for the exact data you to display. Take advantage of the **Search** feature at the top of the screen to quickly find an employee in your report. Your customized report settings will remain in place until you log out of AEX.



Manage

Under the **Manage > Tasks** view, the **Manage** tab contains all the detail behind the items found in the **Pending Transactions** card on the **Overview**. Use the three dots in the Action column to individually approve a transaction or click the **Approve** button at the bottom of the page to mass approve. Clients not taking advantage of the Time and Labor Management module would only see Updates and Time off requests (if configured).



Employee Self-Service

Design updates to multiple pages in Classic View

Awards, Company Assets, Education, and Skills pages redesigned

Over the next few months, you'll see that we are refreshing several screens, moving them to a more modern look using the new grid style that you've already seen on screens such as Benefits and Jobs. The new design provides the ability to sort, filter, and group making it easy to find the information you need. With this release, the following Employee Self-Service pages have been redesigned in Classic View:

- Awards
- Company Assets
- Education
- Skills

Awards					
Expand All Groups Collapse All Groups Clear Grouping/Filters					
Drag a column header here to group by that column					
Award	Date Awarded	Award Received	Reason	Comments	
Customer Service	3/31/2021	\$50 Gift Card	We received multiple comments on Daniel's awesome customer service.	Awarded during busy season where there was a heavy work load. Daniel did great!	

Company Assets							
Expand All Groups Collapse All Groups Clear Grouping/Filters							
Drag a column header here to group by that column							
Search							
Asset Type	Asset Description	Asset Make	Asset Model	Serial Number	Equipment Number	Date Assigned	Date Returned
Cell Phone		ABC Phone Company	Best Phone 8	123456		3/24/2020	
Laptop		ABC Laptop Maker	15	321454			

Education								
Expand All Groups Collapse All Groups Clear Grouping/Filters								
Drag a column header here to group by that column								
Search								
Education	School	Degree	Major	Minor	Honors	GPA	Graduated	Completion Date
Bachelors Degree	State University	Bachelor of Science				4.0	✓	

Skills						
Expand All Groups Collapse All Groups Clear Grouping/Filters						
Drag a column header here to group by that column						
Search						
Skill	Date Attained	Proficiency	Experience	Last Used	Comments	
Excel	3/31/2021	Excellent		Recently	Daniel is a great resource for Excel for the tool	

HR

California pay data reporting

Deadline for submitting reports is May 10, 2023

California enacted legislation in 2020 requiring pay data reporting obligations for certain employers. In 2022, California expanded the legislation to require reporting of median and mean pay information.

Navigate to **Reporting > Client Reports** and select the Report Category “Hr – Compliance” to easily access the CA Pay Data Report in isolved. The portal for submitting reports to the California Civil Rights Department (CRD) is now open and can be found on the [Pay Data Reporting Portal](#). The deadline for submitting reports is **May 10, 2023**.

New Employee Occurrence Report

New report allows you to export your occurrence data

A new report, Employee Occurrence Export, has been added to Client Reports that will export employee Occurrence information, such as

Payroll

West Virginia income tax rate cut

Rate changes retroactive to January 1, 2023

On March 7, 2023, [West Virginia Governor Justice signed HB 2526](#) which immediately reduced the state income tax in year 2023 by an average of 21.25%. These rates were changed retroactively to January 1, 2023.

Therefore, if you over withheld income tax your taxes prior to the rate change in isolved on April 7, 2023, a refund will be available upon the filing of your 2023 personal income tax return in 2024. Payrolls processed after Thursday, April 6th, will reflect the new rates.

The following tables represent the tax rates now applicable to income in the 2023 tax year:

2023 tax rates for individuals, joint returns, head of households, estates, and trusts

If the WV Taxable Income is:	The Tax is:
not over \$10,000	2.36% of taxable income
over \$10,000 but not over \$25,000	\$236 plus 3.15% of the excess over \$10,000
over \$25,000 but not over \$40,000	\$708.50 plus 3.54% of excess over \$25,000
over \$40,000 but not over \$60,000	\$1,239.50 plus 4.72% of excess over \$40,000
over \$60,000	\$2,183.50 plus 5.12% of excess over \$60,000

2023 tax rates for married individuals filing separate returns

If the WV Taxable Income is:	The Tax is:
not over \$5,000	2.36% of taxable income
over \$5,000 but not over \$12,500	\$118 plus 3.15% of excess over \$5,000
over \$12,500 but not over \$20,000	\$354.25 plus 3.54% of excess over \$12,500
over \$20,000 but not over \$30,000	\$619.75 plus 4.72% of excess over \$20,000
over \$30,000	\$1,091.75 plus 5.12% of excess over \$30,000

Although West Virginia did release an update to [Form WV IT-104 Employee Withholding/Exemption Certificate](#) effective March 2023, the updated version is not yet available in the Tax Wizard in Onboarding and Employee Self-Service. Employees can complete paper forms and submit them to their employer if they want to make changes immediately. Otherwise, the updated Tax Wizard form will be coming in a future release.

Colorado Secure Savings program

New Client Reports available to support MyCOSavings

The following Client Reports have been added to allow the export of MyCOSavings data from isolated:

- CO Retirement Savings – Contributions FTP
- CO Retirement Savings – Initial Census
- CO Retirement Savings – Ongoing Census FTP

These reports will provide you with the employee information you need to provide the state as part of the registration process (CO Retirement Savings – Initial Census) as well as the ongoing requirement to provide employee information (CO Retirement Savings – Ongoing Census FTP). CO Retirement Savings – Contributions FTP will export MyCOSavings deduction information from isolated. Please visit the [Colorado Secure Savings website](#) for additional information on the plan.

For more information about the changes in the version 9.06 release, contact your Payroll Specialist.