

Friday, July 14th, 2023

New isolved release: version 9.13

Highlights

isolved version 9.13 makes it easier to manage rates for union and prevailing wage clients. More isolved People Cloud screens have the modernized look with this release, and you can now select subcategories when uploading documents in the Adaptive Employee Experience. There are changes to the isolved Benefit Services COBRA client portal and Indeed job board fee changes with Applicant Tracking too. Disability self-identification in self-service has been updated to meet compliance requirements.

Payroll & Tax

- You can now use **employee labor assignments** to calculate union dues, fringe benefits, and other pay items
- **Retroactive tax changes** to HSAs for New Jersey income tax and the Scranton, PA Employer Payroll Expense Tax
- A new **employee tax exemption** code has been added for the Washington CARES Fund

Benefit Services

- For **added security**, users who have been inactive for 20 minutes will be automatically logged out of the COBRA Client Portal
- You can **review copies of your carrier reports** again in the Download Center in the COBRA Client Portal
- Benefit administrators can **access chat** right from the COBRA Client Portal login page

Applicant Tracking

- Indeed has changed its fee structure so will **only pay when applicants start an application**, saving you money
- The [Twilio changes outlined in the version 9.10 release](#) are rolling out to clients using the Text-to-Hire feature in mid-July
- A **client newsletter** is launching soon to keep you updated on Applicant Tracking best practices, so keep an eye on your inbox

HR & Performance Management

- The **Performance Review Ratings** screen has the modern grid view with options to search and see more information at a glance

- The **Notes** screen for client administrators gets a **refreshed look** to make it easier to sort and filter the list
- The **Employee Contacts** list in the Human Resources section of Employee Management has been updated with the searchable grid view

Reporting

- Find reports more easily in the updated **Year End Report Archive**

Self-Service

- When employees complete their **I-9 during onboarding** in the Adaptive Employee Experience, extra spaces before and after the employee's name will be automatically removed so there are **fewer issues authenticating** when they electronically sign
- When employees voluntarily **self-identify disability information** in Onboarding and the Adaptive Employee Experience (AEX), the verbiage has been updated to use the OFCCP preferred language so government contractors can implement the new form by the July 25, 2023 deadline
- **Tax compliance updates** have been made to employee withholding forms in the Tax Wizard in Onboarding, ESS Classic View, and the Adaptive Employee Experience (AEX)
- **Better screen design** makes it easier for managers, and supervisors to update their employee's salaries in ESS Classic View

Identity Management

- Most users have been successfully migrated to the **new People Cloud account** that combines access to all your isolated roles in one simplified login. We appreciate your patience as we worked through a rocky rollout with version 6.12
- Users with **international cell phone numbers** can now receive text messages with authorization codes for two-factor authentication

Payroll & Tax

Use labor assignments in Pay Item Default Values to calculate rates

Employee default labor assignments can be used to determine rates for union deductions and employer expenses

Pay Item Default Values are a powerful way to define rules that calculate union dues and prevailing wage fringe benefits based on the employee's employment category, job, pay, work location, and organization fields. These union and fringe rates are often tied to the employee's work classification, which is a labor field for clients who run certified payroll reports. You can now include labor fields when defining rules for Pay Item Default Values to better support clients with unions and certified payroll reporting requirements.

Organization Fields	Labor Fields	Miscellaneous Fields			
<input type="checkbox"/> Division	<input type="checkbox"/> Department	<input type="checkbox"/> Color of Eyes	<input type="checkbox"/> Legal Company	<input type="checkbox"/> Pay Group	<input type="checkbox"/> Employment Category
<input checked="" type="checkbox"/> Department			<input type="checkbox"/> Pay Type	<input type="checkbox"/> Pay Frequency	<input type="checkbox"/> Normal Hours
<input type="checkbox"/> Location			<input type="checkbox"/> Job	<input checked="" type="checkbox"/> Work Location	<input type="checkbox"/> Work State
					<input type="button" value="Apply"/>

Tax changes in New Jersey and Scranton, PA are retroactive to January 1, 2023

HSAs are no longer exempt from New Jersey state income tax

Employee and employer contributions to Health Savings Accounts (HSAs) in a Section 125 plan are included in New Jersey income for state tax withholding effective January 1, 2023. For payrolls processed after the version 9.13 update on July 13, HSA pretax deductions and HSA employer contribution memos will be taxed for New Jersey state income tax. However, the system will not automatically recalculate payrolls that were processed earlier in the year. If you need to adjust New Jersey taxable wages in prior payrolls to include HSA contributions, please contact your Payroll Specialist for assistance with prior quarter adjustments.

Scranton, PA City Employer Payroll Expense Tax will recalculate YTD amounts

For employers who are in Scranton, PA, the City Employer Payroll Expense Tax will automatically recalculate in the first payroll posted after the 9.13 update on July 13th. The system will review taxable wages for the full year and adjust tax liabilities to ensure the 0.2787% tax rate was applied for all employees.

Washington CARES Fund exemption

A new code has been added to exempt employees from the Washington CARES Fund

For employees who work in Washington but are exempt from making Washington CARES Fund contributions, use the new **WA Cares Exempt** Tax Exemption code on their employee Tax Information screen.

The screenshot shows the 'Tax Information' screen for Frank Ziegler. The 'Tax Exemption' dropdown menu is open, showing the following options:

- None
- FICA/SDI Exempt
- Medicare Exempt
- Soc Sec Exempt
- SSI and Disability Exempt
- FICA/SDI Exempt
- FICA/SDI Exempt
- FICA/SDI Exempt
- Medicare and FUTA Exempt
- Medicare/FUTA Exempt
- Exempt from All Taxes
- Tax Treaty-FUTA,State,Lc
- IST Exempt
- WA PFM, & NV MBT Exempt
- WA PFM, NV MBT,SDI Exempt
- DC PFL Exempt
- FTT & FICA Exempt
- SSI and WIC Exempt
- Exempt all except SDI
- SDI Exempt
- WA Cares Exempt

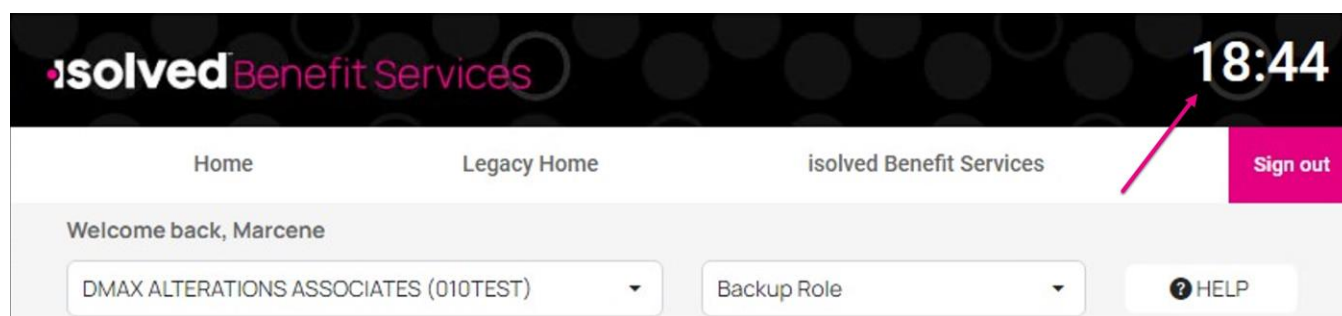
The 'WA Cares Exempt' option is highlighted with a red box. The 'Status Type' dropdown is also visible below it.

Benefit Services

COBRA Client Portal updates for benefit administrators

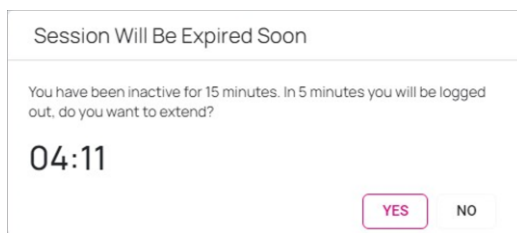
To safeguard protected health information, users who are inactive for 20 minutes will be automatically logged out

When you log into the COBRA Client Portal after the 9.13 release, a timer in the top right will count down for 20 minutes if you are not actively using the site.



The screenshot shows the top navigation bar of the 'isolved Benefit Services' portal. The timer '18:44' is located in the top right corner, with a red arrow pointing to it. Below the navigation bar, there are links for 'Home', 'Legacy Home', and 'isolved Benefit Services', along with a 'Sign out' button. A welcome message 'Welcome back, Marcene' is displayed, followed by dropdown menus for 'DMAX ALTERATIONS ASSOCIATES (010TEST)' and 'Backup Role', and a 'HELP' button.

Once the counter reaches 5 minutes, an additional warning will appear allowing you to extend the session if you still need to use the COBRA portal.

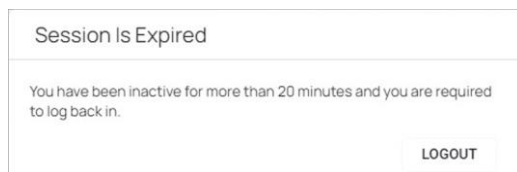


Session Will Be Expired Soon

You have been inactive for 15 minutes. In 5 minutes you will be logged out. do you want to extend?

04:11

If you click **Yes**, you can continue working. If you click No or do not choose an option, the session will end when the counter reaches zero. A message will appear letting you know that you have been logged out.

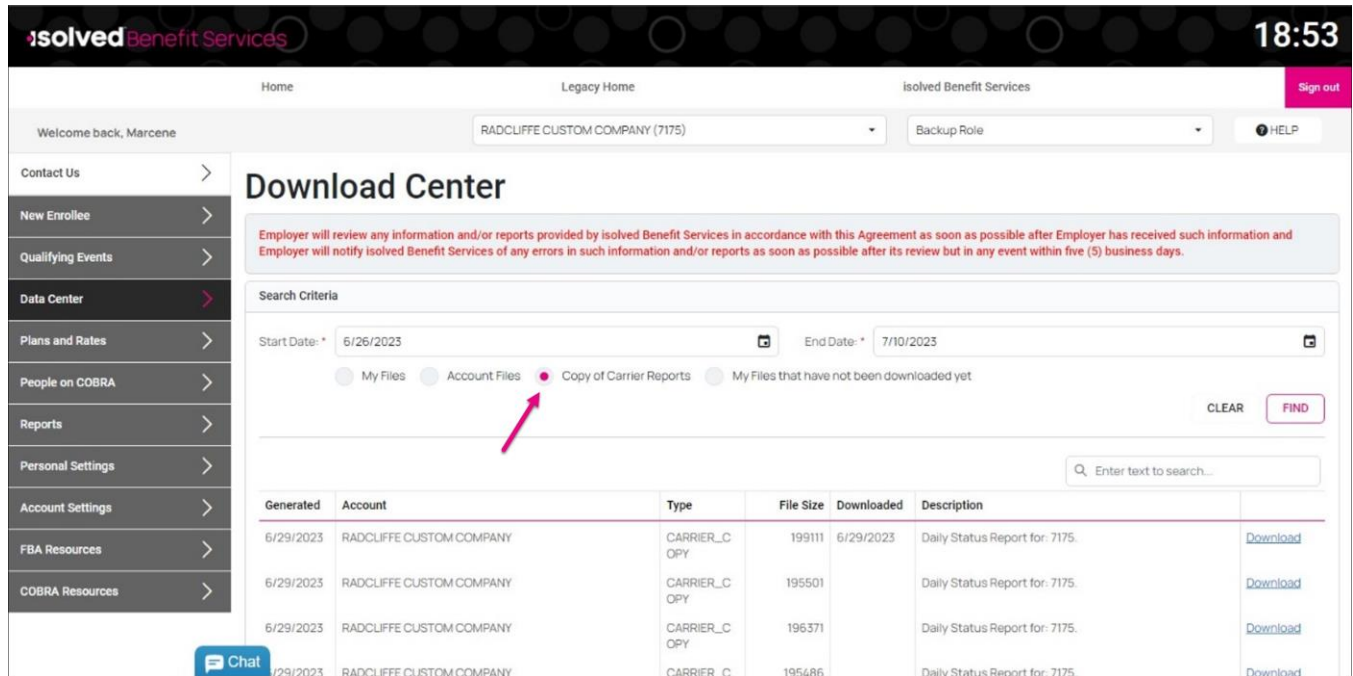


Session Is Expired

You have been inactive for more than 20 minutes and you are required to log back in.

The Download Center has been enhanced to include copies of COBRA carrier feeds

Benefit administrators can see copies of the reports sent to their benefit insurance carriers again in the Download Center section of the Data Center in the COBRA Client Portal. Enter a date range and select **Copy of Carrier Reports** to download and review the information that was sent.

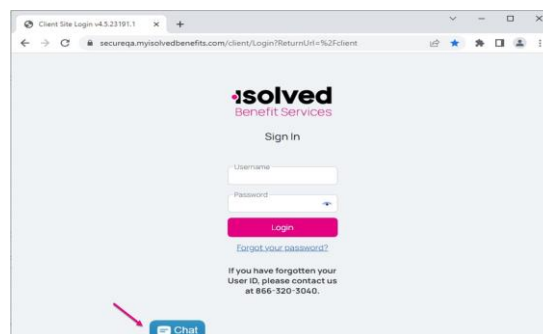


The screenshot shows the 'Download Center' page in the 'isolved Benefit Services' portal. The user is logged in as 'Marcene' for 'RADCLIFFE CUSTOM COMPANY (7175)'. The search criteria are set to 'Start Date: 6/26/2023' and 'End Date: 7/10/2023'. The 'Copy of Carrier Reports' radio button is selected, indicated by a red arrow. Below the search criteria is a table of generated reports.

Generated	Account	Type	File Size	Downloaded	Description	
6/29/2023	RADCLIFFE CUSTOM COMPANY	CARRIER_C OPY	199111	6/29/2023	Daily Status Report for: 7175.	Download
6/29/2023	RADCLIFFE CUSTOM COMPANY	CARRIER_C OPY	195501		Daily Status Report for: 7175.	Download
6/29/2023	RADCLIFFE CUSTOM COMPANY	CARRIER_C OPY	196371		Daily Status Report for: 7175.	Download
6/29/2023	RADCLIFFE CUSTOM COMPANY	CARRIER_C	195486		Daily Status Report for: 7175.	Download

Access chat without logging in

To save time, you can now chat with the isolved Benefit Services COBRA team without having to log into the COBRA Client Portal. Simply click the **COBRA Link** option on the Client Management menu in isolved People Cloud to launch the login page and open chat at the bottom of the screen.



The screenshot shows the 'Client Site Login' page. The page has a 'Sign In' section with 'Username' and 'Password' input fields and a 'Login' button. Below the login section is a 'Chat' button, indicated by a red arrow. The page also includes a link for 'Forgot your password?' and a note: 'If you have forgotten your User ID, please contact us at 866-350-3500.'

Applicant Tracking

Fee structure changes for Indeed users save money

Indeed is moving to a new Pay per started application model

Pay Per Started Application (PPSA) is Indeed's new results-based pricing model that spends your budget to find higher-intent, ideal candidates, so you only pay when they deliver results. With PPSA, you pay for started applications, not just clicks, like when a candidate begins the application process by clicking the **Apply Now** button.

For more information about the PPSA billing model, visit the [Indeed Help Center](#). To learn more about Applicant Tracking in Workforce Acceleration, contact your Customer Success Specialist.

Twilio Text-to-Hire changes take effect in mid-July

Stay informed of changes coming on your July bill

Clients using the feature that lets employees send text messages to apply for jobs should have received an email from Twilio, the service provider. They are changing the text messaging fee structure to include a low monthly fee with fewer sample texts.

- Twilio will be charging a \$19 fee to clients who are currently subscribed to a texting plan
- New clients will receive 25 free texts per month. Free texts are meant to allow companies to test the feature with their applicant pool. They are not intended for long-term use.
- Existing clients who have already purchased the Text-to-Hire feature will retain 50 free texts per month

If you are currently using free text messages but want to take advantage of a full plan, or you would like to learn more about the Text-to-Hire option, contact your Project Manager or Customer Success Specialist to complete the business registration process.

Self-Service

Stay in compliance with Voluntary Disability Self-Identification requirements

Disability self-identification in Onboarding and Self-Service uses updated OFCCP verbiage

The Office of Federal Contract Compliance Programs (OFCCP) requires contractors to implement the new Voluntary Self-Identification of Disability Form by July 25, 2023. The online version available in the Adaptive Employee Experience (AEX) and ESS Classic View meets the updated form requirements.

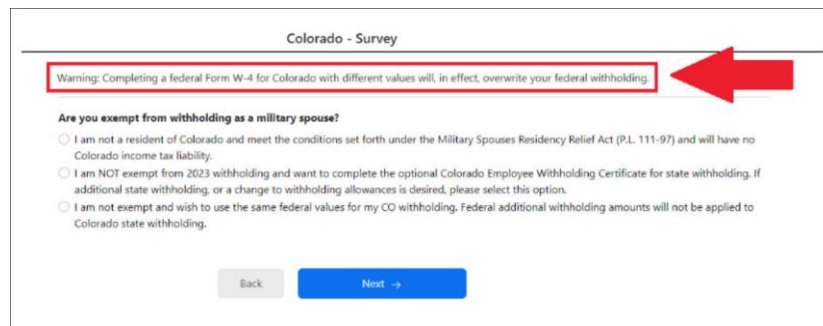
A copy of the revised verbiage is available from the [Voluntary Self-Identification of Disability Form](#) page on the OFCCP site.

Employee tax withholding form updates

Compliance updates are applied to federal, state, and local forms

Employees who use the Tax Wizard to complete their tax withholding forms in the Adaptive Employee Experience (AEX) and ESS Classic View will see some changes after the version 9.13 release.

- Federal Form W-4, Employee's Withholding Certificate**
 In Step 4c, the verbiage has been updated to say **Enter any additional tax you want withheld each pay period.**
- Colorado Form CO-103, Employee Withholding Certificate**
 Language has been added to clarify that if you update Colorado withholding elections and do not have a Federal W-4 on file, the Colorado elections will also be applied as your Federal tax withholding elections.



Colorado - Survey

Warning: Completing a federal Form W-4 for Colorado with different values will, in effect, overwrite your federal withholding.

Are you exempt from withholding as a military spouse?

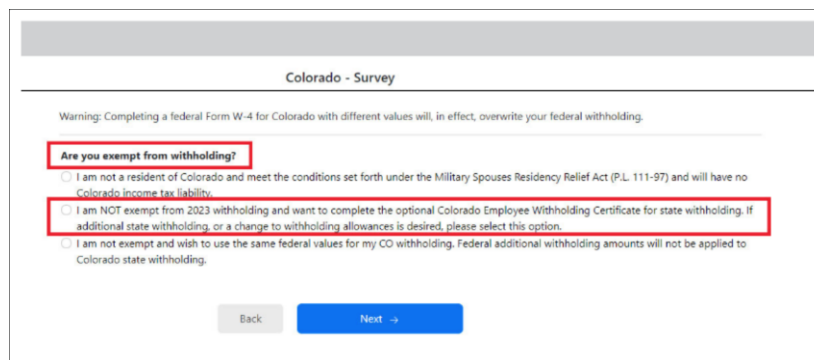
I am not a resident of Colorado and meet the conditions set forth under the Military Spouses Residency Relief Act (P.L. 111-97) and will have no Colorado income tax liability.

I am NOT exempt from 2023 withholding and want to complete the optional Colorado Employee Withholding Certificate for state withholding. If additional state withholding, or a change to withholding allowances is desired, please select this option.

I am not exempt and wish to use the same federal values for my CO withholding. Federal additional withholding amounts will not be applied to Colorado state withholding.

Back Next →

The message has also been updated to clarify why an employee would choose to complete the Colorado withholding exemption form.



Colorado - Survey

Warning: Completing a federal Form W-4 for Colorado with different values will, in effect, overwrite your federal withholding.

Are you exempt from withholding?

I am not a resident of Colorado and meet the conditions set forth under the Military Spouses Residency Relief Act (P.L. 111-97) and will have no Colorado income tax liability.

I am NOT exempt from 2023 withholding and want to complete the optional Colorado Employee Withholding Certificate for state withholding. If additional state withholding, or a change to withholding allowances is desired, please select this option.

I am not exempt and wish to use the same federal values for my CO withholding. Federal additional withholding amounts will not be applied to Colorado state withholding.

Back Next →

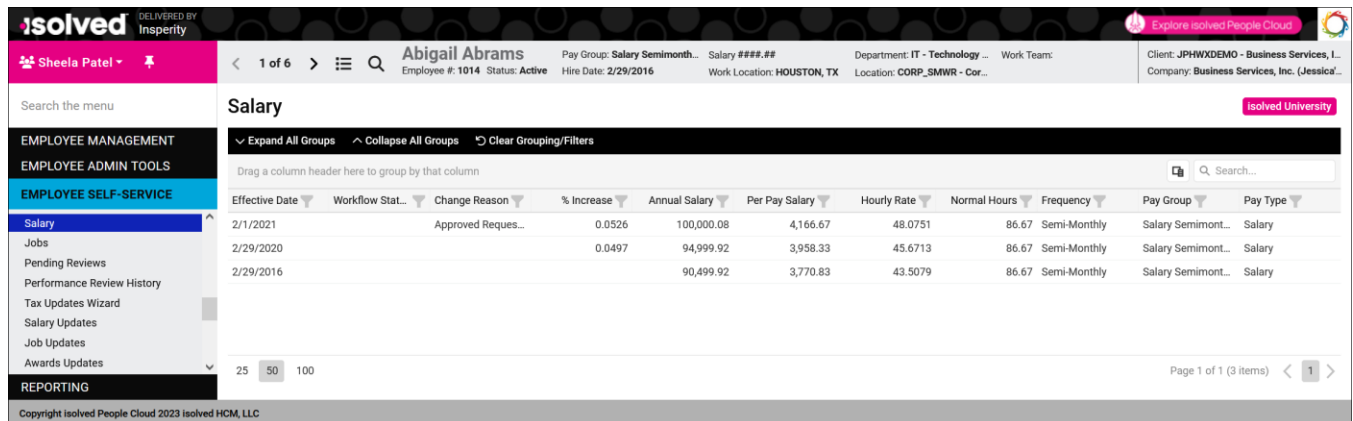
- Indiana Form IN-101, Employee's Withholding Exemption and County Status Certificate**
 When entering additional exemptions on line 6, employees will only be able to enter integer values between 0 and 100. In certain scenarios, they had been able to enter additional digits that would result in errors.

- Iowa Form IA W-4, Employee Withholding Allowance Certificate
An error has been corrected that prevented the state EIN from printing on line 1 of the new hire reporting section on the completed PDF version of the form.
- Puerto Rico Form 499 R-4 and R-41
Employees were previously not marked exempt when they should have been. They will now be marked exempt from Puerto Rico tax withholding when they select:
 - I choose the provisions of the Military Spouses Residency Relief Act
 - My income is less than or equal to \$40,000 per year AND I am between the ages of 16 and 26, AND I choose that my employer consider the exemption on the first \$40,000 from wages

ESS Salary screen redesign

Supervisors and managers who view salaries through ESS Classic View will see a refreshed design

The **Salary** screen on the **Employee Self-Service** menu in ESS Classic view and isolated People Cloud has been updated to use the grid view with a column chooser, filters, and a Search option. This makes it easier to see salary changes over time.



The screenshot shows the 'Salary' screen for employee Abigail Abrams. The interface includes a search bar, a column chooser, and a table of salary records. The table has columns for Effective Date, Workflow Status, Change Reason, % Increase, Annual Salary, Per Pay Salary, Hourly Rate, Normal Hours, Frequency, Pay Group, and Pay Type. The data shows three salary entries for the employee.

Effective Date	Workflow Stat...	Change Reason	% Increase	Annual Salary	Per Pay Salary	Hourly Rate	Normal Hours	Frequency	Pay Group	Pay Type
2/1/2021		Approved Reques...	0.0526	100,000.08	4,166.67	48.0751	86.67	Semi-Monthly	Salary Semimont...	Salary
2/29/2020			0.0497	94,999.92	3,958.33	45.6713	86.67	Semi-Monthly	Salary Semimont...	Salary
2/29/2016				90,499.92	3,770.83	43.5079	86.67	Semi-Monthly	Salary Semimont...	Salary

Usability

More employee screens get the modern look and grid style

Navigate faster with the intuitive interface

As a continuation of the isolated screen design refresh, more screens have been updated with the modern look and new grid style. The overall functionality remains the same but they're easier to navigate. The new screen designs include:

- Columns you can drag to reorganize and click to sort

-
- Filters on each column so you can group records or limit your view to find just the information you need
 - A Search field to easily find specific records
 - An XLSX button to quickly export your current view to Microsoft Excel
 - Employee grid views include a Field Chooser to add additional columns of information to review your employee populations at a glance
 - Employee grid views include Actions buttons or menus on each record that let you add, edit, or delete without having to scroll

Employee Management screen updates

The **Employee Contacts** screen has been updated to a new modern look. Navigate to Employee Management > Human Resources > Employee Contacts to check out the innovative design. You can now sort, filter, and group the information displayed on the screen. The Excel option has been removed.

Client Management screen updates

For client administrators who manage performance and company information, the following screens have been updated with the grid layout:

- Client Management > Client Maintenance > Notes
- Client Management > HR Management > Performance > Performance Review Ratings

Reporting screen updates

The **Year End Report Archive** in the Reporting section has been refreshed. Now you can sort, filter, and search your annual tax reports.

Year End Report Archive
Isolved University
Help

Expand All Groups Collapse All Groups Clear Grouping/Filters

Year ↑
Search...

Output Item	Batch #	Status	Print Date	Output Type	Generate Begin	Generate End	Actions
2022							
1099 Packing List		GENERATED		1099 Packing List	12/19/2022 10:40:15 AM	12/19/2022 10:40:16 AM	Print Download
1099 Wrap Instructions		GENERATED		1099 Wrap Instructions	12/19/2022 10:39:57 AM	12/19/2022 10:39:58 AM	Print Download
W-2 Reconciliation Summ...		GENERATED		W-2 Reconciliation Summ...	12/19/2022 10:40:14 AM	12/19/2022 10:40:15 AM	Print Download
2021 - ACA							
ACA 1094-C and 1095-C ...		GENERATED		ACA 1094-C and 1095-C E...	11/8/2021 10:17:25 AM	11/8/2021 10:17:32 AM	Print Download
ACA Packing List		GENERATED		ACA Packing List	11/8/2021 10:17:41 AM	11/8/2021 10:17:41 AM	Print Download
ACA 1095-C Pressure Seal		GENERATED		ACA 1095-C Pressure Seal	11/8/2021 10:17:33 AM	11/8/2021 10:17:37 AM	Print Download
ACA Delivery		GENERATED		ACA Delivery	11/8/2021 10:17:37 AM	11/8/2021 10:17:39 AM	Print Download
ACA Wrap Instructions		GENERATED		ACA Wrap Instructions	11/8/2021 10:17:39 AM	11/8/2021 10:17:41 AM	Print Download
2020 - ACA							

25 50 100
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For more information about the changes in the version 9.13 release, please contact your Payroll Specialist.