



**isolved™**

# Pulse Deck

November 2023

- Training and Information Videos
- isolved Announcements
- Compliance Corner
- Isolved Surveys
- Isolved Newsletter
- isolved Customer Roadshows!
- isolved People Heroes
- How can isolved help?
- What's New?

# Agenda



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# CONNECT is heading to Orlando, FL!

Oct 7-9  
2024

isolved Connect is back next year with new professional development opportunities to sharpen HCM skill sets, including:

- **Discover** isolved People Cloud hacks
- **Attend** intensive learning sessions with HRCI credit
- **Network** with isolved partners and customers
- **Meet** one-on-one with isolved experts
- **See an** exclusive in-depth look at product roadmaps
- **Browse** the Marketplace Village to discover useful integrations
- **Experience** keynote presentations covering top industry challenges

Register Today at [isolvedconnect.com](https://isolvedconnect.com)!



## Check out live training and informational videos

### Check out The LIVE webinar schedule: FREE Live Training Webinar Calendar

#### The Year in Review: 2023 Compliance Updates Brokers Should Know Tuesday, November 14, 2023 from 1:00 pm – 2:00 pm EST

This webinar will be presented by isolved's expert team, Director of Benefits Services, Carla Adams, Senior Product Marketing Manager, Larry Romero and Cristina Merrifield, Content Marketing Manager.

Come spend time with us as we wrap up 2023 and walk away with a better idea of the areas of compliance you need to address with clients prior to January 1, 2024. We will provide an end of year checklist, important reporting updates, a list of the various benefit plan contribution limit updates and will wrap up with the impact of recent court cases as well as a few items we are keeping an eye on.

Some specific topics that we will touch on are related to:

ERISA	FSA
HIPAA	HSA
COBRA	FMLA
ACA	

Don't miss out on this informative webinar.

#### HR Planning for FY24: Business as Usual Thursday, December 7, 2023 from 1:00 pm – 2:00 pm EST

It's time to pause to think about the year ahead. What changes do you want to see and, more importantly, what are the results you (and your organization) need to experience as a result?

Whether it's a people-strategy change, a structural change, a technology change or an experimental change, the processes to be agile in the way you plan, bring everyone onboard and get the organization ready for it, remain the same. And there is absolutely no better time to start than right now.

Join this Q&A session to hear from organizational agility expert and industry analyst, advisor and influencer Steve Goldberg on how to enact, enable and embrace change at your company – regardless of size or type.

Moderated by isolved VP of Brand & Customer Marketing, Amberly Dressler, Steve will also be joined by isolved's VP of Solution Strategy Geoff Webb to complement this live Q&A with findings from conversations, insights and research from thousands of HR, benefits and payroll professionals. Prepare for FY24 HCM changes now with proven tactics and peer findings too.

# Check out live training and informational videos

## isolved IRL: Ditching Your Manual Processes and Gaining Efficiency Tuesday, November 21, 2023 from 1:00 pm – 2:00 pm EST

Do you fall in the bucket of being bogged down by many tasks that take away from your core job duties? You are not alone, many HR leaders processes are manual, time consuming and inefficient. Though with the right solution they could save time and energy that they can refocus on their day to day duties. Attend our upcoming In Real Life (IRL) webinar to discover how isolved helped a non-profit streamline their core needs—recruiting, onboarding, maintaining employee files and training their staff.

Learn how Ashley Floyd, HR Supervisor of Community Interface Services, utilized isolved to consolidate and reduce their technology stack, as well as, has helped them get everything into one platform where they can now completely shut down all our other systems.

Hear how isolved helped this organization fully utilize the following products:

Adaptive Employee Experience

Self Service

Applicant Tracking

Onboarding

Learn & Grow

Payroll

Applicant Tracking

And so much more!

Don't just hear from our customer, ask questions in this isolved IRL webinar!

## Back to (Employment) law School: Prep for 2024 Changes On-Demand Webinar

Across the country, state laws are changing at a dizzying pace. Our recent webinar covers the laws will go into effect on January 1st, 2024, leaving companies with little time to formulate an action plan.

*Are you prepared to navigate the complexities that come with new employment laws?*

Among the many topics we covered, you'll learn about:

Minimum wage increases

OSHA changes

Form I-9 Changes

And much, much more

# isolved HR Services



**Gain Immediate Results** by enabling regional, relevant and responsive HR service professionals.



**Increase Productivity** by automating processes and focusing on value-added business initiatives.



**Maximize Technology** by leveraging employee data and insights stored with **isolved People Cloud**.



**Reduce Risk** by remaining up-to-date on workforce changes and employment law compliance.



**End-to-end HR augmentation services that put the focus back on your core business.**

Employees are the heart and soul of a company, and what they expect from their employers is continually evolving.

HR professionals, like other business leaders, are taking on a more strategic role—if they can manage to step away from workforce and benefits administration responsibilities.

To meet business and employee needs, organizations need agile support resources to simplify human resource management, adapt to evolving industry requirements, and provide the strategic insight necessary for future-proofing the business and improving the bottom line.

# isolved HR Services



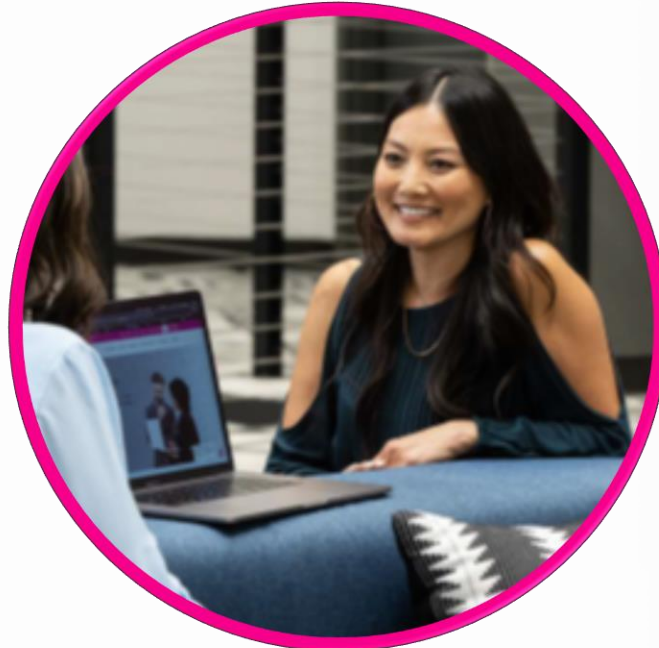
isolved HR services provides comprehensive service packages to make organizations of all sizes and across all industries more productive. Whether you are looking to become compliant in a single aspect of employment or require a full-scale partner for strategic HR management, isolved HR services provides you the resources required to achieve simple, secure and seamless business value.

“

In our short time with isolved HR services, more has been accomplished than with a previous HR partner. Our handbook has been revised, job descriptions updated, and our Account Manager has kept us abreast of the ever-changing workplace landscape.”

Director of Finance  
Electronic Component Wholesaler

**isolved**



**Trusted partners invested in maximizing your business potential.**

Backed by a regional network of HR professionals across the United States, isolved HR services acts as an extension of your HR department or management team—all delivered by trusted HR, risk and compliance experts.

isolved HR services allows your organization to focus on the most strategic, value-added activities for growing your business. Solve the complexities of inefficient HR processes, changing employment regulations, employee/staff turnover, and other daily HR challenges by leveraging a dedicated team of isolved HR services professionals.



# Get a Jump on Year-End!



## S Corp Healthcare Premiums, Stock Options, Gifts, and Awards

Best Practice:

Apply these items to employees' records throughout the year – it will make your Year-End process run smoothly and efficiently.

Reach out to Customer Support with any questions!





# Isolved Announcements

## Missed Connect 2023

Announcing Connect 2024  
October 7 – 9, 2023

**Gaylord Palms Resort, Orlando, Florida**

**Register Now For Discounted Rates**

Quick Links (on landing page)  
Year-End Guide is **HERE**



### QUICK LINKS

- [NEW! isolved 2024 Payroll Calendar](#)
- [NEW! isolved 2023 Year End Guide](#)
- [Tax Quarter-End Schedule 2023](#)
- [TAX ALERT! Tax Quarter-End Spotlight 3Q 2023](#)

### Black Out Period

**January 3, 2024 – February 29, 2024**

We will not be making any adjustments during this time to ensure timely reporting (printing and e-file process) for all of our customers.  
We are not able to make exceptions.

### Holiday – Banks Closed

**November 10, 2023 – Some Banks Closed for Veteran's day (Check with your bank)**  
**November 23 and 24, 2023 (Banks closed November 23, 2023)**

# Year-End Checklist

## Now through early December:

- Review Processing Deadlines and identify your last payroll **check date** of 2023.
- Review 'Dates to Remember for Year-End', page 7.
- Review payroll run schedule for 2024 and contact your Customer Support team for any necessary changes.
- Confirm the Delivery Address for your W-2s. If you have changed mailing addresses, reach out to your support team **BEFORE** your last payroll of 2023 processes to ensure proper delivery.
- Call your Customer Support team with any year-end payroll questions so that there will be sufficient time to resolve any questions. Items that should be considered as being a priority include but are not limited to: third-party sick pay, taxability issues, HSA Contributions, employee SSN updates, name changes, and employee address updates.

## Items you should do before your last scheduled payroll of 2023:

- Perform an audit of employee data related to SSN, name and mailing address and make any updates in isolved **before** you process the last payroll with a 2023 pay date.
- Ensure any employee benefit plan start dates/status/hire dates are current.
- Include any fringe benefits to be reported on 2023 W-2s.
- Reach out to Third-Party Sick Pay providers and request information to be included, if available.
- Enter any additional, manual, and/or voided checks that need to be recorded in 2023.

## If NOT included in last regular payroll with 2023 date, request a special payroll with 2023 check date (if applicable):

- Third Party Sick Pay information should be processed by December 31, 2023. Fees will apply for amendments/adjustments after the deadline.
- Process any Bonus and Fringe Benefits amounts to be included in 2023 W-2.
- Enter any missed additional, manual, and/or voided checks that need to be recorded in 2023, If entering manual checks/voids contact your support team to make sure it's recorded in 2023.

**This CANNOT be done after January 3, 2024**

# Important Year-End Dates

## November

Veteran's Day – Federal Reserve Holiday (Offices Open)

November 10

Martin Luther King Day – Federal Reserve Holiday (Offices Open)

January 15

Thanksgiving – Federal Reserve & isolved Holiday (Offices Closed)

November 23

Last day to approve ACA Forms for delivery prior to January 31

January 17

Day After Thanksgiving – isolved Holiday (Offices Closed)

November 24

Deadline to distribute ACA forms to residents of California

January 31

## December

Christmas Observed – Federal Reserve & isolved Holiday (Offices Closed)

December 25

Last day to approve ACA Forms for a guaranteed delivery prior to March 2nd

February 5

Last Day for Regular 2 Day Processing

December 27

Presidents' Day – Federal Reserve Holiday (Offices Open)

February 19

## January

First Day to Approve ACA Forms for 2023

January 1

## March

New Year's Day Observed – Federal Reserve & isolved Holiday (Offices Closed)

January 1

Deadline to distribute ACA forms to meet Federal and remaining state deadlines

March 2

Last day to process payroll adjustments for 2023

January 3

Deadline for ACA electronic transmission to the IRS

March 31

Year-End Forms Available Online

January 15

# October Newsletter

- **Introducing isolved Mobile App** : Access isolved People Cloud on the go! The new isolved People Cloud Mobile app provides convenient, anytime access to your employees paystubs, benefits, time off and more. Available to download now in the App Store and Google Play.
- **Streamline Employee Benefits** : Managing benefits can be complex and time-consuming. It doesn't have to be! isolved Benefits Services helps you stay compliant while giving employees the benefits they want and need, including COBRA management, FSAs, HSAs & more.
- **An Update to People Cloud Login**: To enhance security, all People Cloud users will be required to utilize multi-factor authentication (MFA) starting 11/3. Learn more by checking out the resource below, which includes answers to FAQs.
- **isolved Connect Recap**: Expanding your HR team can be a challenge. Discover how isolved helped Savannah Logistics Group LLC enable their HR to become more strategic, saving the organization time and money, while also reducing errors and increasing efficiency.
- **Engaging Remote Employees** : It's important to keep your employees engaged regardless of where they are. Our recent Compliance Corner shares how you can maintain productivity and profitability through remote work.
- **Applicable Large Employer Status**: Has your company reached **APPLICABLE LARGE EMPLOYER** status? Reach out to your Customer Support Team for more information on isolved's ACA Reporting Service
- **Get PTO Ready**: Your employees are gearing up for PTO in the New Year! Now is a great time to review setup to ensure a smooth carryover in January. Contact your support team today!



A Helpful Newsletter Resource for the People of isolved People Cloud

Monthly Newsletter - October 2023

## What makes a scary employee experience?

Find out! 1,100+ full-time employees sound off in the **Voice of the Workforce** report.

[See the Stats](#)



### New Products & Resources

[Product Spotlight]

#### Introducing isolved Mobile App

Access isolved People Cloud on the go! The new isolved People Cloud Mobile app provides convenient, anytime access to your employees paystubs, benefits, time off and more. Available to download now in the App Store and Google Play.

[Check It Out](#)

[Product Updates]

#### An Update to People Cloud Login

[Did You Know?]

#### Streamline Employee Benefits

Managing benefits can be complex and time-consuming. It doesn't have to be! isolved Benefits Services helps you stay compliant while giving employees the benefits they want and need, including COBRA management, FSAs, HSAs & more!

[Learn More](#)

[Marketplace Spotlight]

#### Support Employee Development

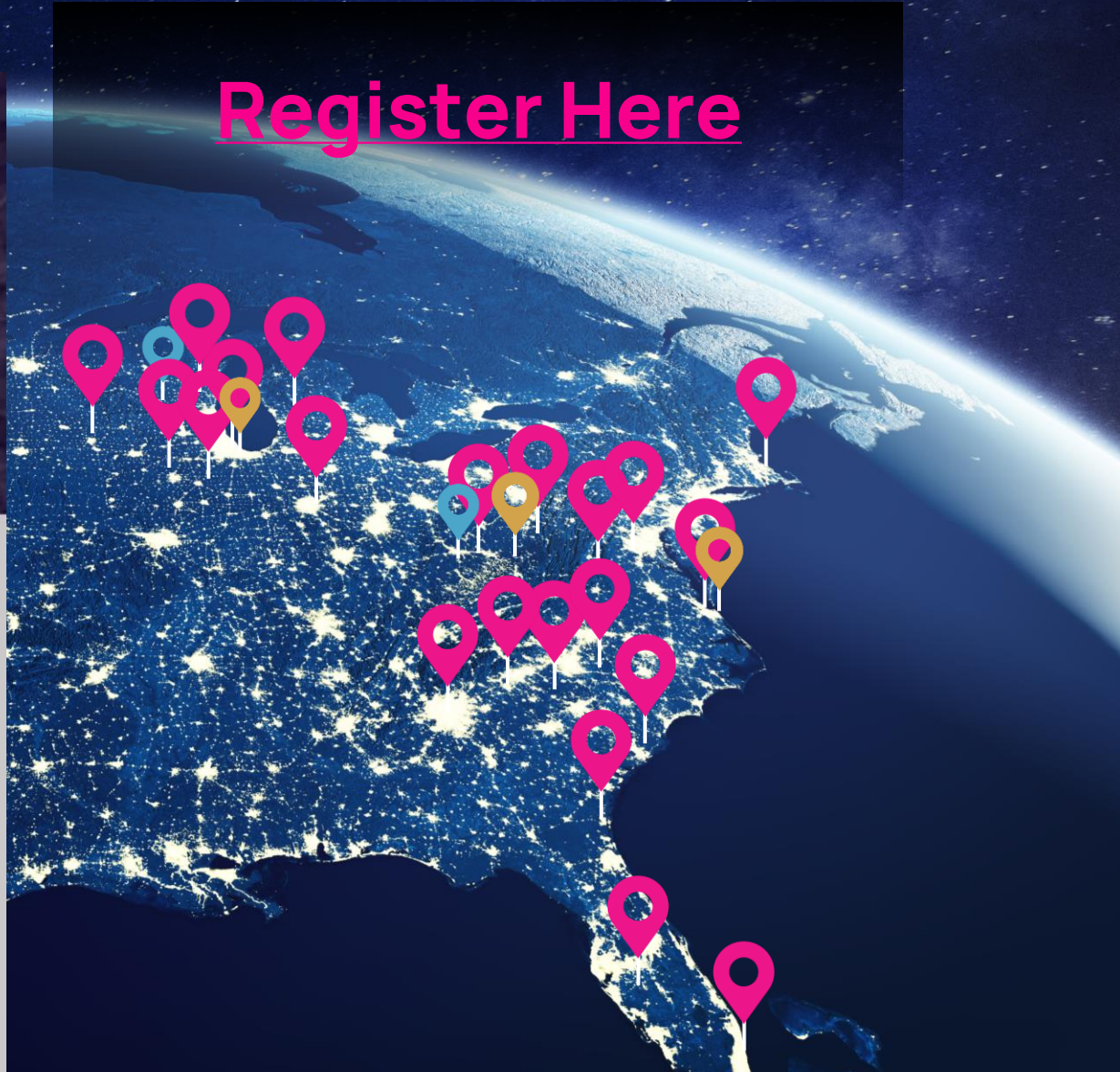


**Save The Date!**

**Upcoming Roadshow Dates:**

- Nov 2..... **Dallas-Fort Worth, TX**
- Nov 8 ..... **Allentown, PA**
- Nov 9 ..... **Philadelphia, PA**
- Nov 14..... **Madison, WI**
- Dec 6 ..... **Scottsdale, AZ**

**[Register Here](#)**



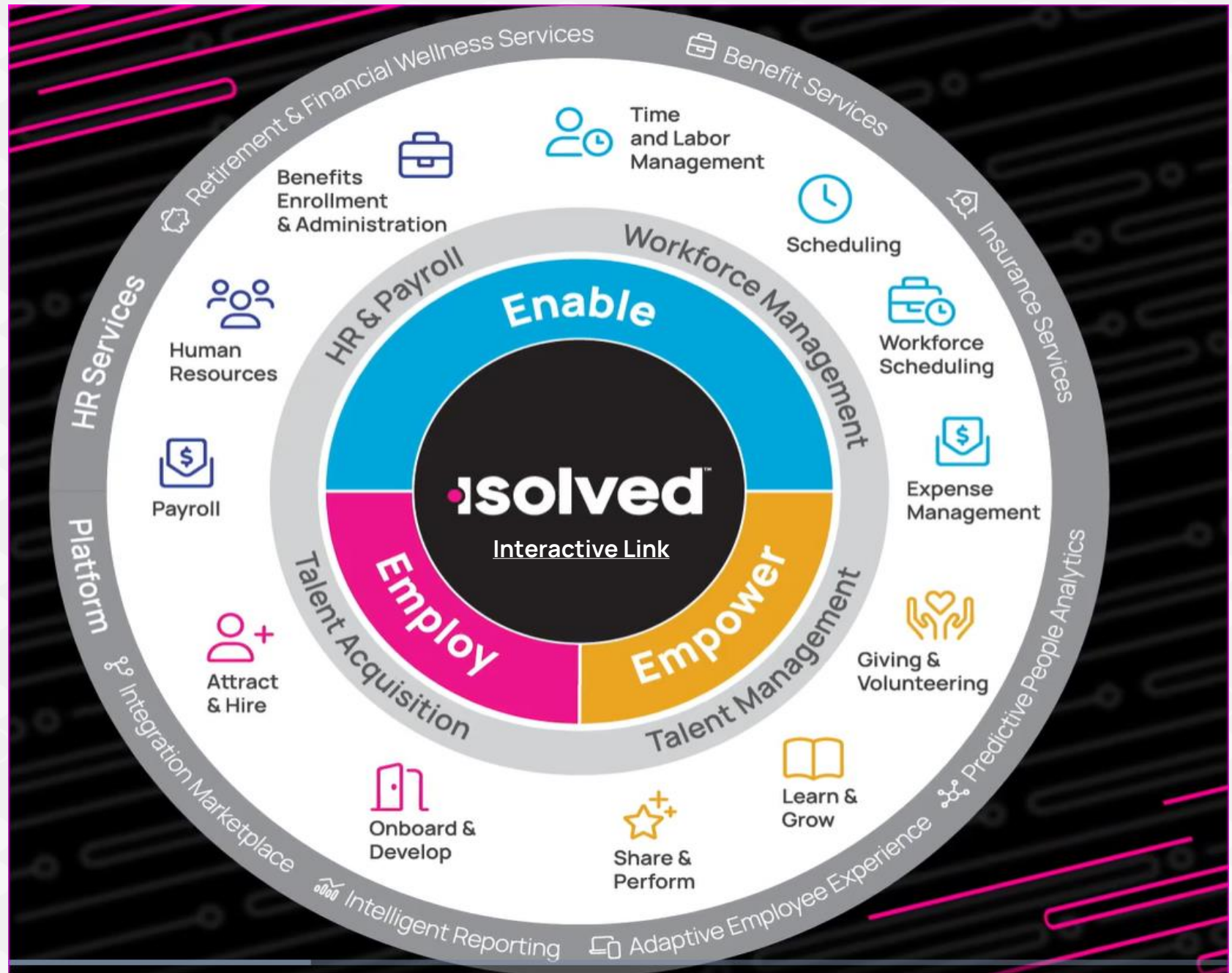
# How can isolved help?

Learn more about  
what we do.

**isolved**



3-minute video



# Stay up to date with isolved People Heroes World!

Get the latest details on new isolved product features, updates and industry news!

[Sign up for our newsletter](#), so you never miss out on what is happening not only with isolved but within People Heroes World.

[Here are some great perks you'll receive:](#)

- Stay informed about isolved product updates.
- Be the first to know about product tips and industry news.
- Gain access to exclusive training content.
- Learn about isolved's upcoming events!

[Click here](#) to sign up for our newsletter today and stay in the know.



## We value your feedback

We have an “un-be-leaf-able” good review campaign for the month of November!

Customers that complete both reviews will earn a \$25 Amazon gift card.

All you need to do is complete these 2 steps:

Step 1: Complete the reviews below

Step 2: Send your Customer Success Manager a confirmation of completion of the surveys.

### Links:

G2 Link - [Here](#)

Shortlister Link - [Here](#)

Gartner Link - [Here](#)







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**What's New?  
Tell me about your  
strategic goals for  
2024?**