

Pulse Deck

December 2022

isolved[™]



- **isolved Customer Roadshows!**
- **Product Enhancements**
- **Training and Information Videos**
- **Year End Reminders and Preparation**
- **Important Dates**
- **Are you READY for 2023?**
- **Your isolved Team**
- **How can isolved help?**
- **Get Compliant**
- **OnDemand Pay**
- **Value Added Solutions**
- **What's New?**

Agenda



We're hitting the road again in 2023! Join us!

California • Illinois • Arizona • Florida
• Iowa • Massachusetts • Oregon •
North Carolina • Georgia •
Wisconsin • Colorado • Oregon •
Indiana • Michigan • Texas •
Pennsylvania • And more...

New locations added soon!



PREVIEW: 8.23 Release | December 2, 2022

Jobs (Job Levels)

Jobs will be enhanced to now include **Job Levels**, providing the client the ability to further organize their Job Titles and Job Groups. Clients will have the ability to associate a Job Level with a Salary Grade. A new screen will be introduced with separate tabs for **Jobs**, **Job Groups**, and **Job Levels**.

More to come about Job Levels with the next edition of Release Highlights.

Jobs (New) Isolved University

This screen is still in development and is subject to change.

Jobs Job Groups Job Levels

+ Add New Expand All Groups Collapse All Groups Clear Grouping/Filters

Status ↑ ▾

Job Code ▾	Job Title ▾	Job Group ▾	Job Level ↑ ▾	Salary Grade ▾	Default Workers' Comp ▾	Default Manager ▾	Default Supervisor ▾	FLSA Exempt	Manager	Supervisor	Actions
- Status: Active (25)											
1001	CAO	Executive	E - Executive	E - Executive				✓	✓	✓	✎ ✕
1000	CEO	Executive	E - Executive	E - Executive				✓	✓	✓	✎ ✕
1040	CFD	Executive	E - Executive	E - Executive				✓			✎ ✕
1002	CTO	Executive	E - Executive								✎ ✕
1075	Tech Support I	Operational & Technical	L1 - Level 1								✎ ✕
1085	Training 1	Operational & Technical	L1 - Level 1								✎ ✕
1090	Tech Support II	Operational & Technical	L2 - Level 2								✎ ✕

[Click here to stay up to date with Product Releases and Newsletters](#)

Product Enhancement

Check out live training and informational videos

December Live Webinar Schedule ([Click Here to View and Register](#)):

Benefits Webinars

December 14th at 11:00am EST – isolved Benefits Admin

Course Description: This training webinar reviews administering benefits to employees including enrollments and other basic functions.

December 14th at 1:00pm EST – isolved Benefit Evaluation Utility

Course Description: This training webinar reviews the use of the benefit evaluation utility. You'll be able to join the webinar up to 5 minutes before the start time.

Preparing for Year-End HR Tasks (click to watch)

Watch the webinar recording to learn:

- What your year-end checklist should look like
 - Payroll and W2 items
 - ACA responsibilities
 - What to expect in 2023

December Live Webinar Schedule ([Click Here to View and Register](#)): Share & Perform Webinars– Preparing for Performance Reviews

December 15th at 11:00am EST – isolved Share & Perform: Performance Supervisor/Employee View

Course Description: This session will review the Employee & Supervisor view & use in Share & Perform. You will be able to join the session up to 5 minutes before it starts.

December 15th at 1:00pm EST – isolved Share & Perform: Engagement

Course Description: This session will cover how to use Share & Perform to create a positive gamification culture, assigning & distributing points, & the store. You'll be able to join this session up to 5 minutes before the start time.

December 21st at 11:00am EST – isolved Share & Perform: Performance Audience Setup

Course Description: Client User - level course will help you with areas of Share & Perform such as: Cycles, Templates, Reporting/Dashboards & Performance Overview. You'll be able to join this session up to 5 minutes before the start time.

Fringe Benefits

Other year-end reminders:

- If you have "S" Corp health insurance premiums for 2% shareholders, REMINDER to get this information added to the employee's record before January 4th. If you need a new earning for this, let your Customer Support Representative/Team know as early as possible.

What Is a Fringe Benefit?

A fringe benefit is a form of pay (including property, services, cash or cash equivalent) in addition to stated pay for the performance of services.

For more information [click this link](#)

Do not forget Items (Fringe Benefits) that are taxable and W2 reportable:

- Group Term Life
- Personal use of company vehicles
- Awards, gifts, and bonuses

Highlights

Review W-2's for Accuracy

Audit Tools

PTO Rollovers

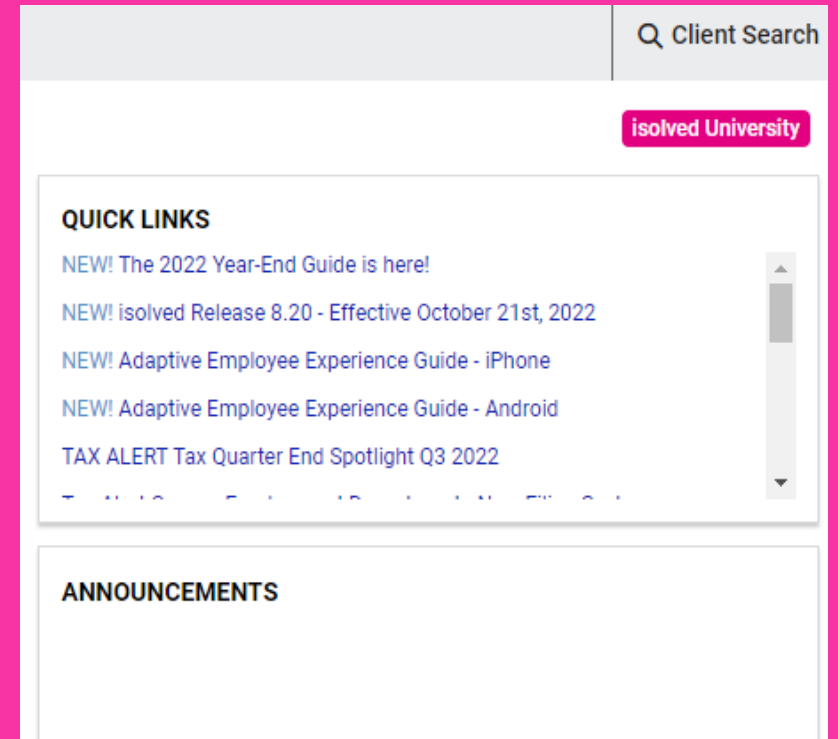
Third Party Sick Pay

Tax Blackout Period

January 4, 2023 – February 28, 2023

There will be NO exceptions

Access the Year-End Guide on
the Landing Page > Quick Links



Year-End Guide

Important Dates

REMINDERS

Tax Blackout Period January 4, 2023 – February 28, 2023

Any adjustments to wages, changes in social security, adjustments affecting W-2's and requiring a new W-2 will not be processed until after Tax Blackout. No exceptions.

BANKS ARE CLOSED

Christmas Holiday Observance, December 26, 2022

New Year's Day Observance, January 2, 2023

PAPERLESS DEADLINE

Paperless option for W2s/1099s/1095s by the last payroll of the year. Your employees must make that electronic selection in ESS by then as well. Paperless is based on what was selected at the time of that final payroll of the year.

Employees utilizing paperless will get their W-2 on 1/15/2023

SAVE THE DATES

isolved Connect 2023 – October 17 – 19, 2023

Palm Desert, California



Ready for 2023

Have you scheduled time with your isolved team for a review of your account? What does that mean to you? Scheduling time with your Customer Success Manager, and Direct Account Manager.

Benefit of meeting with your isolved team: isolved will provide an overview of your products, with additional resources to help ensure efficiency and productivity

Voice of the Workforce

[Click to access article](#)

[Employees Share Reasons for Engaging, Leaving or Staying with Employers](#)

Your isolved Team

Customer

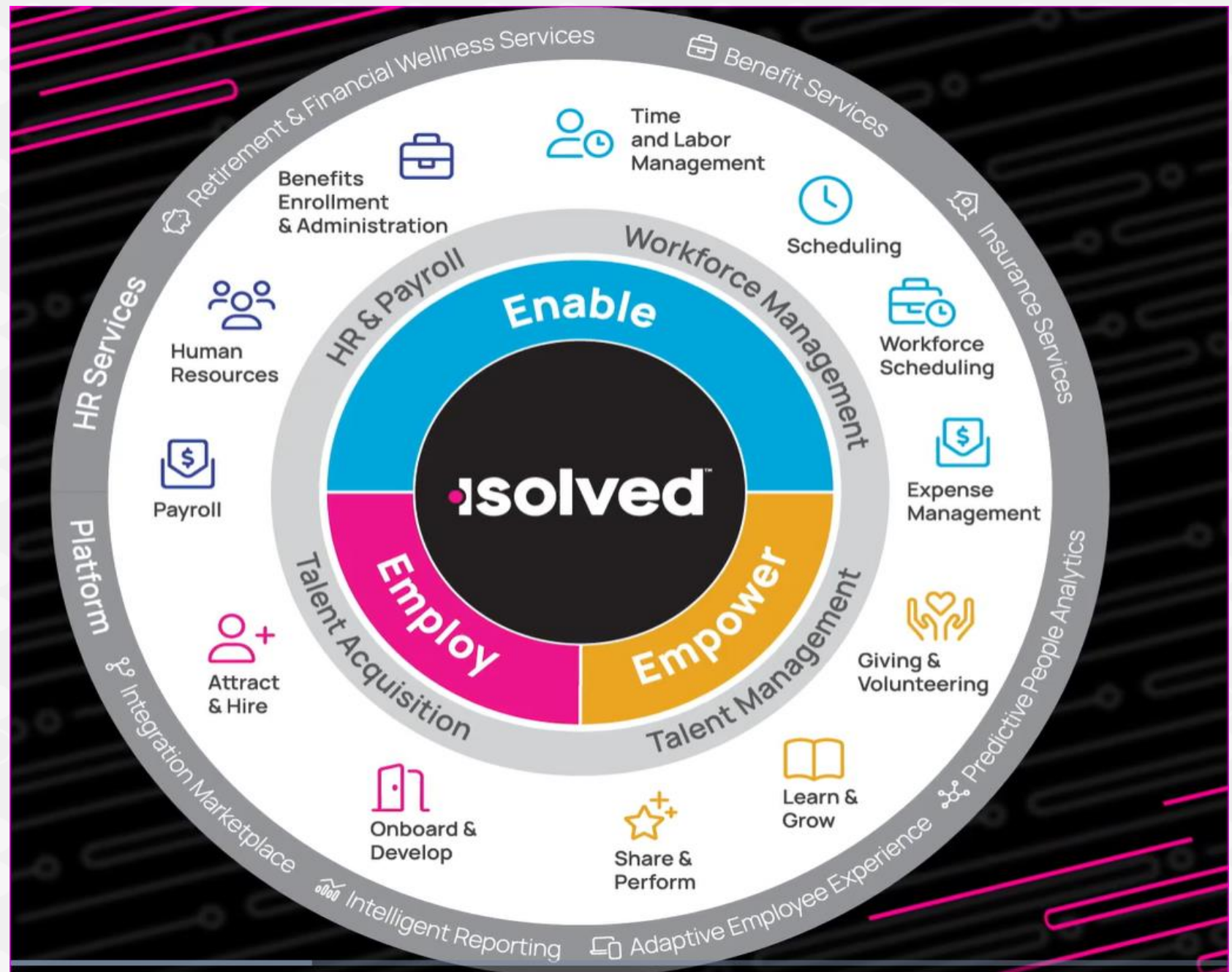


Focused on **future** customer needs with additional products and services

Focused on **current** customer needs and experience to help drive desired business outcomes

First point of contact for **day-to-day** needs in answering system questions

How can isolved help?



Get Compliant

The #EEOC released an updated “Know Your Rights” poster which must be made available to all employees of covered companies. Stay in compliance with our partner, Poster Elite.

Is your business compliant regardless of where your employees are working?

[Click Here for More Information](#)

**Does your business need a total safety and compliance check-up?
We can help.**

OnDemand Pay

Business and HR leaders are continuously faced with new challenges to stay competitive in today's gig economy. Keeping employees satisfied is key to retaining your top workers. Giving them early wage access can help.

With **isolved OnDemand Pay** solutions, remove the need to wait for traditional payroll cycles, giving employees access to their pay when they need it—with zero business disruption. Through a variety of pay card and digital wallet options, employees gain flexible cash flow with access to a portion of their earned wages during the active pay cycle.

Employee Benefits

- **Flexible Pay Schedule:** Quickly view and spend earnings to better align pay dates with financial commitments.
- **Increased Savings:** Gain real time visibility into wages and spending patterns to optimize financial planning.
- **Financial Security:** Access emergency funds if a sudden bill or expense arises—without incurring more debt.

Employer Benefits

- **Attract & Retain Employees:** Provide a key benefit in a competitive market while decreasing time to hire.
- **Increase Productivity:** Eliminate the stress of financial burdens and help employees feel more valued.
- **Ensure Accuracy:** Provide access to real-time net pay calculations showing actual earnings, not just predictions.

Offer your workforce the option to quickly access a portion of earned wages before their scheduled payday without disrupting your payroll process.



- ✓ Direct paycheck deposit
- ✓ Same day ACH
- ✓ Digital wallets
- ✓ Debit & credit builder accounts
- ✓ Earn cash back rewards
- ✓ Shop online & in stores



Additional Services

Retain and develop your best talent and reduce employee turnover with **isolved Share & Perform**

isolved Share & Perform

Create more purposeful and promising paths for your employees. By measuring and guiding their individual and collective progress, isolved Share & Perform and isolved People Cloud help you systematically connect with your employees.

According to 2021 Prudential Financial's Pulse of the American Worker Survey, of the 26% of workers who plan to leave their employers after the pandemic, 80% plan leave because they're concerned about career advancement.



Performance reviews that help your organization monitor and report on performance with flexible cycles that can be tailored to the needs of your organization. Managers and supervisors can use pre-loaded review templates and tailor them to the needs of your organization.



Nine-box technology provides the ability to help identify the career potential of your employees. The technology helps identify the talent potential of your employees and let you focus on retaining the leaders and achievers of your organization.



360 feedback process for reviews enables you to get feedback from peers, leaders and even customers (or anyone else outside your company).



Job history records are maintained, accurate and accessible for every employee.

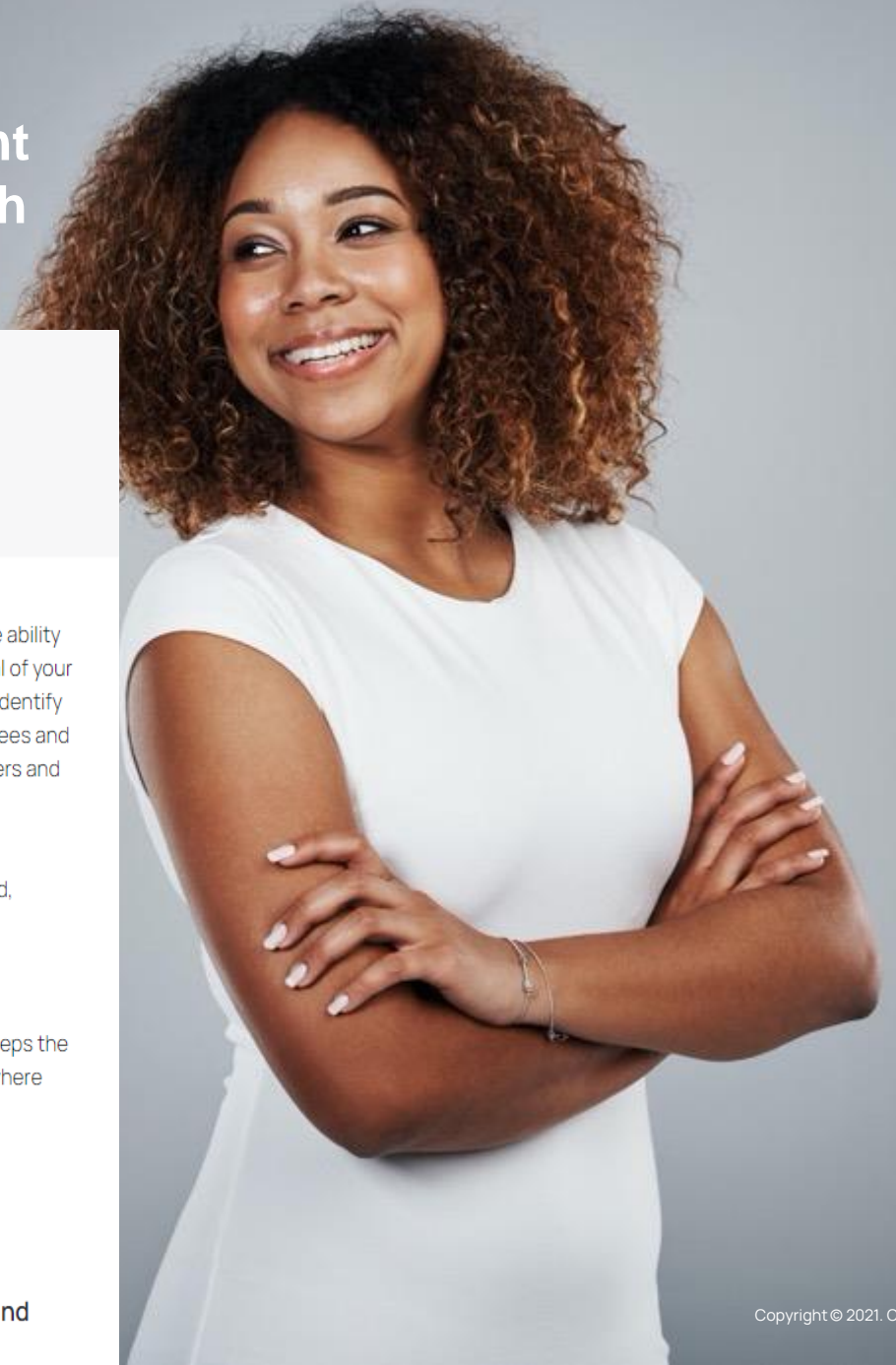


Goal-setting and monitoring, including goals for specific groups, individuals, and the company as a whole. Create workstreams and attach them to goals, or cascade goals down the organization to track the progress from all team members.



A personalized dashboard that keeps the most important information right where you need it.

Retain and develop your best talent and reduce employee turnover - isolved Share & Perform enables the multi-directional engagement that builds a great organization and delivers on your business goals.



Additional Services

isolved Tax Registration

As a company expands into new jurisdictions, a tax registration will be needed in each location that an employee resides, whether it is for just one employee or a large team. Avoid penalties for lack of registration or filing incorrectly with isolved Tax Registration.

Ensure compliance and reduce paperwork.

Businesses with employees in multiple states often struggle with multi-jurisdiction tax registration. Staying compliant while navigating a hybrid work model can be complex and time consuming as laws differ across jurisdictions.

A dedicated team at isolved will help gather and prepare the necessary requirements for each tax registration and file the application documents on your behalf.

Let's talk about how to get started with isolved Tax Registration services to avoid penalties and ensure compliance.

isolved



A man with glasses and a beard, wearing a green and black plaid shirt, is sitting on a light-colored couch. He is smiling and looking to his right, holding a glass in his right hand. The background is a bright, modern office space with large windows and glass partitions.

**Wishing you
a wonderful
holiday
season!**