

Pulse Deck

November 2022

isolved[™]



- isolved Customer Roadshows!
- Product Enhancements
- Training and Information Videos
- Thought Leadership Strategies
- Year End Preparation
- Important Dates
- How can isolved help?
- Value Added Solutions
- What's New?

Agenda





Customer Roadshow

Only **3** left!

Come out and see us on our last leg of the journey!

Detroit, MI

Greenville, SC

Thurs. 3 Nov.

Weds. 9 Nov.

Thurs. 10 Nov

Charleston, SC

Click [here](#) to register!

isolved Customer Roadshows

UPDATE: Employee Calendar - Remove Projected Balance

Navigate to **Employee Self Service > Time > Employee Calendar (Time Off Request)**

The section for **Projected Balances** has been removed from the **Employee Calendar** screen.

A new field has been added, "**Available After Request**" to reflect the available hours after the pending request. The balance will reflect all pending requests.

Employees can continue to view their **Projected Balances** from the **Time Off Balances** screen.

Product Enhancements

New Screen

Employee Calendar

Save Cancel

Request Time Off

* Absence Policy: PTO (Time)

* From Date: 10/18/2022

* To Date: 10/18/2022

Start Time: [] []

Days: S M T W T F S
 Check All

* Hours Per Day: []

Hours Requested: []

Available After Request: [] ⓘ

→ Go to Time Off Balances to see projected balances.

Comments

[]

Old Screen

Employee Calendar

Save Cancel

Request Time Off

* Absence Policy: PTO

* From Date: 11/16/2022

* To Date: 11/16/2022

Start Time: [] []

Days: S M T W T F S
 Check All

* Hours Per Day: []

Hours Requested: []

~~**Projected Balances**~~

~~Available After Request: [] ⓘ~~

~~Balance After Request: [] ⓘ~~

~~Current Plan Year: []~~

~~Next Plan Year: []~~

Comments

[]

Check out live training and informational videos

ACA Sessions ([Click Here to Register](#)):

Masterclass: ACA Administration –

A review of how the isolved system handles Measurement Periods, corresponding life event enrollments, and hours tracked reports. November 29th

Masterclass: ACA Form Generations & Review –

This class is intended for isolved clients who utilize the isolved HCM Payroll & Benefits module and our most comprehensive ACA package. This will be a review of the ACA year end forms, what logic the system uses to pre-populate the forms, helpful hints on how to review your forms. December 1st

Masterclass: Populating the ACA Forms without HCM Benefits Module-

This class will review the necessary steps to populate your 1094 & 1095 forms when you aren't utilizing the isolved HCM Payroll or Benefit modules. December 1st

2023 is quickly approaching – Is your HR team ready?

[Click here to join the live webinar](#)

We will cover year-end checklist, ACA responsibilities, What you need to know about payroll and W-2 items and more

Check out live training and informational videos

Check out The LIVE webinar schedule: [FREE Live Training Webinar Calendar](#)

Benefits Sessions ([Click Here to Register](#)):

Isolved Benefits Admin –

This session reviews administering benefits to employees including enrollments and other basic functions.,
November 9th

Isolved Benefits Evaluation Utility –

this training webinar reviews the use of the benefit evaluation utility., November 9th

50 States in 60 Minutes

[Click here to join the live webinar](#)

An overview of compliance changes and an understanding of how HR leaders are balancing compliance and employee experience strategies.

Thought Leaders Strategies

isolved's media outreach efforts continue to secure headline after headline, resulting in great coverage of our messaging, products, strategy and thought leaders.

Check out some recent highlights:

[Create a culture of belonging](#)

[LIVE from isolved Connect: Leading the transformation of work and life](#)

[22 takeaways from the 2022 HR Tech Conference](#)

[Fall back, but don't fall behind: Daylight savings may be bad for employees' mental health](#)

Year End Readiness Checklist

ACTION ITEM:
Be sure to return the
year-end
questionnaire by
November 18th



Year End Readiness Checklist



Audit Crucial Year End Data

- Run the Employee W2 Verification report to verify your employees' Social Security Number, Name and Mailing Address.
- Confirm your Year End Delivery Address and Employer Contacts with your CSR.
- Review your most recent Payroll Summary report for missing Tax ID's and provide to your CSR.



Check Accrual Plans

- Do you allow PTO hours to rollover when the new year starts?
- Review your accrual plan rollover date with your CSR to ensure PTO rollover occurs at the right time for your employees.



ACA Reporting Readiness

- Determine if you are subject to ACA reporting for 2022.*
- Verify employment records and medical enrollments are up to date and accurate for all of 2022.
- !** **Preview, but do not approve any forms until January 1, 2023. Approving forms prior to this date will result in errors.**



Verify Fringe Benefits on W2's

Run the Employee W2 Preview and W2 Reconciliation Summary to verify the following:

- If Box 12 shows Code DD, the amount should include both the EE and ER contribution to healthcare. If you filed 250 or more W2's in 2021, it is required to report the EE and ER contribution to healthcare in 2022.
- Group Term Life in excess of \$50,000
- Employer HSA, HRA or other medical health contributions
- Third Party Sick Pay. December and YTD statements can be obtained from your provider website before our adjustment deadline of January 4, 2023.
- Personal Use of Company Vehicle

! Some of these items are taxable and should be entered with a normal payroll run before the last pay date in 2022.

! Our blackout period is January 4, 2023 through February 28, 2023. We will not process year end adjustments during this time to ensure timely processing of all Federal and State returns.

Highlights

Review W-2's for Accuracy

Audit Tools

PTO Rollovers

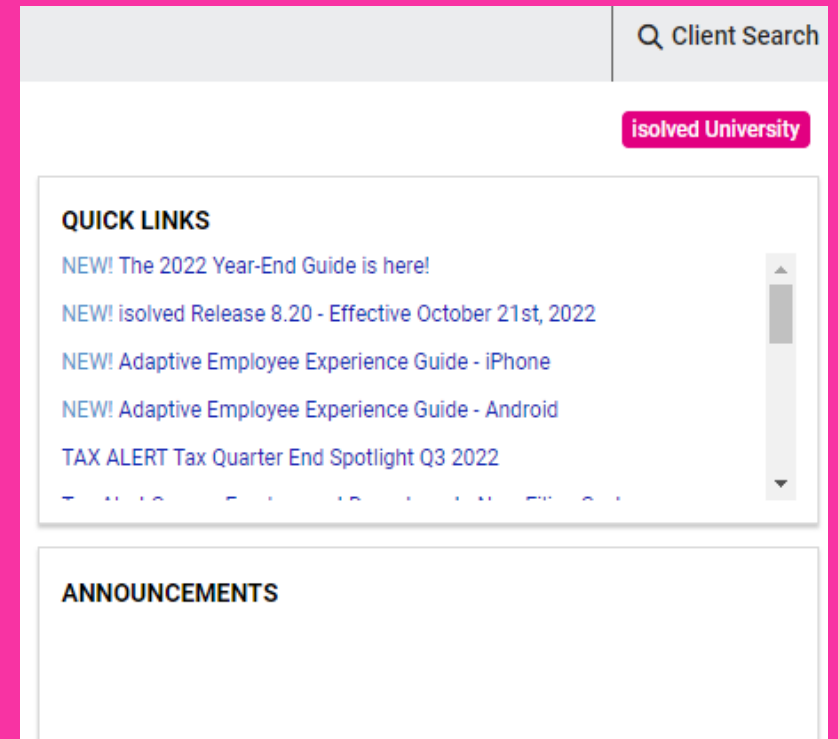
Third Party Sick Pay

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

Daylight Savings, November 6, 2022

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

Veteran's Day, November 11, 2022

Thanksgiving, November 24, 2022

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

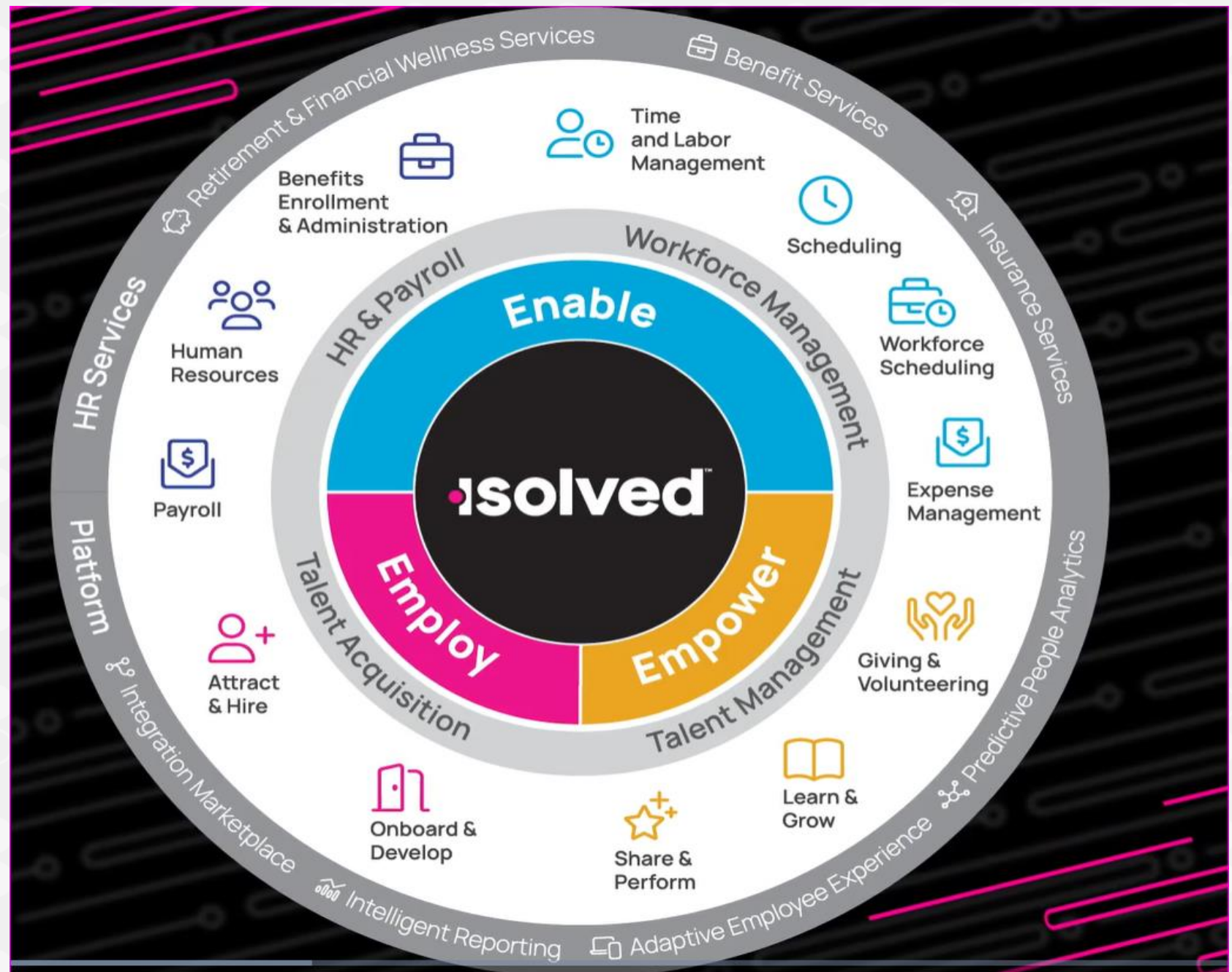
SAVE THE DATES

isolved Connect 2023 – October 17 – 19, 2023

Palm Desert, California



How can isolved help?



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.



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.



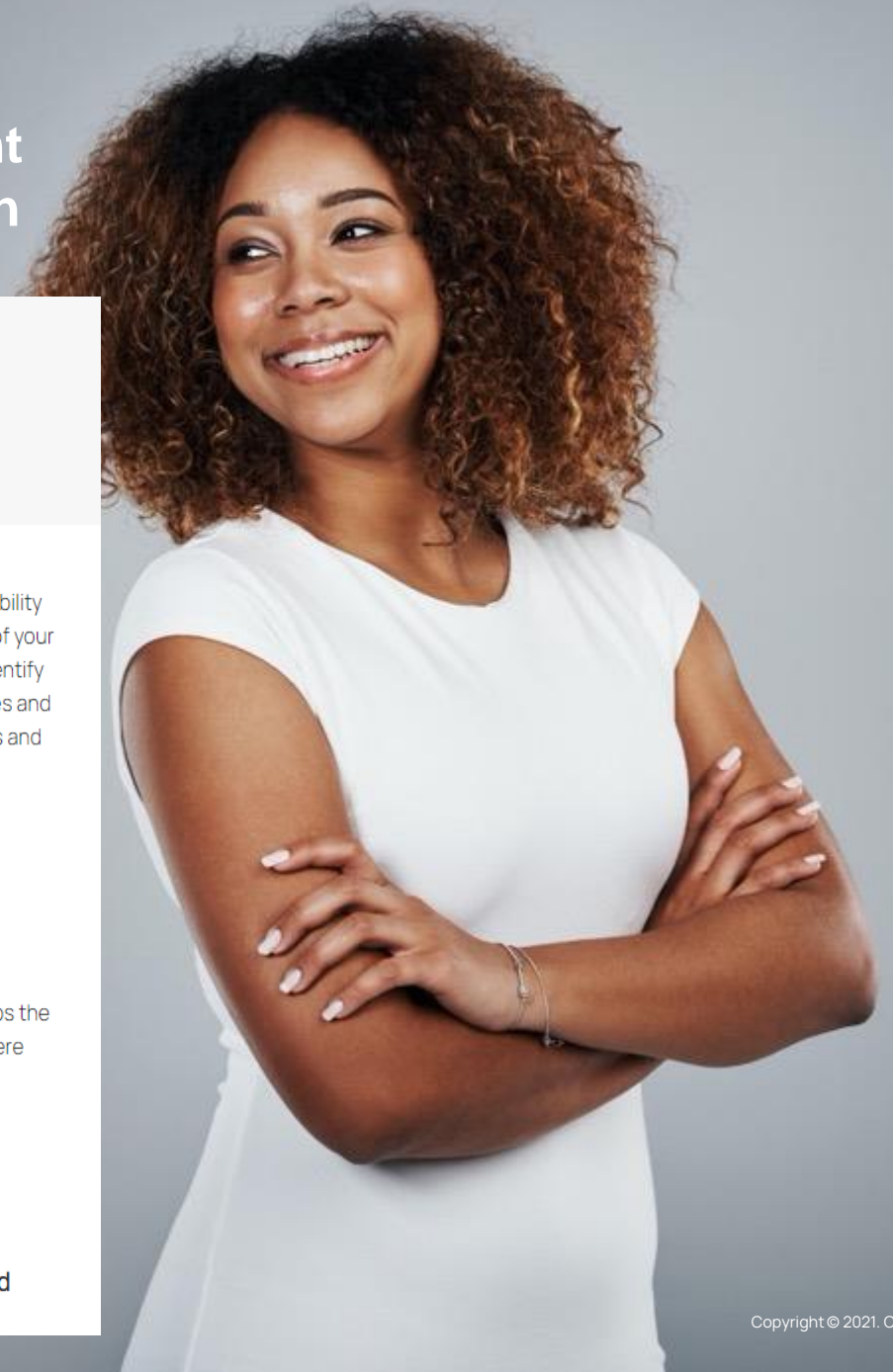
Goal-setting and monitoring, including goals for specific groups, individuals, and the company as a whole. Create workstreams and attach them to goals, or cascade goals down the organization to track the progress from all team members.



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

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.

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.

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Value-Add Insurance Services



Not only does shopping for health insurance plans take time, but it also requires expertise in the industry. At isolved, we offer all-inclusive broker services to help you find the best plans for your business and guide you to the best option. Our licensed experts:

Understand the market.

Know the law.

Work in the industry.

Our Representatives assist employer administrators and members with healthcare questions, no matter how large or small. Armed with options, support, and information, plan administrators and members can make smarter healthcare decisions.

Beyond plan selection and design, isolved offers all-inclusive services to support billing eligibility, claims, explanation of benefits, and renewals. In addition, we offer support with:

Carrier Feeds | COBRA | ACA | Auditing

Specific isolved Insurance Value-Add Services Include:

Member Support

- Representative touchpoints for questions during open enrollment and beyond
- On-demand meeting facilitation to help members understand benefit elections
- Ongoing communication and updates to support employee benefit decisions

Administrative Support


- Dedicated isolved Insurance Services Account Manager
- Paper-free open enrollment and add/deletes
- Compliance updates
- Consolidated billing for all ancillary lines

Cost Savings Strategies

- Direct Primary Care
- Telemedicine
- Health Bar Nurses
- Incentive Based Plan Design
- Referenced Based Pricing

Ask us about our Workers
Compensation Pay As You
Go Options





What's New?

**Do you have any
upcoming projects or
initiatives to discuss?**