



isolved™

Pulse Deck

October 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



Check out live training and informational videos

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

[Fall Webinar Series – Share & Perform](#)

[October 11, 2023 from 1:00 – 2:00pm EST](#)

Join us for our Fall Webinar Series– Share & Perform to learn about how reward and recognition programs can help organizations improve EX. With isolved Share & Perform, companies can enable multi-directional employee communication that drives toward a transformative company culture. Additionally, built-in employee recognition and performance management tools allow both employees and managers to engage in maximum business success.

[From FMLA to Leave Management Solutions to Simply Compliance](#)

[October 24, 2023 from 11:00 – 12:00pm PST](#)

FMLA isn't new and neither are its complexities. Among the employment laws to comply with, FMLA can be one of the most difficult to navigate. In our latest webinar, we'll run through all you need to know to stay current on changing regulation and the comprehensive leave management process.

Hear from isolved experts, Megan Coen, VP of HR Services and Larry Romero, Senior Product Marketing Manager, as they walk you through navigating FMLA. You'll leave with strategies to help you not only understand FMLA better, but streamline leave management.

isolved Benefit Services



Core focus on benefits compliance and maximizing business potential.

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

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



Integrated HCM technology simplifying your evolving employment landscape.

isolved is an employee experience leader, providing intuitive, people-first HCM technology. Our solutions are delivered directly or through our partner network to more than five million employees and 145,000 employers — who use them every day to boost performance, increase productivity, and accelerate results while reducing risk.

Through integrated payroll processing and benefits enrollment capabilities, isolved works hand in hand with brokers to ensure your clients have the information they need to properly and efficiently manage their employee benefit selections.



Your trusted partner in third-party benefits administration.

The role of human resources is changing. Positive employee experiences are increasingly important as they can impact productivity and customer experiences. And employers are taking a more strategic approach to benefits administration. Company leaders need flexible resources to help them adapt to market demands and better guide their strategic decisions.

Combined with the power of the full isolved People Cloud + Services platform, isolved provides third-party services to automate and maximize several benefits administration functions—from initial onboarding throughout the entire employee lifecycle. When you partner with isolved, employers gain access to critical employee benefits data and reporting tools to better inform business decisions.

No matter the industry, we help high-growth organizations employ, enable and empower their workforce by transforming employee benefit administration for a better today and a better tomorrow.



Client issues are just non-existent with isolved. Even if there is an issue, your professionals just take care of it.

— isolved Client Contact, Priority Health

isolved benefit and compliance services **by the numbers**

30+ years operating with sole focus on employee benefit services

19,000+ customers across the U.S.

5M+ benefit claims processed

12M+ notices sent with zero penalties

10+ years average employee tenure in benefit administration

94% year-over-year client retention



Benefit & Compliance Services

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isolated Benefit Services



End-to-end benefit administration solutions that ensure optimal employee experience and returns.



Account-Based Plan Administration

FSA, HRA, HSA, Lifestyle FSA, Transit, Parking, Tuition Reimbursement

Account-based plans can become a competitive advantage for employers seeking to provide employees with the best coverage and tax-preferred options available—enabling a more robust benefit portfolio. isolated provides comprehensive account-based administration to maximize employee experience and benefit reimbursements including:

- Anywhere, anytime access to employee plan information or support services
- Quick and easy reimbursement for out-of-pocket expenses
- Seamless setup and distribution of debit cards for accessing plan benefits
- Full employer visibility and reporting capabilities to improve efficiency and reduce errors
- Assistance with initial plan design and management to meet evolving business needs



COBRA Compliance

For employers with twenty or more employees, federal and state laws require you to offer continuing medical care coverage to most employees who were covered at the time of separation. However, adherence to the Consolidated Omnibus Budget Reconciliation Act of 1985 (COBRA) is not always simple.

isolated offers services for minimizing COBRA liability and time spent administering this often complex and confusing government regulation. The isolated COBRA solution enables:

- Web and phone-based reporting and support
- Methods for automated premium collection
- Online payment options for participants
- Access to a nationwide network of professionals to address the toughest COBRA-related questions



State Continuation

isolated provides state continuation administration for many U.S. states plus the District of Columbia. Some state continuation laws are standalone and apply only to small groups that do not have to adhere to COBRA regulations. Some states, however, have continuation laws in addition to federal COBRA oversight—meaning employers must comply with both. Your isolated team can support you and your clients' in understanding state laws and addressing specific business requirements.



Plan Document Management

While large employers may have the resources to prepare custom plan documents for every employee welfare benefit plan, most small employers lack the resources and expertise to maintain these documents. At the same time, failure to do so can lead to costly penalties.

isolated provides experienced compliance experts to create, and update important benefit plan documents including:

- Premium Only Plan (POP) and summary plan description documents
- ERISA wrap and summary plan description documents
- POP/ERISA wrap document generator for brokers
- Form 5500 and summary annual report for employers with 100+ lives



Non-Discrimination Tests

When you provide an FSA, POP or self-funded health plan, the IRS requires you to conduct non-discrimination tests to ensure that plans do not discriminate in favor of highly compensated or certain key employees. Testing needs to be conducted on an annual basis before the end of your plan year.

isolated will run these tests and provide a detailed report with results and next steps. isolated currently offers testing for:

- Section 125 Cafeteria Plan (POP)
- Health FSA
- Dependent Care FSA (DCAP)
- Section 105(h) – Self-funded Health Plan or HRA



Notice Mailings, Premium Billing, ACA Print & File, and More

From mailing required notices to employees, billing retirees and employees for insurance premiums, or printing and filing required ACA reporting forms, isolated offers services that will eliminate time consuming and tedious tasks. With more than 12M notices sent and zero penalties assessed by the IRS or DOL, you can have peace of mind.

If your clients want to hire the best employees—talented, motivated workers who can help their company succeed—then a solid employee benefits portfolio is a great place to start.

But benefits provide additional impact beyond compensation. Put simply, benefits suggest organizations have what it takes to be a great employer—which in turn attracts great employees. At the same time, evolving regulations, availability in benefit offerings, and systems for managing employee access continue to get more complex.

isolated provides comprehensive benefit administration services to make organizations of all sizes and across all industries more productive.

Whether your clients are looking to become compliant in a single aspect of providing health insurance or require a full-scale partner for strategic benefits management, isolated provides the resources required to achieve simple, secure and seamless business value.

Achieve maximum efficiency with solutions designed to reduce manual effort, accelerate success and maximize your employee benefits engagement and adoption.



isolved Identify Server

In Case You Missed the Webinar:

[Identity Server - Multi Factor Authentication Recorded Webinar](#)

[Quick Help Video](#)

[Updating Mobile Number in Adaptive Employee Experience](#)

[Updating Mobile Number in isolved Classic View](#)

[Identity Server – Multi Factor Authentication \(Administrator\).](#)

QUICK LINKS

[NEW! isolved Release 9.18 Updates - Effective 9/22/2023](#)

[NEW! isolved People Cloud Phase 2 Login Update - Client Users](#)

[NEW! Tax Quarter-End Schedule 2023](#)

[NEW! TAX ALERT! Tax Quarter-End Spotlight 3Q 2023](#)

Effective November 3

At isolved, we prioritize the security of your data and recognize that safeguarding its confidentiality, integrity, and availability is critical for your business. In our ongoing commitment to enhance your security, we will be implementing measures like multi-factor authentication (MFA). Effective November 3, 2023, all users will be required to utilize MFA as a mandatory security measure when logging into isolved People Cloud.



The first time you log in after the release, you will be given the option to set up an additional method of authentication, such as an authenticator app, FaceID/touch ID, or security key. You can utilize one of the additional methods we have added for enhanced security, or you may proceed with using email or text message as your authentication method. Going forward, you will be required to use multi-factor authentication every time you log in to isolved People Cloud.

3 Reasons to Automate Open Enrollment with an Intelligently Connected Platform

Increase productivity

An intelligently connected platform allows benefits enrollment and administration to integrate flawlessly with payroll, HR and other core processes. Automation enables benefits to be calculated accurately based on employees' information and compliance regulations are handled without the need for manual input. Premiums are calculated automatically based on enrollment details and subtracted from payroll without error or delay. With this burden out of the way, your HR team can focus on more strategic initiatives.

Empower employees

Every interaction an employee has with their employer affects their experience, including how they elect benefits. A streamlined process makes a good impression on your workforce. 30 percent of employees say the ability to use technology that's connected to anything else HR-related is an important feature for benefits enrollment.

Artificial Intelligence (AI)-powered tools are on the rise and can create a more personalized enrollment experience without employees having to interact with HR. According to our [AI at Work whitepaper](#), employees are open to the idea. 68 percent believe AI will improve the employee experience and 66 percent would look favorably upon employers that use it.

Get a competitive advantage

While the benefits of using an intelligently connected platform are indisputable, most employers aren't leveraging it. According to [our survey](#), only 47 percent of employees say they elect benefits electronically through a platform that's integrated with other HR tasks. Providing this experience can give your organization a competitive edge.

Download
our [2023
Guide to
Open
Enrollment](#)

**64 percent of
employees say a
poor enrollment
experience could
lead them to look
for a new job**

Power Positions

Our **five new pillars of differentiation:** the “why isolved?”

Increase Productivity with an Intelligently Connected Platform

Eliminate admin and added work to get more time back in your day and focus on the things that really matter

Ensure Performance with isolved Employee Experience by Design™

Spend less time on support and technical issues while ensuring your employees can spend more time being productive

Accelerate Decisions with isolved Analytics Everywhere™

Make better, faster and more informed decisions with deep actionable insights on every aspect of your business

Energize Talent with isolved People Heroes World™

Energize your talent to grow and hone their skills, increasing satisfaction and boosting growth throughout their career journey

Reduce Risk with Your Most-Trusted Partner

Having a secure, stable and scalable partner means you're always cared for—with timely, comprehensive support and industry-leading satisfaction scores, we provide peace of mind.



Paperless

Third Party
Sick Pay

HSA

Delivery
Address

Get a Jump on Year End

Spot Lighting: Year End Form Delivery

Physical Forms: Update or confirm your physical delivery address with support, we are unable to ship to PO Boxes.

Online Form Availability: Forms will be available electronically 1/15/24.

Paperless Year End: Interested in a paperless year end? Contact Customer Support to learn more about setting up “Electronic Consent” for your employees!

Group Term
Life

Personal Auto

401k Box 12D

Stock Options,
Gifts, Awards

Employer Paid
Healthcare
Box 12DD

S Corp
Healthcare
Premiums

Isolved Announcements

SAVE THE DATES
COMING SOON
CONNECT 2024 INFORMATION

Quick Links (on landing page)
Be sure to check your Quick Links for updates

Announcement

[Register Here To Get Up to Date isolved Release Information](#)

QUICK LINKS

[Android](#)

[Preparing for a Successful Open Enrollment](#)

[Training Calendar - Client](#)

[Employee Direct Deposit Form](#)

Customer Experience Survey

We value your feedback.

Be on the
LOOKOUT for your
survey!

Thank you for being
a valued isolved
customer! Your
continued success
is important to us

Please provide
specific details
as we at isolved
are always
striving to be
better than we
were yesterday.

The screenshot shows a survey form with the following sections:

- Header:** isolved logo and "Customer Experience Survey".
- Intro:** "Thank you for being a valued isolved customer! Your continued success is very important to us! This survey will provide insight on your experience with isolved. We will use your feedback to help improve your overall satisfaction."
- Question 1:** "Based on your recent experience, how likely are you to recommend isolved to a friend, colleague or business partner?" (1 = Not at all likely, 5 = Neither likely nor unlikely, 10 = Extremely likely). A 10-point Likert scale is shown with the 10th point selected.
- Question 2:** "What is the primary factor impacting your rating in question #1?" A list of factors with checkboxes: Customer Support, Customer Success, Features & Functionality, Implementation, Ease of Use, People Heroes' Community, Tax Services, Treasury / Funding, Account Management (Sales), Price / Value, and Integrations with other systems.
- Question 3:** "Do you know who to contact for support and how to reach them?" A dropdown menu.
- Question 4:** "How satisfied are you with your isolved teams' responsiveness to issues or inquiries when you require assistance?" (1 = Not at all satisfied, 5 = Extremely satisfied). A 5-point Likert scale is shown with the 5th point selected.
- Question 5:** "Please provide details to question # 4. (Are you satisfied with your isolved teams' responsiveness to issues or inquiries when you require assistance?)" A text input field.
- Question 6:** "How strongly do you feel your isolved contacts provide helpful, knowledgeable solutions when you require assistance?" (1 = Not at all satisfied, 5 = Extremely satisfied). A 5-point Likert scale is shown with the 5th point selected.
- Question 7:** "Please provide details to question # 6. (Do you feel your isolved contacts provide helpful, knowledgeable solutions when you require assistance?)" A text input field.

September Newsletter

- **Stress Free Open Enrollment** : Sixty-seven percent of employees say the open enrollment process is stressful. With isolved's Benefits Enrollment & Administration you can provide your employees with a seamless, self-service process!
Save Time on Leave Processes : isolved Leave Management services will seamlessly manage federal and state job-protected leaves from requests to return to work. Spend less time processing paperwork and more time focusing on what matters.
- **HR Planning for FY24**: It's never too early to plan for the new year. What HR processes do you want to keep or tweak? We'll sit down with industry analyst, Steve Goldberg, on 11/16 at 1:00PM ET to help your organization embrace changes.
- **HR Services Sidekick** 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.
- **Get Ready for 2024**: The end of the year is fast approaching! Get ready by connecting with your Customer Support Representative to verify your delivery address for W2s and discuss options for electronic delivery of employee forms!
- **Benefit Plan Deductions & Memos**: Don't forget to check your payroll schedule! If payroll frequency is weekly or bi-weekly, additional benefits deductions or memos will occur. Reach out to your customer support to help you review.

Monthly Newsletter - September 2023

Need a reason to join us at isolved Connect?
How about 36?

17 HRCI Credits & 19 SHRM Credits now available.

[Register Today](#)



New Products & Resources

[Product Spotlight]

Save Time on Leave Processes

isolved Leave Management services will seamlessly manage federal and state job-protected leaves from requests to return to work. Spend less time processing paperwork and more time focusing on what matters.

[Learn More](#)

[Product Updates]

An Added Layer of Protection

[Did You Know?]

Stress Free Open Enrollment

Sixty-seven percent of employees say the open enrollment process is stressful. With isolved's Benefits Enrollment & Administration you can provide your employees with a seamless, self-service process!

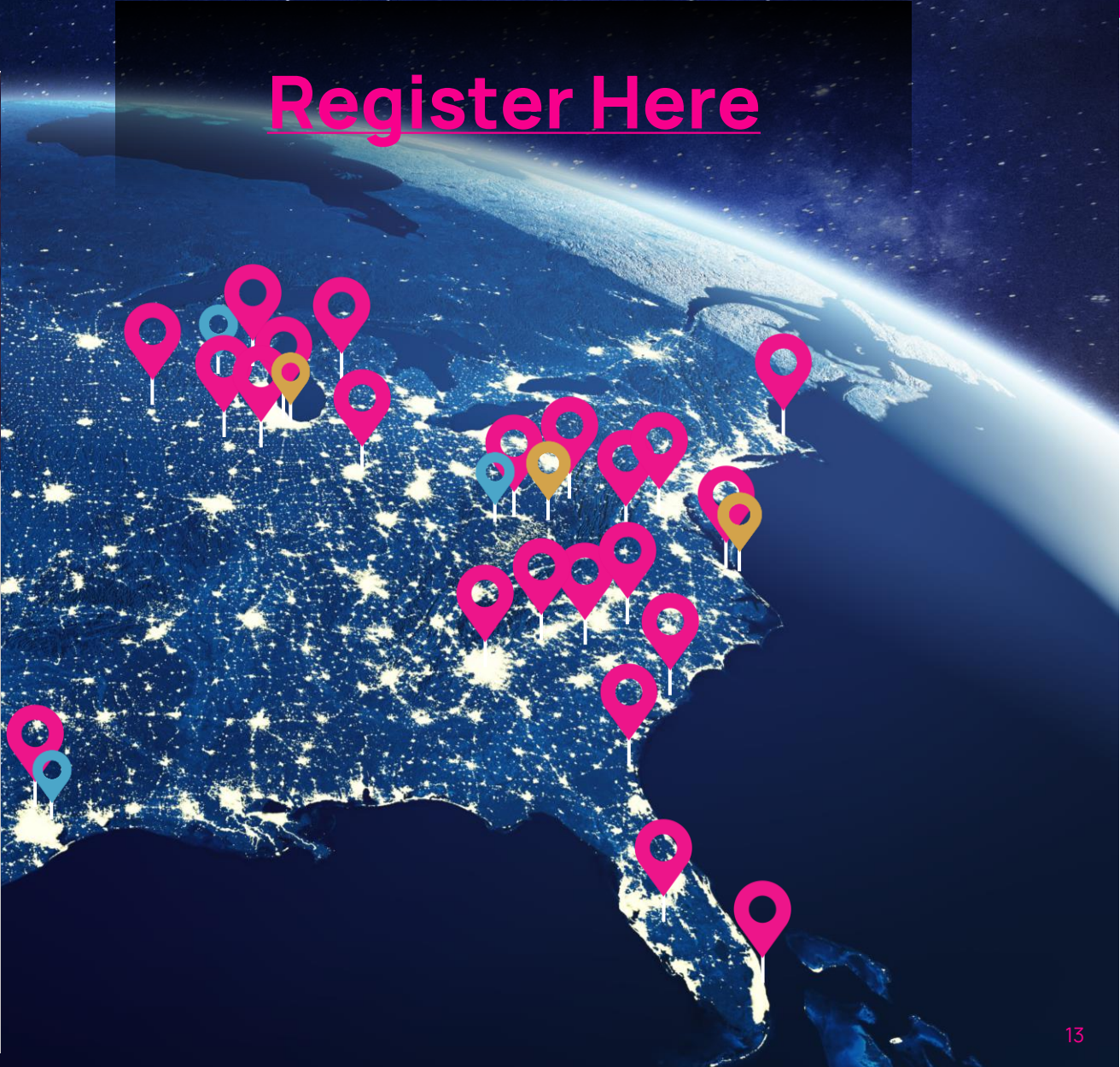
[Learn More](#)

[Marketplace Spotlight]

Pattern



[Register Here](#)



Save The Date!

Upcoming Roadshow Dates:

- | | | | |
|--------------|-----------------------|-------------|------------------|
| Oct 4..... | New York City, NY | Nov 8 | Allentown, PA |
| Oct 5..... | New Brunswick, NJ | Nov 9 | Philadelphia, PA |
| Oct 24..... | Seattle, WA | Nov 14..... | Madison, WI |
| Oct 26 | Salt Lake City, UT | Dec 6 | Scottsdale, AZ |
| Nov 2..... | Dallas-Fort Worth, TX | | |

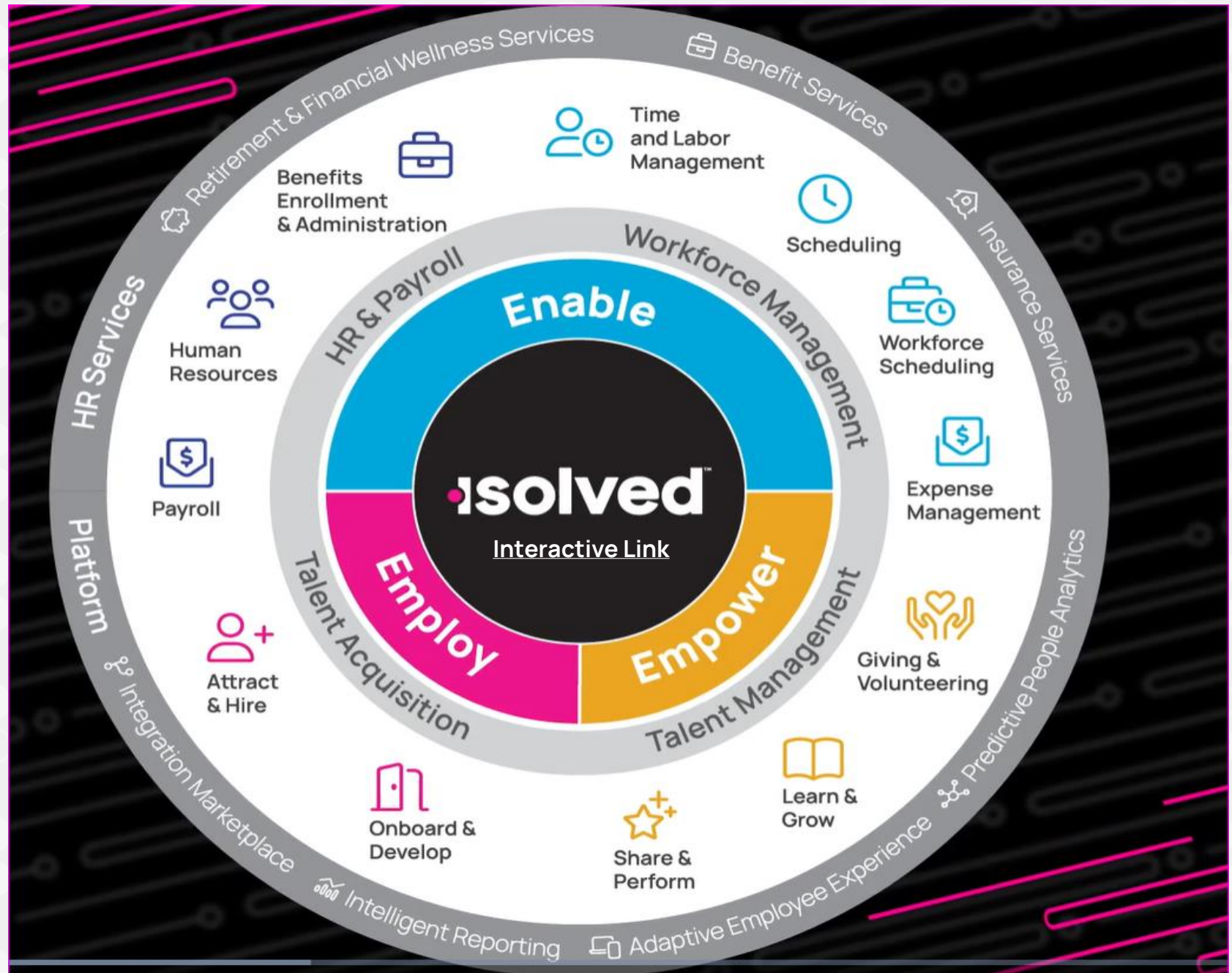
How can isolved help?

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

Complete both reviews and you will earn a \$15.00 Amazon gift card.

All you need to do is complete these 2 steps:

Step 1: Complete both reviews below

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

Links:

[G2](#)

[Capterra](#)





isolved™

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