



isolved™

Pulse Deck

May 2023

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

Agenda





[Register Here](#)

Save The Date! Upcoming Roadshow Dates:

Apr 12.....	San Diego, CA	Aug 3	Hartford, CT
Apr 13.....	Anaheim, CA	Aug 10.....	Chattanooga, TN
Apr 18.....	Portland, OR	Aug 16.....	Orlando, FL
Apr 20.....	Raleigh, NC	Aug 23.....	Charlotte, NC
Apr 26.....	Greenville, SC	Aug 24.....	Columbia, SC
Apr 27.....	Charleston, SC	Sept 7.....	Omaha, NE
May 4.....	Grand Rapids, MI	Sept 12.....	Schaumburg, IL
May 10.....	Chicago, IL	Sept 14.....	Des Moines, IA
May 11.....	Dubuque, IA	Sept 21.....	Phoenix, AZ
May 17.....	Milwaukee, WI	Sept 28.....	Las Vegas, NV
May 18.....	Madison, WI	Oct 4.....	New York City, NY
May 24.....	Dallas, TX	Oct 5.....	New Brunswick, NJ
May 25.....	Houston, TX	Oct 24.....	Seattle, WA
Jun 8.....	Salt Lake City, UT	Oct 26.....	Salt Lake City, UT
Jun 15.....	Newport Beach, CA	Nov 2.....	Dallas-Fort Worth, TX
Jun 22.....	Indianapolis, IN	Nov 8.....	Allentown, PA
Jul 13.....	Columbus, OH	Nov 9.....	Philadelphia, PA
Jul 20.....	Sacramento, CA	Nov 14.....	Madison, WI
Jul 27.....	Grand Junction, CO	Dec 6.....	Scottsdale, AZ

Help Your Peers. Elevate Your Career.



isolved
People Heroes

isolved People Heroes brings together like-minded professionals to invest in each other's success and, by extension, their workforce's success.

Join isolved People Heroes to:

- Share your isolved experiences
- Socialize with your HR and payroll peers
- Source advice from fellow people heroes

isolved will help elevate your personal and professional brand by rewarding your good deeds. Rewards for references are just the beginning.

Be a
People
Hero



Where do I? **On Demand Webinars**

Check out live training and informational videos

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

[isolved Onboarding/Offboarding](#)
[May 4th at 3:00pm EST](#)

Brief description: Reviews template maintenance and onboarding process from initiation to employee experience and back to client user functions. You can join the webinar up to 5 minutes before the start time. Please note each user needs a unique registration code to access the webinar.

[isolved Optimization](#)

[Meet & Greet: isolved Optimization - May 12, 2023 at 1:00pm EST](#)

Meet our Strategic Optimization Team during our exclusive isolved People Heroes Community webinar on May 12 to get tips for maximizing the isolved software and services you currently use. You'll learn who is on our strategic optimization team and how to utilize them to support your business.

Why should you attend Connect 2023? Join us for a live webinar to find out

[Register Here](#)



[Meet Lina Tonk & Mike Flannery: Why attend Connect](#)

June 6th at 1:00pm EST - isolved Connect 2023 is right around the corner, and oh do we have quite the conference planned for you. Come hear from Lina Tonk & Mike Flannery on what exciting sessions and surprises we have in for you. See why you won't want to miss Connect this year.

Please note this webinar is an isolved People Heroes Community exclusive webinar. To register you will have to join the Community and complete the challenge to register for the webinar. Click the link below to join or go to the community to register.



This years Keynote Speaker: Erik Wahl

Artist, Speaker, and Bestselling Author

Erik Wahl is an internationally recognized artist, TED speaker, and No. 1 bestselling author. His breakthrough experience as an artist and entrepreneur has translated into making him into one of the most sought-after corporate speakers on the circuit today. On stage, Erik's keynote experience creates a dynamic multidimensional metaphor for how to systematically embrace innovation and risk. His message: disruption is the new normal and businesses must embrace creativity in a wholesale fashion, or risk being left behind. Erik's presentation inspires organizations to be increasingly agile and outlines how to use disruption as a competitive advantage. Some companies will be disrupted others will choose to be the disruptor. Choose wisely. His new book, *The Spark and the Grind*, activates the essential components of translating ideas into action. His breakthrough thinking has earned praise from the likes of top influencers in both art and business.

Erik's previous book, a bestseller called *Unthink* was hailed by *Forbes Magazine* as *The blueprint to actionable creativity*, and by *Fast Company Magazine* as "provocative with a purpose."

The Warhol of Wall Street, *the Renoir of ROI*, *The Picasso of Productivity*, *the Jobs of ... Well, Jobs*. Erik discovered an alarming truth early in his career as a partner in a corporate firm: organizations that encouraged the mental discipline of creativity did better than those that did not put innovation as a priority mission. So he set out to challenge companies to change their way of thinking. In the meantime, inspired by street art, he became an acclaimed graffiti artist—though he has since stopped selling his works for personal gain, and instead uses his art to raise money for charities. His keynote is where his passion for business growth and art converge into a fascinating performance. Erik's list of clients includes AT&T, Disney, London School of Business, Microsoft, FedEx, Exxon Mobil, Ernst & Young, and XPrize.

In Case you missed it...

[Listen to the Recording:](#)
[Masterclass: Share & Perform Performance Reviews](#)

Isolved People Cloud Login Update!

One email address, One password to remember!

We are simplifying the login process for isolved People Cloud! Effective April 7th, 2023, all users will enter their email address as their username for logging in to isolved People Cloud. If the user has more than one account attached to their email address, they are prompted to select which account they want to access.

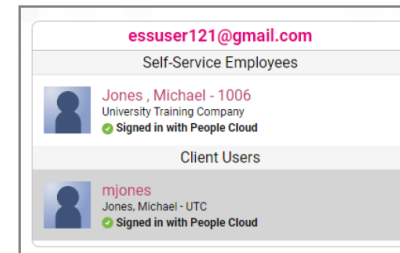
Isolved People Cloud Login Update FAQ

Q: Do you mean to tell me I just have to enter my email address and I can access all my accounts in each URL by logging in once?

A: Yes! You can easily toggle between associated accounts by clicking your name in the upper left corner and selecting "Change User" to see the pick list again. You'll even be able to access different security groups, if applicable, from the list.

Q: What is the advantage to me?

A: It's easy to remember your email address, but not always easy to remember an assigned username. This simplifies your login process as you'll always use your email address to access any accounts related to the email address going forward. If there is only one user associated with the email address, you'll be taken directly to the main landing page.



Q: I am not able to log in; I'm getting a message that my account was disabled.

A: Check your email for a confirmation email from isolved People Cloud (noreply@myisolved.com). This message provides a link to confirm that you are the owner of the account. Click the link to confirm; upon confirmation you can log in to isolved.

Q: Is there anything I can do to make sure I'm ready for this change?

A: Yes! Check the email address that's attached to your user account(s) and make sure it is correct. You should also make sure that your mobile phone number is correct under either My Account in Classic view or Profile in Adaptive Employee Experience so that if you need to update your password, you can bypass security questions by entering an authorization code that is texted to you. Also, read the article [isolved People Cloud - Login Migration \(Service Bureau\)](#) to better understand how to help your clients and their employees with the migration to the new People Cloud account.

Customer Experience Survey

We value your feedback.

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

This survey will provide insight on your experience with isolved. We will use your feedback to help improve your overall satisfaction.

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Customer Experience Survey

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.

*
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)

1 2 3 4 5 6 7 8 9 10

2) What is the primary factor impacting your rating in question #1?

- Customer Support
- Customer Success
- Features & Functionality
- Implementation
- Ease of Use
- People Heroes' Community
- Tax Services
- Treasury / Funding
- Account Management (Sales)
- Price / Value
- Integrations with other systems

3) Do you know who to contact for support and how to reach them?

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)

1 2 3 4 5

5) Please provide details to question # 4.
(Are you satisfied with your isolved teams' responsiveness to issues or inquiries when you require assistance?)

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)

1 2 3 4 5

7) Please provide details to question # 6.
(Do you feel your isolved contacts provide helpful, knowledgeable solutions when you require assistance?)

isolved Onboarding & Offboarding

Gain a competitive edge by capitalizing on key benefits of your employees' experience

Enable Transparent workflows:

Within isolved People Cloud, keep track of your offboarding process from start to finish, identifying what has been accomplished and what more needs to be done







Gain Employment Insights: Capture and store accurate data throughout the offboarding process and analyze trends to support recruiting and retention efforts.

Automate Processes: Streamline the offboarding process and improve compliance with advanced workflows, built-in auditing and reporting.









The isolved People Cloud Onboard & Develop module is ready to help reduce your customer's workload and keep their employees focused on the right things. It provides real-time analytics and status reports, configurable templates, and wizards to ensure consistency and compliance – all at their fingertips – for connecting with employees in more meaningful ways.

Support these all-important human connections while boosting your ROI from increased efficiency and effectiveness.

From start to finish, easily manage your onboarding and offboarding processes.

-  **Built-in I-9 Tool** – Automate forms and processes for employees and managers to save time and effort.
-  **Electronic Signatures** – Use as a binding agreement, if necessary (employee handbooks, NDAs, etc.).
-  **Workflow Automation** – Implement, collect, track and store all forms and documents, including federal and state tax forms, to reduce effort and help eliminate costly errors.
-  **Streamline Processes** – Automatically track assignments, distributions and returns of equipment, systems access and logins, legal and HR documentation, and task completion through isolved People Cloud to keep your business running faster.
-  **Wizards** – Customize onboarding templates for different employee groups.
 - Permissions – Control and assign by role, location and employee.
 - Employee Categories – Determine which are required or optional.
 - Company Communications – Modify company messages or use default.
-  **Onboard On-The-Go** – Complete all onboarding tasks from any device at any time with the Adaptive Employee Experience.managers to save time and effort.

Offboarding Features:

-  Manager / supervisor role assignments
-  Employee self-service to complete offboarding
-  Pending termination dashboard
-  Offboarding templates for simple process replication
-  Performance review storage or deletion
-  Auditing to verify data and finalize terminations
-  Audit reporting across timeframes and employee groups
-  Offboarding wizard with administrative steps for:
 - Collecting phone number and company assets
 - Terminating benefit plans
 - Inactivating direct deposits and deductions
 - Ending payroll garnishments
 - Enabling leave accrual payout communications
 - And more

isolved Onboarding and Offboarding

Onboarding – the Experience (25 minutes) <https://learning.myisolved.com/courses/670> This course will show the beginning to end of the Onboarding process. We begin with the Initiate Onboarding process started by the workflow initiator. The next section shows you step by step details on what the New Hire must complete in Adaptive Employee Experience and how the screen, documents, forms are completed and submitted. Lastly, the course reviews the Pending Employees screen for the process to approve and complete as well as other features available on the screen.

Onboarding Maintenance (19 minutes) <https://learning.myisolved.com/courses/10648> This course walks through updates and changes that may be made to an Onboarding template.

Reboarding (23 minutes) <https://learning.myisolved.com/courses/671> The Reboarding course will begin with some reasons for a unique rehire process. The next section reviews how to rehire a terminated employee using Rehire using Reboarding, new Onboarding templates for rehires and lastly, watch the employee's experience. Next the course covers the lock down of employee data, the Pending Employee Dashboard and a review of the employee's new information.

Case Study:

Supra National Express Onboarding

“Being able to onboard a new hire in the same system that we use for other HR processes makes for a smoother transition for me and our new hire,”

Savings of up to \$60,000 on accelerated onboarding without paper processes



Paperless

Third Party
Sick Pay

HSA/HRA

Delivery
Address

Get a Jump on Year End

Spot Lighting: Third Party Sick Payments

Most providers let employers access their employees third party sick payments throughout the year, typically online.

Best practice: Forward that payment detail to Customer Support every month to load into employee record.

Proactive efforts avoids W-2Cs.

Group Term
Life

Personal Auto

401k Box 12D

Stock Options,
Gifts, Awards

Box 12DD

S Corp
Healthcare
Premiums

Isolved Announcements



SAVE THE DATES

Isolved Connect 2023 - October 17 - 19, 2023
Palm Desert, California
Plan your trip here

IMPORTANT DATES

Monday, May 29, 2023 – Memorial Day – Banks Closed

Best Practices

The 2022 EEO-1 Component 1 data collection is tentatively scheduled to open in **mid-July 2023**. Updates regarding the 2022 EEO-1 Component 1 data collection, including the opening date, will be posted to www.EEOCdata.org/eeo1 as they become available.

Applies to employers with 50 or more employees or a Federal Contractor

Reminder: Your establishments need to be set up in Isolved

We value your feedback

When you complete all 3 surveys below you will receive a pair of isolved People Hero Socks and will be entered to win one of the following:

1. Wine & Cheese Set
 2. isolved Picnic blanket paired with an isolved Metro Picnic basket
- OR
3. isolved People Heroes Umbrella.

Step 1: Complete all 3 surveys below

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

Links:

Software Advice: [Link](#)

TrustRadius: [Link](#)

Capterra: [Link](#)



April Newsletter

- **Simplify & Strengthen HR:** Join us for a webinar on Tuesday, May 9th at 1:00 PM EST to see isolved In Real Life with GPS Air and Purdy Enterprises.
- **People Heroes** Take your isolved experience to new heights!
- **WOTC-** Employers are looking for ways to boost their bottom lines. Federal tax credits, like the Workers Opportunity Tax Credit (WOTC), can help.
- **ACA Filing-** If you utilized isolved for calendar year 2022 ACA IRS filing, expect to receive a status email within the next 2 months. The IRS has three status' – Rejected, Accepted with Errors (AWE) and Accepted.

Sign Up!

isolved
A Helpful Newsletter Resource for the People of isolved People Cloud

Monthly Newsletter - April 2023

We're fueling up!
Over 20 new isolved Roadshow locations were just announced! Meet us in a city near you to get tips that will help you maximize your isolved investment. Register now, for free!

[View the Locations](#)

New Products & Resources

[Product Spotlight]
Make Time Easy!
isolved Time: Scheduling & Attendance allows you to easily build employee schedules, monitor attendance, and compare schedules vs. time worked. [Learn more](#) and get 1 FREE Month when you add Time & Attendance in April!
[Get Started](#)

[Marketplace Spotlight]
isolved Voluntary Life Benefits
Empower your employees to get a secure and customized individual life insurance policy online in as little as 10 minutes. It requires no administration, payroll deductions or reconciliation for you – a modern and convenient benefits experience!
[Learn More](#)

[Product Tips]
Visualize Your Workforce

[Product Updates]
New Courses in Learn & Grow

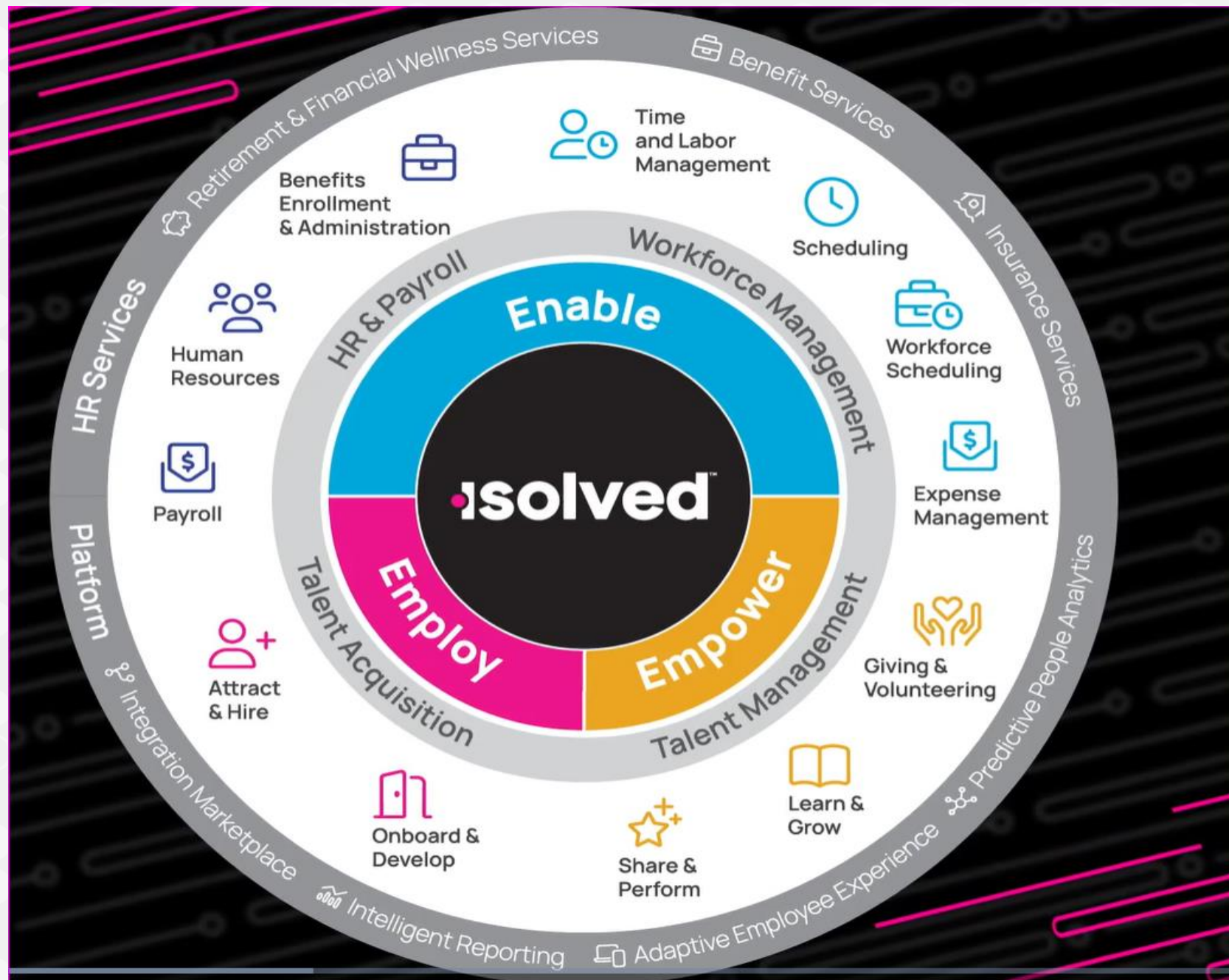
How can isolved help?

Learn more about
what we do.

isolved



3-minute video





isolved™

**What's New?
Tell me about your
strategic goals for
2023?**