

A photograph of three people in a modern, industrial-style setting. On the left, a man in a dark blue sweater and tan pants holds a book. In the center, a woman in a light pink top and dark grey pants looks at a tablet. On the right, a woman with short grey hair, wearing glasses, a black jacket, and grey pants, holds the tablet and looks at it. The background features brick walls and a concrete pillar. A large white circle is in the top left corner.

isolved™

Pulse Deck

January 2024

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isolved Announcements

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 our customers.

We are not able to make exceptions

New Minimum Wage Laws

Get a quick list of active employees Below Minimum Wage

[Click Here:](#) Employee Analytics-Employee Salary/Hourly Rate

Holiday-Banks Closed

Martin Luther King Day-January 15, 2024

Stay Connected

isolved People Heroes Community: [Join Now!](#)

isolved Newsletter: [Sign Up!](#)

Announcing Connect 2024

October 7 – 9, 2023

Gaylord Palms Resort, Orlando, Florida

[Register Now For Discounted Rates](#)



January 2024	
First Day to Approve ACA Forms for 2023	January 1
New Year's Day Observed Federal & isolved Holiday (Offices Closed)	January 1
Last Day to process payroll adjustments for 2023	January 3
Year-End Forms Available Online	January 15
Martin Luther King Day Federal Holiday	January 15
Last Day to Approve ACA Forms for delivery prior to 1/31	January 17
Deadline to Distribute ACA Forms to CA Residents	January 31

February 2024	
Last Day to Approve ACA Forms for guaranteed delivery prior to 3/2	February 5
President's Day Federal & isolved Holiday (Offices Open)	February 19

March 2024	
Deadline to distribute ACA forms to meet Federal and remaining state deadlines	March 2
Deadline for ACA electronic transmissions to the IRS	March 31

Check out live training and informational videos!

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

[isolved Inspire: Women in Leadership](#)

[Wednesday, January 17, 2024, 1:00pm-2:00pm EST](#)

As part of the isolated Inspire series, top women leaders are ready to answer your top questions. Learn from these leaders with how they navigate challenges women face in their careers. Join us for a live Q&A and come with questions you want answered!

We'll be joined by some of isolated's female leaders, Amanda Razzi, VP of Direct Account Management, Amberly Dressler, VP of Brand & Customer Marketing and Kelli Rico, VP of Product Management. Hosted and moderated by Cristina Merrifield, Content Marketing Manager.

Don't miss out on this informative webinar.

[Masterclass Series-ROI of EX](#)

[Thursday, January 25, 2024, from 1:00pm - 2:00pm EST](#)

isolved is launching a new masterclass series. Come join industry analysts who will share the latest insights with you and bonus-give you those continuing education credits you need. Starting in 2024, you'll now be able to gain industry knowledge and simultaneously earn SHRM credits.

Each month we'll be offering a class with some of the top experts in the field. From topics like ROI and the Employee Experience, to payroll and even A.I. in HR.

Our first masterclass-ROI of EX with Nucleus Research's Trevor White and Evelyn McMullen is one you don't want to miss! Hosted by isolated's VP of Brand & Customer Marketing, Amberly Dressler, this webinar offers SHRM credits (1 PDC).

New Year Reports Review

Employee Zero Earnings Report

This report will show the last time an employee was paid and could help you determine if you need to terminate someone.

Exception Reports

This will show tax exceptions that may need to be addressed

Paid Time Off Rollover Report

This will help you ensure any paid time off rollovers are accurate

The EEO-1 Component 1 Report

This is a mandatory annual data collection that requires all private sector employers with 100 or more employees, and federal contractors with 50 or more employees meeting certain criteria, to submit demographic workforce data, including data by race/ethnicity, sex and job categories.

Links to the 2023 ACA Guide & ACA Training

Links to the ACA Guide can be found on the Landing Page under the Quick Links tab as show below:

QUICK LINKS

[NEW! isolved ACA Administrator Guide -2023 Filing](#)

[NEW! isolved ACA Previewing & Approving Forms and Overrides Training](#)

[NEW! isolved Release 9.24 Updates - Effective 12/15/2023](#)

[NEW! Tax Alert - Tax Quarter-End Spotlight 4Q 2023](#)

[NEW! Upcoming Federal Reserve Observed Holiday Closures - Christmas & New Years Day](#)



Reminder: If you need additional guidance with your Year End activities, inclusive of ACA, please reach out to your Customer Support team.

ACA 2023 Reporting Important Dates



December

Begin reviewing 1094 and 1095 forms in isolved



January 1

1st day to approve forms



January 17

Approvals due for those with California residents



January 31

Deadline to Distribute 1095 forms to California residents, per CA regulations



February 5

Approvals due for all other states. Approvals after this date will be charged a late fee



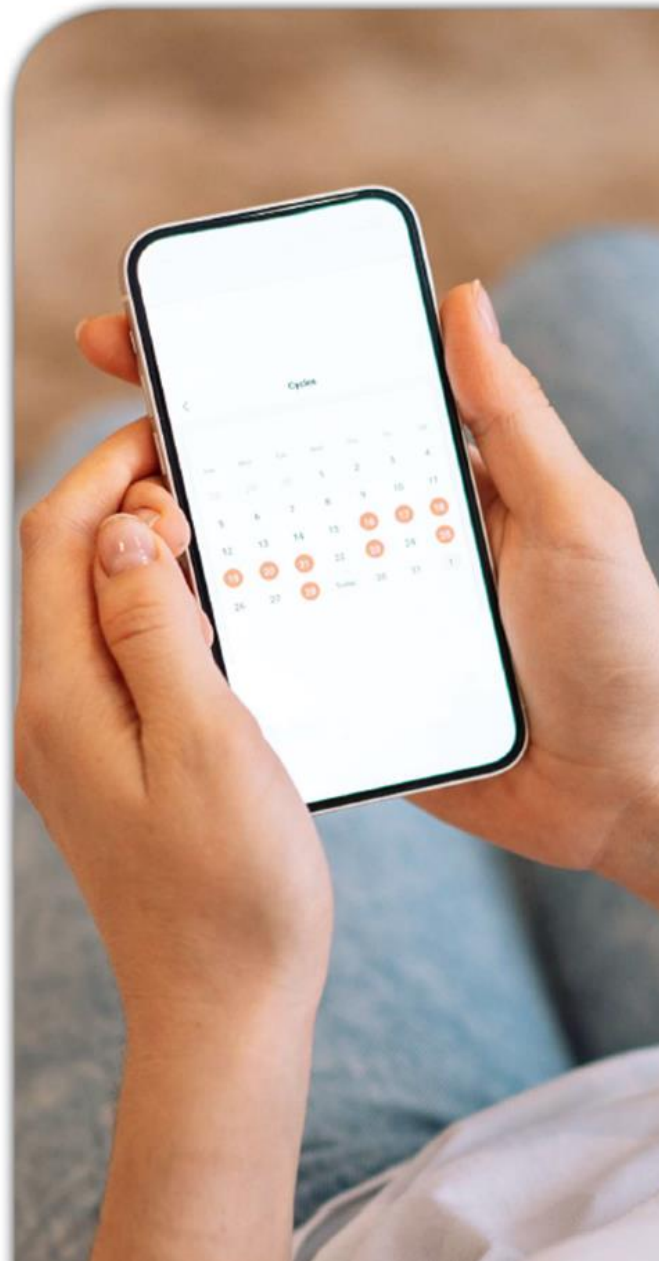
March 4

Deadline to Distribute 1095 forms to all employees, per IRS regulations



March 31

Deadline to electronically submit ACA forms to the IRS



2024 Compliance Changes

Are you Ready for any changes that may take place in your state?!



- When was the last time you did a deep dive into your policies and procedures?
- How do you maintain compliance on a Federal, State, and Local level?
- What goals do you have for hiring, growth, or retention?
- How many states are you currently doing business in?
- Are you familiar with new pay transparency laws or State mandates of paid family leave?
- Have you heard of isolved HR Services?

We're here to help set you up for a successful 2024!

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.



Employment Law Center.

Giving you reliable convenience and support, the isolved Employment Law Center provides direct access to attorneys for expert answers on employment related questions and easy escalation up to and including discounted representation.

Through a simple ticketing system, receive expert answers, escalate concerns including document review, redlining, and drafting. Plus, gain access to ongoing webinars regarding current business topics and new employment laws.



Access the isolved Employment Law Center to stay informed and protected on all aspects of compliance

Do you already have a **login**?

Click [Here](#) to learn about HR Trends for 2024!

isolved offers multiple packages to meet your employment law needs.

Solution Benefits:

- Quick responses from industry professionals
- Employment and business form library
- Comprehensive resources for all aspects of employment law

Available Resources:

- Hiring and termination support
- New employee onboarding assistance
- Wage rules and requirements
- Time and attendance policies
- Employment law updates and guidance
- Compliance resources for benefits

isolved has teamed up with Turbo Tax

Make tax time simple!

Enable employees to easily transfer last year's tax info.

Get Started



isolved is teaming up with TurboTax, America's #1 tax preparation provider, to simplify tax filing and help your employees get their biggest possible tax refunds.

W-2s are now available in isolved, so your employees can get started on their taxes! Did you know that they can speed up tax time by importing their W-2 right from isolved into TurboTax? With TurboTax, they can file on their own, get help and advice from experts, or even have a dedicated expert do their taxes for them – and they're always guaranteed their maximum refund.

Inform your employees today!



Special offer from isolved

Get your taxes done right, right away

File confidently with expert help or on your own. 100% accurate, [guaranteed](#).

[For Discounted Rates and More Information](#)

New Year, New Plans?
Tell us more about your 2024 Strategic Goals!

Benefit Enrollment/Open Enrollment

Giving and Volunteering Overview

isolved Predictive Analytics With TrenData

Attract and Hire

Applicant Tracking/Hire, Onboarding

Time and Attendance

Scheduling Links (Requires isolved Time)

Share & Perform and LMS/University

Employ Enable and Empower Top Talent Overview

isolved People Cloud

The “mobile” platform: Adaptive user experience on any device



A woman with long brown hair, wearing a bright pink blouse, is smiling and looking at her laptop in a modern office. Other people are blurred in the background, and there are small potted plants on the desk.

What's New?

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

New Year. New Goals.

Achieve your professional development goals and discover the next best steps for your organization at isolved Connect!

Attend to:

- **Maximize** your use of isolved People Cloud
- **Earn HRCI credits** with intensive learning sessions
- **Network** with isolved People Heroes
- **Meet** one-on-one with isolved experts
- **Get an** exclusive look at product roadmaps
- **Discover** useful integrations in the Marketplace Village
- **Get Inspired** with motivational keynote presentations

Register Today at isolvedconnect.com!

Oct 7-9
2024



Thank you!

Appendix Detail Info

- ACA Basics
- ACA 2023 Reporting Important Dates
- 1094 & 1095 Forms



Involved ACA Basics

What is ACA ? – Affordable Care Act (ACA)

The "Affordable Care Act" is the name for the comprehensive health care reform law (passed in 2010) & its amendments. The law addresses health insurance coverage, health care costs, & preventive care.

What are the requirements for employers in 2023?

The Affordable Care Act (ACA) is a law that requires all businesses that average 50 or more full-time employees to provide health insurance to at least 95% of their Full-time employees and their dependents or face penalties.

Who needs to file ACA in 2023?

An Employer with 50 or more full-time employees or equivalents, a Self-insured Employer, regardless of size, or a health insurance provider. An Employer or a Self-Funded Employer with 50 or more full-time employees or equivalents: 1095C Form, Self-insured Employer with less than 50 or more full-time employees or equivalents: 1095B Form.

What is Full-Time Equivalent?

Full-Time equivalent, or FTE, measures the total amount of full-time employees working at any one organization. It is a way of adding up the hours of full-time, part-time, & various other types of employees into measurable 'full-time' units.

How to Determine 50 or More Full-Time Equivalents

Reporting > Client Reports > ACA Large Employer Compliance Test

*Should be based on the average during the prior Calendar Year.

My Reports

Report Category: All

Search: [] Filter

Output Name	Report Type
ACA 1095-C Form Preview	As Of Date
ACA FT Lookback Report - New Hires	As Of Date
ACA FT Lookback Report - Ongoing Employees	Date Range
ACA Large Employer Compliance Test	Date Range
ACA Look-Back Change in Status Report	By Payroll Run
ACA Monthly Measurement Status Report	Date Range
ACA Plan Renewal - Affordability Projection Tool	As Of Date
ACA Safe Harbor Affordability W-2 Wages-Avg Hours	As Of Date
ACA Safe Harbor Affordability-FPL	Date Range
ACA Safe Harbor Affordability-Rate of Pay	Date Range
ACA Safe Harbor Affordability-W-2 Wages	As Of Date
Accrual Audit History Report	Date Range
Accrual Transaction Detail Export	Date Range
Accrued Time Report	By Payroll Run
Address and Telephone Change Audit	Date Range

Filtering

From Date: 01/01/2022

To Date: 12/31/2022

PayGroups: Benefits R Us 1

Grouping

Grouping Option: []

Options

Include Hours Detail Page:

Exclude ACA Full Time:

Format: PDF



ACA 2023 Reporting Important Dates



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How to Preview 1094 & 1095 Forms

Client Management > ACA Setup Options > ACA Forms Approval

Choose 2023 from the "Year" dropdown.

Preview Export with Audit:

- Excel format
- Condensed version of 1094 & 1095 C's only
- Highlights some potential errors in RED & YELLOW
- Tab for each month giving the Employee Count
- Do not update this spreadsheet*

Run Alerts:

- PDF formation of condensed version
- Highlights some potential errors in RED & YELLOW

Preview Forms:

- Produces a full version of the 1094 & 1095 forms
- This is the only version that includes Part III- Covered Individuals section for self-funded plan reporting

***If changes are needed to the forms, they must be entered directly in the system.**

Edits made to the Preview Export CAN NOT be uploaded to the system



Upon selection of one of the tiles, click on the hyperlink to go to **My Reports Queue**.

How to Preview 1094 & 1095 Forms

Client Management > ACA Setup Options > ACA Forms Approval

The screenshot shows the 'ACA Forms Approval' interface. On the left is a navigation menu with categories: EMPLOYEE MANAGEMENT, EMPLOYEE ADMIN TOOLS, EMPLOYEE SELF-SERVICE, CLIENT MANAGEMENT, and ACA Setup Options. The 'ACA Forms Approval' option is highlighted. The main content area is titled 'ACA Forms Approval' and includes a 'Report Information' section with a dropdown for '* Reporting Year' set to '2023' and a label 'Report Type for Selected Year: ACA 1094-C and 1095-C Employer'. Below this are five buttons: 'Preview Export with Audit' (highlighted with a pink box and a 'Start Here' callout), 'Run Alerts', 'Preview Forms', 'Approve Forms', and 'Show History'.

