iSolved

iSolved

Employee Self-Service
User's Guide

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Overview

This document will outline Employee Self-Service (ESS) log in information and maintenance. It will also review some of the screens that your employer may give you access to. You may have each of these screens in either "view only" mode, "update" mode or "blocked" mode, depending on the setup requested by your employer. Here are some of the screens available:

- **Name/Address:** A screen where you may be able to view the current information or change the current information.
- **Documents:** A screen where you may be able to view any documents stored in the system based on your file (I9, W4, etc.), or where you may be able to upload documents and save them to your file.
- **Pay History:** A screen where you are able to view your pay stubs with all details. You are also able to print the stub for your records.
- **W2/ACA/1099 Forms:** A screen where you are able to view your W2, ACA or 1099 forms. You are also to print the form but it is not printed on the IRS approved paper. You must contact your employer if you need an IRS approved form.
- **Training:** A screen where you can view all training completed, or add any training you have completed. These types of screens are available for many HR related categories.
- **Direct Deposits:** A screen where you can view your current direct deposit information, or add and change that information.
- **Tax Information:** A screen where you can view your current tax withholding and status or change the information.

Employee Self-Service Initial Email

Your employer will initiate a system-generated email to you upon the activation of Employee Self-Service. This email is from a no-reply email address. Here is what it will look like:

New Self Service User:

Welcome to Training. Below are your login credentials. Your account must be activated before it can be used. To access your payroll information through Training, click the activation link below to get started.

https://training.myisolved.com//AuthenticateUser.aspx?ticket=8b9ed3bd-4a6b-4241-9a34-746d22a0e812&eid=2031&peid=&

In order to activate your account, you will need to provide the following information on the activation form:

Authorization Code/Pin (This will be the last 4 digits of your SSN)

User name:
Client Code

The Training Team

You must click on the link provided in the email. The **User Name** is the email address provided or given to you by your employer which is usually your work email address. A personal email address may be used. Whichever email address is provided in the email will be your user name each time you log into Employee Self-Service.

Your one-time authorization code for your initial sign-on is the last four digits of your SSN.

Employee Self-Service Initial Sign-on

Once you click on the link provided, the **User Name** and **Client Code** will be pre-filled.

- You must add your **Authorization Pin** number (the last 4 digits of your SSN)

- Create and verify a **Password**.
- You then must select a challenge question/answer and verify your response.
- It is best to add your cell phone number in order to receive text messages if you are accessing your Employee Self-Service from a different IP address, or if you need to reset your password.

First Time Log-in

Once you click on **Continue** from the initial New User Account Setup, it will log you into Employee Self-Service. Depending on the roles set up for you by your employer, your screen could have one, two, or more subjects listed on the left side menu. Here is an example:
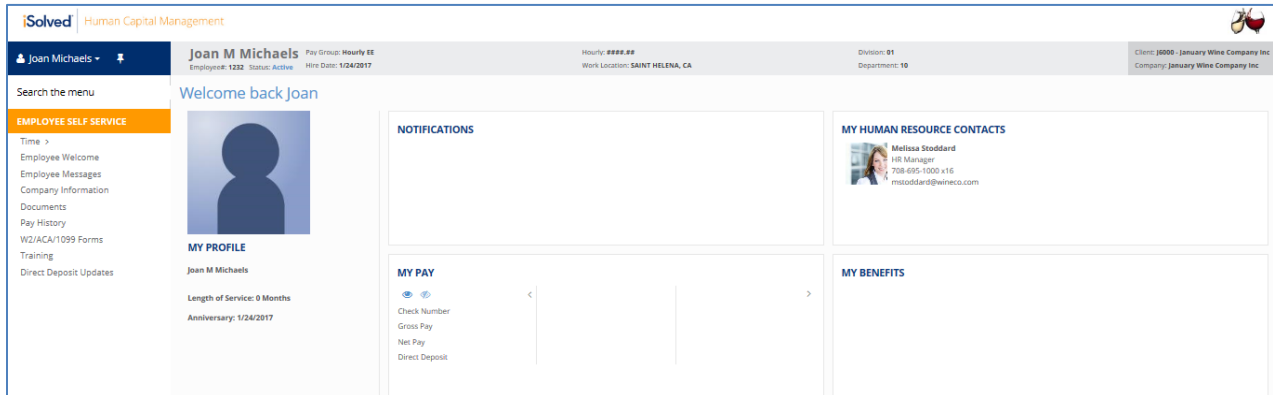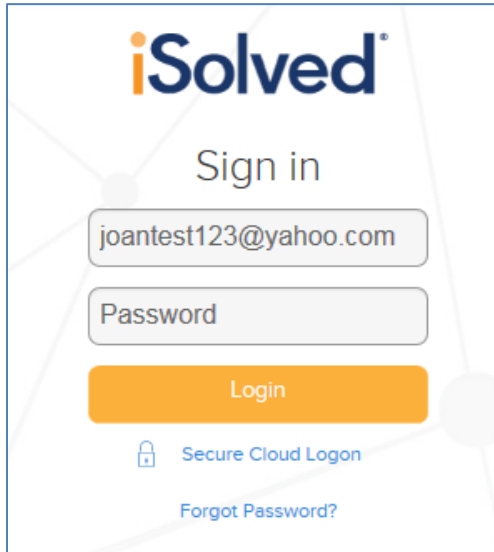
Under your name on the left land side is a drop-down menu.
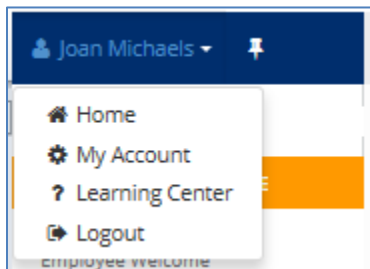
- Click on **My Account** to add or change your mobile phone number, change your password, or change your security question.
- Click on the **Learning Center** to create an account for access to help documents or recorded videos about the iSolved system.
- **Home** will take you back to your **Welcome** page.
- **Logout** is used when you have completed your activities in Employee Self-Service.

Please remember to save the URL to your favorites or bookmark the page.

If you are trying to log in and you key your password incorrect 3 or more times, it will lock you out of the system. Please ask your System Administer to unlock your account. However, if you forget your password, you can reset it yourself before the 4th try by clicking on the **Forgot Password** link.

- Type in your **User Name**.
- You can then request a new **Authorization Code** by email or text.
- Type in the **Authorization Code** received.
- Verify the answer to your **Challenge Question.**
- Create a new **Password**.
- Confirm the new P**assword**.
- Click **Next** and log on using the new password.

Pay History

Pay History is a record of each check stub available in iSolved. The history at the top of the page is by year and check date. It includes "Gross Pay," "Total Hours," "Net Pay," "Check or Voucher Number," "Check Amount," "Description" and "Payroll Run #."

Pay History							
Year: 2016 ▾							
⇕ Check Date	⇕ Gross Pay	⇕ Total Hours	⇕ Net Pay	⇕ Check\Voucher #	⇕ Check Amount	⇕ Description	⇕ PR Run #
7/29/2016	2769.23	86.67	324.42	V001790	0.00	Regular Check	54
7/29/2016	900.00	0.00	708.92	V001789	0.00	No Deductions	54
6/15/2016	2769.23	86.67	324.41	V001460	0.00	Regular Check	53
5/31/2016	2769.23	86.67	282.81	V001452	0.00	Regular Check	52
5/13/2016	2769.23	86.67	49.09	V001423	0.00	Regular Check	50

In order to see more Pay History, use the scroll bar on the right-hand side of the menu, or change the **Year** in the drop-down box.

The screen default will be a view of your most current pay stub. The top of the pay stub is a summary of dates and employee information, including withholding status.

Check Type:	Regular Check	Gross Pay:	2769.23	**Caprice C Benedict**		Employee #:	1222	Division	01
Check Date:	7/29/2016	Gross Wage:	2772.97	13 Katherine Way		Soc Sec #:	XXX-XX-3534	Department	106
Period End:	7/31/2016	Net Pay:	324.42	Norwalk, OH 44857		Fed Filing:	Single	St Filing:	
Period Begin:	7/16/2016	Check Amt:	0.00		May Network Company Inc	Fed Exemptions:	0	St Exemptions:	0
Payroll Run #:	54	Voucher #:	V001790			Fed Additional:		St Additional:	

The next section contains **Earnings or Memos**, **Deductions** and **Taxes**. These figures include the current pay hours or dollars and the YTD hours or dollars. It also includes the current and taxable wages in the Tax section for each type of tax listed.

Earnings & Memos*	Curr Hours	Curr Dollars	YTD Hours	YTD Dollars	Deductions	Curr Dollars	YTD Dollars	Taxes	Curr Dollars	Curr Wages	YTD Dollars	YTD Wages
Regular	86.67	2769.23	1016.04	33005.07	Child Support	500.00	2000.00	SOC SEC EE	171.92	2772.97	2073.89	33449.90
Sick			8.00	268.39	Child Support 2	250.00	1000.00	MED EE	40.20	2772.97	485.02	33449.90
GTL	0.00	3.74	0.00	46.12	Medical Pre-tax		2760.90	FEDERAL WH	464.94	2662.05	5665.54	32784.38
Holiday			16.00	511.22	HSA Pre-tax		300.00	OHIO WH	80.29	2662.05	994.76	32784.38
Commission			0.00	900.00	401K	110.92	665.52	NORWALK			459.67	33449.90
Bonus			0.00	1580.00	401K Loan	813.25	9759.00	NORWALK CITY SD	13.29	2662.05	163.70	32784.38
Gift Cards			0.00	200.00								
HSA ER Contribu*			0.00	100.00								
401K Match*	0.00	97.05	0.00	582.30								

There are three sections on the bottom of the pay stub. They include the **Current Period Leave Accruals**. This may be blank if your employer has blocked this service, or may not be using iSolved to process their accruals. This is what it will look like if the accruals are processed by the system.

| Current Period Leave Accruals	Hours Accrued	Hours Taken	Available Balance
Vacation	3.33	0.00	3.33
Sick	0.00	0.00	28.00

The second section at the bottom of the pay stub is your **Direct Deposit** information, if applicable. It will list any direct deposit accounts along with the amount deposited into each account.

Direct Deposit		
	Account	Deposit Amount
Checking	####2243	324.42

The bottom left side of the pay stub includes the current dollars and taxable wages and the YTD dollars and taxable wages for any **Employer Taxes** paid on your behalf.

Employer Taxes	Curr Dollars	Curr Wages	YTD Dollars	YTD Wages
SOC SEC ER	171.92	2772.97	2073.89	33449.90
MED ER	40.20	2772.97	485.02	33449.90
FUTA ER			42.00	7000.00
OHIO SUI ER			243.00	9000.00

You are able to view or print your pay stub in a .pdf version by clicking on the **View/Print Pay Stub** on the blue action line.
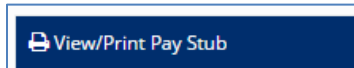
🖶 View/Print Pay Stub   This copy can be used for your records or as proof of income.

W2/ACA/1099 Forms

W2/ACA/1099 Forms can be used to obtain a .PDF copy of either your W2, ACA 1095 Form or a 1099 Form, if applicable. The Tax Year will appear, and when selected, you can view the PDF version and print if needed.

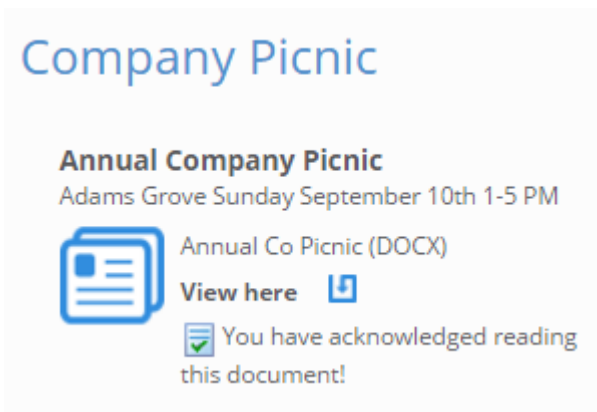| YEAR 2015	
W2/1099 Forms:	📄 View PDF
1095 Form:	📄 View PDF

- There forms will be available for any years that iSolved produced the forms.
- Employee Self-Service will not normally post the current year form until near or after the deadline (January 31st)
- You will receive a physical copy of the forms from your employer.

Employee Messages

If you employer has posted a message for you, an alert will appear on your home page under **Notifications**.

NOTIFICATIONS

Important Company Messages
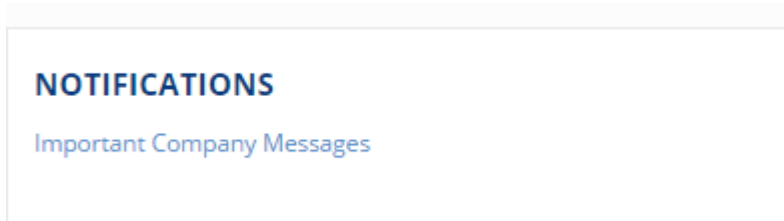
- Click on **Important Company Messages**.
- You will be directed to the **Employee Message** menu Item.
- A document may be attached or a link.

Company Picnic

Annual Company Picnic
Adams Grove Sunday September 10th 1-5 PM

Annual Co Picnic (DOCX)
View here
You have acknowledged reading this document!

Your employer can ask for an acknowledgement from you that you have read the message. View the message or document, read the materials and click on the acknowledgement button.

Company Information

The menu item called **Company Information** can contain many documents or links depending on the needs of your employer. Many employers may post such things as their company handbook, benefit information, links to benefit sites or any other documentation they may wish you to view. Again, this documentation may need your acknowledgement.

Benefit Summary

If your employer is using iSolved Benefit services, several other menu items may appear. These include:

- **Benefit Summary:** A list of Benefits and your elections for each along with the cost per-pay.
- **Benefit Plan Details:** A list of coverage levels for each plan, and the start date.
- **Life Events Wizard:** If you have a change in personal status or circumstances such as a birth of a child, divorce, marriage, you can use the wizard to make changes and upload any documents needed.
- **Life Event History:** Reviews all of your life events.
- **Open Enrollment:** This is used during the period your company has indicated as a benefit selection period either as a new hire or yearly. This screen will walk you through your benefit selections and you are able to select the applicable plans for your needs.

Documents

Your employer may load documents in the system such as your W4, state withholding form, I9, employment documents and more for your view or access. Here is an example of what you will see.
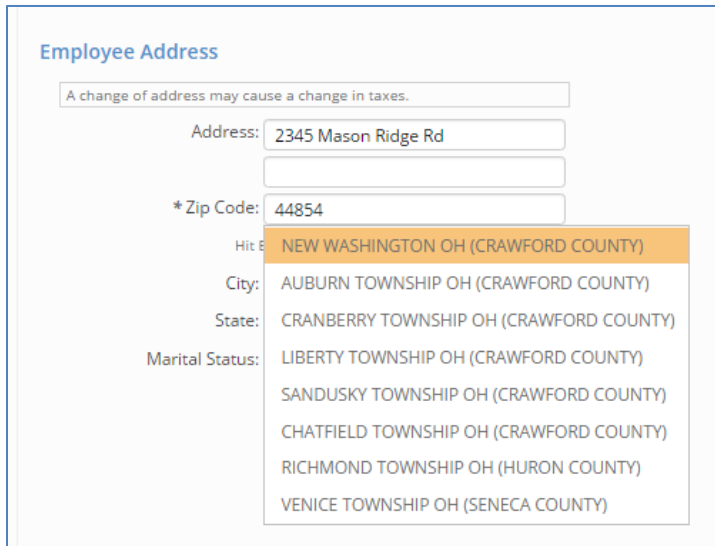
⇕ Document Type	⇕ Document Description	⇕ Document Name	View Document
Employee Tax Documents	W4	W4.docx	View Document

Click on "View Document" to open and review the document loaded.

Name/Address Only Updates

Anytime you see a menu item with the word "Updates," it means you are able to change the information on that menu item. It may need an approval from your HR department or manager prior to becoming effective, however you will receive a system generated email when it is approved.

On Name/**Address Updates** you are able to change your name or address.


- Enter the new street address and proper zip code.
- When entering a zip code, you may get a drop-down menu with multiple towns listed.
- Choose the proper city or town because they may affect your taxation.
- Click on **Save.**

Note: A change of address may cause a change in taxes.

Tax Updates

If you have access to **Tax Updates**, you are able to change your withholding information for any Federal, state or local jurisdictions in which you are paying taxes. Here are some of your options:

- **Filing Status:** Change the filing status from "Single," "Married" or "Head of Household" in some jurisdictions. Some states do not have a filing status or it may be different than federal. Please refer to the applicable withholding forms for guidance.
- **Exemptions:** Per the worksheet from your withholding form, you can select the proper number of exemptions.
- **Additional Amount:** This additional amount taken in taxes is on top of what the tax chart determines based on your filing status and exemptions. The additional can be added in either a flat dollar amount ($25 extra per pay) or an additional percentage (10% extra per pay).
- **Block Tax:** Check this box if you do not want the system to look at the tax chart either because you want no withholding or because you are replacing the chart with an additional amount or percent.

Tax Updates

🖫 Save   🔄 Cancel
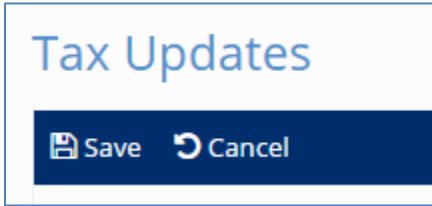
- Click **Save** after every change.
- Remember your employer may need to approve this change.
- They may also ask for a new withholding form based on the change.

See below for some example changes:

Federal Income Tax

Filing Status: Single

Exemptions: 0   ☑ Block Tax

Additional $: [   ] Dollars

OH State Income Tax (Residence)

Tax Description: **OHIO WH**

Filing Status: N/A

Exemptions: 0   ☐ Block Tax

Additional $: 5.00   Dollars

Addl Exemptions: [   ]

Exemption Amount $: [   ]

Alternate Calculation: N/A

City Income Tax (Residence)

Tax Description: **No city income tax for current residence**
(Other local/county taxes may apply)

City Income Tax (Work)

Tax Description: **No city income tax for current work location**
(Other local/county taxes may apply)

- Company Assets
- Awards
- Prior Employment
- Training
- Skills
- Education
- Certifications
- Direct Deposit
- Salary
- Personal
- Performance Reviews, which can include Pending Reviews and Review History