

A photograph of three people (two women and one man) smiling and looking at a tablet computer. The image is overlaid with a semi-transparent blue filter. The man is in the center, pointing at the screen, while the two women are on either side, also smiling.

iSolved  
Employee Self-Service  
User's Guide



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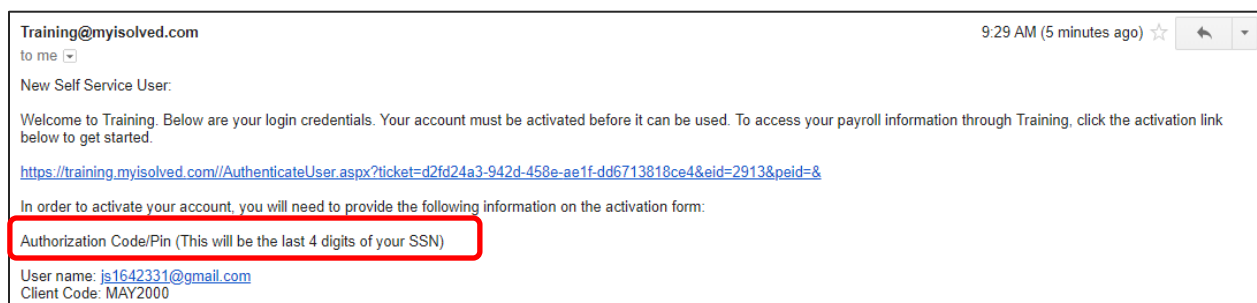
### Overview

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.
- **Employee Contacts:** A screen will you can view employee contacts and their role (emergency contact, beneficiary or dependent) or add and change that information.
- **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.
- **Benefit Updates:** A screen where you can update your Deferred Compensation deduction amount, HSA amounts or direct deposit, as well as Primary Care Physician if the benefit plan is set up update.

### 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:



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

**New User Account Setup**  
To activate your new account please enter the following information into the fields below and click the Continue button.

**Account Information**

User Name:

Client Code:

Company Name:

Employee Name:

**Identity Confirmation**

\* Authorization Code/Pin:

This information is located in the activation email sent to you.

**Setup Account Password**

\* New Password:

Choose a password for your new account. Please ensure that passwords are a minimum of 12 characters (at least one lower case alpha [a-z], one upper case alpha [A-Z], one numeric [0-9], and one special character. Spaces are allowed to support the use of easier to remember passphrases. Going forward, your password will not expire.

\* Confirm New Password:

Re-enter your password to ensure it is correct.

\* Challenge Question:

Choose a question only you would know the answer to. You will be prompted to answer this question if you need to reset your password.

\* Challenge Answer:

Specify the answer to the challenge question you created above.

\* Confirm Answer:

Re-enter the answer from above to ensure it is correct.

**Contact Information**

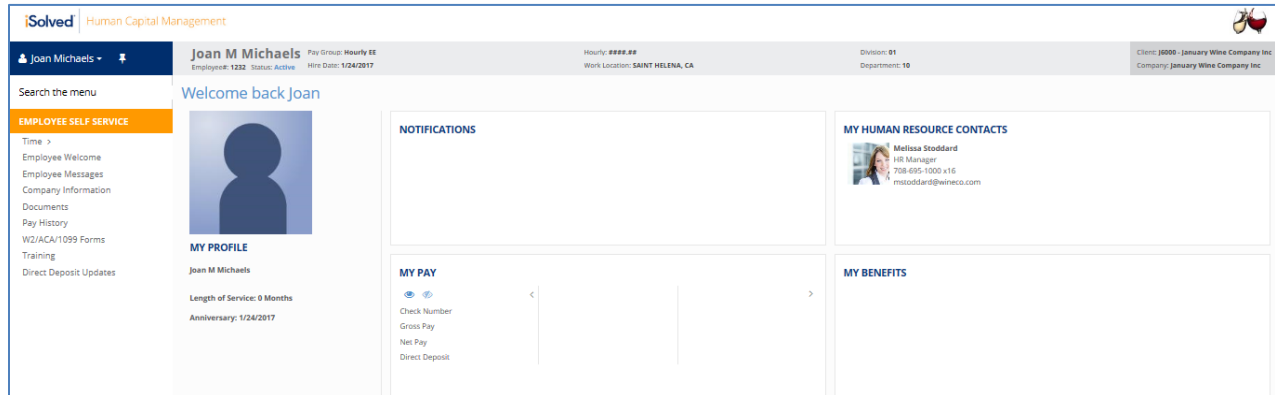
Mobile Phone:

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

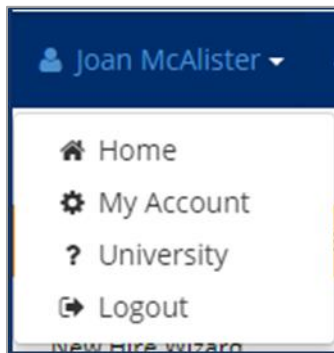
- You must add your **Authorization Pin** number (the last 4 digits of your SSN).
- Create and confirm a **Password**.
- Please ensure that passwords are a minimum of 12 characters (at least one lower case alpha [a-z], one upper case alpha [A-Z], one numeric [0-9], and one special character. Spaces are allowed to support the use of easier to remember passphrases. Your password will not expire.
- You then must select a challenge question/answer and confirm your answer.
- 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.

## 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:

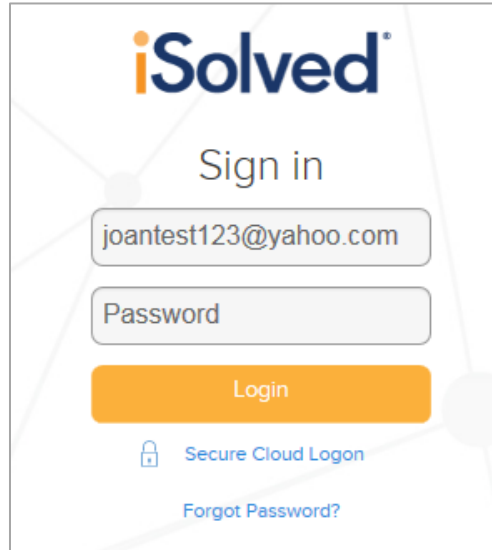


Under your name on the left land side is a drop-down menu.



- Click on **My Account** to add or change your mobile phone number, change your password, or change your security question.
- Click on the **Univeristy** link 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.

A screenshot of the iSolved sign-in page. At the top is the iSolved logo. Below it is the text "Sign in". There are two input fields: the first contains the email address "joantest123@yahoo.com" and the second is labeled "Password". Below the input fields is an orange "Login" button. Underneath the button are two links: "Secure Cloud Logon" with a lock icon and "Forgot Password?".

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 4<sup>th</sup> 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 **Password**.
- Click **Next** and log on using the new password.

## iSolved | University and Library

The iSolved | University and Library are full of knowledge-based materials and videos to enhance your ability in using Employee Self-Service. Let's take a look at some options.



You may click on the drop-down menu at the top of the screen, or click on **Articles** to see all articles published for your help. If a new article is published, it will be listed under the **New Articles** section on the front page of the Library.

If you know the name of the article, you can click on the **Search** button at the top of the page, and key in the complete name, or a portion of the name of the article. It will narrow your search.



Once you have keyed in the subject, click **Search**. Based on the search above, 14 results are listed. Here is a section of that list.

### (14) Search Results for "time"

---

**IQ550 Time Clock Specifications**  
Type: Article  
Please find the hardware specifications for the IQ550 Time Clock here: [IQ550\\_clock\\_specifications](#)

---

**IQ 1050 Time Clock Specifications**  
Type: Article  
As our flagship data collection terminal, the IQ1050, our most advanced time clock, delivers the capabilities required for even ...

---

**Velocity 800 Time Clock Specification**  
Type: Article  
The Velocity 800 from Infinisource delivers all of the benefits of biometric technology at a cost effective price, all while pro...

---

**Velocity 850 Time Clock Specification**  
Type: Article  
The Velocity 850 from Infinisource delivers all of the benefits of biometric technology at a cost effective price, all while pro...

---

**Velocity 800R Time Clock Specification**  
Type: Article  
The Velocity 800R (Rugged Edition) is a sophisticated, feature-rich biometric system, built tough for use on the job site. Ideal...

---

**Velocity 850R Time Clock Specification**  
Type: Article  
The Velocity 850R (Rugged Edition) is a sophisticated, feature-rich biometric system, with the ability to perform job costing an...

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**iSolved | Time - Employee Guide**  
Type: Article  
This guide provides an overview of the features that are available to employees within the new Time feature-set of iSolved. You ...

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**TimeForce Clock Comparison Chart**  
Type: Article  
Time Clock Feature Comparison Chart - standard feature - optional feature | Need more help? We...

---

**IQ200 Clock Specifications**  
Type: Article  
Find the hardware specifications for the IQ200 series time clock here: [IQ200\\_clock\\_specifications](#)

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**TimeForce II - Unprocessed Punches Explained**

- Click on the article name.
- A description of the article or an attachment will be available with more details.
- Open the attachment.
- You are able to save the article, or print the article for your records.



If there are any Recorded Webinars, you can also click on the drop-down under Library and click on **Webinars** on the front page.

## Recorded Webinars

- ACA 2016 Year-End Preparation
- ACA Partner Training
- Biometric and Time Clocks Webinar
- Employee Opt-in for Electronic Delivery of Year-end Tax Forms
- ESS Punch Page
- General Ledger Training
- General Ledgers
- Hours Allocation Rules Best Practice 9.20.17
- How to Schedule an HCM Demo
- How to Train Your Clients
- iSolved - Report Writer

### iSolved | University

In order to access iSolved | University, click on the icon on the front page. The main page contains “New Courses” and “Popular Articles.”

The screenshot shows the iSolved University website. At the top, there is a navigation bar with the iSolved University logo on the left and four menu items: CLASSROOM, LIBRARY (highlighted with a white box), CAMPUS LOUNGE, and CONTACT. Below the navigation bar is a large orange and blue banner for the 'iSolved connect 2018 USER CONFERENCE'. The banner features the text 'EARLY BIRD PRICING ENDS 4/30 ACT NOW & SAVE \$300 OFF' and a 'CLICK HERE TO REGISTER' link. Below the banner, the text 'What would you like to do next?' is displayed. Underneath this text are two orange buttons: 'TAKE COURSES' and 'SEARCH HELP DOCUMENTS'. Below the 'TAKE COURSES' button is the text 'VISIT UNIVERSITY CLASSROOM', and below the 'SEARCH HELP DOCUMENTS' button is the text 'VISIT UNIVERSITY LIBRARY (FORMERLY LEARNING CENTER)'. At the bottom of the page, there are two sections: 'New Courses' with a 'View All >' link, and 'Popular Articles' with a 'View All >' link.

The **Classroom** drop-down menu gives you the following options:

- Course
- Course Paths
- Certificates
- Leaderboards

Click on **Courses** from the drop-down menu to see the courses available to you. New courses are added all the time, so please check back if you don't see the course you're looking for.

## Courses

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EMP-101 — iSolved | Time - Employee Training

EMP-102 — iSolved | Time - Manager and Supervisor Training

EMP-103-A — iSolved | Time - Admin View (A)

EMP-103-B — iSolved | Time - Admin View (B)

IG-100 — iSolved | Go - HCM (Employee Self-Service)

IG-101 — iSolved | Go - Login and Navigation (Employee Self-Service)

IG-102 — iSolved | Go - Time (Employee Self-Service)

IG-103 — iSolved | Go - HCM (Manager/Supervisor)

IG-104 — iSolved | Go - Time (Manager/Supervisor)

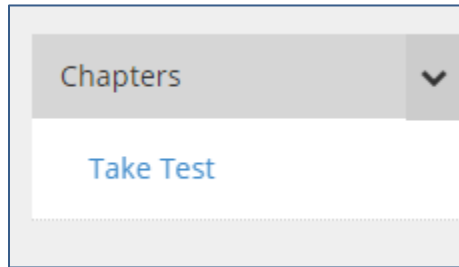
The course contains a video. Click on the **Play** button to listen and watch the video.



The length of the video in minutes and seconds is highlighted next to the **Play** button so you are able to allot the proper time to watch the video. You may pause the video at any time by selecting the appropriate icons at the bottom of the video.

**Course Paths**, listed in the drop-down menu, guide you through a path to pass an outlined series of courses, earn badges and change grade levels and ranks.

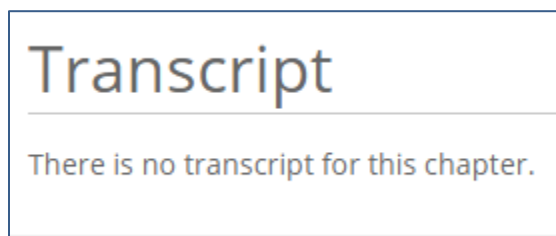




- Some videos contain a **Test** to check your knowledge. The tests are short and contain multiple choice or true/false questions.
- Some videos may have parts so you can complete one section at a time. When you return, you will know where you left off.



- Some videos may have **Related Articles** attached which will point you to an article in the Learning Center that could assist you with the knowledge retention for this course.



- The video may also include a **Transcript**, which is a written document with the audio from the video. You may use the transcript to follow along in the video, or use for future reference.

iSolved | University also includes **Course Paths** and **Certificates** for completing courses and paths. You can also earn **Ranks, Points** and **Badges**.

Courses   Course Paths   Certificates


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Current Grade Level  
Senior

Current Rank  
Ace

Current Points  
1070

Badges [View all >](#)



Also, check back into the University for additional courses and updates about iSolved. We are adding materials to the Learning Center and University all the time to keep you up-to-date on any changes or enhancements to your service.

### Menu Item

The menu is located on the left-hand side. The items you have available were assigned to you by your employer. I will review some of the more common menu items. By clicking on the menu item name, it will take you to a new screen.

## 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 #.”

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	<b>Caprice C Benedict</b>	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		Fed Exemptions: 0	St Exemptions: 0
Payroll Run #: 54	Voucher #: V001790	May Network Company Inc	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*				Deductions			Taxes					
	Curr Hours	Curr Dollars	YTD Hours	YTD Dollars		Curr Dollars	YTD Dollars		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

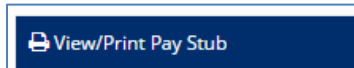
The second section at the bottom of the pay stub is your **Direct Deposit** information, if applicable. It will list any direct deposit accounts along with the amount deposited into each account.

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.



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**

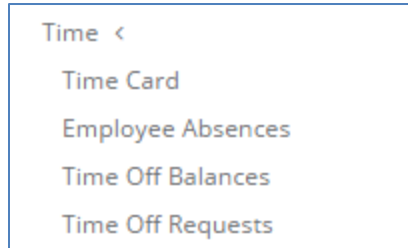
W2/1099 Forms: [View PDF](#)

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 31<sup>st</sup>)
- You will receive a physical copy of the forms from your employer.

## Time

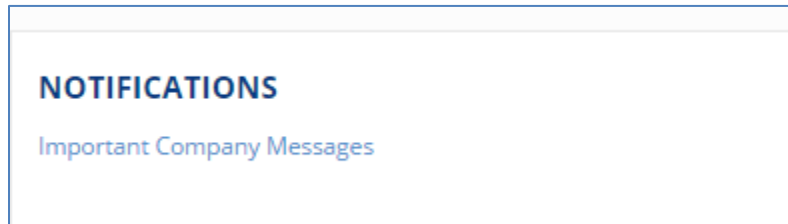
If you are using iSolved Time as your time-keeping system, you will have this menu item. Expand the menu item in order to see the **Time** items available.



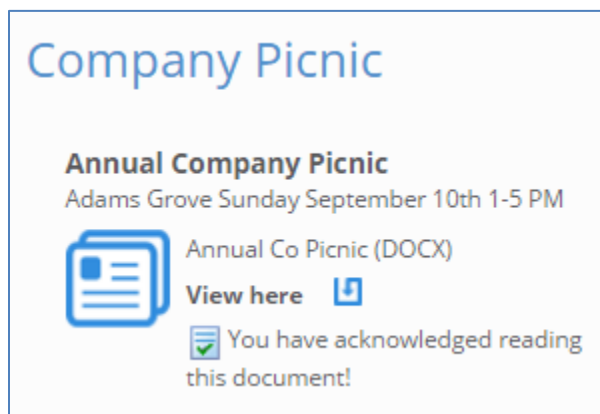
If you need further assistance on using any of these menu items, please refer to the article titled **iSolved Time Employee Guide** in the Learning Center.

## Employee Messages

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



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



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.
- **Benefit Updates:** This may be available if the plan is set up for plan updates. You are able to set up plan updates for Deferred Compensation, HSA updates, Beneficiary and Primary Care Physician updates.

## 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.

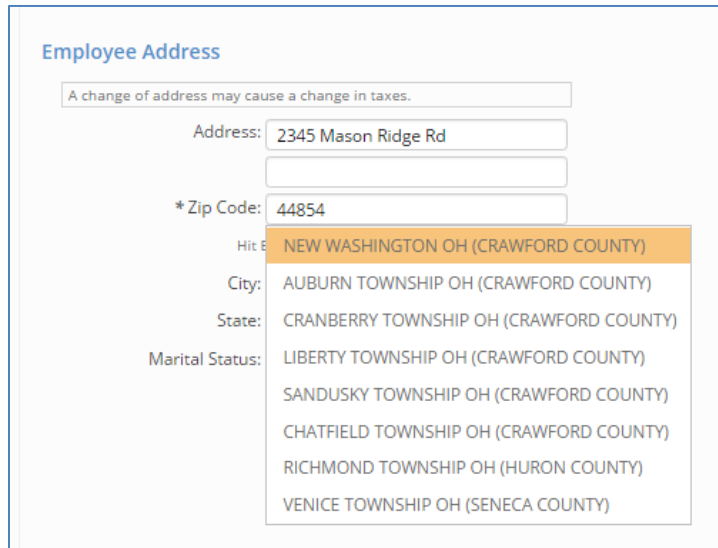
Documents			
Document Type	Document Description	Document Name	View Document
Employee Tax Documents	W4	W4.docx	<a href="#">View Document</a>

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

## 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 **Address Only Updates** you are able to change your address.



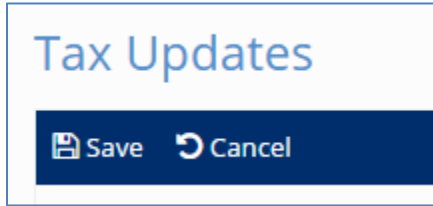
- Enter the new street address and proper zip code.
- When entering a zip code, you may get a drop-down menu with multiple towns listed.
- Choose the proper city or town because they may affect your taxation.
- Click on **Save**.

**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.
- **Additional Fields:** States or locals may have their own special rules and the applicable rules for your state will be available. Again, refer to the worksheet from your state withholding form.



- 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:

<p><b>Federal Income Tax</b></p> <p>Filing Status: <input type="text" value="Single"/></p> <p>Exemptions: <input type="text" value="0"/> <input checked="" type="checkbox"/> Block Tax</p> <p>Additional \$: <input type="text"/> Dollars</p>	<p><b>City Income Tax (Residence)</b></p> <p>Tax Description: <b>No city income tax for current residence</b> (Other local/county taxes may apply)</p>
<p><b>OH State Income Tax (Residence)</b></p> <p>Tax Description: <b>OHIO WH</b></p> <p>Filing Status: <input type="text" value="N/A"/></p> <p>Exemptions: <input type="text" value="0"/> <input type="checkbox"/> Block Tax</p> <p>Additional \$: <input type="text" value="5.00"/> Dollars</p> <p>Addl Exemptions: <input type="text"/></p> <p>Exemption Amount \$: <input type="text"/></p> <p>Alternate Calculation: <input type="text" value="N/A"/></p>	<p><b>City Income Tax (Work)</b></p> <p>Tax Description: <b>No city income tax for current work location</b> (Other local/county taxes may apply)</p>

## Jobs

When you see a menu item without the word “Update,” it is probably a view-only screen. An example is that is **Jobs**. Your employer determines your access.

View-only means that you are able to view the information your employer has in the system. You can check for accuracy at any time. If your employer makes a change, the change will be reflected in your view. However, your screen will not include an **Edit**, **Add** or **Save** button.

Here is an example of a view-only screen:

**JOB DETAILS**

Effective Date: 10/23/2011

Job Title: District Managers

Job Code: 9

Job Family:

Manager: Jerry L Lewis

Supervisor:

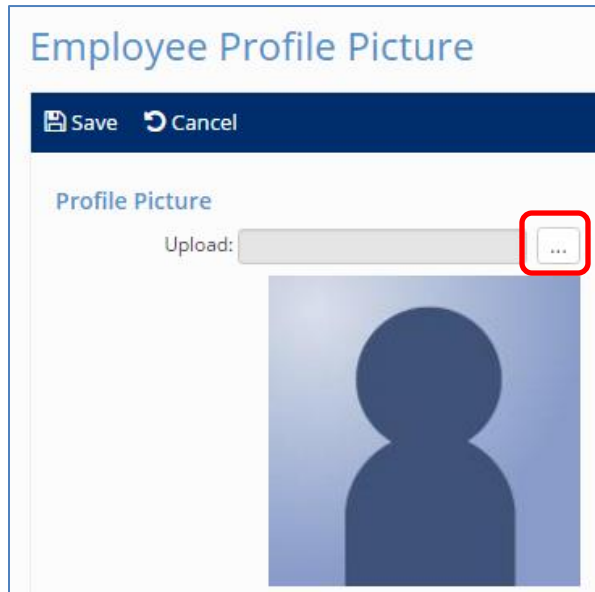
Union Employee: No

Seasonal Employee: No

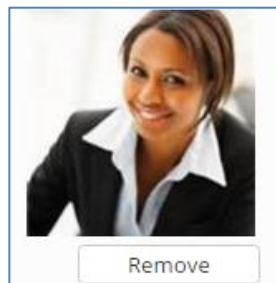
Notes:

## Employee Profile Picture

If you have a menu item called **Employee Profile Picture**, you are able to upload a picture of yourself into the system. Managers, Supervisors and administrators of the system will also be able to see your picture. Please check with your company policy on the types of pictures that are acceptable.



- In order to upload a picture, click on the ellipsis icon (box with the three dots).
- It will open a location on your computer.
- Find the location where your picture is saved.
- Click on the picture and select **Open**.
- Click on the **Save** icon.



## More Menu Items

Remember, when you log into Employee Self-Service (ESS) you may see more or less menu items than described in this document. If you do not see a menu item, it means your employer has not granted access, or is not using that screen for information. If you see a menu item without the word “Update,” you can just view the information. It is always best to view any information for accuracy. If the menu item has the word update, you are able to change the information on that screen.

Some other menu items you may have access to in either a "View" or "Update" capacity are:

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



## **Recap**

The information stored in Employee Self-Service could be entered by your employer's HR department, Payroll department, Manager or Supervisor however you will always see the most up to date information when you log into your account. Please remember to check your information and report and discrepancies to your employer.