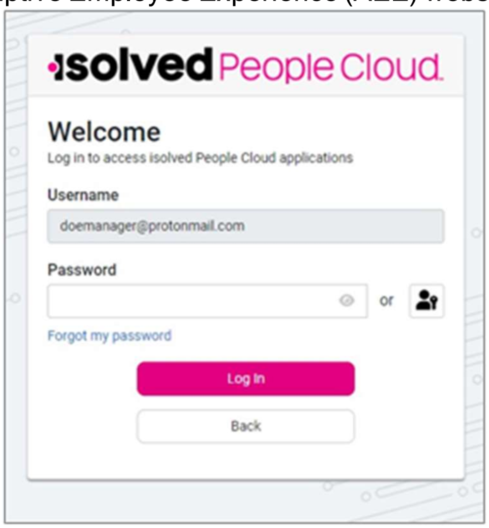
Adaptive Employee Experience

General Login and Navigation

isolved is committed to protecting your data. All users are required to use Two - Factor Authentication (2FA) with every login to isolved.

Logging in

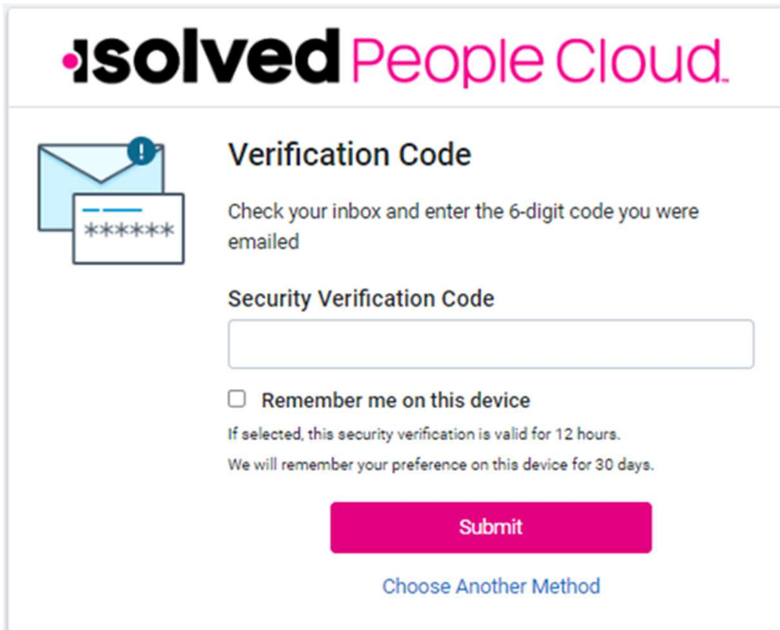
Navigate to the isolved Adaptive Employee Experience (AEE) website using a web browser of your choice.



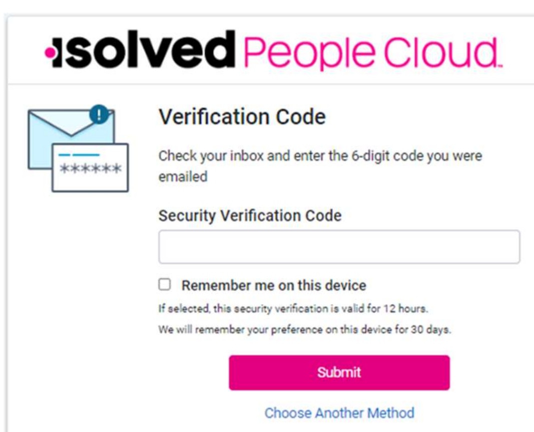
1. Key in your username and password and select **Log In**.

Note: After logging in if you receive an error message stating "You're not configured to use Adaptive at this time" you will need to contact your administrator to update your access.

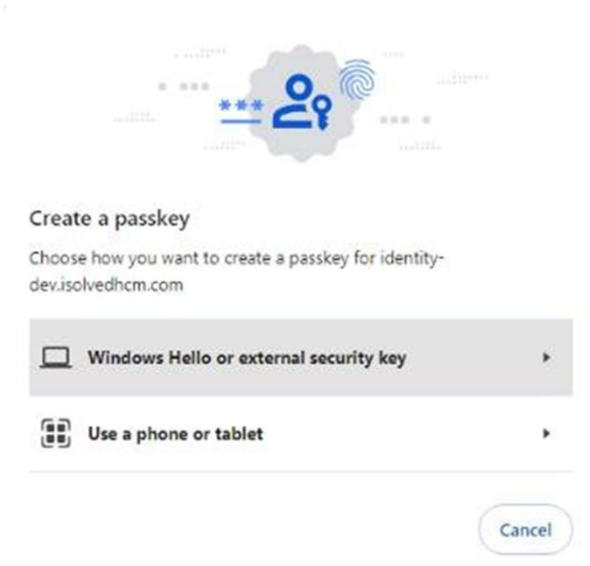
2. Select a verification option, select **Request Security Code.**



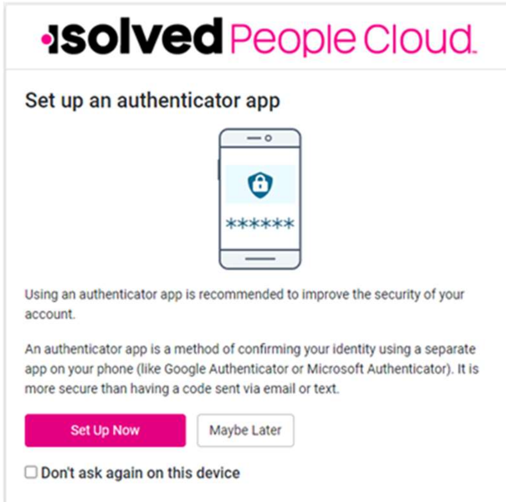
3. Enter the code you receive into the **Security Verification Code** field, or you can select **Choose Another Method** to receive the code to the other verification option. Click on the **Submit** icon. On this screen, you can select the “Remember me on this device” (note: this is selected by default on initial login). If this option is checked, then your security verification is valid for 12 hours. If the box is not checked, you’ll be asked to authenticate at any subsequent login, regardless of the amount of time that has passed. Whatever you elect to do with checking or unchecking the box will stay as the default until either a different selection is made or 30 days has passed with no change, at which time the box will revert to being checked.



4. **Set Up Now** allows you to setup your passwordless option. You can make changes to this at any time when logged into isolved & you select the drop down under your name, select **My Account**. Once this is set up, future logins will use what you have added for your options. You may be able to use FaceID, Thumbprint, Passcode, PIN, or other options present on your device:



5. **Maybe Later** allows you to set up the password-less criteria later. This does not allow you to bypass the multifactor authentication process.
6. Select **Don't ask again on this device** if you don't want this message to show up again. This does not allow you to bypass the multifactor authentication process.
7. If the **Maybe Later** option is selected, you're presented the opportunity to set up an authenticator app for subsequent logins. This, too, you can choose to Set Up Now, or you may set it up at a later juncture. Choosing **Set Up Now** leads you through the steps to set up your authenticator app.



8. Going forward, you can log in to your account by either of these methods:
    a. Entering your password (this option requires entering a code sent to your email or phone).
    b. Selecting the icon for passkey when you log in to isolved which allows you to use the passkey you enabled for that device.

Commonly Asked Questions

What if I don't remember my password? Use the Forgot Password option.

What are the key features and functionality? We now offer MFA options outside of email and text messaging. MFA requires a user to validate their identity with two or more forms of evidence or factors when they log in. We are enforcing a minimum of two. One factor is something the user knows, such as their username and password combination. Other factors are verification methods that the user has in their possession.

Can a user have passwordless access on multiple devices? Yes, each device will allow and recognize what was set up on that device and use that as a default. Some passwordless options can be used on multiple devices.

What might a user expect this to do that it does not? The user may expect to not do this every login if they are on the same device, a registered IP address, or have logged in within the same day – however, they will still need to do some method of MFA regardless. This could be different than what they are used to today depending on the system settings per client.

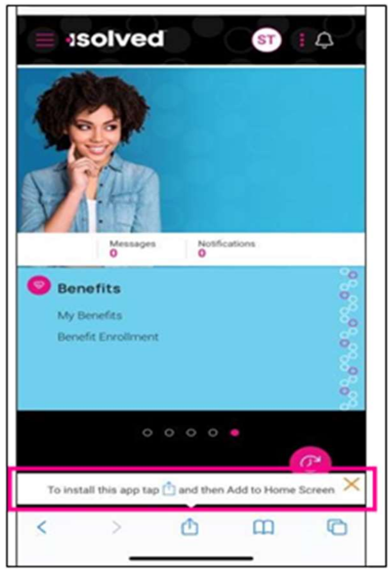
Can we opt out of the multi-factor authentication? No

Logging in on a SmartPhone

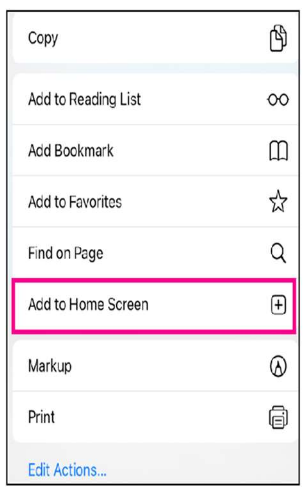
You may log in to AEE on a mobile device in two different ways:

1. Log into ESS and select the "Try our new look" link.

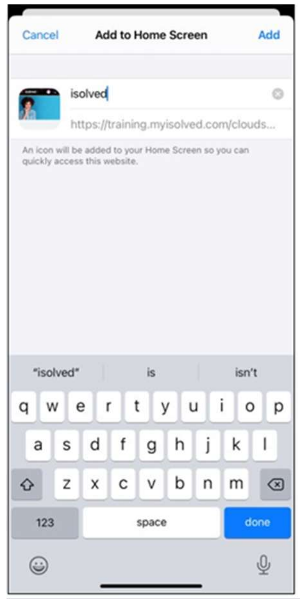
The screen below appears:



2. Key in the URL of the ESS plus "/cloudservice.com." This opens AEE where you can select to add it to your Home Page (see above image).
    a. For example, my normal ESS login is https://myisolved.com. For AEE I would use https://myisolved.com/cloudservice.
    b. Select if you'd like to add to the home screen:



After you select the "Add to Home Screen" option, the screen below becomes available:

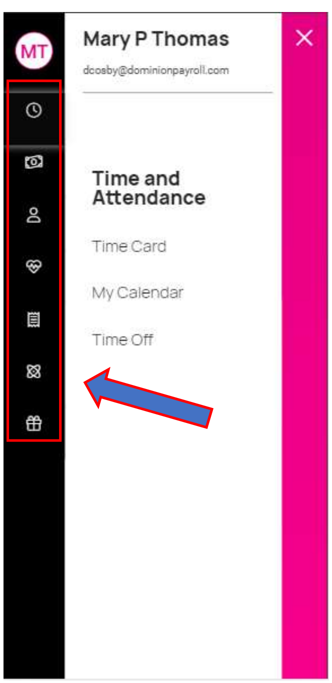


Click **Add** at the top of the phone screen.

Welcome Page Navigation

The **Welcome** page allows you to see all items you have access to in one screen.

Each card is geared towards the general task you are looking to complete:

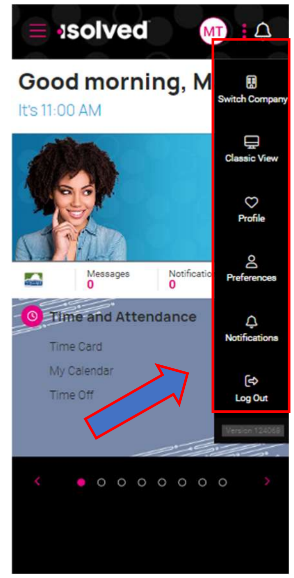


- **Time and Attendance:** Used for all standard time functions such as viewing and verifying your Time Card,requesting time off, and viewing your schedule.
- **Personal:** Used to update your personal information such as address, emergency contacts, dependents,beneficiaries, and federal reporting data.
- **Pay and Tax:** Used to view and edit direct deposit, pay history, year-end tax forms, and update your taxwithholdings.
- **Benefits:** Used to view your benefits summary and link you to benefits enrollment.
- **People Cloud:** Has links to access Learn & Grow, Share and Perform, Benefit Services, and ApplicantTracking.
- **Marketplace Integrations:** Links you to any 3rd party or legacy isolved applications your company mightuse.

To navigate, you can use the icons on the left-hand side of the screen, click on the cards in the center, or use therecently visited card in the top right-hand corner which is populated by the cards you have visited recently.

The ellipses icon allows you to navigate to more preferences and items inside of People Cloud

- **Switch Companies:** If the employee is employed in multiple legal companies for one Client.
- **Classic View:** Allows you to toggle to the isolved Employee Self-Service "Classic View." This view is only available if you are using a Desktop and is not compatible with other devices. This view requires that theSelf-Service classic view roles are set up to view and access any data or items. If this is not set up, theemployee receives a message that this view is not configured.



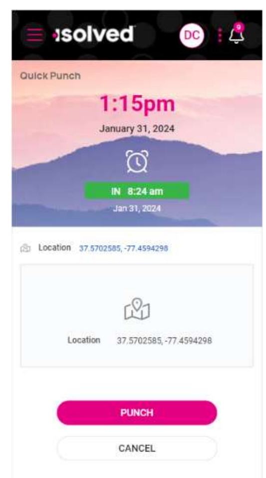
- **Profile:** This allows the employee to view and update their profile information including:
    - Preferred Name
    - Pronouns
    - Mobile number
    - Password
    - Security Challenge
- **Preferences:** Allows the employee to update their "Electronic Consent for Communication and Delivery ofTax Forms."
- **Notifications:** Shows any current company notifications.
- **Feedback:** Provide Feedback on the site.
- **Sign-out:** Log out of the site.

Self-Service Punching

Once logged in, you can immediately create a punch by using the pink symbol located at the top-left corner ofthe page, as seen below. In this menu, a punch can be created using two different methods:

Quick Punch

If you select "Quick Punch," the system immediately brings you to a page to create a punch for the current date and time, without the option to add punch notes or any other punch options. Once the page loads click the pink to create the quick punch. Once the punch is created you will see a punch confirmation on the screen as shown below:



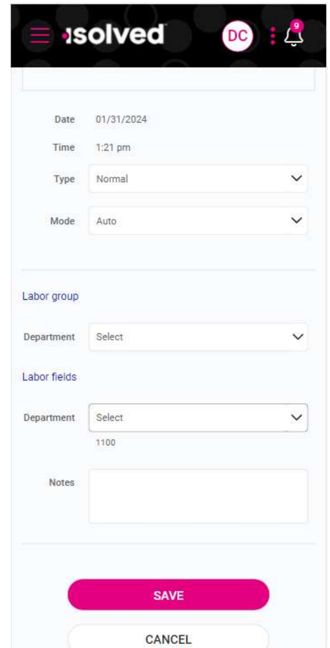
Detailed Punch

If you select "Detailed Punch," the system opens a creation screen and displays the current date and time. **Note:** The **Date** and **Time** fields are not editable during Self-Service punching. The punch options available in the detailed punch screen are as follows (options on this screen may differ based on your company permissions).

a. **Type**: Allows you to specify the Punch Type for the entry. The options are "Normal," "Meal," and "Break."
b. **Mode:** Allows you to specify if the punch is an "IN," "OUT," "AUTO," or "TRANSFER."
    a. **IN** means you are clocking in and is typically used when you are first in for the day or coming back from a break or meal.

b. **OUT** means you are clocking out and is typically used when you are leaving for the day or leaving for your break or meal.

c. **AUTO** allows the system to determine the status of the punch
TRANSFER allows you to move from one labor value to another without having to create multiplepunches. When using the transfer option isolved creates two punches; one clocking you out of your current labor and one clocking you into the labor you transferred to.



c. **Labor:** If the option to enter labor allocations is enabled, select from the allowed labor levels when creatinga punch. If no labor is selected, isolved uses your default labor allocation.

d. **Notes:** If notes are entered, anyone looking at the Time Card is able to view the details.

Time and Attendance > Time Card

The following is a breakdown of the different areas located on the **Time Card** and their functions:

Time Card Date Range

The default view of the Time Card is automatically set to the current "Pay Period." You can change the view by selecting the "Pay Period," "Week," and "Day" buttons in the top-center of the screen. You can toggle betweendates by selecting the < > buttons with the date next to them.

Data Summary

A breakdown of the "Earnings," "Labor," "Adjustments" (mileage, bonus or reimbursements) as well as a summaryof alerts are located on the left-hand side of the screen.

Daily Breakdown

The default view of the Time Card is a Gantt chart of your time. You can select the > icon next to the date to expand the details. When expanded, you can see actual punch times, total hours, errors, and labor associated tothe punches.

The color-coding of items on the Time Card are as follows:

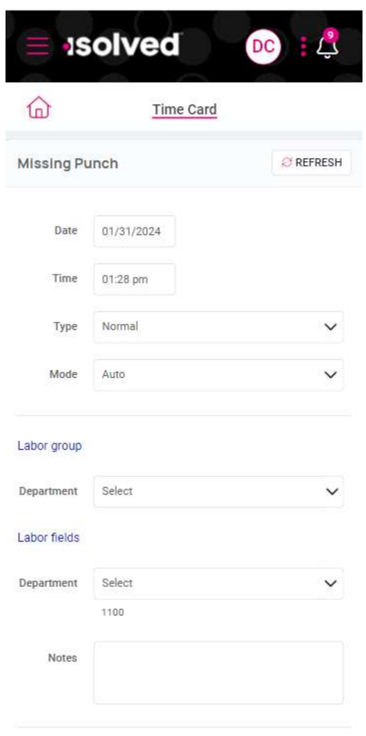
Hours Punch Absence Adjustment Break Meal Holiday

Submitting a Missing Punch

Should you miss a punch at any time, you can select the **Missing Punch** button at the bottom of the Time Card. This option allows you to submit a request that routes directly to your manager/supervisor to approve the missing punch.

Once you select the **Missing Punch** button, fill in the requested details and select **Save.**

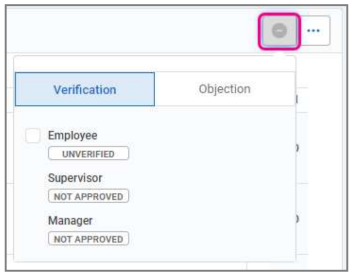
- **Punch Date:** Date of the missing punch.
- **Punch Time:** Time of the missing punch.
- **Type**: Designate if it should be a “Normal” (standard in/out), “Meal” or “Break” punch.
- **Mode**: “Auto,” “In,” “Out,” or “Transfer.”
- **Labor**: Should the time be tied to a certain labor field such as “Department,” “Job” or “Task.”
- **Notes**: Add any notes for your manager/supervisor to view during the approval process.



Time Card Verification

Time Card Verification is an optional feature that allows you to electronically sign off on the Time Card prior to thedata being populated to the Time Entry Grid for payroll processing.

The button to verify is in the top right-hand corner of the Time Card. Select the square checkbox next to the Employee section to verify. Depending on your employer's setup, you may also see an



Objection tab to object tothe data on your Time Card.

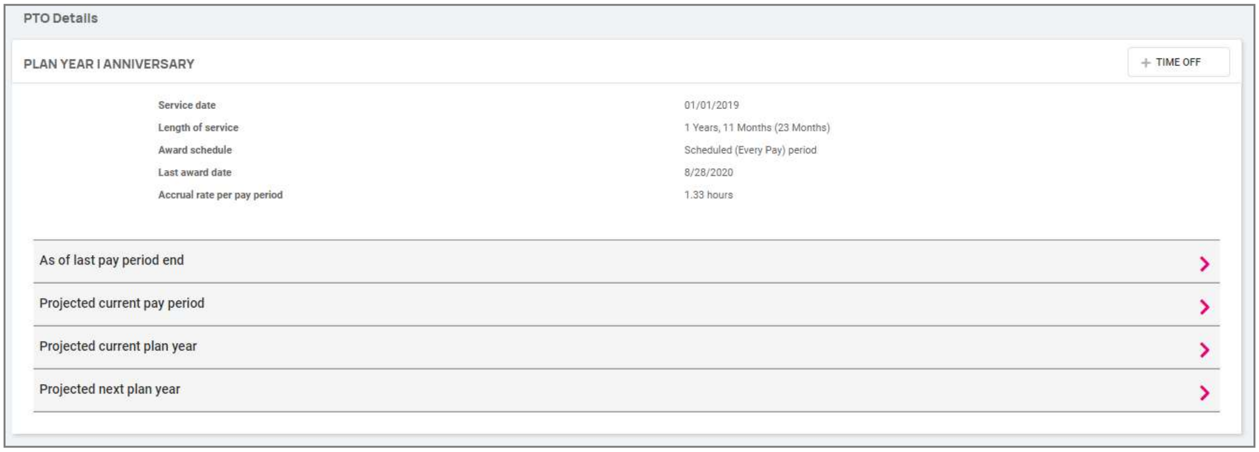
Note: The system does not allow you to verify your Time Card if there are outstanding high or critical alertspending your manager or supervisor's review.

Time and Attendance > Time Off

The **Time Off** screen can be opened by selecting the **Time Off** button at the top of the Time Card view. This allowsyou to view details of your accrual plans, upcoming, pending, and past time off requests.

The first section provides a summary of your accrual plans with balances, and if selected, a detailed outline ofwhen you last accrued time, any upcoming accrued time, etc.

When you select the **Detail** button on the right-hand side, the details around that specific accrual plan will beoutlined



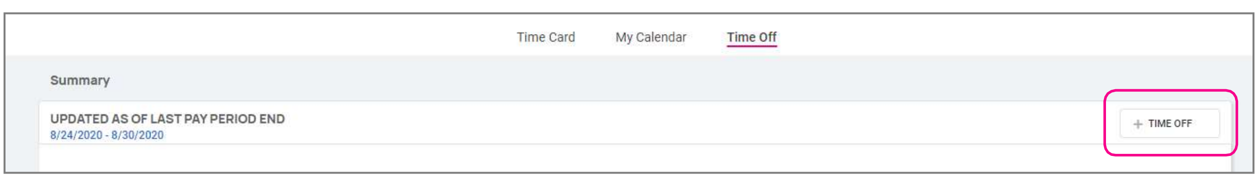
- **Service Date:** This lists your hire date or rehire date, in some case where the accrual is being calculatedfrom.
- **Length of Service:** Based on your Service Date, this calculates your length of service with the company.
- **Award Schedule:** This lets you know how frequently you are awarded the accrual time.
- **Last Award Date:** This displays the last date you were awarded time for this accrual.
- **Accrual Rate:** This displays how much time you earn on each award schedule.
- **As of Last Pay Period End:** Once expanded using the > on the right side, this displays your availablebalance as of the last pay period, hours used last pay period, and year to date.
- **Projected Current Pay Period:** Once expanded using the > on the right side, this displays projections for the current pay period. It displays how many hours were taken, how many hours will be accrued, and whathours are pending (requests that have not been approved or are in the future).

Note: Pending hours are not included in your balance.

The bottom of the **Time Off** screen outlines any upcoming time off requests, pending requests, and historical timeoff entered into the system, as well as company observed holidays.

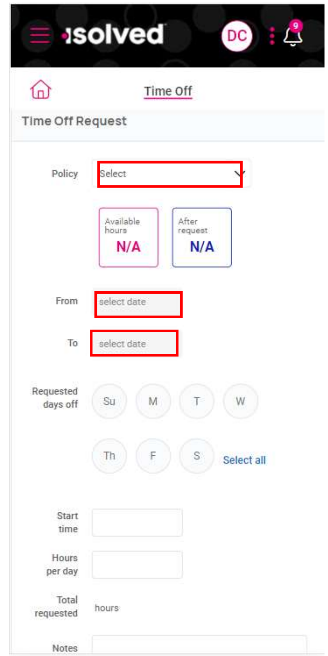
Requesting Time Off

To submit a time off request, select the **Time Off** button in the top-right corner of the screen.



- Select the **Absence Policy.**
- Select the **From** and **To** dates.
- Enter the **Start Time** for the request.
- Update the corresponding **Days of the week.**
- Enter the **Number of hours** per day you are requesting.
- Double check the **Total Requested Hours.**
- Enter any **Notes** you want the approver to see.
- Choose **Submit.**

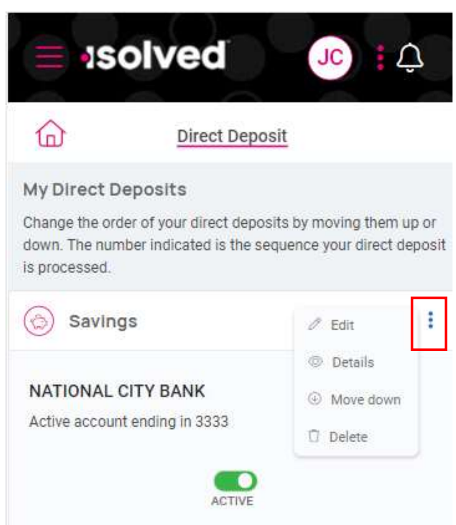
Once the request has been submitted, it goes through your company workflow process for approval.



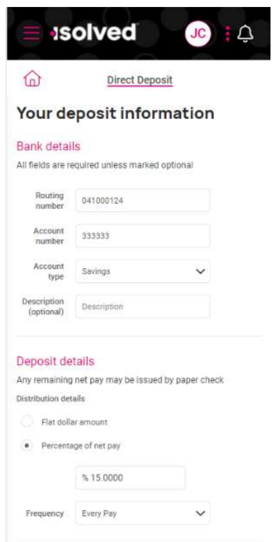
Pay and Tax > Direct Deposit

Your current Direct Deposit account(s) appear when you access this screen. The details are masked forconfidentiality purposes. There are several options when using this screen

- In order to deactivate this account, click on the symbol. You receive a confirmation stating "Deactivatethis account?" Click on **Deactivate** to agree. **Cancel** if you do not wish to deactivate this account.
- To view or edit your current accounts, click on the **Details** button.
    - Your **Bank Details** appear, including:
        - Routing Number
        - Masked Account Number
        - Account Type
        - Description (if applicable)
        - Distribution Details (net pay or partial amount)
        - Frequency of direct deposit



If you need to make an adjustment to the account select the **Edit** button, make your adjustments and choose **Save.**



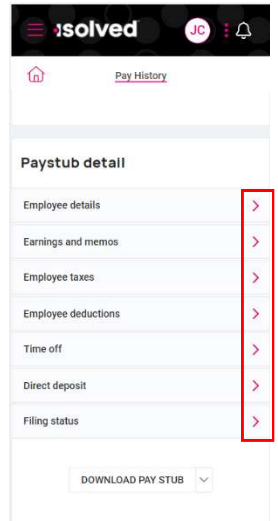
If you need to add a new direct deposit account, from the main direct deposit screen, click on the **Add New** buttonand add the following:

- **Routing Number**: If you enter an incorrect routing number, a message indicating “Routing number isinvalid” appears. Correct the number to continue.
- **Account Number**: Enter the account number from your account.
- **Account Type**: Select the applicable check type.
- **Distribution Details**: Select either:
  - **Flat dollar amount:** If selected, enter the amount.
  - **Percentage of Net Pay:** If selected, enter the percentage.
  - **Remaining Net** (you may only have one Remaining Net account)
- **Frequency**: Select how often you want the funds in this account.
- Click on **Save.**

If you have multiple bank accounts and wish to re-sort the order in which they are used for Direct Deposit, click onthe symbol in the upper right-hand corner. Instructions appear on how to reorder your accounts. It is a simple drag-and-drop process. See the instructions below.

Payroll and Tax > Pay History

The **Pay History** screen is where you can obtain and download copies of your check stubs. Your most recent **PaySummary** appears at the top of the screen and for confidentiality purposes, only the "Gross" and "Net Pay" displays, along with the hours you worked (if applicable). The "Pay Date" also appears in the center.



In order to see the details of your check, you may click on any of the sections of your **Paystub Detail**. Please makesure you are viewing in a private location. The details include:

- Earnings
- Employee Taxes
- Employee Deductions
- Direct Deposit

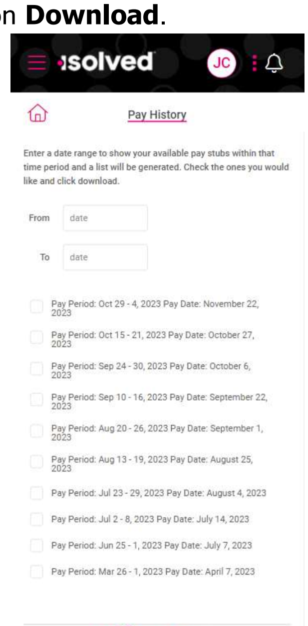
If you choose the **>** next to the details section, the area will expand with full details.

You can change the check detail by using the **<** in the top left-hand corner to move backward through pay dates.You can also toggle between years on the right-hand side of the screen.

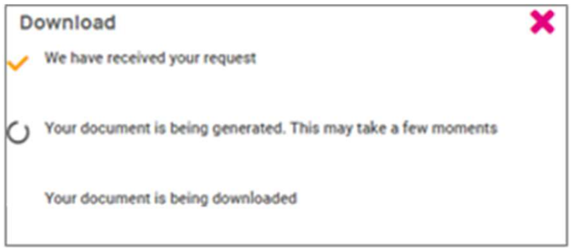
To download a copy of your pay stub, navigate to the bottom of the screen and click the arrow next to **Download.**

- If **Multiple Pay Stubs** are selected, a list of checks in the current year appears. You may also add a date range at the top of the screen. Select the checks you wish to download by clicking on the box in front ofthe check date.

Once your selection is complete, click on **Download**.



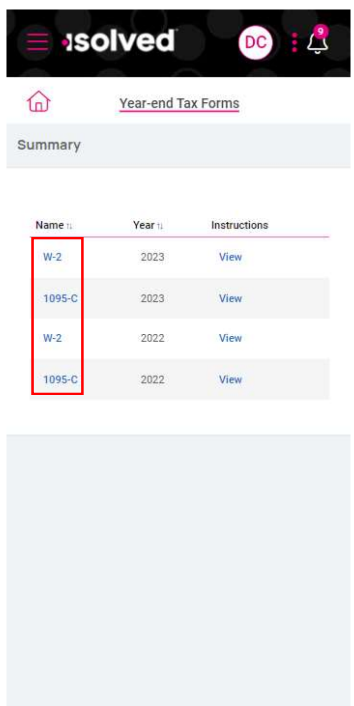
- If you select “This Check,” a copy of your current check begins downloading.
- Once the file has been downloaded, open the PDF version of your Pay Stub and save or print.

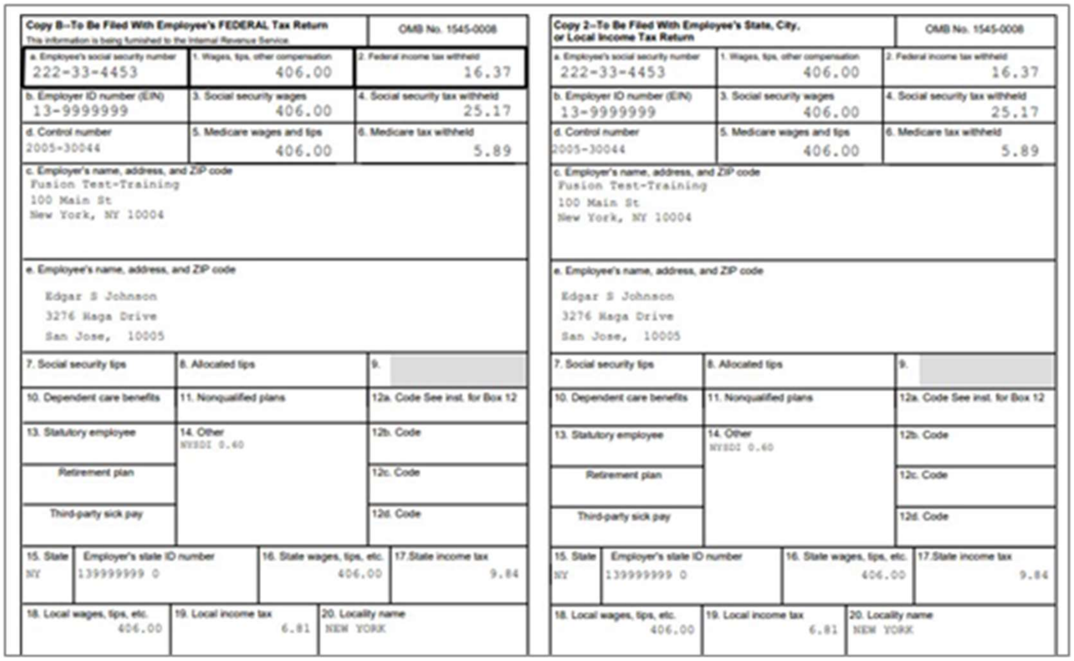


Pay and Tax > Year-end Tax Forms

The **Year-end Tax Forms** screen displays forms for the current year (if closed) and the past years. All forms aredisplayed in the summary layout.

To view your Year-end Tax Form, click on the **Name** of the form in the first column. A pop-up appears indicating that your form is generating. Once available, the form is available in PDF. Open the PDF and view and/or print yourYear-end Tax Form. Here is an example of a W-2 stored in this section.





Copy B--To Be Filed With Employee's FEDERAL Tax Return
This information is being furnished to the Internal Revenue Service.
OMB No. 1545-0008

a. Employee's social security number 222-33-4453	1. Wages, tips, other compensation 406.00	2. Federal income tax withheld 16.37
b. Employer ID number (EIN) 13-9999999	3. Social security wages 406.00	4. Social security tax withheld 25.17
d. Control number 2005-30044	5. Medicare wages and tips 406.00	6. Medicare tax withheld 5.89

c. Employer's name, address, and ZIP code
Fusion Test-Training
100 Main St
New York, NY 10004

e. Employee's name, address, and ZIP code
Edgar S Johnson
3276 Haga Drive
San Jose, 10005

7. Social security tips	8. Allocated tips	9.
10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12
13. Statutory employee	14. Other NYSDI 0.60	12b. Code
Retirement plan		12c. Code
Third-party sick pay		12d. Code

15. State	Employer's state ID number	16. State wages, tips, etc.	17.State income tax
NY	139999999 0	406.00	9.84

18. Local wages, tips, etc.	19. Local income tax	20. Locality name
406.00	6.81	NEW YORK

Copy 2--To Be Filed With Employee's State, City, or Local Income Tax Return
OMB No. 1545-0008

a. Employee's social security number 222-33-4453	1. Wages, tips, other compensation 406.00	2. Federal income tax withheld 16.37
b. Employer ID number (EIN) 13-9999999	3. Social security wages 406.00	4. Social security tax withheld 25.17
d. Control number 2005-30044	5. Medicare wages and tips 406.00	6. Medicare tax withheld 5.89

c. Employer's name, address, and ZIP code
Fusion Test-Training
100 Main St
New York, NY 10004

e. Employee's name, address, and ZIP code
Edgar S Johnson
3276 Haga Drive
San Jose, 10005

7. Social security tips	8. Allocated tips	9.
10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12
13. Statutory employee	14. Other NYSDI 0.60	12b. Code
Retirement plan		12c. Code
Third-party sick pay		12d. Code

15. State	Employer's state ID number	16. State wages, tips, etc.	17.State income tax
NY	139999999 0	406.00	9.84

18. Local wages, tips, etc.	19. Local income tax	20. Locality name
406.00	6.81	NEW YORK

Also available under **Summary** are the Instructions for the Year-end Tax form selected. Simply choose the **View** icon on the right-hand side for them to populate.