

February 2022



# Adaptive Employee Experience

Manager/Supervisor Guide

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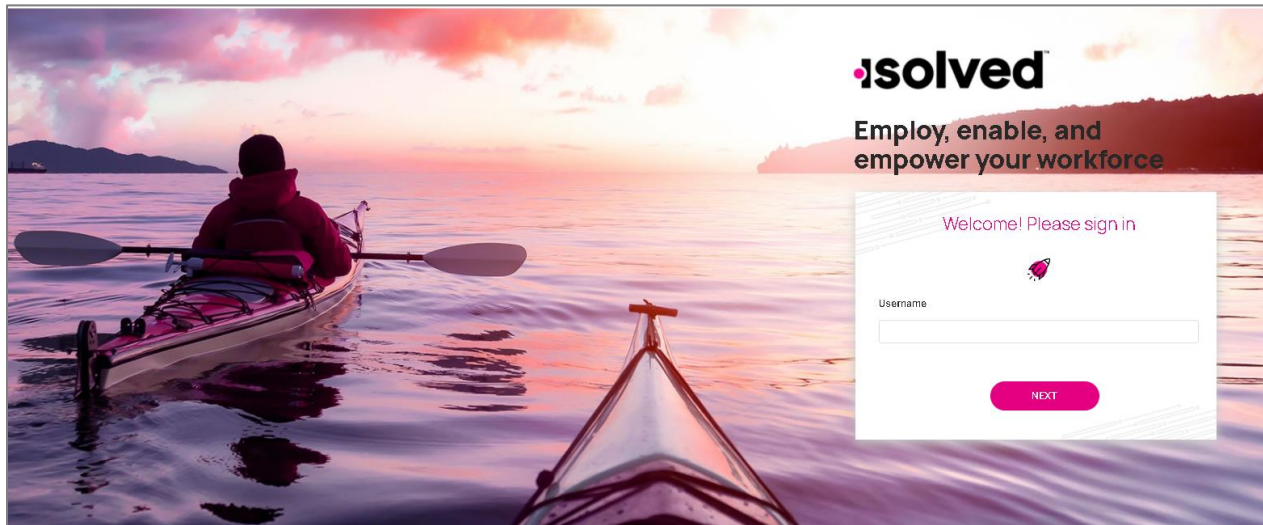


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## General Login and Navigation

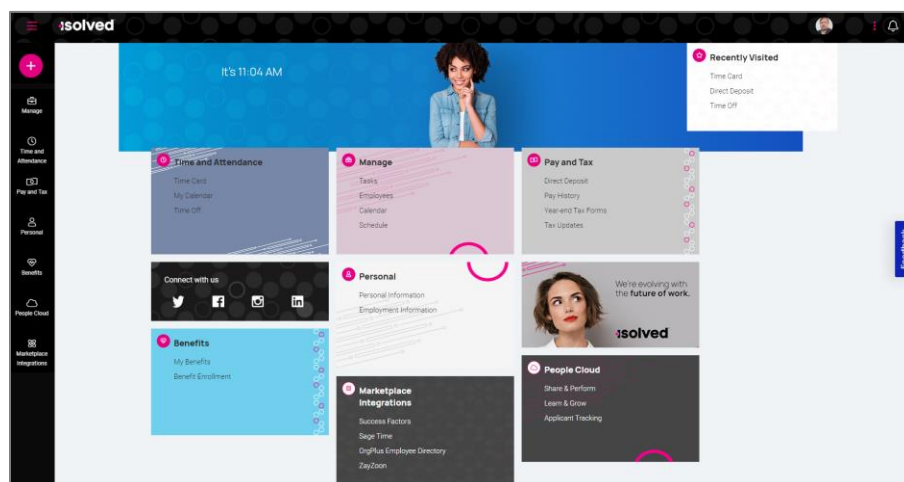
Navigate to the isolated Adaptive Employee Experience website using a web browser of your choice.



1. Key in your username (this is your self-service email address)
2. Click on the **Next** icon after entering your username  
**Note:** If you entered your username incorrectly, choose "This is not my username" which will bring you back to the main login page.
3. Key in your password  
**Note:** If you have forgotten your password, choose "Forgot my password" which allows you to reset after answering your security questions.
4. Click on the **Next** icon which will log you into Adaptive Employee Experience

## Welcome Page Navigation

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




## Help Docs

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 tax withholdings.
- **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 Applicant Tracking.
- **Marketplace Integrations:** Will link you to any 3<sup>rd</sup> party or legacy isolved applications your company might use.

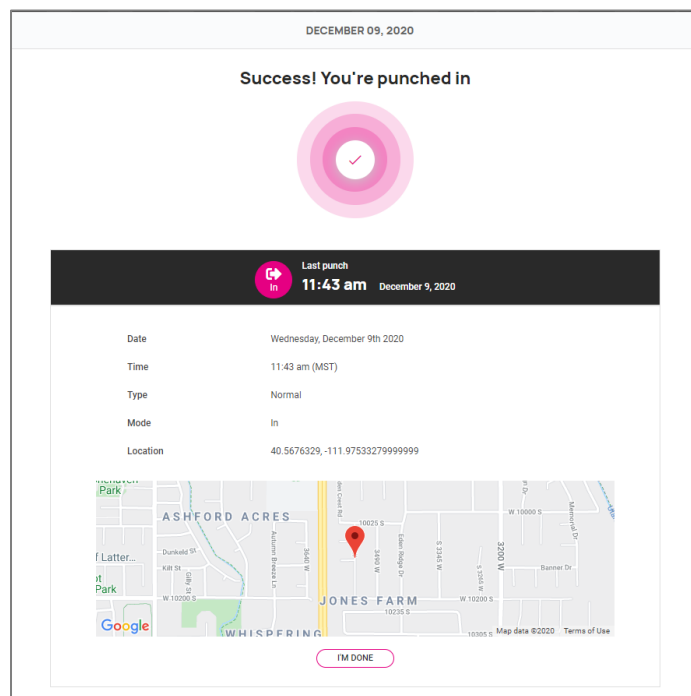
To navigate, you can use the icons on the left-hand side of the screen, click on the cards in the center, or use the recently visited card in the top right-hand corner which is populated by the cards you have visited recently.

## Self-Service Punching

Once logged in, you can immediately create a punch by using the pink  symbol located at the top left corner of the 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 will immediately bring 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 will open a creation screen and display 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:

**Note:** 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
  - d. TRANSFER allows you to move from one labor value to another without having to create multiple punches. When using the transfer option isolved will create 2 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, you will select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use your default labor allocation.
- d. **Notes:** If notes are entered, anyone looking at the Time Card will be able to view the details.

11:45 AM

PUNCH OUT

**ADD DETAIL**

Location 40.567629, -111.97582799999999

Punch date December 9, 2020      Punch time 11:45 am

Type Normal      Mode Auto

**Labor Group**

Corporate None [Change](#)

Electricians 1-TIG1 [Change](#)

**Labor Fields**

Department BUSDEV - Business Development

Division Central


Task 01

Group 01

BACK SAVE

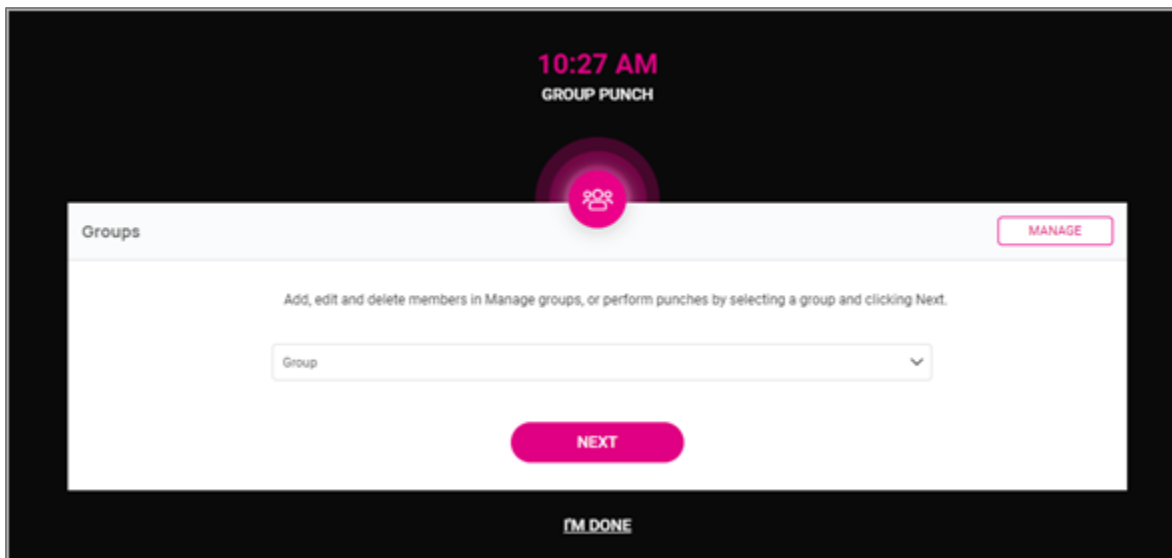
## Help Docs

### Group Punch

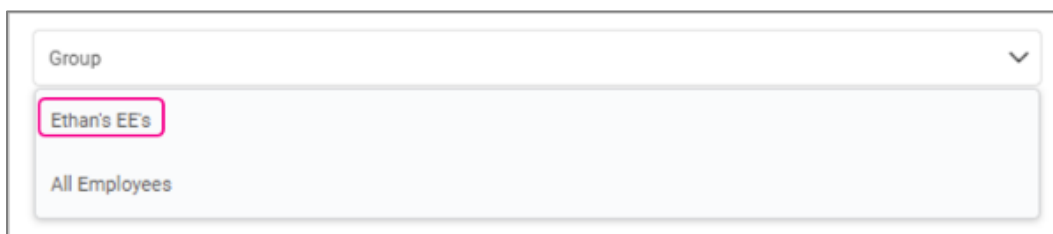
The Group Punch feature under the **Time** menu allows you to filter a specific group of employees, and then create a punch for them at a specific time. Once logged in, you can immediately create a punch by using the pink  symbol located at the top left corner of the page. To create a group punch, select the "Group Punch" option.



Next, you'll need to select the group of employees you would like to enter a punch for; to do this, select a previously created group from the Group menu:



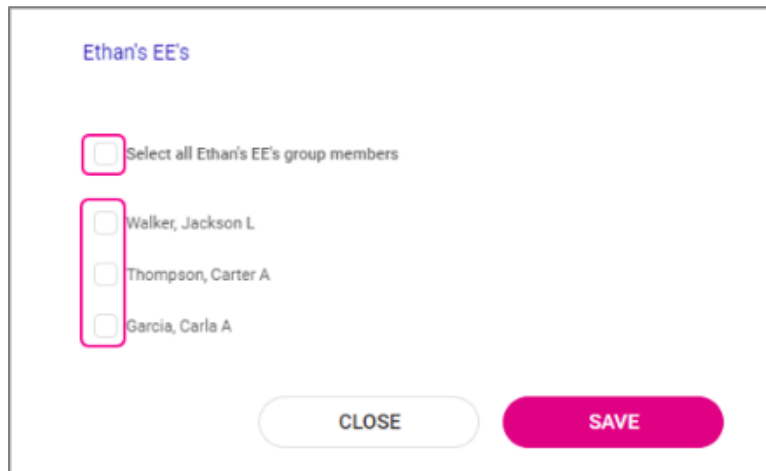
Choose the appropriate group of employees and select **Next**.





## Help Docs

The supervisor will now be able to select either all group members or individual employees for the desired punch and select **Save**.



**Ethan's EE's**

☐ Select all Ethan's EE's group members

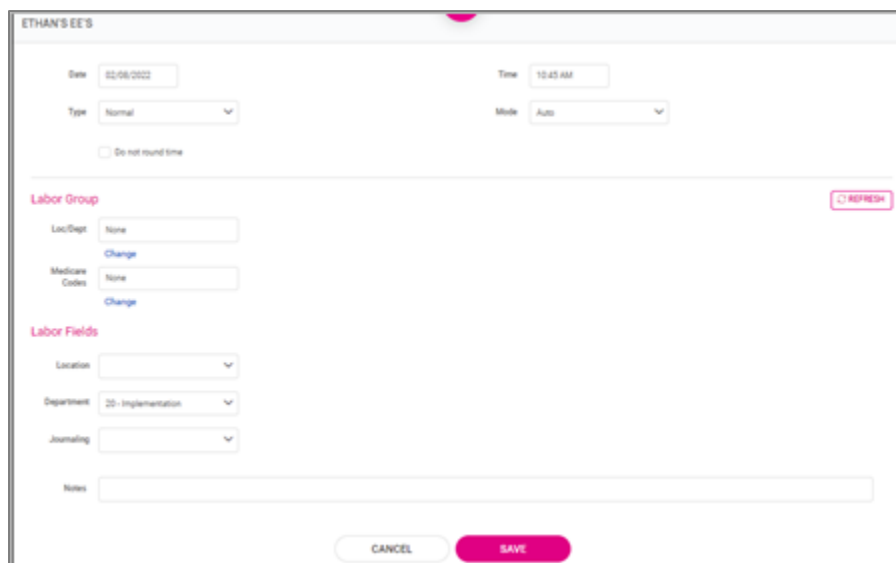
☐ Walker, Jackson L.

☐ Thompson, Carter A.

☐ Garcia, Carla A.

**CLOSE** **SAVE**

To complete the punch, select and enter in the appropriate **Date**, **Type**, **Time**, and **Labor** values, (Detail Punch) and complete by selecting **Save**.



**ETHAN'S EE'S**

Date: 02/08/2022 Time: 10:45 AM

Type: Normal Mode: Auto

☐ Do not round time

**Labor Group** **REFRESH**

Loc/Dept: None [Change](#)

Medicare Codes: None [Change](#)

**Labor Fields**

Location:

Department: 2D - Implementation

Journaling:

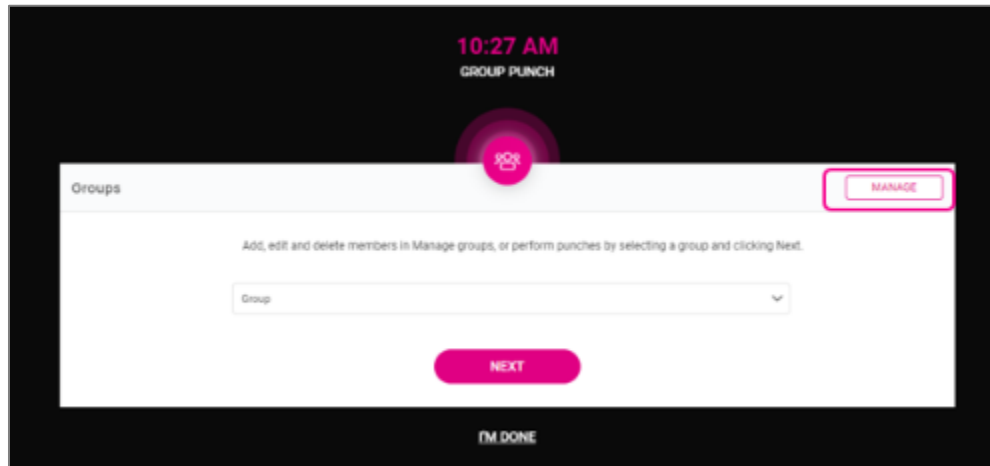
Notes:

**CANCEL** **SAVE**

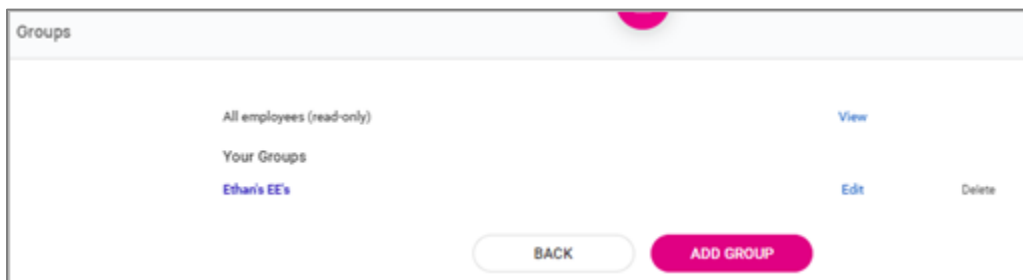
## Help Docs

### Manage Groups

The **Group Punch** menu is where the supervisor will also create and manage their employees for group punching. To create or edit a group of employees, select the **Manage** button in the top right-hand corner.



To edit an existing group, select the **Edit** option to the right of the group's name or the supervisor can delete a group if it is no longer needed. To create a group, choose the **Add Group** option.



Next, name your group and select **Add**, select the employees that will comprise the group and finish by choosing the **Save** option.

EATHAN'S 2ND SHIFT

Eathan's 2nd Shift

☐ Select all Eathan's 2nd Shift group members

☐ Walker, Jackson L

☒ Thompson, Carter A

☒ Garcia, Carla A

☐ Ryan, Nathan

☒ Andrews, David

☐ Montalbano, Nicholas

CLOSE

SAVE

## Manage > Tasks

The Manage Tasks screen provides an overview of pending requests such as: punch requests, Time Card approval, time off requests and address/contact updates. Each link on this screen will expand to view details around the request and allow approval.

9

PENDING

Approvals and requests
9

+ Create new

Approvals and requests

Pending punch requests
2

View and approve time cards
1

Time off request
5

Address/Contact updates
1

The total on the left-hand side of the screen considers all the approval and request counts on the right.

## Help Docs

### Pending Punch Request

Once you click the **Pending Punch Requests** link any pending punch requests requiring your attention will be displayed.

Name	Date	Status	Action
✓ Doe, Mason M	6/19/20, 8:38 AM	Pending	⋮
Type	Normal		
Mode	Out		
Labors			
Time Clock Id			
Employee Number	3		
Status Change By	doemanager@protonmail.com		
Date	6/19/20, 8:38 AM		
Notes	aabqabrewrbewrbr		
> Doe, Mason M	6/19/20, 1:43 PM	Pending	⋮

APPROVE 2

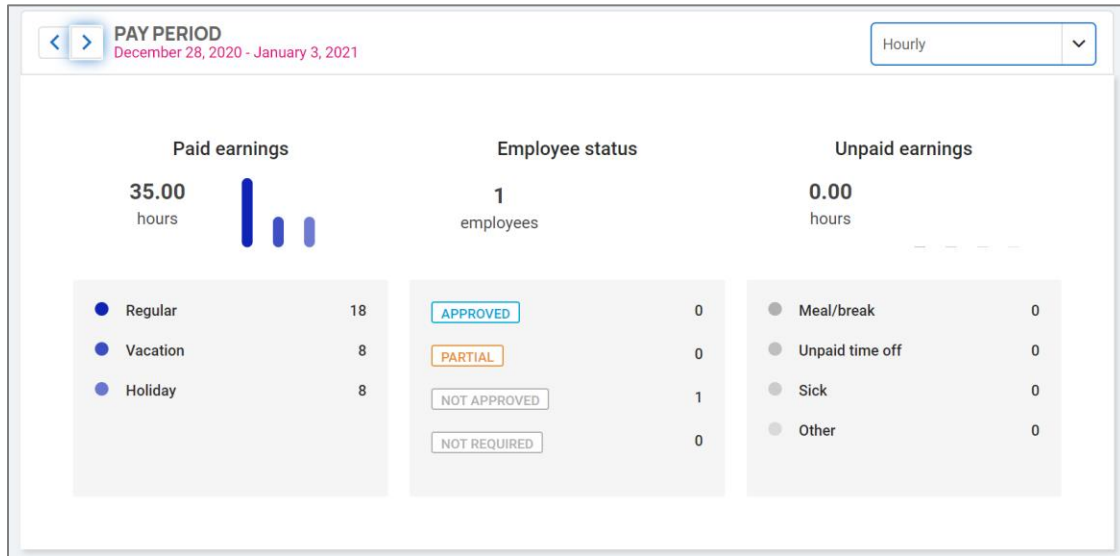
I'M DONE

To approve or reject the request you can choose the > symbol to expand the request and review the details. Select the ⋮ symbol and you the option to Approve or Reject the request. If you have more than 1 pending punch request, you can choose the Approve button at the bottom of the screen to approve all at the same time.

Once you have completed the tasks, select Manage > Tasks and choose **I'm Done** at the bottom and you will be redirected back to the main screen.

### View and Approve Time Cards

Once you click the **View and Approve Time Cards** from the **Manage** screen link, the summary will display a graphical breakdown of all paid earnings, employee verification statuses and unpaid earnings for your employees. If you have employees in different pay periods you can select the drop-down in the right corner to change the pay period you are viewing.



All details from the graphs above are listed underneath with a place for you to review and verify.

- To verify, select the checkbox on the far-right side of the screen. You can also select the approve button at the bottom if you wish to approve all Time Cards at once.

**Note:** If an employee has outstanding critical Time Card errors, such as missing punches, it will not allow you to verify their time.

Weekly						Search	
Employee 11	Total	Paid	Unpaid	Adj \$	Alerts 11	Timecard status	Your approval 11
Doe, Supervisor	0.00	0.00	0.00	0.00		NOT APPROVED	<input type="checkbox"/>
APPROVE 1							
I'M DONE							

If you'd like to review an individual employee's time, select their name from the list and the Time Card data will populate.

**Employee**

Supervisor

Waiting for your approval

**APPROVE**

**Summary**

**Earnings**

Vacation	8.00 hours
Holiday	8.00 hours
Regular	18.00 hours

**Labor**

Department	30.00 hours
1	4.00 hours

**Adjustment**

No data to display

**Alerts**

No data to display

**Carlos Johnson** CREATE NEW

Day	Total	Paid	Unpaid	Adj \$	Alerts
Monday December 28	8.00	8.00	0.00	0.00	
Tuesday December 29	10.00	10.00	0.00	0.00	
Wednesday December 30	8.00	8.00	0.00	0.00	
Thursday December 31					
Friday January 1	8.00	8.00	0.00	0.00	
Saturday January 2					
Sunday January 3					

**I'M DONE**

### Time Card Review

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

The default view of the Time Card is a spreadsheet view with expansion options. You can select the > icon next to the date to expand the details. When expanded, you can see actual punch times, total hours, and errors.

**Monday December 28** 8.00 8.00 0.00 0.00

**Hours (recorded as punch)** In 7:00 am

**4.00**

**Modified time**

Out 11:00 am

>

## Help Docs

To view labor attached to punches choose the > icon in the lower right corner and the screen will expand.

**Note:** Labor will only display if outside of the employee's home value.

Hours (recorded as punch) 4.00

In 7:00 am

Modified time

Out 11:00 am

Labor allocations

Department 1

## Editing Records

To edit an existing record, expand the date choose the > icon in the lower right-hand corner and then choose the icon and you will have an option to **Edit** or **Delete**

Edit

Delete

When you select the **Edit** option, you will be prompted with an **Edit Punch** screen letting you choose which punch you are editing

EDIT PUNCH

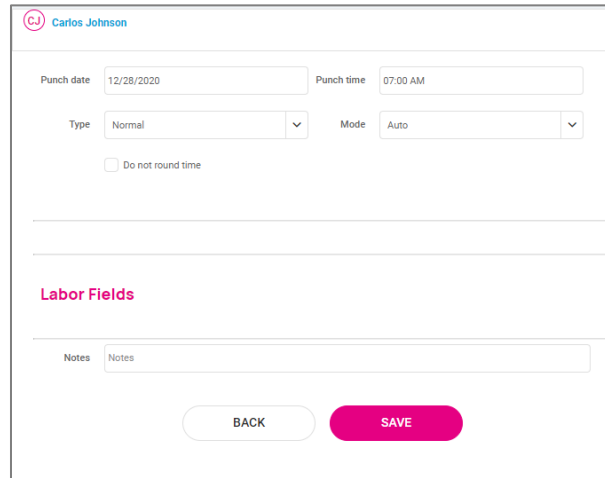
Which entry are you editing?

☐ In 7:00 am

☐ Out 11:00 am

CANCEL NEXT

- Select the punch you are wishing to edit and choose **Next**
- Make any adjustments you see fit
- Choose **Save**



Employee: Carlos Johnson

Punch date: 12/28/2020      Punch time: 07:00 AM

Type: Normal      Mode: Auto

☐ Do not round time

---

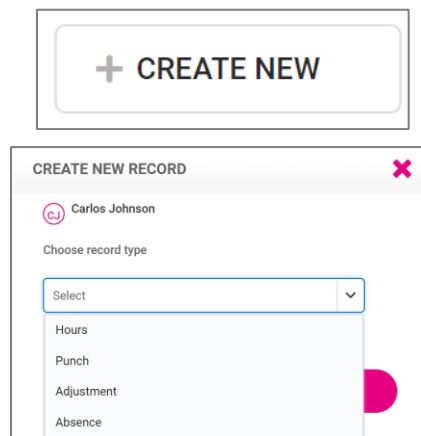
**Labor Fields**

Notes: Notes

BACK      SAVE

### Adding Records > Hours

To add a new record to the employee Time Card, choose the **Create New** button in the top right-hand corner of the Time Card. You will be prompted to choose what type of record you are adding; Punch, Hour, Adjustment or Absence.



**+ CREATE NEW**

---

**CREATE NEW RECORD** ✕

Employee: Carlos Johnson

Choose record type

Select

- Hours
- Punch
- Adjustment
- Absence

Once you have selected **Hour** in the create new record screen choose **Next** to fill out the hour details.



Start date Start time

End date End time

Duration Type Normal

Notes

**Labor Fields**

CANCEL SAVE

- Enter the **Start Date**
- Enter the **Start Time**
- Enter the **End Date**
- Enter the **End Time**
- The **Duration** will auto populate based on the start and end time
- **Type** allows you to specify if the hour type is Normal, Meal, and Break
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details.
- If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no **labor** is selected, isolved will use your default labor allocation
- Choose **Save** and the hour record will be added to the employee Time Card

#### Adding Records > Punches

Once you have selected **Punch** in the create new record screen choose **Next** to fill out the punch details.

Punch date Punch time

12/10/2020 08:38 PM

Type Normal Mode Auto

☐ Do not round time

**Labor Fields**

Notes

BACK SAVE

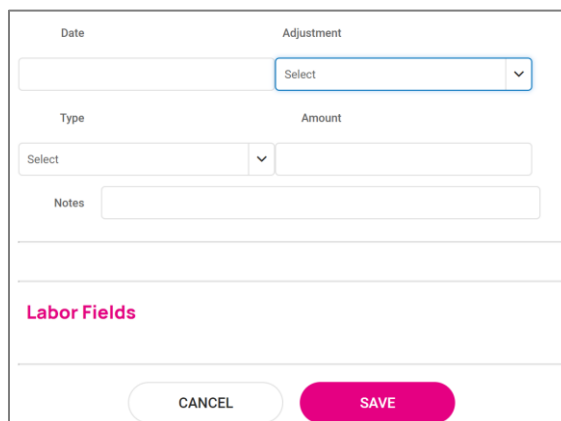
## Help Docs

- Select the **Punch Date**
- Enter the **Punch Time**
- **Type**: allows you to specify the punch type for the entry. The options are Normal, Meal, and Break.
- **Mode**: allows you to specify if the punch is an IN, OUT, AUTO, or TRANSFER
  - a. IN means you are creating a punch in and is typically used when you the punch you are creating is the 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 the punch you are creating is for when the employee is leaving for the day or leaving for break or meal
  - c. AUTO allows the system to determine
  - d. TRANSFER is used to move from one labor value to another without having to create multiple punches. When using the transfer option isolved will create 2 punches; one clocking the employee out of their current labor and one clocking them into the labor transferred to.
- **Labor**: If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use your default labor allocation.
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details
- Choose **Save** and the punch record will be added to the employee Time Card

### Adding Records > Adjustments

Once you have selected **Adjustments** in the create new record screen choose **Next** to fill out the details.

**Note**: Adjustments are typically used (if enabled by your company) to enter mileage, bonus or reimbursements.



- Enter the **Punch Date**
- Select the type of **Adjustment**
- Choose whether you are enter this adjustment as **Hours or Dollars** (there may only be 1 option based on your company setup)
- Enter the **Amount**
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details.
- **Labor**: If the option to enter labor allocations is enabled, you will select from the allowed labor levels when creating a punch. If no labor is selected, isolved will use your default labor allocation
- Choose **Save** and the adjustment record will be added to the employee Time Card

## Help Docs

### Adding Records > Absences

Once you have selected **Absence** in the create new record screen choose **Next** to fill out the details.

- Select the **Absence Policy**
- Enter the **Date** for the absence
- Enter the **Hours** amount being taken
- Choose the **Start Time** for the absence
- If the absence is tied to an accrual plan, the **Available Balance** and **Balance After Request** will populate
- If **Notes** are entered, anyone looking at the Time Card will be able to view the details
- Choose **Save** and the absence will be added to the employee Time Card

### Reviewing/Excusing Alerts

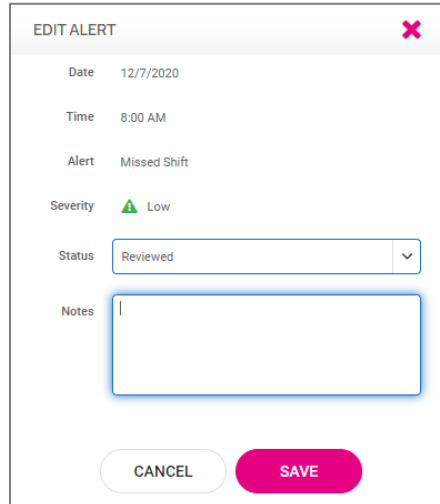
Should an employee have an alert on their Time Card (missing meal, missed shift etc.) you can set the alert to **Reviewed** or **Excused**. When viewing the employee Time Card, you will see the color code icon in the far-right side letting you know there is an alert pending your attention.

Day	Total	Paid	Unpaid	Adj \$	Alerts
> Monday December 7	0.00	0.00	0.00	0.00	

- To review or excuse choose the > icon to expand the date
- Select the symbol and select **Edit**

Day	Total	Paid	Unpaid	Adj \$	Alerts
> Monday December 7	0.00	0.00	0.00	0.00	
<div> <div>Missed Shift  8:00 AM</div> <div>  Edit </div> </div>					
<div> <div>Unscheduled Absence  8:00 AM</div> <div> </div> </div>					

- An edit alert popup will appear allowing you to set the **Status** and add any **Notes**

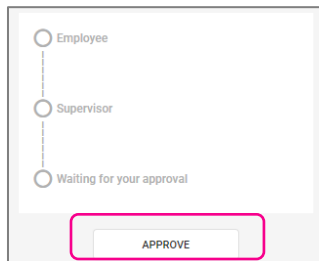


The 'EDIT ALERT' popup form contains the following fields:

- Date:** 12/7/2020
- Time:** 8:00 AM
- Alert:** Missed Shift
- Severity:** Low (indicated by a green triangle icon)
- Status:** A dropdown menu currently showing 'Reviewed'.
- Notes:** A large text area for adding comments.
- Buttons:** 'CANCEL' and 'SAVE' buttons at the bottom.

### Verification

You can use the **Approve** button on the left side of the screen to approve once you have completed the review of their Time Card. Once approved it will date and time stamp your approval



The verification screen shows a vertical timeline with three steps:

- Employee
- Supervisor
- Waiting for your approval

At the bottom of the screen, there is a button labeled **APPROVE**.

Once you have verified the time, you can choose the **I'm Done** link at the bottom of the Time Card to be brought back to the **Manage > Tasks** screen.

**Note:** The system will not allow you to verify the Time Card if there are outstanding high or critical alerts pending your review and correction. Example: Missing Punch

### Time off Requests

Once you click the **Time off Request** link from the **Manage** screen, all pending time off requests will populate for your review.

Name <sup>1</sup>	Dates <sup>1</sup>	Hours <sup>1</sup>	Policy <sup>1</sup>
Johnson, Carlos Adan	1/15/21	8.00	Vacation
Johnson, Carlos Adan	1/18/21	8.00	Vacation

CLOSE

The basic details are listed on the main screen, but you can select the employees name and the full request details will populate

☒ Johnson, Carlos Adan  
12/10/2020 03:26pm

☐ Waiting your approval

APPROVE

DECLINE

<
JA
Johnson, Carlos Adan

Time off request

January 18, 2021

AVAILABLE

104.00

Hours

AFTER REQUEST

96.00

Hours

---

Total hours requested: 8.00

Time off type: Vacation

From: Monday January 18, 2021

To: Monday January 18, 2021

Notes: Heading to the mountains with the family Show

- If the request is attached to an accrual plan, the employees current available balance and what their balance will be if the request is approved will display
- The **Show** link next to the calendar icon allows you to see if any other employees assigned to you have this day off

January 2021						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Jan 17 No activity

Jan 18 Pending 1 Carlos Johnson

- To **Approve** or **Decline** the request, use the buttons on the left side of the screen. Once approved the absence will automatically add to the employee's Time Card.

## Manage > Employees

Once you click the **Employees** link from the **Manage** screen a listing of all employees who report to you will populate. You can select the employees name from the list and their **Personal Information** will populate for review.

Manager		Search	Search	Filter
Employees 1				
Emp #	Name	Title	Company	Status
JA 30016	Johnson, Carlos Adan	103		Active

Personal Information

Employee

Address

Contact

Personal

Tax

Employer

Position

Absences

Manager

Carlos Johnson

Name

Carlos Johnson

Address

1129 Willow Road

City

Menlo Park

State

Zip code

10002

Create new

I'm done

### Employee

The **employee** section allows you to view/edit (based on company permissions) the selected employee's information such as address, contact information, personal (DOB, marital status, gender, and military status), and tax.

### Employer

The **employer** section allows you to view/edit (based on company permissions) the selected employee's employment, management and pay information.

### Position

The **position** section allows you to view/edit (based on company permissions) the selected employee's job and organization and labor information.

## Help Docs

### Absences

The **Absences** section allows you to view an overview of the employee's accrual plans, any current absences, and a list of historical absences.

#### Absences > Overview

The **overview** screen allows you to see any assigned accrual plans as well as the hours earned, current and projected balance details for the selected employee.

Policy
Vacation

**2020 Plan year | January - December**

Service date10/07/2013  
Length of service7 Years, 2 Months (86 Months)  
Award scheduleScheduled (First Pay of Year) period  
Last award date  
Accrual rate per pay period120.00 hours

As of last pay period end


Projected current pay period

Projected current plan year

Projected next plan year

[I'm done](#)

#### Absences > Current

The **current** screen allows you to see lists of any upcoming and pending absences. You can use the  symbol to edit or delete these absences from the system.

Upcoming absences				
Date	Policy	Status	Hours	Balance
> 12/30/2020	Vacation	Approved	8	112
> 01/04/2021	Vacation	Approved	8	
Pending absences				
Date	Policy	Status	Hours	Balance
> 1/15/21	Vacation	Pending	8.00	104
> 1/18/21	Vacation	Pending	8.00	96
<a href="#">I'm done</a>				

## Help Docs

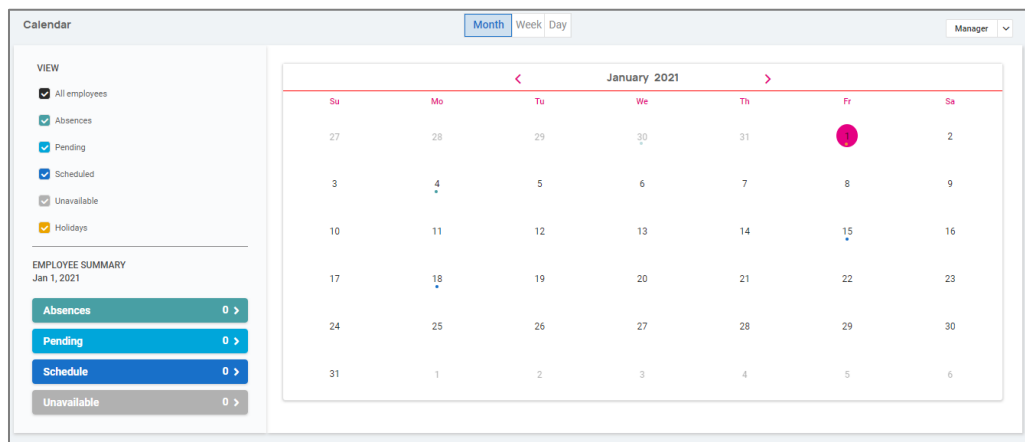
### Absences > History

The **history** screen allows you to see a list of historical absences for the selected employee.

Date !!	Policy !!	Status !!	Hours	Balance
> 12/30/2020	Vacation	Approved	8	112

### Manage > Calendar

The **Calendar** allows you to view your employees' absences, scheduled hours, unavailable time, and holidays in a calendar format.



The calendar provide the ability to view items in a Monthly, Weekly, or Daily view. Simply select the words at the top of the calendar to adjust your display.

The filters on the left-hand side of the screen allow you to determine what items you want to display on the calendar. The options are as follows:

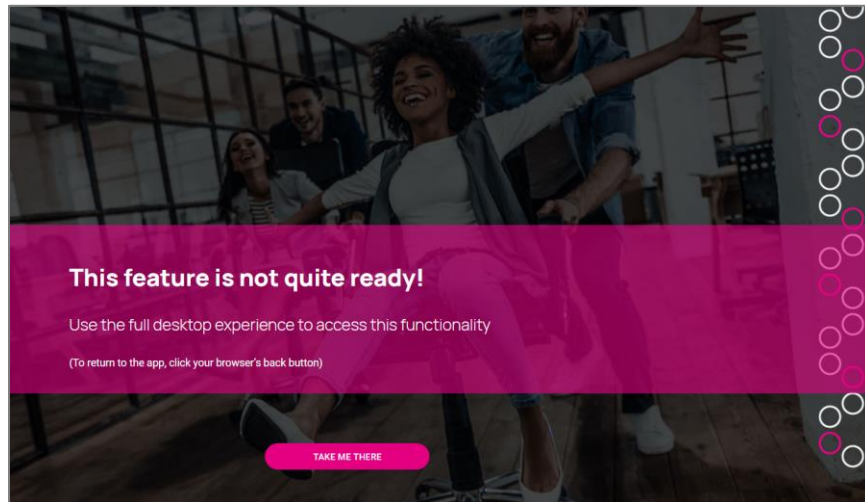
- All Employees: Displays all items listed below in the calendar view for all your employees.
- Scheduled: Displays the days and hours your employees are scheduled to work.
- Absences: Display all approved absences.
- Pending: Displays all pending (not approved or denied) absences.
- Holidays: Displays company holidays.

The Summary at the bottom totals up all the types associated to your current calendar view.



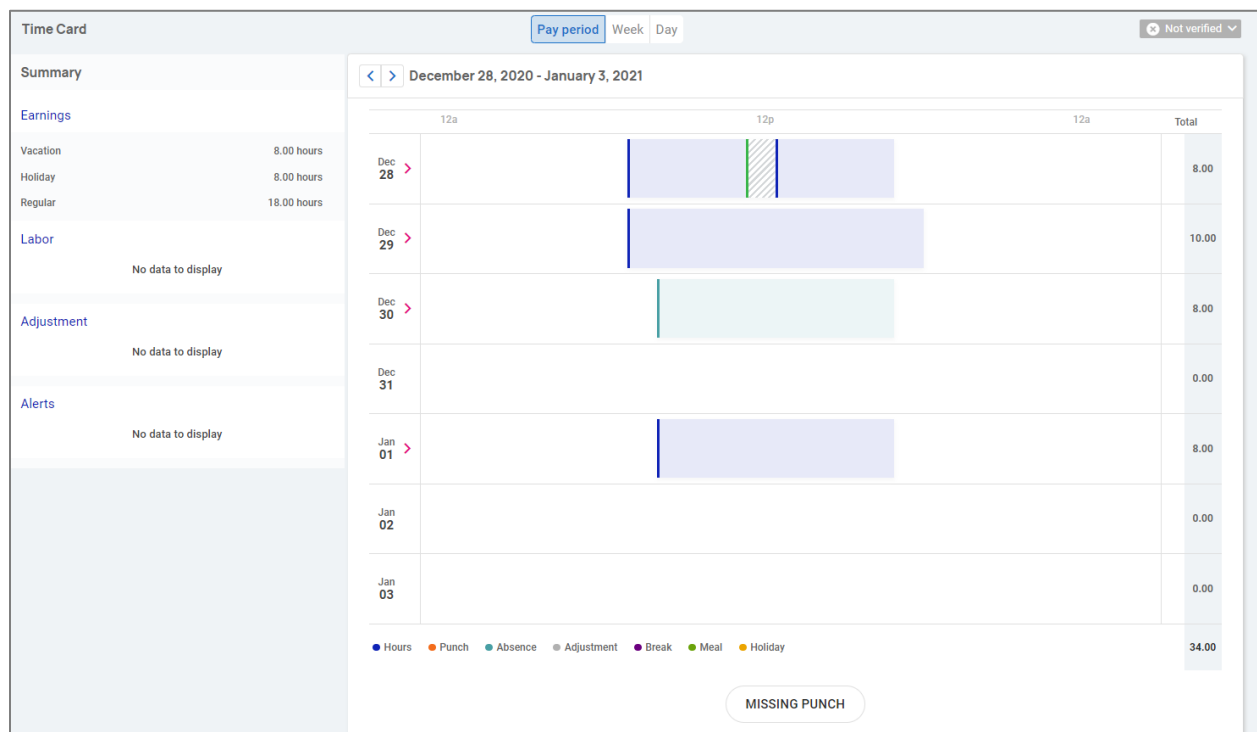
## Manage > Schedule

The **Schedule** screen will give you a link into the full desktop experience to add or edit schedules for your employee. Click in the **Take Me There** button to begin your enrollment



## Time and Attendance > Time Card

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



## Help Docs

### 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 between dates 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 summary of 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 to the 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, you will 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

MISSING PUNCH

Punch date
12/09/2020

Punch time
11:52 AM

Type
Normal

Mode
Auto

**Labor Group**

Corporate
None
Change

Electricians
1-T101
Change

**Labor Fields**

Department
BUSDEV - Business Development

Division
Central

Task
01

Group
G1

BACK

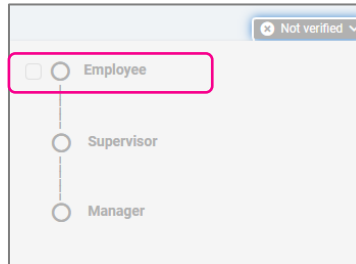
SAVE

## Help Docs

### Time Card Verification

Time Card Verification is an optional feature that allows you to electronically sign off on the Time Card prior to the data being populated to the time entry grid for payroll processing.

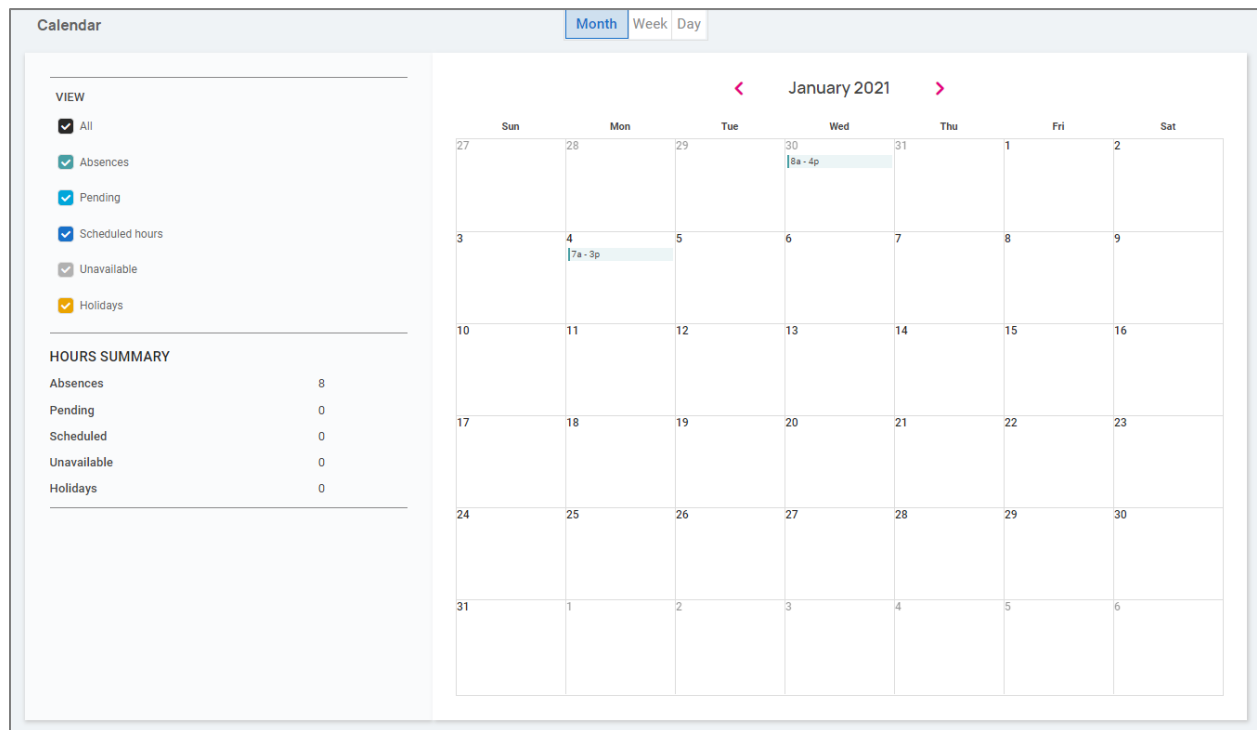
The button to verify is in the top right-hand corner of the Time Card. You will select the square checkbox next to the Employee section to verify.



**Note:** The system will not allow you to verify your Time Card if there are outstanding high or critical alerts pending your manager or supervisors review.

### Time and Attendance > My Calendar

My Calendar allows you to view your absences, scheduled hours, unavailable time, and holidays in a calendar format. Below is a screenshot and details of the My Calendar screen:



The calendar allows you to view items in a Monthly, Weekly or Daily format. Select the words at the top of the calendar to adjust your display.

## Help Docs

The filters on the left-hand side of the screen allow you to determine what items you want to display on the calendar. The options are as follows:

- All: Displays all the items listed below in the calendar view.
- Absences: Displays all approved absences.
- Pending: Displays all pending (not approved or denied) absences.
- Scheduled Hours: Displays the days and hours you are scheduled to work.
- Unavailable: Displays the days and hours you set yourself to "Unavailable."
- Holidays: Displays company holidays.

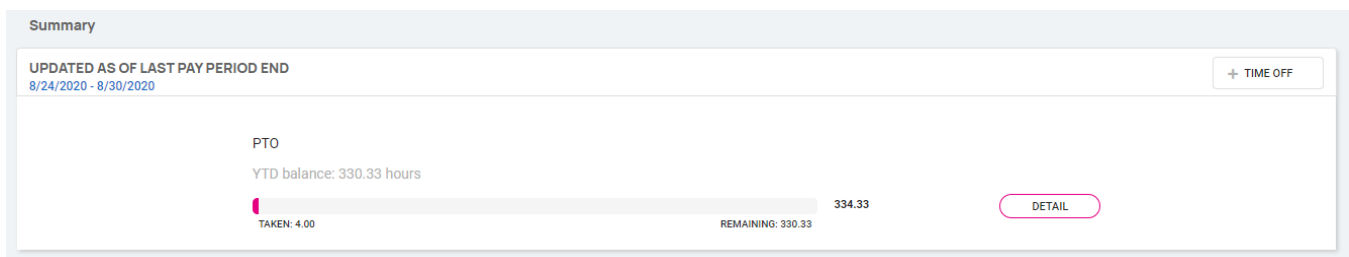
**Note:** Hours that are displayed as "Unavailable" are not guaranteed. Manager/Supervisors can still schedule you during these times.

The Hours Summary at the bottom totals up all the types and hours associated to your current calendar view.

## 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 allows you 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 on when 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 be outlined

PTO Details	
PLAN YEAR 1 ANNIVERSARY	
Service date	01/01/2019
Length of service	1 Years, 11 Months (23 Months)
Award schedule	Scheduled (Every Pay) period
Last award date	8/28/2020
Accrual rate per pay period	1.33 hours
As of last pay period end	>
Projected current pay period	>
Projected current plan year	>
Projected next plan year	>

- 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 time off entered into the system, as well as company observed holidays.

UPCOMING TIME OFF

Date	Absence policy	Hours	Status

PENDING REQUESTS

Date	Absence policy	Hours	Status
10/9/20	Sick	1	Pending
10/10/20	Sick	1	Pending

View 3 more

PAST TIME OFF

Date	Absence policy	Hours	Status
9/25/20	Vacation	8	Approved
9/18/20	Vacation	8	Approved

View 39 more

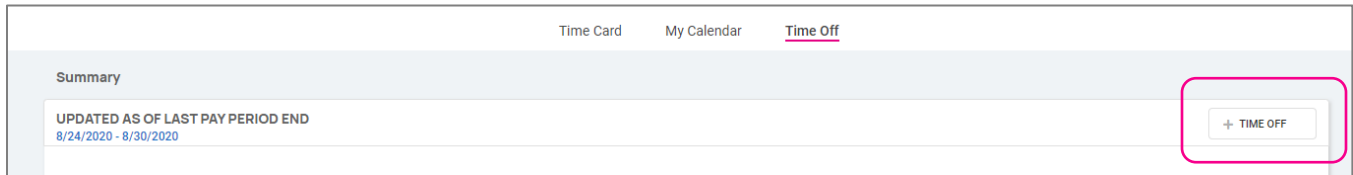
2020 holidays

Jan 1	New Years
Jan 15	MLK Jr Day
Feb 2	President's Day
May 25	Memorial Day
Jul 3 - Jul 5	Date Range
Jul 4	Independence Day
Sep 7	Labor Day
Oct 2	Columbus Day
Nov 6	Veterans Day
Nov 26	Thanksgiving Day
Dec 25	Christmas Day

## Help Docs

### Requesting Time Off

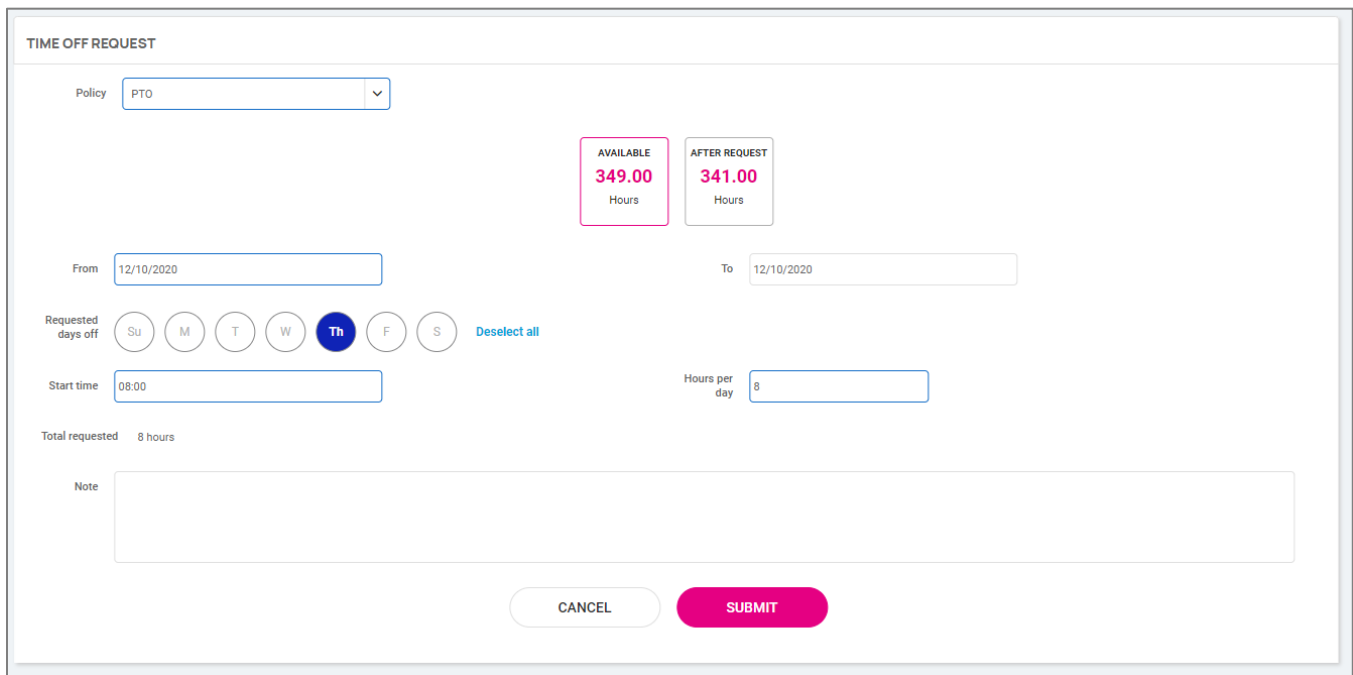
To submit a time off request, you will select the **Time Off** button in the top right corner of the screen.



The screenshot shows the top navigation bar with three tabs: 'Time Card', 'My Calendar', and 'Time Off'. The 'Time Off' tab is selected and highlighted with a red box. Below the tabs, there is a 'Summary' section with the text 'UPDATED AS OF LAST PAY PERIOD END 8/24/2020 - 8/30/2020'. In the top right corner of the 'Summary' section, there is a button labeled '+ TIME OFF' which is also highlighted with a red box.

- 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 will go through your company workflow process for approval.



The screenshot shows the 'TIME OFF REQUEST' form. At the top, there is a 'Policy' dropdown menu set to 'PTO'. Below this, there are two boxes showing 'AVAILABLE 349.00 Hours' and 'AFTER REQUEST 341.00 Hours'. The 'From' date is '12/10/2020' and the 'To' date is '12/10/2020'. The 'Requested days off' section shows a row of buttons for the days of the week: Su, M, T, W, Th (selected), F, S. There is a 'Deselect all' link next to the buttons. The 'Start time' is '08:00' and the 'Hours per day' is '8'. The 'Total requested' is '8 hours'. There is a 'Note' text area at the bottom. At the very bottom, there are two buttons: 'CANCEL' and 'SUBMIT'.

## Pay and Tax > Direct Deposit


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


- To deactivate this account, click on  symbol. You will receive a confirmation stating, "Deactivate this 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 will appear including
    - Routing Number
    - Masked Account Number
    - Account Type
    - Description (if applicable)
    - Distribution Details (net pay or partial amount)
    - Frequency of direct deposit

Savings
4 ...

**WACHOVIA BANK N.A.**


Active account ending in 9456




Active

DETAILS

**Your deposit information**



**Bank details**

Routing number	021200025	Account number	*****9456
Account type	Savings	Description	000000000000123)(*%\$##

**Deposit details**

Distribution details	Flat dollar amount \$72.73
Frequency	Every Pay

CLOSE

EDIT

DELETE

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

### Your deposit information

#### Bank details

Routing number

021200025

Account type

Select

▼

Account number

789456

Description (optional)

000000000000123)(\*%\$##

#### Deposit details

Any remaining net pay may be issued by paper check

Distribution details

☒ Flat dollar amount
 ☐ Percentage of net pay
 ☐ Remaining net

\$ 72.73

Frequency

Select

▼

CANCEL

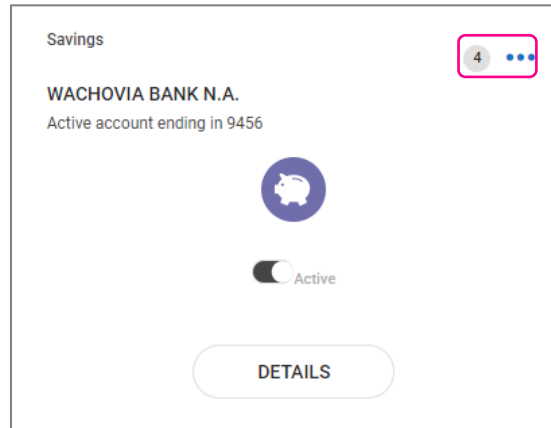
SAVE

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

- **Routing Number:** If you enter an incorrect routing number, a message indicating "Routing number is invalid" 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 amount
  - Percentage of Net Pay – if selected, enter percent
  - 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 on **⋮** symbol in the upper right-hand corner. Instruction will appear on how to reorder your accounts. It is a simple drag-and-drop. See the instructions below.



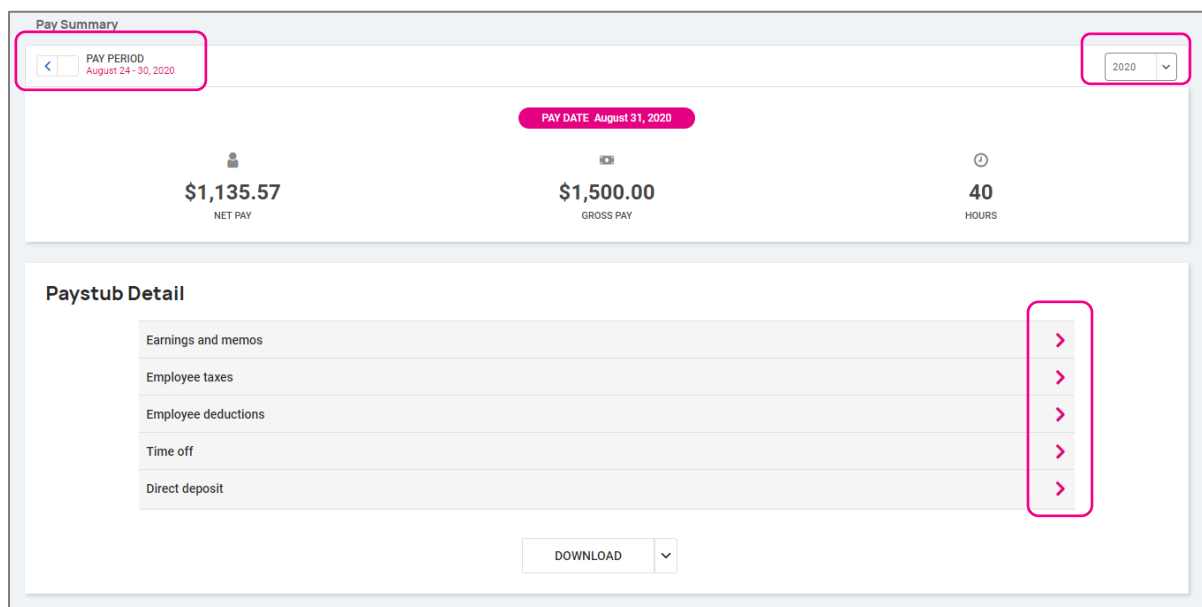


## Payroll and Tax > Pay History

The Pay History screen is where you can obtain and download copies of your check stubs. Your most recent Pay Summary 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.

To see the details of your check, you may click on any of the sections of your Paystub Detail. Please make sure 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.

## Help Docs

You can change the check detail by using the ◀ in the top left-hand corner to move backwards 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 will appear. 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 of the check date.
- Once your selection is complete, click on **Download**.

### Select Multiple Pay Stubs

Enter a date range to show your available pay stubs within that time period and a list will be generated. Check the ones you would like and click download.

From

To


☐ Pay Period: Aug 24 - 30, 2020 Pay Date: August 31, 2020
   
☐ Pay Period: Mar 23 - 29, 2020 Pay Date: March 30, 2020
   
☐ Pay Period: Mar 16 - 22, 2020 Pay Date: March 23, 2020
   
☐ Pay Period: Feb 17 - 23, 2020 Pay Date: February 24, 2020
   
☐ Pay Period: Feb 10 - 16, 2020 Pay Date: February 14, 2020


CANCEL

DOWNLOAD

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

### Download

 We have received your request

 Your document is being generated. This may take a few moments

Your document is being downloaded

## Pay and Tax > Year-end Tax Forms

The Year-end Tax forms screen will display forms for the current year (if closed) and the past years. All forms will be displayed in the summary layout

Summary		
Name	Year	Instructions
1095-C	2019	<a href="#">View</a>
W-2	2019	<a href="#">View</a>

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 will be available in PDF. Open the PDF and view and/or print your Year-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				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 Retirement plan Third-party sick pay		14. Other NYSDI 0.60		12b. Code 12c. Code 12d. Code			
15. State NY	Employer's state ID number 139999999 0	16. State wages, tips, etc. 406.00		17. State income tax 9.84			
18. Local wages, tips, etc. 406.00		19. Local income tax 6.81		20. Locality name 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 Retirement plan Third-party sick pay		14. Other NYSDI 0.60		12b. Code 12c. Code 12d. Code			
15. State NY	Employer's state ID number 139999999 0	16. State wages, tips, etc. 406.00		17. State income tax 9.84			
18. Local wages, tips, etc. 406.00		19. Local income tax 6.81		20. Locality name 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.

Summary		
Name	Year	Instructions
1095-C	2019	<a href="#">View</a>
W-2	2019	<a href="#">View</a>

## Pay and Tax > Tax Updates

The **Tax Updates** screen allows you to begin the process of updating your withholdings. Your current Tax Withholdings for Federal, State and Local (if applicable) will appear when you access the screen.

If you need to change your Tax Withholdings and complete a new tax form, click on the **Start Wizard** button on the left-hand side of the screen as outlined above.

**Note:** Please read the message below Start Wizard to ensure you have the correct settings in your browser.

Once you select Start Wizard, you will be presented with the **Tax Withholdings** screen to start or sign out. To start a new form, click **Start**.

You can then choose the jurisdiction by selecting the radio buttons and **Continue**. If you wish to change your Federal withholding, click on "Help me determine which withholding forms apply to me" and take the **Survey**.

Once the survey is complete, click on the **Start** icon in the Federal-Summary.

Federal — Summary				
Based on answers you provided, we have determined the following <b>Federal</b> withholding form(s) may apply to you.				
<a href="#">Start</a>	Locality	Name	Title	Status
	Federal	W-4	Employee's Withholding Certificate	<b>Not completed</b>
<a href="#">&lt; Back</a>				

You can click on the **Back** button if you made an error on your survey or move forward and complete each section in the form by responding to questions on the screen and clicking the **Next** icon. Your progress will be saved on the left side, and you can return to any section by using the **Back** button or the side menu.

<a href="#">★ Wizard</a> <a href="#">? Form and Instructions</a>	
<a href="#">? Check my progress</a>	
<div>Nonresident Alien ▶</div> <div>Exemption ▶</div> <div>Filing Status ▶</div>	<b>Select a filing status</b> <input type="radio"/> Single or Married filing separately <input type="radio"/> Married Filing Jointly <input type="radio"/> Head of Household <div> <a href="#">&lt; Back</a> <a href="#">Next &gt;</a> </div>

The next page gives you the following options:

- I want to use the worksheet to calculate roughly accurate withholding
- There are only two jobs total. The option is accurate or jobs with similar pay, otherwise more taxes than necessary may be withheld
- None of the above

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

**Choose one**

☐ I want to use the worksheet to calculate roughly accurate withholding

☐ There are only two jobs total. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.

☐ None of the above

[< Back](#)
[Next >](#)

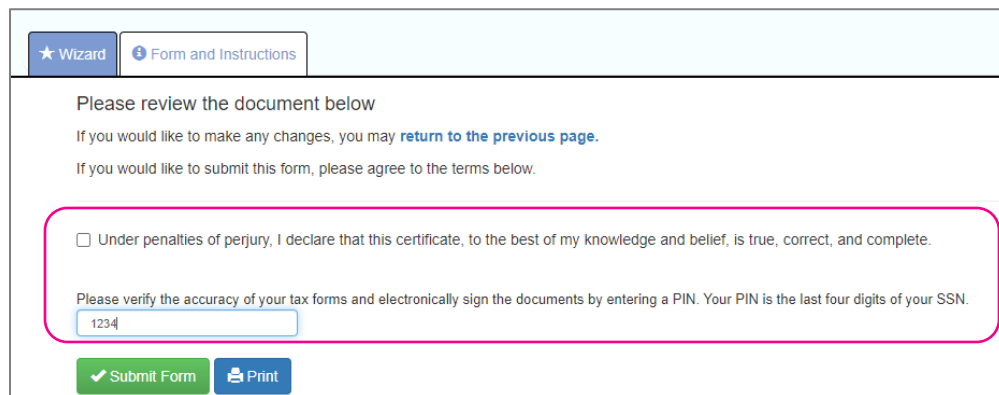
Select the desired option and click on **Next**. Depending on your selection, different options may appear. In the example below, "None of the above" was selected, since the Forms and Instructions were already used to determine the withholding.

Complete each section by responding to the questions on the screen and clicking on **Next**.

## Help Docs

Once complete, you can view or print your completed W-4. You must also attest to the accuracy of the W-4 by clicking on:

- Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct and complete
- Enter your PIN in the box provided by entering the last 4 digits of your SSN
- Once complete, click on **Submit Form**.

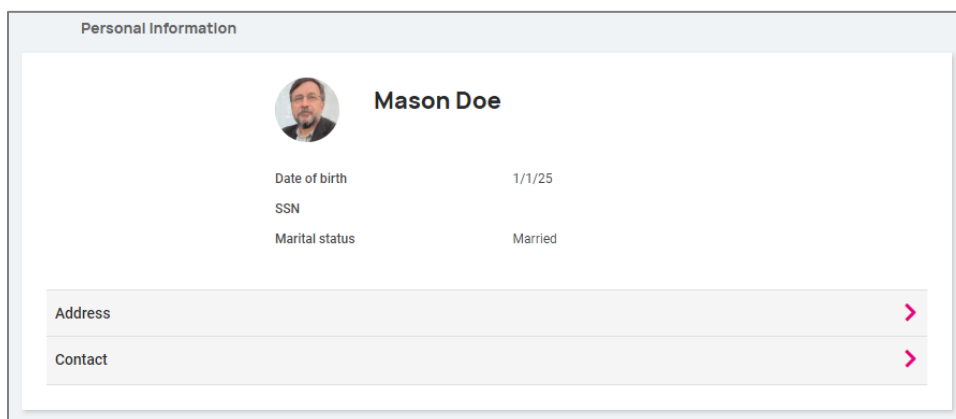



You will receive a confirmation stating "Your form has been submitted. All sections are completed."

If you have addition jurisdictions to complete, follow the same procedures.

## Personal > Personal Information

The Personal Information screen allows you to view your Name, Date of Birth, SSN (masked) and Marital Status. You also have a drop- down menu to view your Address and Contact information.



By selecting the > you can expand your address and contact info to see the details on file. If your company allows you to edit/update this information you will see the  icon on the right-hand side which allows you to edit the details.

Address

Street address

27 Serpentine Lane

Street address 2

kjdfkjdfkd

City

Levittown

State

NY

Zip code

11756

Contact

Work phone

(609) 553-2265

Mobile phone

(732) 251-0275

Home phone

(704) 555-7895

Self-service email

doemanager@protonmail.com

Personal email

emailchange@someplace.com

## Contacts

The next section labeled **Contacts** stores any existing Emergency Contacts, Beneficiaries and Dependents available. If you need to add to any of the categories, click on the **Manage Contacts** button. A new page will appear which allows you to **Add New** or **Edit** contacts.


Emergency contacts

Beneficiaries

Dependents

MANAGE CONTACTS

The  symbol will allow you to edit or delete the contact on file if needed.

Manage Contacts			
Name	Beneficiary	Dependent	Emergency
McCorkle, Josiah	✓	✓	

If you need to **Add New** choose the button at the bottom of the screen and fill out the form that opens.

ADD NEW

☐ Beneficiary
 ☐ Dependent
 ☐ Emergency

General

Relationship Select ▼

Select other if adding trust/estate as a beneficiary

First name

Prefix

Last name

Suffix

Contact

Work number

Home number

☐ Use employee address

Address

Zip code

State

Mobile number

Email address

Address 2

City

Personal

SSN

Date of birth

Gender Select ▼

Update SSN

Update date of birth

CANCEL

SAVE

**Note:** You can check "Use employee address" or key in a different address.

Once saved, the information appears under the appropriate contact type drop-down menu.

## Federal Reporting Data

There are three options under Federal Reporting Data:

- Disability Self-Identification
- EEO Self-Identification
- Veteran Self-Identification

By using the arrow **▶** symbol, you can view the information that your employer currently has recorded for these categories. If you wish to add or change any of the categories, click on the arrow.



## Disability Self-Identification

If available, your "Current disability status" is displayed. You are also given with the reason why you are being asked to provide this information.

Disability Self-Identification

Current disability status

Not Disabled

Why are you being asked to complete this form?

We are a federal contractor or subcontractor required by law to provide equal employment opportunity to qualified people with disabilities. We are also required to measure our progress toward having at least 7% of our workforce be individuals with disabilities. To do this, we must ask applicants and employees if they have a disability or have ever had a disability. Because a person may become disabled at any time, we ask all of our employees to update their information at least every five years.

Identifying yourself as an individual with a disability is voluntary, and we hope that you will choose to do so. Your answer will be maintained confidentially and not be seen by selecting officials or anyone else involved in making personnel decisions. Completing the form will not negatively impact you in any way, regardless of whether you have self-identified in the past. For more information about this form or the equal employment obligations of federal contractors under Section 503 of the Rehabilitation Act, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at [www.dol.gov/ofccp](http://www.dol.gov/ofccp).

Select an option

☐ Yes, I Have A Disability, Or Have A History/Record Of Having A Disability
 ☐ No, I Don't Have A Disability, Or A History/Record Of Having A Disability
 ☐ I Don't Wish To Answer

SAVE

After reading, you can decide to respond:

- Yes, I have a disability, or have a history/record of having a disability
- No, I don't have a disability, or a history/record of having a disability
- I don't wish to answer

Make your selection and click on **Save**. The information provided displays as your "Current disability status" upon save.

## EEO Self-Identification

If available, your current Gender and Ethnic Origin displays. You are also given the reason why you are being asked to provide this information.

EEO Self-identification

Current EEO status

GenderMale  
Ethnic originWhite (Not Hispanic or Latino)

Why are you being asked to complete this form?

Your employer is subject to certain governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations. To comply with these laws, your employer invites employees to voluntarily identify their race, ethnicity, and gender. Submission of this information is voluntary and refusal to provide it will not subject you to any adverse treatment. The information obtained will be kept confidential within the Human Resources Department and may only be used in accordance with applicable laws, executive orders, and regulations, including those that require the information to be summarized and reported to the federal government for our Affirmative Action Program and civil rights enforcement. When reported, data will not identify any specific individual.

If you choose not to identify your race, ethnicity, or gender at this time, the federal government requires your employer to determine this information by visual observation and/or other available information.

For civil rights monitoring and enforcement purposes only, all race, ethnicity, and gender information will be collected and reported in the categories identified below. The definitions for each category have been established by the federal government. If you choose to voluntarily self-identify, you may mark only one of the boxes in each section presented below.

**Gender identification**

☐ Female  
☐ Male  
☐ I don't wish to answer

**Race and ethnicity identification**

☐ Hispanic or Latino  
☐ White (Not Hispanic or Latino)  
☐ Black or African American (Not Hispanic or Latino)  
☐ Native Hawaiian or Other Pacific Islander  
☐ Asian (Not Hispanic or Latino)  
☐ Native American or Alaska Native (Not Hispanic)  
☐ Two or More Races (Not Hispanic or Latino)  
☐ Chose not to answer

CANCEL
SAVE

After reading, you can decide to respond to the Gender Identification using the following selections:

- Female
- Male
- I don't wish to answer

You can then decide to respond to Race and Ethnicity Identification using the following selections:

- Hispanic or Latino
- White (Not Hispanic or Latino)
- Black or African American or other Pacific islander
- Asian (Not Hispanic or Latino)
- Native American or Alaska (Not Hispanic)
- Two or more races (Not Hispanic or Latino)
- Chose not to answer

If you want to add or change your information, make your selections and click on **Save**.

For more information about the Race and Ethnicity selections or to read the Anti-Discrimination Notice, select the following:

- > Definitions of race and ethnicity

> Anti-discrimination notice

## Veteran Self-Identification

If available, your “Current Veteran Status” displays. You are also given the reason why you are being asked to provide this information.

After reading the reason, you can add or edit the information by selecting the Veteran status that applies:

- I am not a veteran
- I belong to the following categories of protected veteran:
  - Disabled Veteran
  - Recently Separated Veteran (discharge date)
- I don't wish to identify my veteran status
- I am a protected veteran, but I choose not to self-identify to which I belong
- I am NOT protected veteran, I served in the military but do not fall into the veteran categories listed above

After making your selections, click on **Save**.

Once the information is saved, it will replace your “Current Veteran Status.”

For more information on the “Definition of protected veteran,” “Reasonable accommodation notice” and “Anti-Discrimination note,” click on the following:

- › Definitions of protected veterans
- › Reasonable accommodation notice
- › Anti-discrimination notice

## Benefits > My Benefits

The My Benefits screen allows you to assess your elected personal benefit package and at a quick glance, view your annual and per pay deductions for those benefits.

The screenshot shows the 'My Benefits' screen. On the left, there is a sidebar with four tabs: 'Summary' (selected), 'Current', 'Waived', and 'History'. The main content area is titled 'BENEFIT COST AND CONTRIBUTIONS'. It displays two large figures: '\$7,800.00 ANNUALLY' and '\$150.00 PER PAY PERIOD\*'. Below these, there is a table listing benefits and their costs:

Benefit	Cost
401(k)	\$150.00
HSA ('Other' category)	\$0.00
Vision Pre-Tax 125	Waived

Below the table, there is a disclaimer: '\*Elected costs is an estimate only. Actual deduction amounts can vary in specific instances. For example, a 5% deferred compensation (i.e., 401k plan) election is projected using your base pay, but the deduction is calculated using actual compensation and plan rules. Plans that require Evidence of Insurability (EOI) such as life insurance, reflect the cost of the requested amount but the deduction may be based on actual coverage until EOI is approved.'

By selecting the **Current** tab on the left-hand side, you will see the benefits you are currently enrolled for in a detailed view with effective dates, per pay amounts, and frequencies.

The screenshot shows the 'My Benefits' screen with the 'Current' tab selected. The sidebar shows 'Current' as the active tab. The main content area is titled '401(K)' and shows the effective date 'Effective 5/26/2019'. It displays a table of deductions:

Deductions	Amount
401K	\$150.00

On the right side, there is a summary box showing a piggy bank icon, '\$150.00', and 'Every Pay'.

When you select the **Waived** tab on the left-hand side, you will see the information on plans that you have waived and the date the waiver took effect.

The screenshot shows the 'My Benefits' screen with the 'Waived' tab selected. The sidebar shows 'Waived' as the active tab. The main content area is titled 'WAIVED BENEFITS' and shows the plan 'VISION PRE-TAX 125' with the effective date 'Effective December 1, 2020'.

## Help Docs

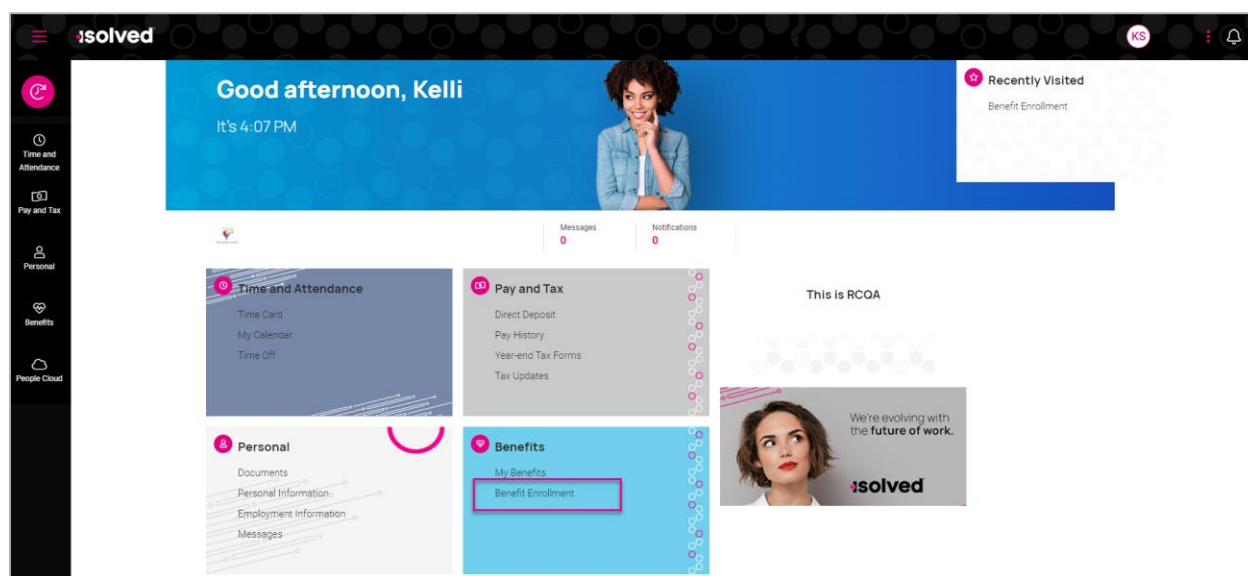
### Benefits > Benefit Enrollment

This help topic goes over Open Enrollment from an employee's perspective for Adaptive Employee Experience isolved People Cloud. This Benefit Enrollment will adapt to your computer and most mobile devices and provide a truly unique benefit enrollment experience.

**Note:** Screen images may differ based on the mobile device used.

### Employee Self Service Benefit Enrollment

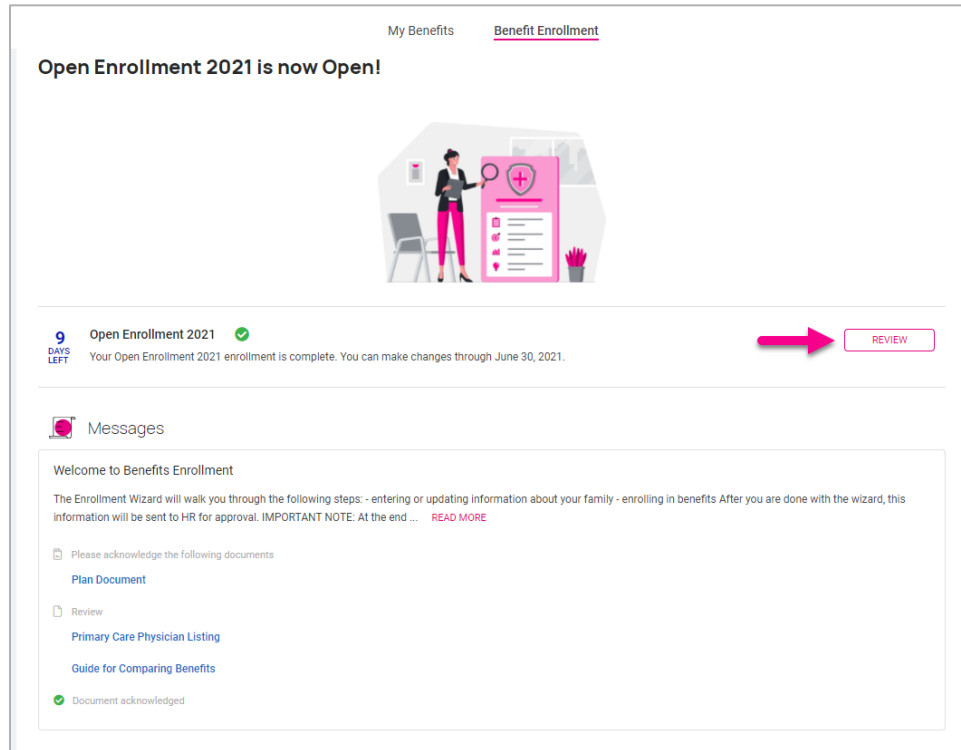
- Log in to isolved using your Employee Self-Service People Cloud login credentials.
- To access your enrollment, select "Benefit Enrollment" in the **Benefits** tile.



### Your Information

You will be moved into the Benefit Enrollment wizard Welcome screen.

- See the timeframe for your enrollment so you can be aware of when your enrollment must be finalized.
- You will be able to select the **Next** or **Review** buttons to move through the enrollment screens and start your enrollment.



Any messages from your employer are displayed below the enrollment period(s) available. These messages display helpful information such as messages, documents, forms, and links from your employer.

- If a document is posted that requires acknowledgement will appear in its own section prompting you to acknowledge that document.
- Select the document name to review.

Once reviewed, select **Acknowledge** and if you certify that you have read and understand the content of the document. Select **OK**.

You will be moved into the Benefit Enrollment Wizard where you will be able to see your navigation and process on the left-hand side. Your **Shopping cart** will display your elections so far and any messages attached to the page or item you are on will be displayed in their own boxes on the page.

**Benefit Enrollment**

My Benefits **Benefit Enrollment** EXIT WIZARD

**1 Your Information**  
Please review and update for accuracy.

**2 Preview**  
Current Benefits  
Cost Analysis

**3 Your selections**

- Medical PreTax
- Dental PreTax
- Vision
- Vol Life EE
- Vol Life SP
- Vol Life CH
- FSA Medical
- FSA Dep Care
- HSA
- 401(k)
- CoPd Life
- CoPd STD

**4 Final review**  
Review and submit your benefit selections.

Compare Costs  
Tasks to Complete

**Let's Verify Your Personal Information**

**General**

First name	Kelli
Middle name	L
Last name	Smith
Date of birth	**-**/**-****
Marital status	Married

**Address**

Street address	10900 Meadowood Lane
Street address 2	
City	St Helena
State	CA
Zip code	94574

**Contact**

Work phone	
Mobile phone	
Home phone	
Self-service email	megandemo35@gmail.com
Personal email	

**Shopping cart**  
You have not selected any benefits.

**Messages**  
You have no message.

**START WIZARD** **NEXT**

## Personal Beneficiaries and Dependents

**Benefit Enrollment**

My Benefits **Benefit Enrollment** EXIT WIZARD

**1 Your Information**  
Please review and update for accuracy.

**2 Preview**  
Current Benefits  
Cost Analysis

**3 Your selections**

- Medical PreTax
- Dental PreTax
- Vision
- Vol Life EE
- Vol Life SP
- Vol Life CH
- FSA Medical
- FSA Dep Care
- HSA
- 401(k)
- CoPd Life
- CoPd STD

**4 Final review**  
Review and submit your benefit selections.

Compare Costs  
Tasks to Complete

**Let's Verify Your Beneficiaries and Dependents**

Please add/update your dependents and beneficiaries here. They must be flagged as a dependent to include them on your benefit coverage.

**Beneficiaries**

Child Smith	Child	Date of birth	01/01/****	⋮
Spouse Smith	Spouse	Date of birth	01/01/****	⋮

**Dependents**

Child Smith	Child	Date of birth	01/01/****	⋮
Spouse Smith	Spouse	Date of birth	01/01/****	⋮

**Edit**  
**Delete**

**START WIZARD** **NEXT**

**Shopping cart**  
You have not selected any benefits.

- You can update or add beneficiaries/dependents so that you can attach them to your coverages, as needed.
- If you have dependents/beneficiaries listed already, click on the three ellipses to edit or delete any information.

- To add a new dependent/beneficiary:
  1. Select the plus sign next to **Add dependent**.
  2. Use the drop-down menu to select the **Relationship** type.
  3. Choose **Dependent** if they are eligible to participate in your benefit coverage.
  4. Choose **Beneficiary** if they may be selected as a beneficiary on applicable plans.
  5. Complete the remainder of the information, noting the required fields.

**Note:** If you do not have a social security number, please do not use a fake number as a place holder , as this can cause issues for future reporting.

## Health and Wellness

**Note:** This may not be an option on your employer's setup.

- Select the contacts who are tobacco users.



This option may vary based on your employer's setup. You will find your Benefits at-a-Glance listed here. Select any plans highlighted in blue to open more detailed information on that benefit.

Benefit Enrollment

1 Your information

Please review and update for accuracy.

Personal

Beneficiaries and Dependents

Health and Wellness

2 Preview

Current Benefits

Cost Analysis

3 Your selections

Medical PreTax

Dental PreTax

Vision

Vol Life EE

Vol Life SP

Vol Life CH

FSA Medical

FSA Dep Care

HSA

401(k)

CoPd Life

CoPd STD

4 Final review

Review and submit your benefit selections.

Compare Costs

Tasks to Complete

KS Kelli L Smith

Status: Completed

9 DAYS LEFT

Benefits at-a-Glance

This page shows your current elections, if any. You may have the opportunity to select "Keep" on this page, or you can navigate to each coverage to make your selections. If you do not have the option to "Keep" a coverage, you do need to navigate to that coverage to either elect or waive it.

AVAILABLE PLANS	CURRENTLY ENROLLED	COVERAGE	COST
Medical PreTax	Yes	EE ONLY	\$0.00
Dental PreTax	Yes	EE ONLY	\$12.50
Vision	No		
Vol Life EE	No		
Vol Life SP	No		
Vol Life CH	No		
FSA Medical	No		
FSA Dep Care	No		
HSA	No		
401(k)	Yes		
CoPd Life	No		
CoPd STD	No		

NEXT

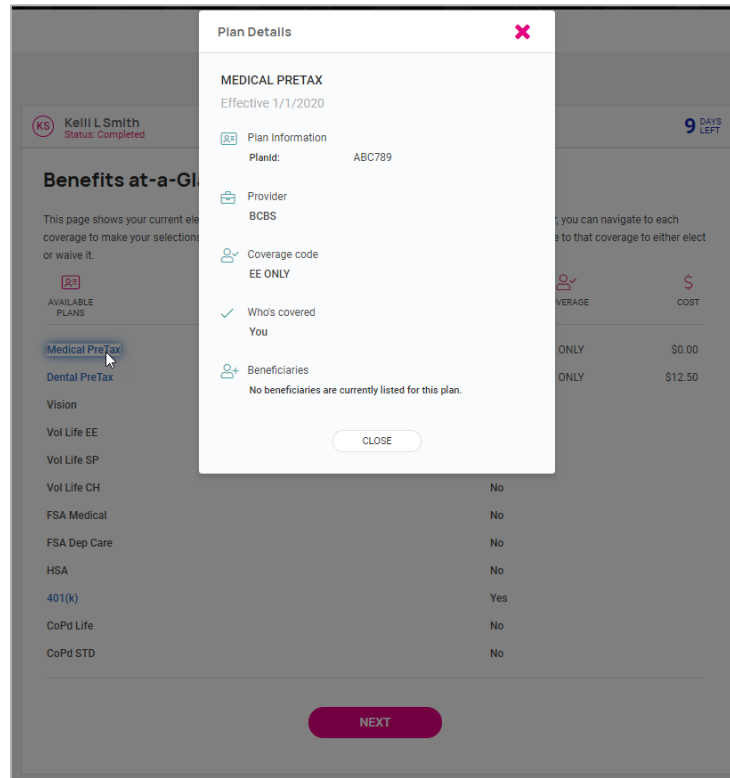
\*Value displayed may be an annual target or per pay election amount (FSA/QTB/HSA type plans) or actual coverage amount (life or disability type plan).

EXIT WIZARD

Shopping cart

You have not selected any benefits.

Messages



## Cost Analysis

1 Your information

Please review and update for accuracy.

Personal

Beneficiaries and Dependents

Health and Wellness

2 Preview

Current Benefits

Cost Analysis

3 Your selections

Medical PreTax

Dental PreTax

Vision

Vol Life EE

Vol Life SP

Vol Life CH

FSA Medical

FSA Dep Care

HSA

401(k)

CoPd Life

CoPd STD

KS Kelli L Smith

Status: Completed

9 DAYS LEFT

Medical PreTax

Dental PreTax

Vision

Vol Life EE

Vol Life SP

Vol Life CH

View more

Medical PreTax

Back to Beneficiaries and Dependents

This page is informational. You can use this to quickly compare prices.

DISPLAY

Plans	EE ONLY	EE+SP	EE+CH(REN)	EE+FAM
Med PPO	\$0.00	\$125.00	\$200.00	\$510.00
Med HMO	\$0.00	\$100.00	\$200.00	\$300.00
Med HDHP	\$0.00	\$100.00	\$200.00	\$300.00

Monthly deduction amounts are displayed above.

NEXT

## Help Docs

- Displays the cost of coverages you are eligible to select.
- You can choose to view each plan type from the tabs across the top.

## Your Selections

### Deferred Compensation

**401(k)**

You are only able to enroll in Jan, Apr, July & Oct. Keep this in mind if you decide not to elect this now.

**Plan selections** COST ANALYSIS

401(K) **SELECTED** EDIT

Plan information  
Guardian

PREVIOUS NEXT

\* Elected cost is an estimate only. Actual deduction amounts can vary in specific instances. For example, a 5% deferred compensation (i.e. 401k plan) election is projected using your base pay but the deduction is calculated using actual compensation and plan rules. Plans that require Evidence of Insurability (EOI) such as life insurance, reflect the cost of the requested amount but the deduction may be based on actual coverage until EOI is approved.  
\*\* Per Month costs are calculated by taking the annual amount and dividing it by 12; therefore, the actual monthly cost may vary from the stated amount if the deduction schedule is not distributed evenly on a per month basis.

**Shopping cart**

You have not selected any benefits.

**Messages**

You have no message.

- Select **Edit** to contribute to the plan or waive.
- If selected, you must enter in a contribution amount and beneficiary designation and percentage. The beneficiary percentages must equal 100%.

**Select Coverage** COST ANALYSIS

**401(k)**

Select coverage level to view costs and complete your information.

☐ I have been informed of the option to make contributions to the 401(k) Plan and I elect not to make contributions to the plan at this time.

**Deductions**

401(k) Roth Amount  401(k) Roth Percent

401K Amount  401K Percent

**Beneficiaries**

☒ Spouse Smith

Primary percent  Contingent percent

☒ Child Smith

Primary percent  Contingent percent

+ Add beneficiary

CANCEL SAVE AND NEXT

\* Elected cost is an estimate only. Actual deduction amounts can vary in specific instances. For example, a 5% deferred compensation (i.e. 401k plan) election is projected using your base pay but the deduction is calculated using actual compensation and plan rules. Plans that require Evidence of Insurability (EOI) such as life insurance, reflect the cost of the requested amount but the deduction may be based on actual coverage until EOI is approved.  
\*\* Per Month costs are calculated by taking the annual amount and dividing it by 12; therefore, the actual monthly cost may vary from the stated amount if the deduction schedule is not distributed evenly on a per month basis.

**\$1,500.00**  
Per Pay Amount

If wishing to not contribute to your deferred compensation plan, select the button at the top.

Select coverage level to view costs and complete your information.

☐ I have been informed of the option to make contributions to the 401(k) Plan and I elect not to make contributions to the plan at this time.

## Company Paid Benefits

KS

Keili L Smith

Status: In progress

9 DAYS LEFT

Select Coverage

COST ANALYSIS

Basic Life

Select coverage level to view costs and complete your information.

Coverage

EE ONLY

Who to cover

☒ You
 

+

Add dependent

\$0.00

Per Pay Amount

Coverage options

Actual coverage

\$0.00

Age-reduced amount

\$0.00

Beneficiaries

☐ Spouse Smith
 

Primary percent

Contingent percent

☐ Child Smith
 

Primary percent

Contingent percent

+

Add beneficiary

CANCEL

SAVE AND NEXT

- If your employer offers benefits such as company paid life insurance, you may not have an opportunity to waive the coverage.
- Select the coverage, and if available, enter beneficiary designation and percentage.

**Select Coverage**

Med HDHP

Select coverage level to view costs and complete your information.

Coverage: EE+FAM

Who to cover:

- ☒ You
- ☐ Spouse
- ☐ Child Smith
- 

EE+SP

EE+CH(REN)

EE+FAM

**\$150.00**  
Per Pay Amount

\* Elected cost is an estimate only. Actual deduction amounts can vary in specific instances. For example, a 5% deferred compensation (i.e. 401k plan) election is projected using your base pay but the deduction is calculated using actual compensation and plan rules. Plans that require Evidence of Insurability (EOI) such as life insurance, reflect the cost of the requested amount but the deduction may be based on actual coverage until EOI is approved.  
\*\* Per Month costs are calculated by taking the annual amount and dividing it by 12; therefore, the actual monthly cost may vary from the stated amount if the deduction schedule is not distributed evenly on a per month basis.

- If you select **Coverage Waived**, you may be required to select a waive reason from the drop-down menu.
- Once on the waived screen, you can go back to the election screen by selecting the **Back** option.
- Select a plan using the **Select Plan** option and use the drop down to select the **Coverage** option.
- If you have dependents, they will be listed. Select the dependents you wish to add to the plan. Dependents can be selected based only on the coverage option you choose – for example, if you choose employee + spouse, only your spouse can be selected.
- If you do not see your dependents listed, select **Add dependent**. Remember to check the “dependent” box when adding dependents that will be added to your plans.

## HSA/FSA

- When electing HSA, you must select the level of coverage that matches the level of coverage for your medical HDHP plan, whether that plan is offered by your employer or is provided by outside coverage.
- Enter in the amount you would like to contribute under **Amount Per Scheduled Pay** or **Annual Target Amount**.
- Based on your company's configuration, you may receive a message that you are not eligible for the FSA since you enrolled in the HSA. Otherwise, you would have the option to enroll in the FSA.

**Select Coverage** COST ANALYSIS

HSA

Select coverage level to view costs and complete your information.

Coverage EE ONLY

Who to cover

☒ You

+ Add dependent

Employee contribution amounts

Annual target \$1,000.00

Amount must be less than or equal to \$4,450.00

\$62.50  
Per Pay Amount

CANCEL SAVE AND NEXT

\* Elected cost is an estimate only. Actual deduction amounts can vary in specific instances. For example, a 5% deferred compensation (i.e. 401k plan) election is projected using your base pay but the deduction is calculated using actual compensation and plan rules. Plans that require Evidence of Insurability (EOI) such as life insurance, reflect the cost of the requested amount but the deduction may be based on actual coverage until EOI is approved.  
\*\* Per Month costs are calculated by taking the annual amount and dividing it by 12; therefore, the actual monthly cost may vary from the stated amount if the deduction schedule is not distributed evenly on a per month basis.

### Voluntary Life, Spouse Life and Child Life

- Your plan may be configured to alert you if you select an amount over the guaranteed amount that would require evidence of insurability (EOI).
- The message will include the amount your coverage is allowed up to until the EOI approval is obtained.
- Select beneficiaries and/or those dependents covered by the related plan.

KS

Kelli L Smith

Status: In progress

9 DAYS LEFT

Select Coverage

COST ANALYSIS

Voluntary Life EE

Select coverage level to view costs and complete your information.

Coverage

EE ONLY

Who to cover

☒ You
 

+

Add dependent

\$0.00

Per Pay Amount

Coverage options

Requested coverage

\$100,000.00

Per Pay Amount Requested

\$61.87

Actual coverage

\$0.00

Age-reduced amount

\$0.00

Any benefit over \$0.00 requires Evidence of Insurability (EOI). Your coverage will be \$0.00 until EOI approval is obtained.

Beneficiaries

At least one beneficiary is required to be selected for this plan.

☒ Spouse Smith
 

Primary percent

100.00

Contingent percent

0.00

☒ Child Smith
 

Primary percent

0.00

Contingent percent

100.00

55

## Help Docs

## Final Review

### Compare Costs

Move to compare your costs. This will take your shopping cart and put in a current vs elected cost analysis for you.

Benefit Review

1 Your information

Please review and update for accuracy.

Personal

Beneficiaries and Dependents

Health and Wellness

2 Preview

Current Benefits

Cost Analysis

3 Your selections

Medical PreTax

Dental PreTax

Vision

Vol Life EE

Vol Life SP

Vol Life CH

FSA Medical

FSA Dep Care

HSA

401(k)

CoPd Life

CoPd STD

4 Final review

Review and submit your benefit selections.

Compare Costs

Tasks to Complete

KS

Keili L Smith

Status: In progress

9 DAYS LEFT

Compare Your Costs

PLAN	CURRENT	ELECTED
Medical PreTax	\$0.00	\$150.00
Dental PreTax	\$12.50	\$50.00
Vision	—	\$0.00
Vol Life EE	—	\$0.00
Vol Life SP	—	\$0.00
Vol Life CH	—	\$0.00
FSA Medical	—	\$62.50
FSA Dep Care	—	—
HSA	—	\$62.50
401(k)	—	\$2,000.00
CoPd Life	—	\$0.00
CoPd STD	—	\$0.00
Total	\$12.50	\$2,325.00

NEXT

EXIT WIZARD

Shopping cart

Pay

Month

Year

Medical PreTax	\$150.00
Coverage level	
EE+FAM	
Dental PreTax	\$50.00
Coverage level	
EE+FAM	
Vision	\$0.00
Coverage level	
EE+FAM	
Vol Life EE	\$0.00
Coverage level	
EE ONLY	
Vol Life SP	\$0.00
Coverage level	
SP ONLY	
Vol Life CH	\$0.00
Coverage level	
CH ONLY	
FSA Medical	\$62.50
Coverage level	
EE ONLY	
FSA Dep Care	Waived
HSA	\$62.50
Coverage level	
EE ONLY	
401(k)	\$2,000.00
CoPd Life	\$0.00
Coverage level	
EE ONLY	

\*Elected costs are an estimate only. Actual deduction amounts can vary in specific instances. For example, a 5% deferred compensation (i.e., 401k-plan) election is projected using your base pay, but the deduction is calculated using actual compensation and plan rules. Plans that require Evidence of Insurability (EOI) such as life insurance, reflect the cost of the requested amount but the deduction may be based on actual coverage until EOI is approved.

\*\* Per Month costs are calculated by taking the annual amount and dividing it by 12; therefore, the actual monthly cost may vary from the stated amount if the deduction schedule is not distributed evenly on a per month basis.

### Tasks to Complete

View any task that still require your attention, such as unverified documents or forms, incorrect plan enrollment, missing required information such as beneficiaries or PCP information. Once all tasks have been completed you will be allowed to finish your enrollment. You may leave and come back and finish your enrollment at any time during the enrollment period. The wizard will save your place.



Benefit Review

1 Your Information

Please review and update for accuracy.

Personal

Beneficiaries and Dependents

Health and Wellness

2 Preview

Current Benefits

Cost Analysis

3 Your selections

Medical PreTax

Dental PreTax

Vision

Vol Life EE

Vol Life SP

Vol Life CH

FSA Medical

FSA Dep Care

HSA

401(k)

CoPd Life

CoPd STD

4 Final review

Review and submit your benefit selections.

Compare Costs

Tasks to Complete

KS Kelil L Smith

Status: In progress

9 DAYS LEFT

Almost done!

It looks like some items need your attention.

Welcome to Benefits Enrollment

The Enrollment Wizard will walk you through the following steps: - entering or updating information about your family - enrolling in benefits After you are done with the wizard, this information will be sent to HR for approval. IMPORTANT NOTE: At the end ...

READ MORE

Please acknowledge the following documents

Plan Document

Review

Primary Care Physician Listing

Guide for Comparing Benefits

Document acknowledged

CLOSE

FINISH LATER

Shopping cart

Pay

Month

Year

Medical PreTax	Coverage level	EE+FAM	\$150.00
Dental PreTax	Coverage level	EE+FAM	\$50.00
Vision	Coverage level	EE+FAM	\$0.00
Vol Life EE	Coverage level	EE ONLY	\$0.00
Vol Life SP	Coverage level	SP ONLY	\$0.00
Vol Life CH	Coverage level	CH ONLY	\$0.00
FSA Medical	Coverage level	EE ONLY	\$62.50
FSA Dep Care	Coverage level	EE ONLY	Waived
HSA	Coverage level	EE ONLY	\$62.50
401(k)	Coverage level	EE ONLY	\$2,000.00
CoPd Life	Coverage level	EE ONLY	\$0.00

KS Kelil L Smith

Status: In progress

9 DAYS LEFT

Almost done!

It looks like some items need your attention.

Welcome to Benefits Enrollment

The Enrollment Wizard will walk you through the following steps: - entering or updating information about your family - enrolling in benefits After you are done with the wizard, this information will be sent to HR for approval. IMPORTANT NOTE: At the end ...

READ MORE

Please acknowledge the following documents

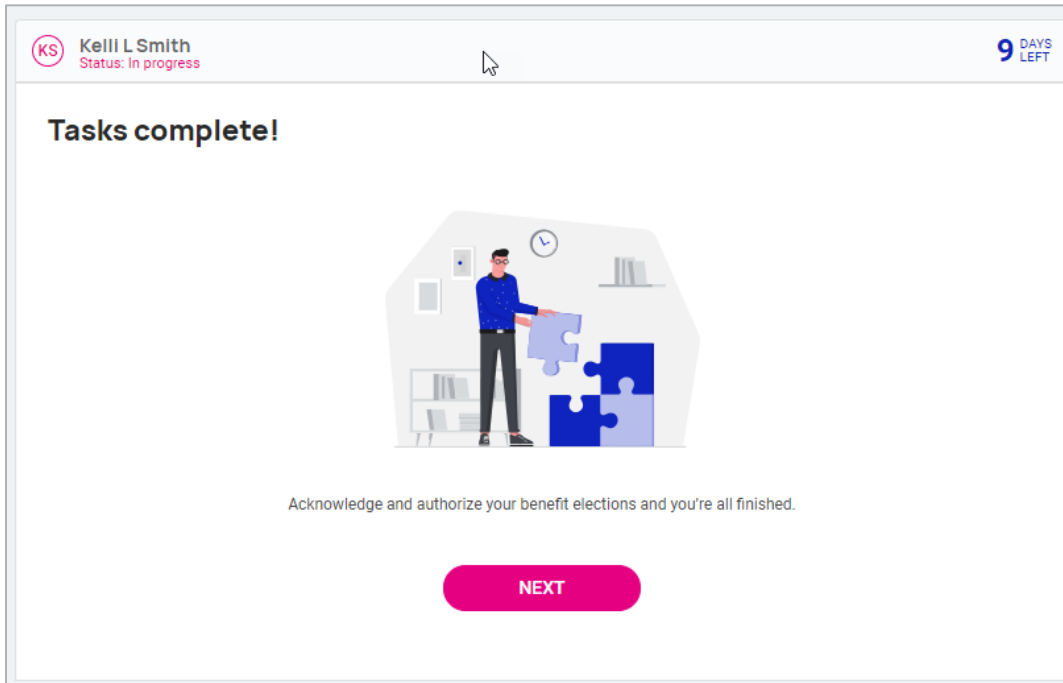
Plan Document

I acknowledge I have read and understand this document.

I certify I have read, understood and accept the content of this document.

✓

SIGN



1 Your information  
Please review and update for accuracy.  
Personal  
Beneficiaries and Dependents  
Health and Wellness

2 Preview  
Current benefits  
Cost Analysis

3 Your selections  
Medical PreTax  
Dental PreTax  
Vision  
Vol Life EE  
Vol Life SP  
Vol Life CH  
FSA Medical  
FSA Dep Care  
HSA  
401(k)  
CoPd Life  
CoPd STD

4 Final review  
Review and submit your benefit selections.  
Compare Costs  
Tasks to Complete

KS Kelli L Smith  
Status: In progress

9 DAYS LEFT

### Benefit Election and Deduction Authorization

- I have elected to participate or opt out of the benefit plans as shown below.
- I authorize my Employer to deduct from my pay any premium amounts shown below.
- I understand that most pre-tax elections cannot be changed or revoked prior to the next plan anniversary date unless I experience a "Change in Status" as defined under the Internal Revenue Code
- Updates to these elections can be made until the final day of the enrollment period

SUBMIT BENEFITS

Plan selections

DOWNLOAD

These benefits will start on January 1, 2021

**MED HDHP**

Provider  
BCBS

Who's covered  
Spouse Smith  
Child Smith

**MEDICAL PRETAX**  
ANNUAL CONTRIBUTIONS

\$3,600.00  
You

\$1,800.00  
Your Employer

**DENTAL**

Provider  
Guardian

Who's covered  
Spouse Smith  
Child Smith

**DENTAL PRETAX**  
ANNUAL CONTRIBUTIONS

\$1,200.00  
You

\$0.00  
Your Employer

**VISION**

Provider  
VSP

**VISION**  
ANNUAL CONTRIBUTIONS

\$0.00  
You

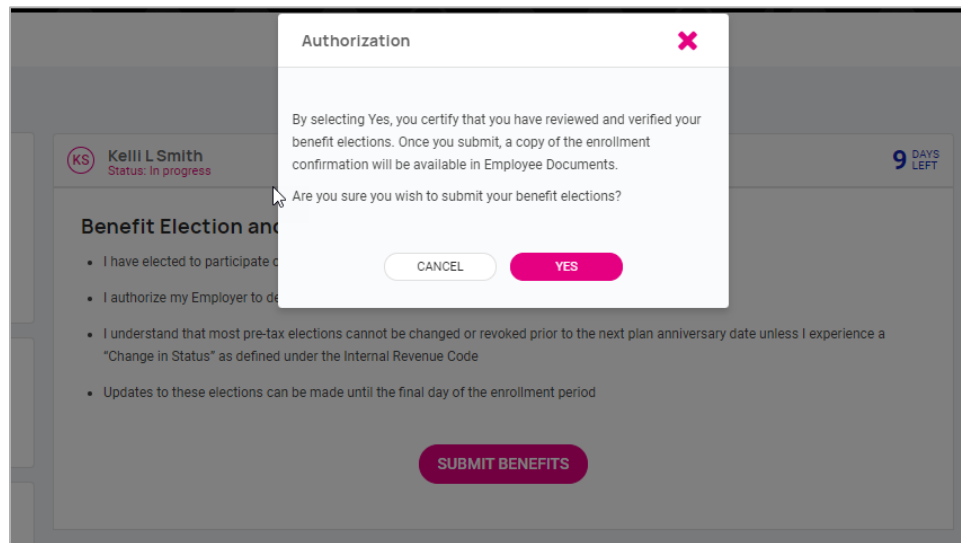
\$0.00  
Your Employer

Shopping cart

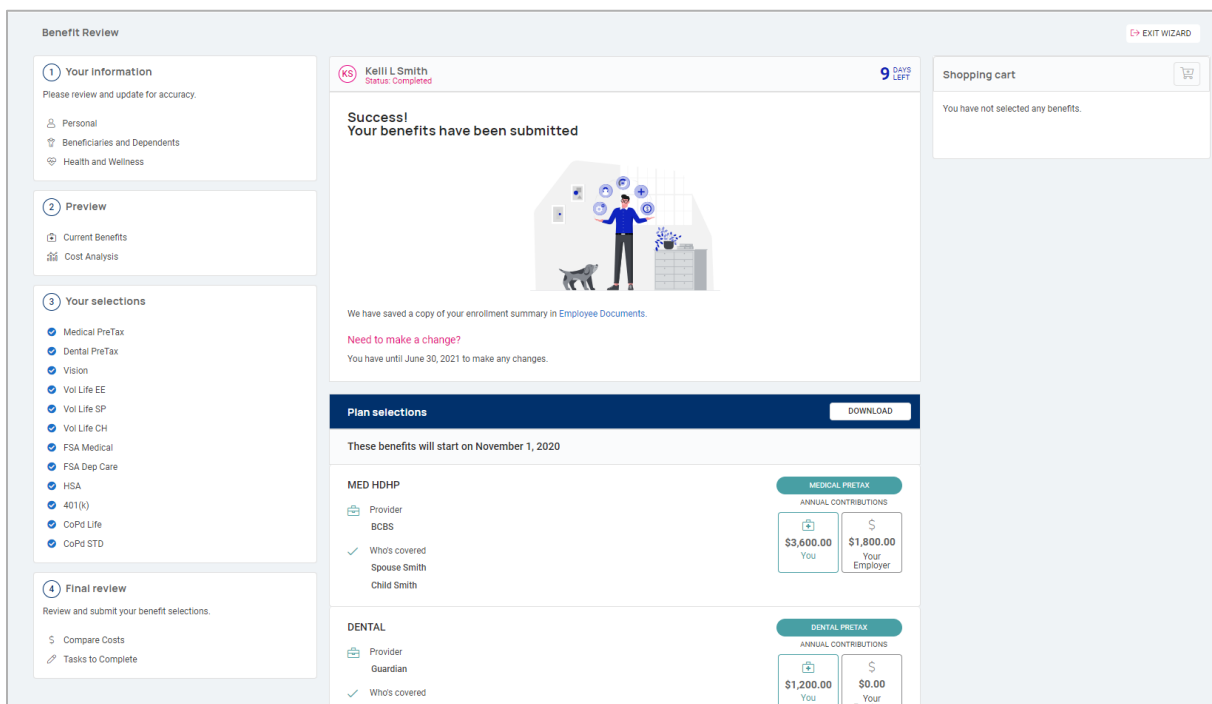
Pay Month Year

<b>Medical PreTax</b> Coverage level EE+FAM	\$150.00
<b>Dental PreTax</b> Coverage level EE+FAM	\$50.00
<b>Vision</b> Coverage level EE+FAM	\$0.00
<b>Vol Life EE</b> Coverage level EE ONLY	\$0.00
<b>Vol Life SP</b> Coverage level SP ONLY	\$0.00
<b>Vol Life CH</b> Coverage level CH ONLY	\$0.00
<b>FSA Medical</b> Coverage level EE ONLY	\$62.50
<b>FSA Dep Care</b>	Waived
<b>HSA</b> Coverage level EE ONLY	\$62.50
<b>401(k)</b>	\$2,000.00
<b>CoPd Life</b> Coverage level EE ONLY	\$0.00
<b>CoPd STD</b> Coverage level EE ONLY	\$0.00

- When you have finished making your benefit elections, the confirmation page will display.
- Scroll down to see a full list of your elections.
- Select **Download** at the right of the page to download your elections.
- Select **Submit Benefits** when you are ready to complete your enrollment.
- A message will appear to ensure you reviewed and verified your elections and will remind you that a copy of the enrollment confirmation will be available to you in **Documents**.
- If you wish to submit your benefit elections, select **Yes**. If you wish to go back, select **Cancel**.



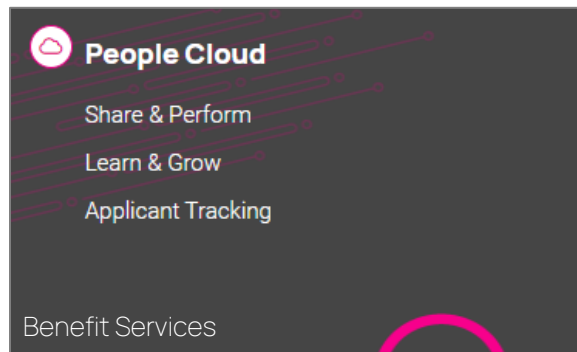
- Once you submit, the **Enrollment Progress** message at the top right of the screen will change to "Completed."



## People Cloud

The links within the People Cloud tile will log you in through SSO (single sign on) to other isolated modules:

- Share & Perform: This will take you to the engagement management platform
- Learn & Grow: This will take you to the online LMS (learning management system)
- Applicant Tracking: This will take you to the applicant tracking platform
- Benefit Services: This will take you to COBRA



## Marketplace Integrations

The links within the Marketplace Integrations tile will log you in through SSO (single sign on) to any integrations your company may have setup with 3<sup>rd</sup> party companies, or company's isolated partners with.