isolved™

Adaptive Employee Experience

Employee User Guide – Mobile Version

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General Login and Navigation

isolved is committed to protecting your data. All users are required to use Multifactor Authentication (MFA) with every login to isolved. Please note that after five failed attempts, the account locks like a failed password attempt.

Logging in

Download the isolved Mobile App in your phone's App Store. Once downloaded the app takes you to the log-in screen where the user can enter their username and password, and then select **Log In**.

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

Note: Verification options available depend on your companies MFA configuration.

On the verification screen, type in the verification code that you just received, then press submit. On this screen, you can select the **Remember me on this device**. If you select this, then your security verification is valid for 12 hours, and this selection is remembered for 30 days.

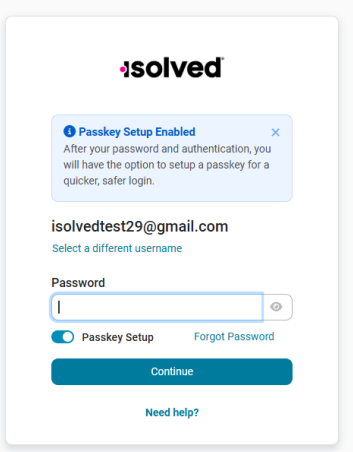
After successfully submitting the Security Verification Code, you are logged in.

Passwordless Login

When new users log onto the mobile app for the first time, they are presented with an option for setting up passwordless logging in. Depending on the device being used to access the mobile app, there are different options available for the user.

If Passkey is set up with Face ID, the system automatically logs you in once Face ID is verified.

Once the user is set up for passwordless logging in, they see the following additional icon on the log in screen after the password entry field.



To see a complete list of passwordless log authentications the user has set up:

1. Visit https://identity.myisolved.com
2. Click the user email address in the upper right corner
3. Select **My Account**
4. Select **Passwordless Authentication**.

Note: Passwordless Log in does not bypass Multifactor authentication.

Multifactor Authentication Setup

The user is able to receive the multifactor authentication code in one of 3 ways: text message, email, or third party app (we are using Microsoft authenticator for this example).

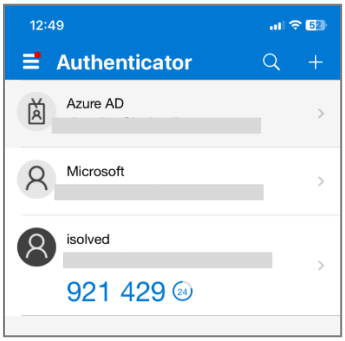
Note: The user does not have to set up an authenticator app if they are planning on using text message, or email verification.

After the user makes it past the log in screen for the first time, by either typing their username and password, or using passwordless authentication, they are brought to the below screen.

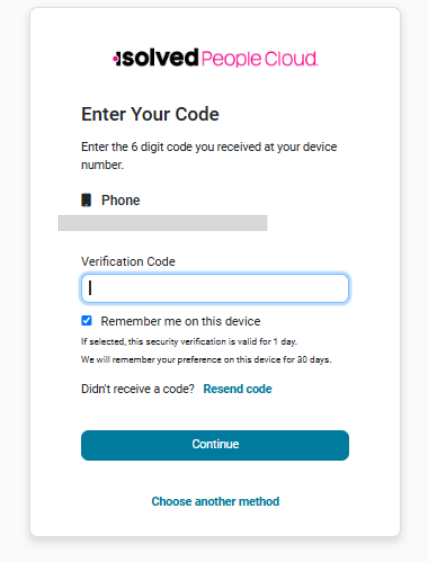
The user can select **Set Up Now** to start setting up an authentication app.

The screenshot below shows the setup page for a multifactor authentication app. The user needs to download one of the following apps: Google Authenticator, Microsoft Authenticator, or Authy.

Copy the 40-character QR code and then open the app you downloaded. For this example, Microsoft Authenticator is used. Press the plus button in the upper right corner to add a new app to your authentication list. Complete the directions given and a code becomes available in your list of authenticated apps. This is the code you use as your verification code.



Now, when the user reaches the screen below, they can type in the six-digit code from their authentication app, then they are logged in. The user can also choose to use another option, to use text or email.



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 allows and recognizes 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 still need to do some method of MFA regardless. This could be different to what they are used to today depending on the system settings per client.

Can we opt out of multifactor authentication?

No

Do we have to sign in every time we use the app?

Yes, for security the app requires the user to sign and use Multifactor Authentication for on each use.

When will the app sign me out?

The app signs users out automatically after 15 minutes of inactivity.

How does geofencing work?

The isolved People Cloud Mobile App can confirm the user's location when clocking in and out. This feature only works when the users have allowed the app to access their phone's GPS in their phone settings. Company defined Geofencing rules are applied at this time.

How does offline punching work?

Users can offline punch if the isolved People Cloud Mobile App is already running on their phone. To do this, the user must:

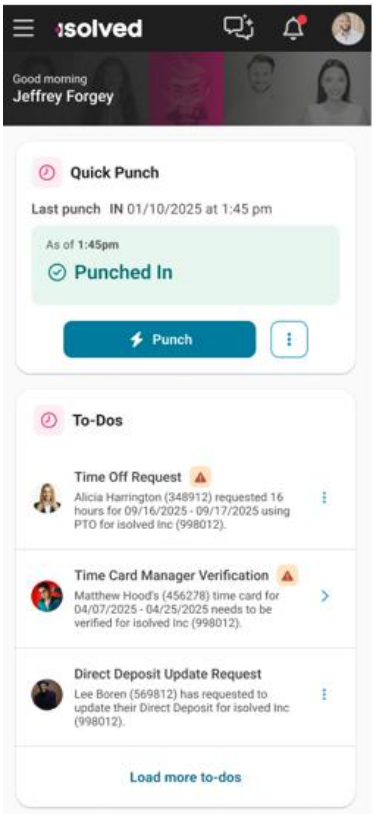
1. Open the isolved People Cloud Mobile App on their phone when they have access to cellular networks or Wi-Fi. Usually in the morning before they leave their home. The user should not close the app (https://support.apple.com/en-us/HT201330) during this time, but they can use other apps on their phone as they normally would.
2. When the user arrives at a work site without internet, they can open the app and clock in or out as they normally would.
3. When the user returns to cellular networks or Wi-Fi, the app sends the time stamps automatically.

Logging in on a Smartphone

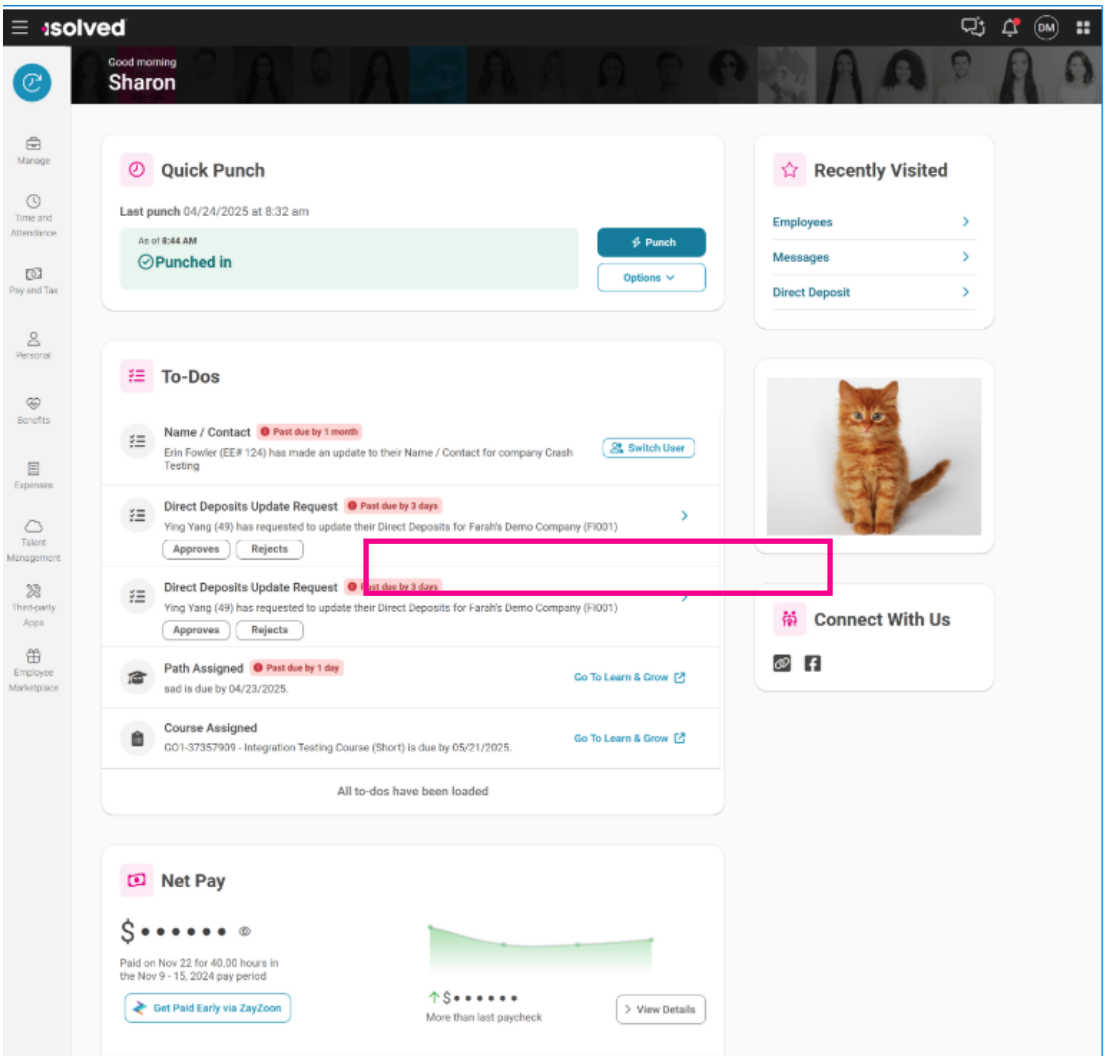
You may log in to the Adaptive Employee Experience (AEE) on a mobile device in two different ways:

1. Downloading the App in the App Store.
   Or
2. Navigate to aee.myisolved.com

Mobile App View:



Workspace Navigation



The menu items available on the left side are determined by your organization's setup. Some options available are:

- **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.
- **Talent Management:** Has links to access Learn & Grow, Share and Perform, and Applicant Tracking.
- **Third Party Apps:** Links you to any third party or legacy isolved applications your company might use.

To navigate, you can use the menu on the left side of the screen, or use the **Recently Visited** card on the right side which is populated by the menu items you have visited recently.

Workspace Options

Quick Punch

If Enabled, allows the user to easily record a punch by selecting the Punch Icon.

To Do

To Do shows a list of any Pending, Past Due or Future Items. The user can easily approve or reject Time Off Requests, navigate to verify timecards or view notifications from other applications on this screen.

Net Pay

Net Pay shows the user their latest paycheck information. As well as any changes to their paycheck that may have occurred such as an increase in pay.

Recently Visited

Recently Visited displays the last 3 menu items that the user visited in AEE.

Note: Options displayed on the Workspace depend on the company setup, so your screen may have a limited number of options displayed.

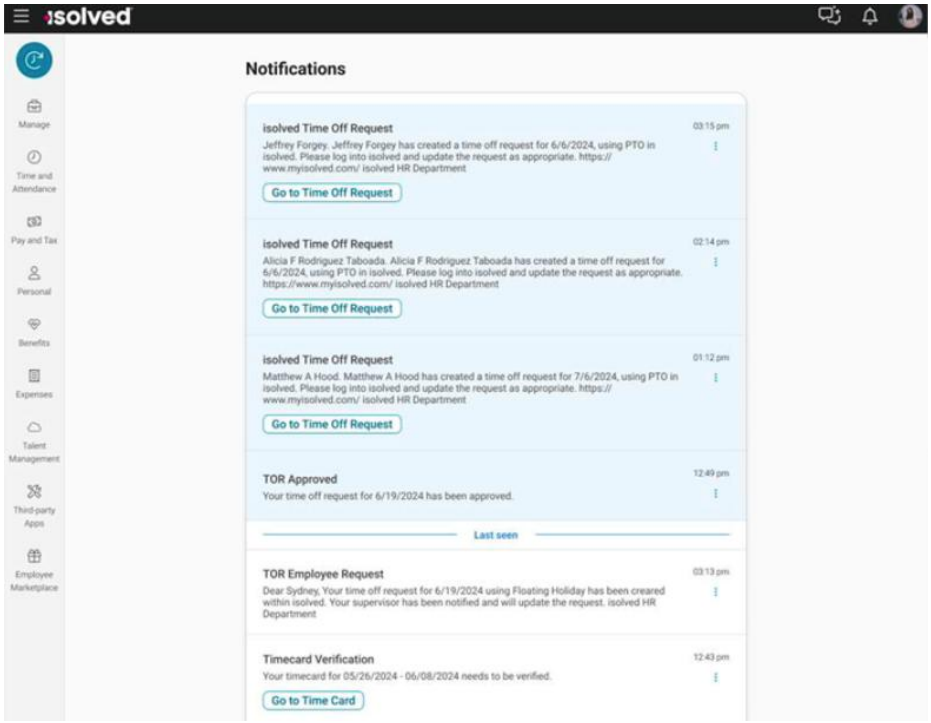
Account Settings

Conversation Virtual Assistant (CVA)

The first option available is CVA. The Conversational Virtual Assistant (CVA) chatbot is an add-on service that allows employees to interact with technology, delivering a much simpler way to access information and services. You can ask questions about your time off, benefits, and other information.

Notifications

When you select the “bell” icon in the upper right corner of the screen, you are taken to the notifications screen



- **Notifications:** Shows any current company or employee notifications such as Time off Request submissions or approvals

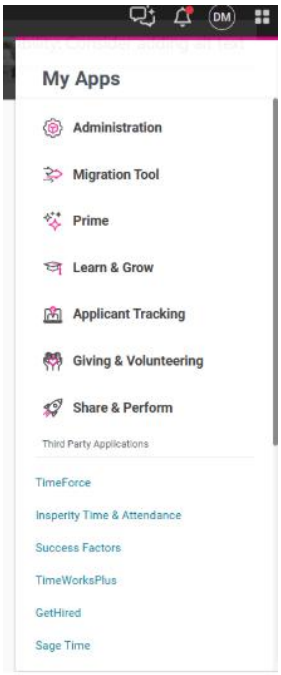
Settings

Next to the bell icon is your initials or Profile Photo if uploaded, select this icon to see some additional user options such as:

- **Manage Account**: Allows you to view and update profile information including Preferred Name, Pronouns, Mobile Number, Password, and Security Challenge.
- **Switch Site:** This allows you to toggle between multiple legal companies that you are employed with.
- **User Preferences:** Allows you to update your "Electronic Consent for Communication and Delivery Tax Form."
- **Log Out:** Log out of AEE.

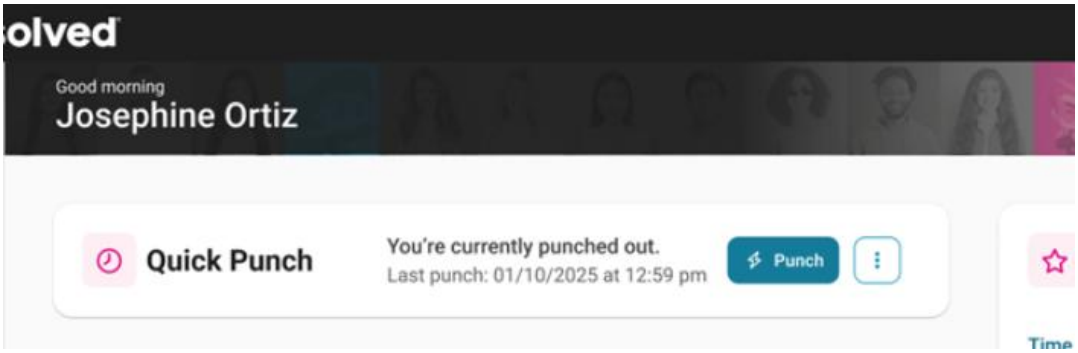
App Launcher

The last icon is the App Launcher. Here you can also easily log in to different areas in isolved that your company has enabled. Some of these Apps may include Share & Perform, Applicant tracking or Administration which takes you to isolved Classic. Additional Third-Party Apps appear at the bottom.



Self-Service Punching

Once logged in, you can immediately create a punch by using the blue Punch button symbol located in the middle of the workspace screen.



Other ways to create a punch can be found on the left navigation menu. The Blue clock symbol can be used for: **Quick Punches** or a **Detail Punch.**

Quick Punch

If you select **Quick Punch**, the system 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. Click **Punch** to create the quick punch. Once the punch is created, a punch confirmation appears.

Detail 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 on the **Detail Punch** screen are as follows (options on this screen may differ based on your company permissions).

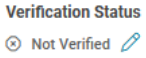
- **Type**: Allows you to specify the **Punch Type** for the entry. The options are "Normal," "Meal," and "Break."
- **Mode:** Allows you to specify if the punch is an "IN," "OUT," "AUTO," or "TRANSFER."
    - **IN** means you are clocking in and is typically used when you are first in for the day or coming back from a break or meal.
    - **OUT** means you are clocking out and is typically used when you are leaving for the day or leaving for your break or meal.
    - **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 multiple punches. 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.
- **Labor:** If the option to enter labor allocations is enabled, select from the allowed labor levels when creating a punch. If no labor is selected, isolved uses your default labor allocation.
- **Notes:** If notes are entered, anyone looking at the time card can view the details.

Time and Attendance > My Time Card (beta)

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

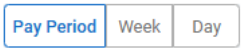
Verification Status

The status of the Time Card verification is displayed. Verification/approval may be performed by clicking on the "pencil" icon. This opens options for users to verify or object to Time Card data.



- **Not Verified:** Never been verified
- **Unverified:** Was once verified, but a change made it again not verified
- **Partially Verified:** If multiple user verifications are required (Manager/Supervisor/Employee) and at least one but not all have signed off
- **Fully Verified:** All user verifications are complete
- **Objected:** Employee does not agree with the Time Card and must state a reason

Calendar View



Time Cards may be displayed in three different calendar options:

- **Pay Period**: All dates for a selected pay period display on the screen
- **Week**: Only days within a selected week display
- **Day**: Only a single selected date displays

Date Range Navigation

Arrow keys can be used to change dates or date ranges for display depending on calendar view selected. There is also the ability to jump to a specific date by selecting the "calendar" icon to the right of the date range.

+ Add Entry

Depending on permissions, this allows new record types to be entered on the employee Time Card:

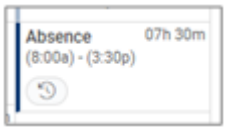
- Punch
- Hour
- Adjustments
- Submit Missed Punch Request

Time Card Entry Tiles

- Shift

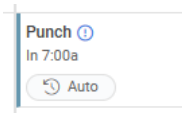
  - Displays:
    - Assigned Shift Name
    - Shift Start/End (HH:MM)
    - Duration (HH:MM)

- Absence

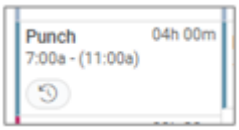


    - Displays:
        - Start/End (HH:MM)
        - Duration (HH:MM)
- Adjustment

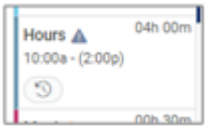
    - Displays:
        - Type (Hours/Dollars)
        - Amount
- Punch
    - Single Punch



        - Displays:
            - Punch Time (HH:MM)
            - Alert Symbol
    - Punch Pair

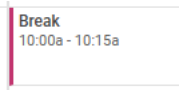


        - Displays:
            - Punch IN Time (HH:MM)
            - Punch OUT Time (HH:MM)
            - Duration (HH:MM)
            - Alert Symbol
- Hours



    - Displays:
        - Start Time (HH:MM)
        - End Time (HH:MM)
        - Duration (HH:MM)
        - Alert Symbol
- Meal

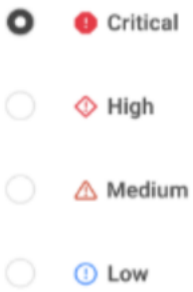
    - Single Punch
        - Displays:
            - Punch Time (HH:MM)
            - Alert Symbol
    - Punch Pair
        - Displays:
            - Punch IN Time (HH:MM)
            - Punch OUT Time (HH:MM)
            - Duration (HH:MM)
            - Alert Symbol
- Break



    - Single Punch
        - Displays:
            - Punch Time (HH:MM)
            - Alert Symbol
    - Punch Pair
        - Displays:
            - Punch IN Time (HH:MM)
            - Punch OUT Time (HH:MM)
            - Duration (HH:MM)
            - Alert Symbol

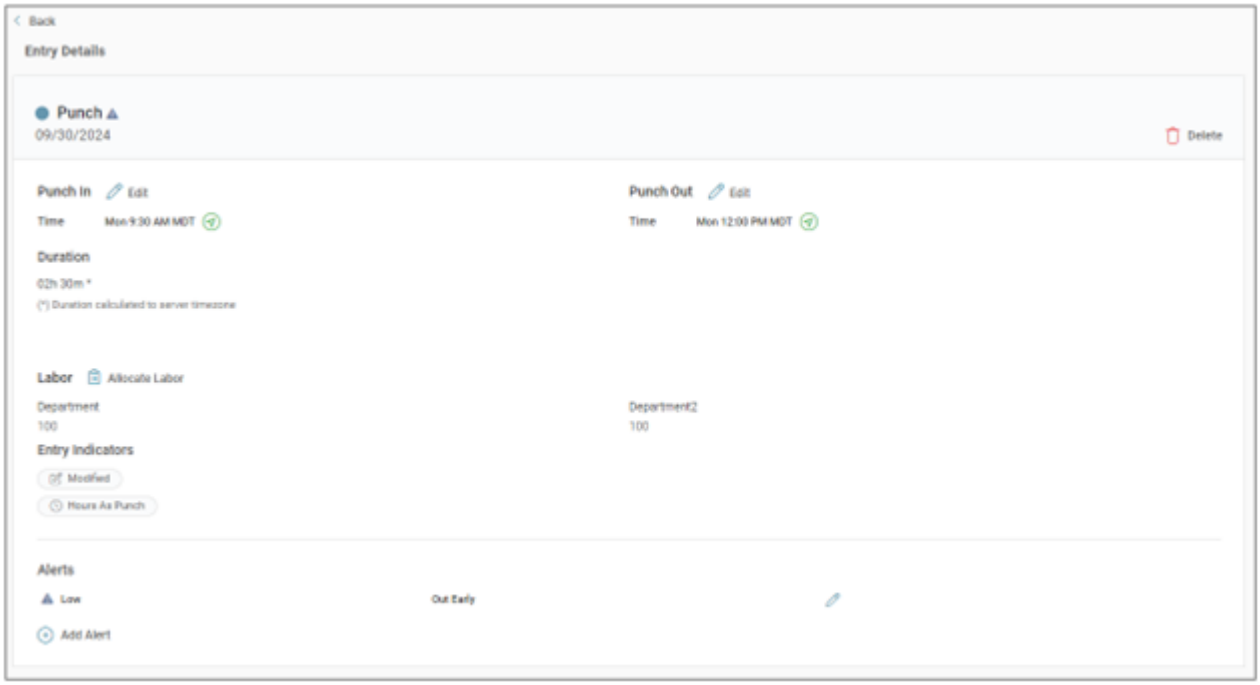
Symbols

- () = System Generated Time
    - Parenthesis indicate time that was system generated. For example 7:00a – (11:00a), the 11:00a time was system generated.
- Alert (color coded based on severity)



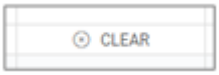
Tile Actions

When clicking on a tile, additional detail displays. From here a user may edit the details if permitted by clicking on the pencil mark icons.



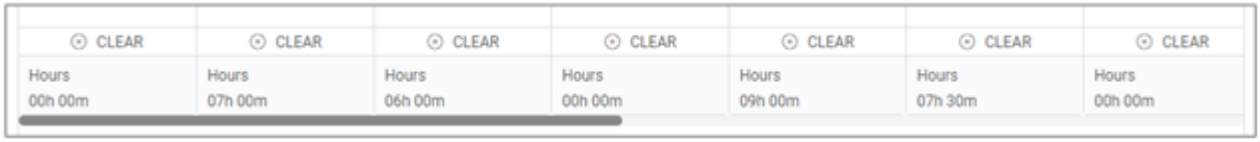
Clear

If a user has permissions, this allows them to clear the transactions for the day.



Daily Totals

Daily totals display in HH:MM format.



Period Totals

Period totals display in HH:DD (hours and decimals) format.

Summary

A summary of hours for the selected calendar view display at the bottom of the screen. Breakdown options show in four tabs:

- **Earnings:** Breakdown of Earnings/Memos for the period being displayed
- **Labor:** Breakdown of hours associated with labor for the period being displayed
- **Adjustments:** Breakdown of adjustment entries

Alerts: View of all the alerts with a count for the period being displayed

Time and Attendance > My Calendar

My Calendar allows you to view your absences, scheduled hours, unavailable time, and holidays in a calendar format.

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

The filters on the left side of the screen allow you to determine the 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. Managers/supervisors can still schedule you during these times.

The **Hours Summary** at the bottom of the screen totals up all the types and hours associated with your current calendar view.

Time and Attendance > Time Off

The **Time Off** screen can be opened by selecting **Time Off** 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 of when you last accrued time, any upcoming accrued time, etc.

When you select **Detail** on the right side, the details around that specific accrual plan are outlined.

- **Service Date:** This lists your hire date or rehire date, in some cases where the accrual is being calculated from.
- **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 available balance 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 what hours are pending (requests that have not been approved or are in the future).
  Note: Pending hours are not included in your balance.
- **Projected Current Plan Year:** Once expanded using the **>** on the right side, this displays projections for the current plan year. It displays how many hours were taken, how many hours will be accrued, and what hours are pending (requests that have not been approved or are in the future).
  Note: Pending hours are not included in your balance.
- **Projected Next Plan Year:** Once expanded using the **>** on the right side, this displays projections for the next plan year. It displays how many hours were rolled over from the previous plan year, what your current balance is, how many absence hours are approved, how many hours will be accrued, and what hours 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 time off entered in the system, as well as company observed holidays.

Requesting Time Off

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

1. Select the **Absence Policy**.
2. Select the **From** and **To** dates.
3. Enter the **Start Time** for the request.
4. Update the corresponding **Days of the week.**
5. Enter the **Number of hours** per day you are requesting.
6. Double check the Total Requested Hours.
7. Enter any **Notes** you want the approver to see.
8. Click **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 for confidentiality purposes. There are several options when using this screen.

- To deactivate this account, click the **Active** toggle. A confirmation pop-up then appears stating, "Deactivate this account?" Click **Deactivate** to agree. **Cancel** if you do not wish to deactivate this account.
- To view or edit your current accounts, click **Details**.
    - 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 **Edit**, make your adjustments, and click **Save**

If you need to add a new direct deposit account, from the main direct deposit screen, click **Add New** 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 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 **Save.**

If you have multiple bank accounts and wish to re-sort the order in which they are used for direct deposit, click the ellipsis in the upper right corner. Instructions appear on how to reorder your accounts. It is a simple drag-and-drop process.

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 expands with full details.

You can change the check detail by using the **<** in the top left corner to move backward through pay dates. You can also toggle between years on the right 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 of the check date.
- Once your selection is complete, click **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

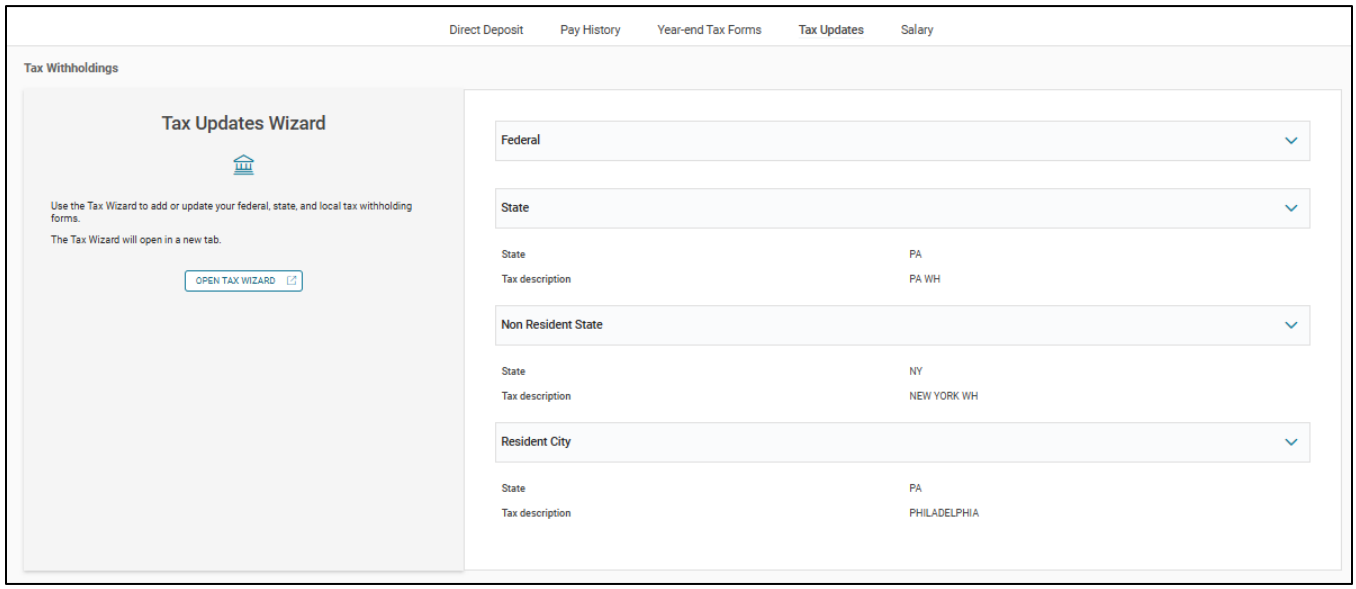
The **Year-end Tax Forms** screen displays forms for the current year (if closed) and the past years. All forms are display in a summary.

To view your Year-end Tax Form, click 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 your Year-end Tax Form.

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

Pay and Tax > Tax Updates

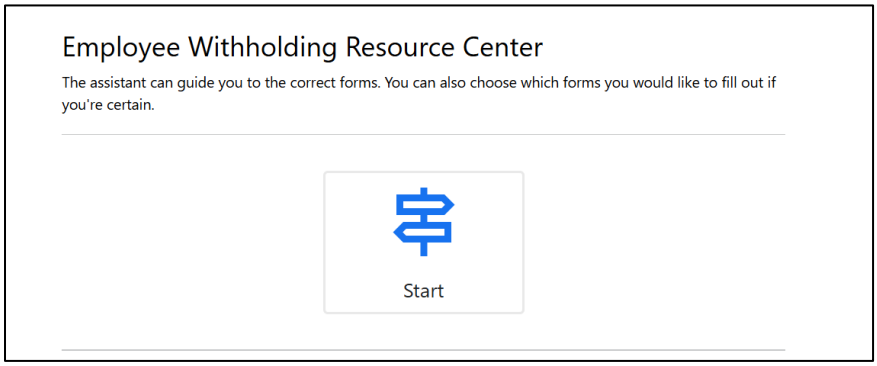
The T**ax Updates** screen allows you to begin the process of updating your withholdings. Your current Tax Withholdings for **Federal**, **State**, and **Local** (if applicable) appear when you access the screen.



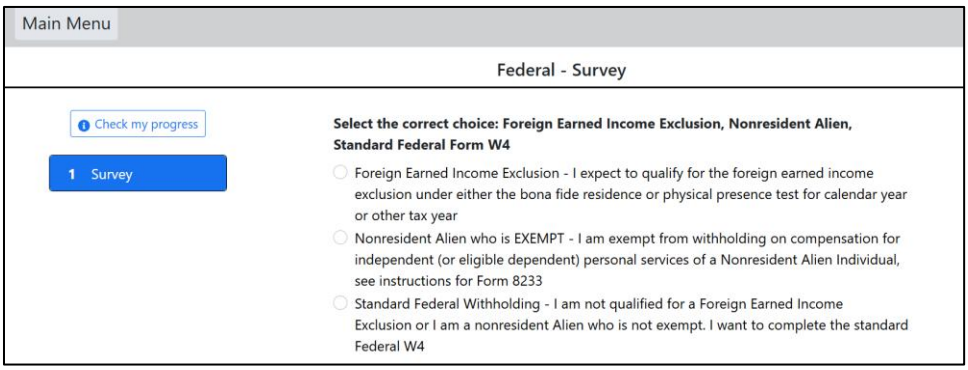
If you need to change your Tax Withholdings and complete a new tax form, click **Open Tax Wizard** on the left side of the screen.

Once you select **Open Tax Wizard**, you are presented with the **Employee Withholding Resource Center** screen to start or sign out. To start a new form, click **Start.**

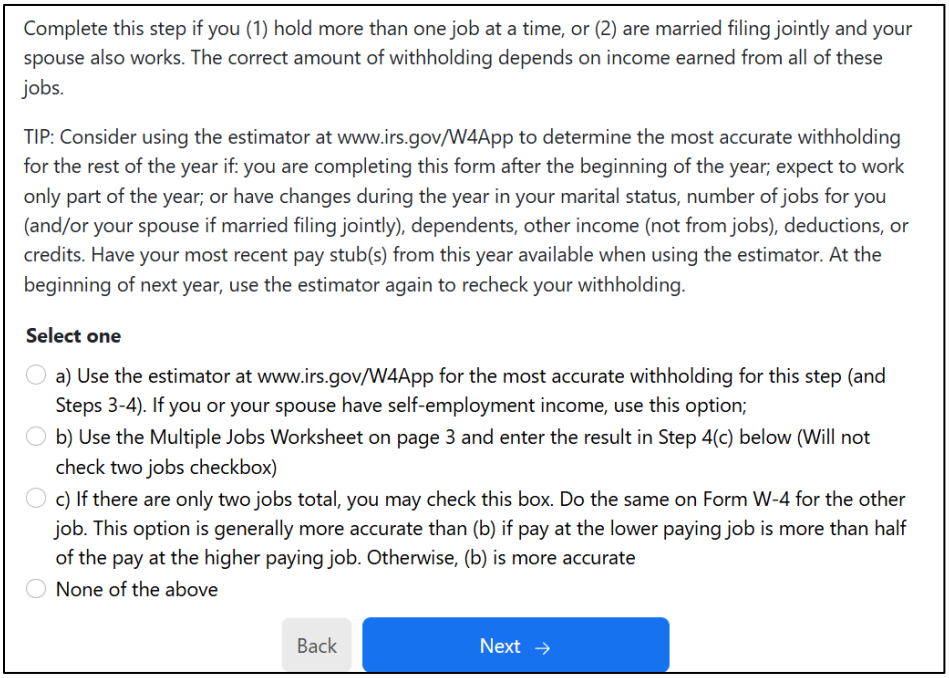
You can then choose the jurisdiction you wish to update by selecting the radio buttons and clicking **Continue.**



You can click **Back** 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 is saved on the left side, and you can return to any section by using the **Back** button or the side menu.



The next page gives you the following options:



Select the desired option and click **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**.

Once complete, you can view or print your completed W-4. You must also attest to the accuracy of the W-4 by selecting the checkbox next to, “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 four digits of your SSN.

Once complete, click **Submit Form.**

You receive a confirmation stating “Your form has been submitted. All sections are completed.” If you have additional jurisdictions to complete, follow the same process.

Once the updates have been confirmed, **Refresh Changes** allows users to refresh the **Tax Updates** page and view any recent updates made to the **Tax Wizard**.

Personal > Personal Info

The **Personal Information** screen allows you to view personal, contacts, and federal reporting information. Under each menu there are additional sub-pages.

Note: The ability to view/edit these fields is determined by your administrator and all fields discussed here may not be available to you.

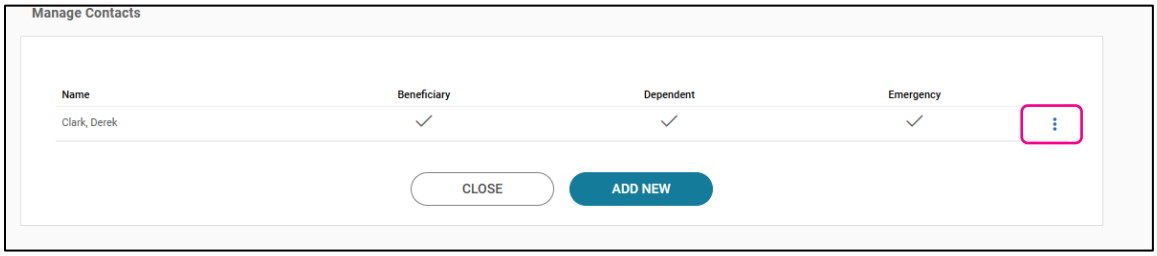
Personal

Under **Personal**, you can view and/or edit the information needed regarding **General**, **Address,** or **Contact** information. For example, under the **General** page, you can view/edit your **First Name**, **Last Name**, **Preferred Name**, or **Pronouns**.

Contacts

The next section, labeled **Contacts,** stores any existing emergency contacts, beneficiaries, and dependents that are available. If you need to add to any of the categories, click **Manage Contacts**. A new page appears which allows you to **Add New** or **Edit** contacts.

The ellipses allows you to edit or delete the contact on file.



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

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

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

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 the arrow.

Disability Self-Identification

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

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 **Save**. The information provided displays as your "Current disability status" upon saving.

EEO Self-Identification

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

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

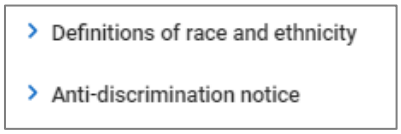
- Female
- Male
- I don't wish to answer

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 **Save**.

For more information about the race and ethnicity selections or to read the "Anti-Discrimination Notice," select the following:



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:

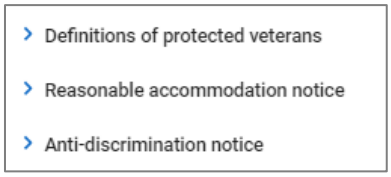
- "I am not a veteran."
- "I belong to the following categories of protected veteran:"
  - Disabled Veteran
  - Recently Separated Veteran (discharge date)
- "I don't wish to identify my veteran status."
- "I am a protected veteran, but I choose not to self-identify to which I belong."

- "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 **Save**.

Once the information is saved, it replaces your "Current Veteran Status."

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



Personal > Form I-9

If this option is enabled, you can complete your portion of the Form I-9 to confirm your identity and verify your employment eligibility.

Benefits > My Benefits

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

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

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

Benefits > Benefit Enrollment

This topic goes over **Open Enrollment** from an employee's perspective for AEE isolved People Cloud. This **Benefit Enrollment** adapts to your computer and most mobile devices and provides a truly unique benefit enrollment experience.

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

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 are moved into the Benefits Enrollment Wizard **Welcome** screen.

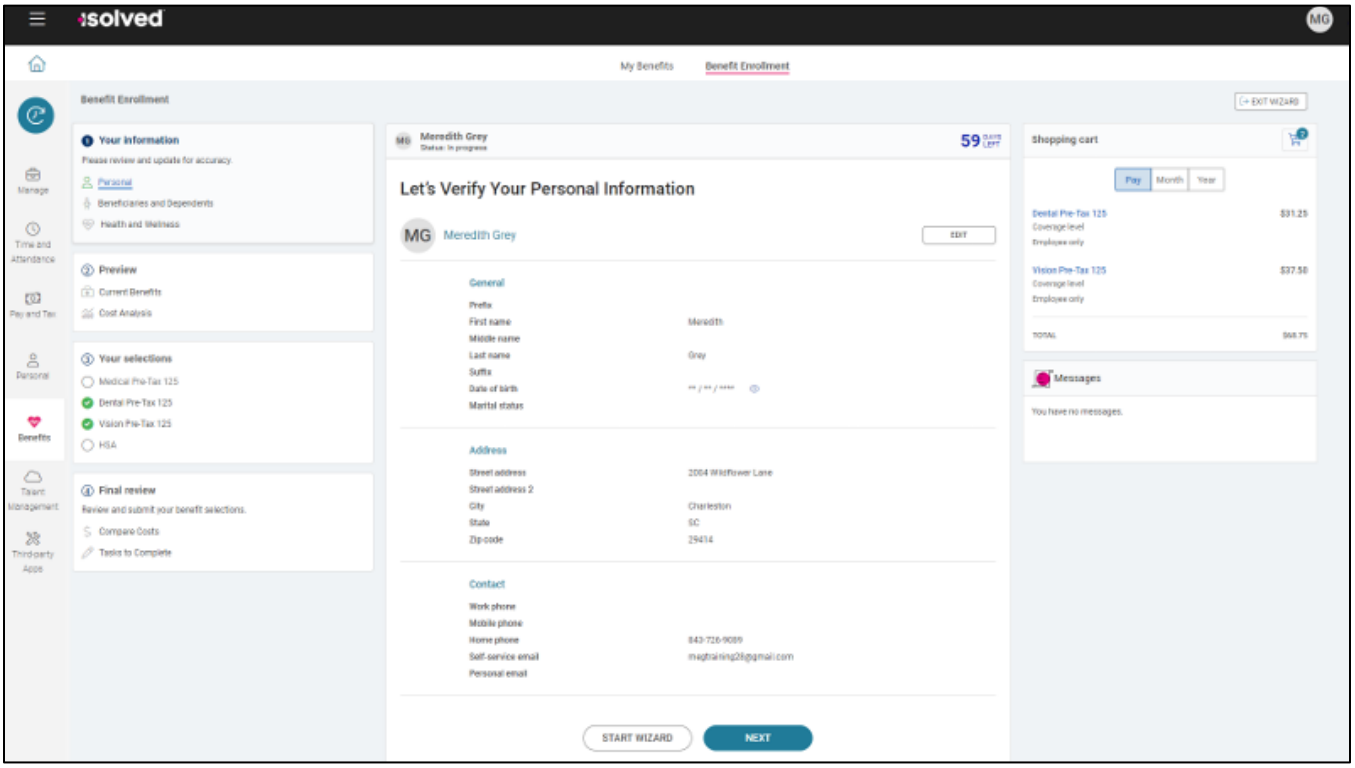
- See the timeframe for your enrollment so you can be aware of when your enrollment must be finalized.
- Select the **Next** or **Review** buttons to move through the enrollment screens and start your enrollment.

Any messages from your employer display 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 acknowledgment appears 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 understood the content of the document. Select **OK**.

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



Personal Beneficiaries and Dependents

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 the 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 benefits 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 placeholder, as this can cause issues for future reporting.

Health and Wellness

If applicable, select the contacts who are tobacco users.

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

Preview

Current Benefits

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

Cost Analysis

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

Select **Edit** to contribute to the plan or waive.

If selected, you must enter in a contribution amount, beneficiary designation, and percentage. The beneficiary percentages must equal 100%.

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

Company-Paid Benefits

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.

Medical, Dental, and Vision

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.

Any dependents you may have are 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.

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).

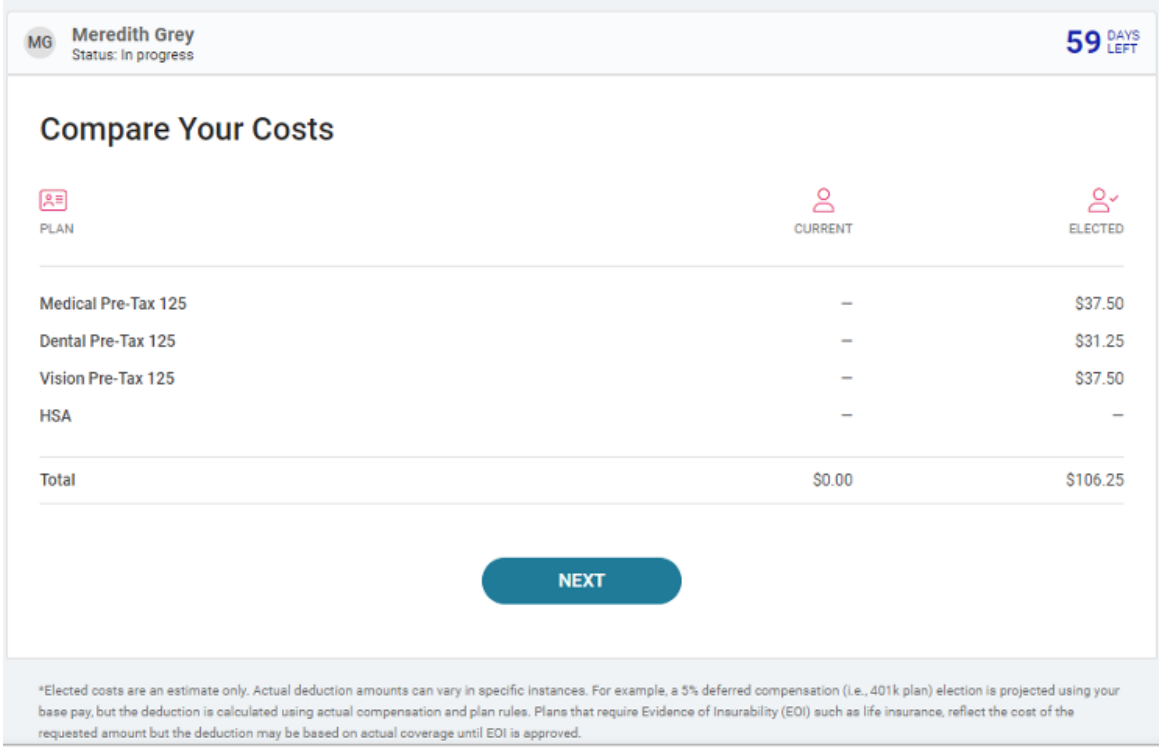
The message includes the amount your coverage is allowed up to until the EOI approval is obtained.

Select beneficiaries and/or those dependents covered by the related plan.

Final Review

Compare Costs

Move to compare your costs. This takes your shopping cart and puts in a “current vs. elected” cost analysis for you.



Tasks to Complete

View any task that still requires 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 are allowed to finish your enrollment. You may leave and come back and finish your enrollment at any time during the enrollment period. The wizard saves your place.

When you have finished making your benefit elections, the confirmation page displays.

1. Scroll down to see a full list of your elections.
2. Select **Download** at the right of the page to download your elections.
3. Select **Submit Benefits** when you are ready to complete your enrollment.
4. A message appears to ensure you reviewed and verified your elections and reminds you that a copy of the enrollment confirmation is available to you in **Documents**.
5. 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 changes to “Completed.”

People Cloud

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

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

Third Party Apps

The links within the Third Party Apps tile log you in through SSO to any integrations your company may have set up with third party companies, or companies isolved partners with.