January 16, 2024

Solved Adaptive Employee Experience

Employee User Guide O Mobile Version

Adaptive Employee Experience - Employee User Guide

Help Docs

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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.

Logging in

Download the isolved Mobile App in your phone's App Store. Once downloaded the app will take you to the log-in screen where the user can enter their username and password, then press log in.

Username	@protonmail	.com		
Password	CP		0	or 🙎
Forgot my pas	sword			
		Log In		
		Back		
			0- (
		POD	e Cl	DUC
solv	ear	COP		



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Select a verification option, select **Request Security Code**. Note: A text message is usually most convenient if you are on your mobile phone.



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 will be remembered for 30 days.

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





Good afternoon, Drew

It's 12:52 PM



-solved

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Passwordless Logging In

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

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

150IV	eapeop		SIOU	JC
Welcom	TE is isolved People Cl	oud app	lications	8
doemanager	@protonmail.com			
Password				
		0	or	-
Forgot my pass	sword			
	Log In			
	Back			
	Back			

To see a complete list of passwordless log authentications the user has set up, visit <u>https://identity.myisolved.com</u>, click on the user email address in the upper right corner, then "My Account", then Passwordless Authentication.

Note: Passwordless Log in does not bypass Multifactor authentication.

Tenant ID

Some users may see a screen at login prompting a selection of a Tenant. This occurs if your email address is connected to more than one isolved environment. The Tenant is an identifier which indicates the URL you would typically visit to log in to self-service. Typically, this code is similar to that URL, so for example, if you logged in to xyz.myisolved.com previously to access self-service, you might see a tenant ID option "xyzco". If you need to switch tenants, you can do so by pressing the bell icon in the upper right corner and an option Switch Tenants is displayed. Follow the prompts to switch.



0		
√solve	ed Dec	
Select a tena	ant to log in	
	rbyws	
	infin	

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 will be 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 will be brought to the below screen.

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

Set up an	authenticator app
	<u> </u>
	0

Using an authen	ticator app is recommended to
improve the sec	urity of your account.
An authenticato	r app is a method of confirming your
identity using a	separate app on your phone (like
more secure that	in having a code sent via email or text.
0.000	Marchaelastar

The screenshot below shows the setup page for a multifactor authentication app. The user will need 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 will be used. Press the plus button in the upper right corner to add a new app to your authentication list. Complete the directions given and you will see a code available in your list of authenticated apps. This is the code you will use as your verification code.





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Now, when the user reaches the screen below, they will be able to type in the six digit code from their authentication app, then they will be 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 will allow and recognize what was set up on that device and use that as a default. Some passwordless options can be used on multiple devices.

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

Can we opt out of the multifactor authentication? No

Do we have to sign in every time we use the app? Yes, for security the app will require the user to sign and use Multifactor Authentication for on each use.

When will the app sign me out? The app will sign users out automatically after 15 minutes of inactivity.

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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:

- 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 (<u>https://support.apple.com/en-us/HT201330</u>) 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 will send the time stamps automatically.

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Logging in on a Smartphone

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

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

The screen below appears:



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



Сору	ß
Add to Reading List	00
Add Bookmark	Ш
Add to Favorites	\$
Find on Page	Q
Add to Home Screen	ŧ
Markup	\odot
Print	Ē
Edit Actions	

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

Cancel	Add to Home Screen	Add
	isolved	۲
1 1 1	https://training.myisolved.com/clo	uds
An icon wi guickly ac	ill be added to your Home Screen so you can ccess this website.	n
quickly do		
"isolve	ed" is is	n't
q w	ertyu i	o p
a	s d f g h j k	1
Ŷ	z x c v b n m	\bigotimes
123	space	done
٢		Ŷ

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

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Welcome Page Navigation

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



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

- **Time and Attendance**: Used for all standard time functions such as viewing and verifying your Time Card, requesting time off, and viewing your schedule.
- **Personal:** Used to update your personal information such as address, emergency contacts, dependents, beneficiaries, and federal reporting data.
- **Pay and Tax:** Used to view and edit direct deposit, pay history, year-end tax forms, and update your 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: Links you to any 3rd 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.

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

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



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



Self-Service Punching

Once logged in, you can immediately create a punch by using the pink I 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 2

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

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Detailed Punch

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

- a. Type: Allows you to specify the Punch Type for the entry. The options are "Normal," "Meal," and "Break."
- b. Mode: Allows you to specify if the punch is an "IN," "OUT," "AUTO," or "TRANSFER."
 - **a.** IN means you are clocking in and is typically used when you are first in for the day or coming back from a break or meal.
 - **b. OUT** means you are clocking out and is typically used when you are leaving for the day or leaving for your break or meal.
 - c. AUTO allows the system to determine the status of the punch.
 - d. **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.
- c. **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.
- d. Notes: If notes are entered, anyone looking at the Time Card is able to view the details.



		PUNCH OUT
DD DETAIL		
♥ Tr N N S Goc	Park A S H F he Church of suis Christ of Latter. Ascot Downs Park W 1000 F Gle	
Location	40.5676329, -111.97533279999999	
Punch date	December 9, 2020	Punch time 11:45 am
Туре	Normal	V Mode Auto V
Labor G Corporate Electricians	None Change 1-T161	
Labor F	leids	
Department	BUSDEV - Business Development	~
Division	Central	~
Task	01	~
	G1	~
Group		

Time and Attendance > Time Card

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

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Time Card				I	Pay period Wee	k Day			🗴 Not verified 🗸
Summary			< > D	ecember 28, 2020 -	January 3, 202	1			
Earnings				12a			12p	12a	Total
Vacation Holiday Regular		8.00 hours 8.00 hours 18.00 hours	Dec >						8.00
Labor	No data to display		Dec > 29						10.00
Adjustment			Dec > 30 >						8.00
Alerts	No data to display		Dec 31						0.00
	No data to display		Jan > 01 >						8.00
			Jan 02						0.00
			Jan 03						0.00
			Hours	Punch Absence	 Adjustment 	🖲 Break 🛛 👄 Meal	Holiday		34.00
							MISSING PUNCH		

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:







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Adding an Adjustment

Time card adjustments allow employees to add hour/unit or dollar amounts to their Time Card that exist outside of

regular hours worked. This includes items such as mileage or tips. This can be done under by using the pink speed dial symbol located at the top-left corner of the page for same day adjustments or by adding a record on the Timecard to add an adjustment to any day during the pay period.

May 30 - June 12, 2022		ADD RECORD V
		ADJUSTMENT
12:00a	12:00p	12:00a Total
n		

Once you select **Adjustment**, fill in the requested details and select **Save**.

- Date: Date of the adjustment entry.
- Adjustment: Select the appropriate adjustment.
- **Type**: Select whether the entry will be either "Hours/Units" or "Dollars". Depending on configuration, you may only see one option in the drop-down menu.
- Amount: Input the adjustment amount correlated with the Type selected.
- Labor: Should the hours/units or dollars be tied to a certain labor field such as "Department," "Job" or "Task."
- Notes: If needed, add any notes related to your adjustment entry.

Adjustment					
Data			Adjustment	Ting)
Date			Adjustment	Tips	ļ
Туре	Dollars	~	Amount		
Notes					
Labor Group)				ମ REFRESH
Loc/Dept	None				
Proj/WorkClss	None				

Submitting a Missing Punch

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

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

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- **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.

Punch date	12/09/2020			Punch time	11:52 AM	
Туре	Normal		~	Mode	Auto	~
Labor G	roup					
Corporate	None			Electricians	1-T1G1	
	Change				Change	
Labor F	ields					
Department	BUSDEV - Business Development	~		Division	Central	
Task	01	~		Group	G1 🗸	
			ВАСК		SAVE	

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. Select the square checkbox next to the Employee section to verify. Depending on your employer's setup, you may also see an **Objection** tab to object to the data on your Time Card.

	• •••
Verification	Objection
Employee UNVERIFIED	>
Supervisor NOT APPROVED	
Manager NOT APPROVED)

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

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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.

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 of 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.



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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 of when you last accrued time, any upcoming accrued time, etc.

Summary					
UPDATED AS OF LAST PAY PERIO 8/24/2020 - 8/30/2020	DD END				+ TIME OFF
	PTO				
	YTD balance: 330.33 hours				
	•		334.33	DETAIL	
	TAKEN: 4.00	REMAINING: 330.33			

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

PLAN YEAR I ANNIVERSARY + TIME OFF 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 Accurate the error working 13 burrs
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 servind 13 hours
Award schedule Schedule (Very Pay) period Last award date 8/28/200 Accruit at the ray method 1 33 hours
As of last pay period end
Projected current pay period
Projected current plan year
Projected next plan year

- Service Date: This lists your hire date or rehire date, in some case 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.

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- 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 into the system, as well as company observed holidays.

PCOMING TIME OFF				2020 holidays	
Date	Absence policy	Hours	Status	Jan 1	New Years
				Jan 15	MLK Jr Day
				Feb 2	President's Day
				May 25	Memorial Day
ENDING REQUESTS				Jul 3 - Jul 5	Date Range
Data	Abarra a llas	line Otto		Jul 4	Independence Day
Date	Absence policy	Hours Status		Sep 7	Labor Day
10/9/20	Sick	1 Pending	1	Oct 2	Columbus Day
10/10/20	Sick	1 Pending	i.	Nov 6	Veterans Day
			View 3 more 📏	Nov 26	Thanksgiving Day
				Dec 25	Christmas Day
AST TIME OFF					
Date	Absence policy	Hours	Status		
9/25/20	Vacation	8	Approved		
9/18/20	Vacation	8	Approved		
			View 39 more 📏		

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Requesting Time Off

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

	Time Card	My Calendar	Time Off	
Summary				
UPDATED AS OF LAST PAY PERIOD END 8/24/2020 - 8/30/2020				+ TIME OFF

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

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

TIME OFF RE	QUEST					
Policy	PTO ¥					
	AVAILABLE 349.00 Hours AFTER REQUEST 341.00 Hours					
From	12/10/2020 To 12/10/2020					
Requested days off	Su M T W Th F S Deselect all					
Start time	08:00 Hours per 8					
Total requeste	d 8 hours					
Note						
	CANCEL SUBMIT					



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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

- In order to deactivate this account, click on the 🛛 symbol. You 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** appear, including:
 - Routing Number
 - Masked Account Number
 - Account Type
 - Description (if applicable)
 - Distribution Details (net pay or partial amount)
 - Frequency of direct deposit

	4 ••
WACHOVIA BANK N.A.	
Active account ending in 9456	
C Active	
DETAILS	

Your de	posit information		
\bigcirc			
Bank detai	ls		
Routing number	021200025	Account number	******9456
Account type	Savings	Description	0000000000123)(*&^%\$##
Deposit de	tails		
Distribution details	Flat dollar amount \$72.73		
Frequency	Every Pay		
	CLOSE		EDIT
		DELETE	

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

Your d	eposit information			
Bank detai	ls			
Routing number	021200025		Account	789456
Account type	Select	~	Description (optional)	000000000123)(*&^%\$##
Deposit de Any remaining Distribution details	tails Inet pay may be issued by paper check 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 the amount.
 - Percentage of Net Pay: If selected, enter the percentage.
 - **Remaining Net** (you may only have one Remaining Net account)
- Frequency: Select how often you want the funds in this account.
- Click on Save.

If you have multiple bank accounts and wish to re-sort the order in which they are used for Direct Deposit, click on the 2 symbol in the upper right-hand corner. Instructions appear on how to reorder your accounts. It is a simple drag-and-drop process. See the instructions below.



Savings	4 •••
WACHOVIA BANK N.A.	
Active account ending in 9456	
Active	
DETAILS	

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.

In order 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

Avgust 24-30, 2020		2020 ~
\$1,135.57 NET PAY	ICH GROSS PAY	• 40 HOURS
Paystub Detail		
Earnings and memos		> >
Employee deductions Time off Event 4 weith		>
Direct deposit	DOWNLOAD 🗸	,

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

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

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

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

Select Mu	Itiple Pay Stubs
Enter a date range to download.	show your available pay stubs within that time period and a list will be generated. Check the ones you would like and click
From	Date
То	Date
Pa	y Period: Aug 24 - 30, 2020 Pay Date: August 31, 2020
Pa	y Period: Mar 23 - 29, 2020 Pay Date: March 30, 2020
Pa	y Period: Mar 16 - 22, 2020 Pay Date: March 23, 2020
Pa	y Period: Feb 17 - 23, 2020 Pay Date: February 24, 2020
Pa	y Period: Feb 10 - 16, 2020 Pay Date: February 14, 2020
	CANCEL 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.

D	ownload	X
~	We have received your request	
C	Your document is being generated. This may take a few moments	
	Your document is being downloaded	

Adaptive Employee Experience - Employee User Guide

Help Docs

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 displayed in the summary layout.

Summary				
Name ti	Year 11	Instructions		
1095-C	2019	View		
W-2	2019	View		

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

Copy BTo Be Filed With Empl This information is being furnished to the	oyee's FEDERAL Tax Return e Internal Revenue Service.	OMB No. 1545-0008	Copy 2To Be Filed With Emp or Local Income Tax Return	Noyee's State, City,	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	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	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	d. Control number 2005-30044	5. Medicare wages and tips 406.00	6. Medicare tax withheld 5.89
c.Employer's name, address, an Fusion Test-Training 100 Main St New York, NY 10004	d ZIP code		c. Employer's name, address, an Fusion Test-Training 100 Main St New York, NY 10004	nd ZIP code	
e. Employee's name, address, ar Edgar S Johnson 3276 Haga Drive San Jose, 10005	ad ZIP code		e.Employee's name, address, a Edgar S Johnson 3276 Haga Drive San Jose, 10005	nd ZIP code	
7. Social security tips	3. Allocated tips	9.	7. Social security tips	8. Allocated tips	9.
10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12	10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12
13. Statutory employee	14. Other NYSDI 0.60	12b. Code	13. Statutory employee	14. Other NYSDI 0.60	12b. Code
Retirement plan		12c. Code	Retirement plan		12c. Code
Third-party sick pay		12d. Code	Third-party sick pay		12d. Code
15. State Employer's state ID r NY 1399999999 0	number 16. State wages, tips 406	e, etc. 17.State income tax 00 9.84	15. State Employer's state ID NY 139999999 0	number 16. State wages, tij 40	ps, etc. 17.State income tax 06.00 9.84
18. Local wages, tips, etc. 19 406.00	9. Local income tax 6.81 NEW 1	ality name YORK	18. Local wages, tips, etc. 406.00	19. Local income tax 6.81 NEW	ocality name

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.

Su	ummary		
	Name 11	Year 11	Instructions
	1095-C	2019	View
	W-2	2019	View



Help Docs

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.

Tax Withholdings		
Tax Updates Wizard	Federal	~
4	🕑 Block tax	
Make changes and updates to your tax withholdings	Filing status	Married Filing Jointly
START WIZARD	Dependent exemption amount	\$7,503.00
	Additional income amount	\$3.00
Enable 3rd party cookies in your browser settings if the wizard shows "your session is inactive"	Additional withholding	\$234.00
	State	~
	Non Resident State	~
	State	NJ
	Tax description	NEW JERSEY WH
	Ilock tax	
	Filing status	Married/Civil Union Partner Separate
	Exemptions	3
	Additional withholding	\$3.00

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 are presented with the **Tax Withholdings** screen to start or sign out. To start a new form, click **Start**.

Employee Withholding Resource Center
The assistant can guide you to the correct forms. You can also choose which forms you would like to fill out if you're certain.
Start → X Sign out

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



Help Docs

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

Based on answers you provided, we have determined the following Federal withholding form(s) may apply to you.				
	Locality	Name	Title	Status
Start	Federal	W-4	Employee's Withholding Certificate	Not completed

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

★ Wizard	• Form and Instructions		
Check my pr	rogress		Select a filing status
			 Single or Married filing separately
Nonresident	Alien		O Married Filing Jointly
Exemption		►	Head of Household
Filing Status		K Back Next >	
\searrow			/

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
O I want to use the worksheet to calculate roughly accurate withholding
O Financial dee the inclusion of calculate roughly declarate manifolding
O There are only two jobs total. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld.
O None of the above
Rack 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.

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Help Docs

Once complete, you are able to 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.**

★ Wizar	d G Form and Instructions
Ple	ease review the document below
lf y	ou would like to make any changes, you may return to the previous page.
If y	ou would like to submit this form, please agree to the terms below.
	Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.
Plea 1	ase verify the accuracy of your tax forms and electronically sign the documents by entering a PIN. Your PIN is the last four digits of your SSN. 234
	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 procedures.

Personal > Personal Information

The **Personal Information** screen allows you to view your "Name," "Date of Birth," "SSN" (masked), and "Marital Status." There is also a drop-down menu for viewing your "Address" and "Contact" information.



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Help Docs

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, the 🛛 icon appears on the right-hand side, allowing 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 appears which allows you to **Add New** or **Edit** contacts.

Contacts	
Emergency contacts	>
Beneficiaries	>
Dependents	>
MANAGE CO	NTACTS

The 🛛 symbol allows you to edit or delete the contact on file if needed.

Manage Contacts				
Name	Beneficiary	Dependent	Emergency	
McCorkle, Josiah	~	~	~	:

-solved[®]

Adaptive Employee Experience - Employee User Guide

Help Docs

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

		ADD NEW	
Contac	t type		
Beneficia	ry		
Depender	1t		
Emergeno	29		
General			
Relationship	Select 🗸		
	Select other if adding trust/estate as a beneficiary		
First name		Last name	
Prefix		Suffix	
Contact			
Work number		Mobile number	
Home		Email address	
Use employ	/ee address		
Address		Address 2	
Zip code		City	
State			
Personal			
SSN		Update SSN	
Data of black		Update date	
Date of birth		of birth	
Gender	Select 🗸		
		CANCEL	SAVE

Note: You are able to 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.

Adaptive Employee Experience - Employee User Guide

Help Docs

Federal Reporting Data

There are three options under Federal Reporting Data:

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

By using the arrow I symbol, you are able to 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 the reason why you are being asked to provide this information.

	Current disability status
	Not Disabled
Why are yo	u being asked to complete this form?
Ve are a fede o measure ou ave a disabil east every fiv	al contractor or subcontractor required by law to provide equal employment opportunity to qualified people with disabilities. We are also requires reprogress toward having at least 7% of our workforce be individuals with disabilities. To do this, we must ask applicants and employees if they ty 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 evers.
dentifying yo ot be seen by egardless of nder Section www.dol.gov	urself 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 selecting officials or anyone else involved in making personnel decisions. Compieting the form will not negatively impact you in any way, whether you have self-dentified in the past. For more information about this form on the quade engloyment obligations of federal contractors \$03 of the Netabilitation Act, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at /ofccp.
Select an o	ption
Yes, I H	ave A Disability, Or Have A History/Record Of Having A Disability
	n't Have & Disability Or & History/Record Of Having & Disability
No, I Do	and the of blobbing, of Article 1, he bed of the high blobbing

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 saving.



Help Docs

EEO Self-Identification

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

	entification	
		Current EEO status
	Gender	Male
	Ethnic origin	White (Not Hispanic or Latino)
Vhy are you	I being asked to complete this form?	
our employer our employer i dverse treatm rders, and reg nforcement. V	is subject to certain governmental record(seeping and report) invites employees to voluntarily identify their race, ethnicity, aret. The information obtained will be kept confidential within ulations, including those that require the information to be su Vhen reported, data will not identify any specific individual.	ig requirements for the administration of civil rights laws and regulations. To comply with these laws, nd gender. Submission of this information is voluntary and refusal to provide it will not subject you to the Human Resources Opartment and may only be used in accordance with applicable baws, executi mmarized and reported to the federal government for our Affirmative Action Program and civil rights
f you choose n ther available	iot to identify your race, ethnicity, or gender at this time, the fe	deral government requires your employer to determine this information by visual observation and/or
or civil rights i or each catego	monitoring and enforcement purposes only, all race, ethnicity, bry have been established by the federal government. If you c	and gender information will be collected and reported in the categories identified below. The definitio hoose to voluntarily self-identify, you may mark only one of the boxes in each section presented below
ender iden	tification	
Female		
Male		
📄 I don't w	ish to answer	
ace and et	hnicity identification	
Hispanic	or Latino	
White (N	lot Hispanic or Latino)	
Black or	African American (Not Hispanic or Latino)	
Native H	lawaiian or Other Pacific Islander	
📄 Asian (N	lot Hispanic or Latino)	
Native A	merican or Alaska Native (Not Hispanic)	
	Nore Races (Not Hispanic or Latino)	
U Two or N		

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.



Help Docs

Adaptive Employee Experience - Employee User Guide

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.

Veteran Self	Fidentification
	Current Veteran status
	Unknown
Why are you	being asked to complete this form?
Your employer U.S.C. 4212 (Vi	is a fear a government contractor subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002, 38 VPRA), which requires employers to take affirmative action to employ and advance in employment veterans within one of the following four categories:
1. Disable	id Veteran
2. Recent	ly Separated Veteran
3. Active	Duty Wartime or Campaign Badge Veteran
4. Armed	Forces Service Medal Veteran
This informatio Compliance (Ol used in a mann	n is being requested on a voluntary basis. It will be kept confidential except when your employer is required to provide information to the Office of Federal Contract CCPD, Unded States Department of Labor (US DOL), Refural to provide this information will not subject you to any adverse treatment, and this information will not be er inconsistent with the Virtama TR 4 variant Resignations tradisations can be 1974, as an ended.
Protected veter employment in certainty if not DOL.	ans may have additional rights under the Uniformed Services Employment and Reemployment Rights Act (USERRA) in particular. If you were abasen from order to parform service in the uniformed services, you may be emploided to be reemployed by your employer in the positions you would be obtained with reasonable for the absence due to service. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VETS), toll-free, at 1-866-4 USA-
As a Governme each specified	nt contractor subject to VEVRAA, your employer is required to submit a report to the OFCCP, US DOL, each year identifying the number of employees belonging to "protected veteran" category. If you believe you belong to any of the categories of protected veterans, please indicate by selecting the appropriate box below.
Select the o	ption(s) that apply to your veteran status
I am not	a unterna
I belong	to the following categories of protected veteran
	Choose all that apply
	Disabled Veteran
	Recently Separated veteran
	Military discharge date
	Active Wartime or Campaign Badge Veteran
	Armed Forces or Service Medal Veteran
🔘 I don't w	ish to identify my veteran status
🔵 Tam a p	rotected veteran, but I choose not to self-identify the categories to which I belong
I am N0'	T a protected veteran. (I served in the military but do not fall into any veteran categories listed above)
	CANCEL

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**.



Help Docs

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

Personal > Form I-9

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

Form I-9 Employment Eligibility Verification



Verify your identity, and complete authorization for employment.

Read instructions before completing	for I-9 employment eligibility verification carefully g this form.	
	VIEW INSTRUCTIONS	
	+ FORM I-9	

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.

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Help Docs

7,800.00 \$150.00 ANNUALLY PER PAY PERIOD*
3000.00 \$150.00 ANNUALLY PER PAY PERIOD*
ANNUALLY PER PAY PERIOD*
\$150.00
\$0.00
Waived
s can vary in specific instances. For example, a 5% deferred compensation (i.e., 401k plan) elect d using actual compensation and plan rules. Plans that require Evidence of Insurability (EOI) su eduction may be based on actual coverage until EOI is approved.
s ca d us edu

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.

Summary	401(K)		401 (K)
Current 401(k) HSA ('Other' category) Waived	Effective 5/26/2019	\$150.00	\$150.00 Every Pay
History			

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

Summary	WAIVED BENEFITS
Current >	VISION PRE-TAX 125 Effective December 1, 2020
Waived	
History	

Adaptive Employee Experience - Employee User Guide

Help Docs

Benefits > Benefit Enrollment

This topic goes over Open Enrollment from an employee's perspective for Adaptive Employee Experience isolved People Cloud. This Benefit Enrollment adapts 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.





Help Docs

Your Information

You will be 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.
- 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 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**.

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Help Docs

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 will be displayed in their own boxes on the page.

囵		1	Vy Benefits Benefit Enrollment			
G	Benefit Enrollment	_				E→ EXIT WIZARD
	1 Your Information	KS Kelli L Smith Status: Completed		9 DAYS	Shopping cart	۲
Time and Attendance	Personal Beneficiaries and Dependents	Let's Verify Your Personal	Information		You have not selected any benefits.	
Pay and Tax		KS Kelli L Smith		EDIT	Messages	
Paragaal	Preview Current Benefits	General First name	Kelli		You have no message.	
and the solution of the soluti	論 Cost Analysis	Middle name Last name Date of birth	L Smith ** / ** / **** 💿			
Benefits	 3 Your selections Medical PreTax 	Marital status	Married			
People Cloud	Dental PreTax Vision	Address Street address	10900 Meadowood Lane			
	Vol Life EE	Street address 2	St Helena			
	Vol Life SP Vol Life CH FSA Medical	State Zip code	CA 94574			
	 FSA Dep Care HSA 4010c) 	Contact				
	CoPd Life CoPd STD	Mobile phone Home phone Self-service email	megandemo35@gmail.com			
	4 Final review	Personal email				
	Review and submit your benefit selections. \$ Compare Costs % Tasks to Complete	STAF	RT WIZARD NEXT			
		1				

Personal Beneficiaries and Dependents

ಸ್ Benefit Enrollment						C→ EXIT WIZARD
1 Your Information	KS Kelli L Smith Status: Completed			9 DAYS	Shopping cart) E
Presse review and uppare of accuracy.	Let's Verify Your Please add/update your depender	Beneficiaries and nts and beneficiaries here. They m	d Dependents ust be flagged as a dependent to in	clude them on your benefit coverage.	You have not selected any benefits.	
2 Preview	Beneficiaries					
 Current Benefits< (論 Cost Analysis 	 Child Smith Child Spouse Smith 	Date of birth	01/01/****	1		
3 Your selections	Spouse Add beneficiary	Date of birth	01/01/****			
Medical PreTax						
 Dental PreTax Vision 	Dependents			•		
Vol Life EE	& Child Smith			Edit		
Vol Life SP	Child	Date of birth	01/01/****	o Delete		
Vol Life CH	Spouse Smith	Date of hirth	01/01/****			
 FSA Dep Care HSA 	Add dependent	bate of birth	01/01/			
401(k) CoPd Life						
CoPd STD		START WIZARD	NEXT			
4 Final review						
Review and submit your benefit selections.						
S Compare Costs						
🖉 Tasks to Complete						

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Help Docs

- 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.

		:
Date of birth	01/01/****	
		÷
Date of birth	01/01/****	
	NEYT	
	Date of birth Date of birth	Date of birth 01/01/**** Date of birth 01/01/****

- 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

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

Benefit Enrollment				C→ EXIT WIZARD
1 Your information	KS Kell LSmith Statu: Completed 9	DAYS LEFT	Shopping cart	R
Preserie even wild opdate for accuracy. Personal Beneficiaries and Dependents Health and Wellness Preview C Durrent Benefits	Help TExt Select the box below for any individual who should be designated as a tobacco user for insurance premium purposes. Any change in tobacc use status is effective as of the later of the plan year benefit start date or the life event initiating this enrollment. You Spouse Smith	cco	You have not selected any benefits.	
iii Cost Analysis 3 Your selections Medical PreTax Dental PreTax Viol Life EE Vol Life SP	Child Smith			
Vol Life CH FSA Medical FSA Dep Care HSA 401(k) CoPd Life CoPd STD				

Help Docs

• Select the contacts who are tobacco users.

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.

Benefit Enrollment	Ν					E> EXIT WIZARD
1 Your Information	Kelli L Smith Status: Completed		9	DAYS	Shopping cart	
Please review and update for accuracy.	Benefits at-a-Glance This page shows your current elections, if any. You may have coverage to make your selections. If you do not have the optic or waive it.	the opportunity to select "Keep" on this pag on to "Keep" a coverage, you do need to nav	ge. or, you can navigate to each vigate to that coverage to either ele	ect	You have not selected any benefits.	
 Preview Current Benefits 論 Cost Analysis 	RE AVAILARE PLANS 	CURRENTLY ENROLLED Yes	EE ONLY \$0.0	ат 0		
3) Your selections Medical PreTax Dental PreTax Vision Vol Life EE Vol Life SP Vol Life CH FSA Medical FSA bep care HSA 4 01(k) Codel life	Dental PreTax Vision Vol Life EE Vol Life SP Vol Life CH FSA Medical FSA Dep Care HSA 401(k) CoPd Life CoPd STD	Yes No No No No No Yes No No	EE ONLY \$12.54	0		
Cord STD Final review Review and submit your benefit selections. Compare Costs Tasks to Complete	"Value displayed may be an annual target or par pay election amount (152	NEXT	(ife or disability type plan).			

•**ISOIVED** Help Docs

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Cost Analysis

1 Your Information	KS Kelli L Sm Status: Comp	ith leted					9 DAYS LEFT
Please review and update for accuracy.	Medical PreTax	Dental PreTax	Vision	Vol Life EE	Vol Life SP	Vol Life CH	View more 💊
 A Personal [™] Beneficiaries and Dependents [∞] Health and Wellness 	Medical © Back to Bene	PreTax	nts				
2 Preview	This page is info	mational. You can us	e this to quickly com	pare prices.			
 Current Benefits 							OISPLAY
新 Cost Analysis	Plans	EE ONLY	E	E+SP	EE+CH(REN)	EE+FAM	
(a) Your estactions	Med PPO	\$0.00	\$	125.00	\$200.00	\$510.00	
3) Four selections	Med HMO	\$0.00	S	100.00	\$200.00	\$300.00	
Medical PreTax	Med HDHP	\$0.00	s	100.00	\$200.00	\$300.00	
Dental PreTax	Manthlu daduntian a	mounte ano displayed abo					
 Vision Vol Life EE 	wonthly deduction a	mounts are displayed abo	we.				
Vol Life SP				NEVE			
Vol Life CH				NEXT			
FSA Medical							
FSA Dep Care							
HSA							
✓ 401(k)							
✓ CoPd Life							
CoPd STD							

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

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Your Selections

Deferred Compensation

Kell L Smith Status: Completed 9 LEFT	Shopping cart
401(k)	You have not selected any benefits.
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	You have no message.
401(K) SELECTED EDIT	
Contraction Guardian	
PREVIOUS	
* 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, which the oct of the requested amount but the deduction may be based on actual coverage until EOI is approved. "It is the function can are calculated using taking the 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.	

- 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%.

Kelli L S Status: Co	Smith ompleted					9 8
Select	Coverag	e				COST ANALYSIS
401(k)						
Select coverage	ge level to view c n informed of the c tributions to the pla	osts and complete ption to make contri in at this time.	your information. butions to the 401(k) Plan and I elect n	ot to	
\$ Deductio	ins					¢
401(k) Roth Amount		401(k) Roth Percent	3.00			\$1,500.00 Per Pay
401K Amount		401K Percent	3.00			Amount
Spou Spou Primary percent Child	se Smith 100.00 Smith			Contingent percent	0.00	
Primary percent	0.00			Contingent percent	100.00	
🕀 Add I	beneficiary					
			CANCEL	SAVE A	IND NEXT	
* Elected cost is projected using y insurance, reflec ** Per Month cost	an estimate only. Ac your base pay but th t the cost of the requ sts are calculated by	tual deduction amount e deduction is calculate rested amount but the taking the annual amo	s can vary in specific ed using actual comp deduction may be ba unt and dividing it by	instances. For examp ensation and plan rule sed on actual coverag 12; therefore, the actu	ole, a 5% deferred compensation (i.e. a es. Plans that require Evidence of Insu je until EOI is approved. Jal monthly cost may vary from the st	101k plan) election is rability (EOI) such as life ated amount if the deduction

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

•**ISOIVED** Help Docs

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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)	Status: In pr	ogress			9
Se	elect (Coverage			COST ANALYSIS
Bas	ic Life				
Sele	ct coverage	level to view costs	and complete your inforn	nation.	
	Coverage	EE ONLY	~		
8	Who to cov	er			<u> </u>
	You H Add de	pendent			\$0.00 Per Pay Amount
0	Coverage o	ptions			
	Actual coverage	\$0.00			
Age	e-reduced amount	\$0.00			
8	Beneficiari	es			
	Spouse	Smith			
	Primary percent			Contingent percent	
	Child S	mith			
	Primary percent			Contingent percent	
	🕂 Add be	neficiary			
			CANCEL	SAVE A	

- 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.

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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.

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Help Docs

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.

Kelli L Sr Status: In pr	nith ogress		9 DAY LEF
Select (Coverage		COST ANALYSIS
HSA			
Select coverage	level to view costs and complete	your information.	
Coverage	EE ONLY	~	
Who to cov	er		Sec.50 Per Pay Amount
Annual target	\$1,000.00 Amount must be less than or equal to \$4,450.00		
		CANCEL SAVE AND NEXT	
* Elected cost is an projected using yo insurance, reflect t ** Per Month costs schedule is not dis	estimate only. Actual deduction amount Ir base pay but the deduction is calculate te cost of the requested amount but the are calculated by taking the annual amo tributed evenly on a per month basis.	ts can vary in specific instances. For example, a 5% deferred compensation (i.e. 401k ad using actual compensation and plan rules. Plans that require Evidence of Insurabil deduction may be based on actual coverage until EOI is approved. unt and dividing it by 12; therefore, the actual monthly cost may vary from the stated	plan) election is ity (EOI) such as life amount if the deduction

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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.

KS Kelli L Sr Status: In pr	nith ogress					9 DAYS LEFT
Select (Coverage					COST ANALYSIS
Voluntary Life	e EE					
Select coverage	e level to view costs and c	complete your infor	mation.			
Coverage	EE ONLY	~				
🔗 Who to cov	er					8
Vou You						\$0.00
🕂 Add de	ependent					Per Pay Amount
Coverage o	options					
Requested coverage	\$100,000.00	~				
Per Pay Amount Requested	\$61.87					
Actual coverage	\$0.00					
Age-reduced amount	\$0.00					
Any benefit ove	r \$0.00 requires Evidence	e of Insurability (EC	DI). Your coverage will be \$	0.00 until EOI appro	val is obtained.	
Beneficiari	es					
At least on	e beneficiary is required t	to be selected for t	his plan.			
Spourse	Smith					
✓ spouse	Sinth		0			
percent	100.00		percent	0.00		
✓ Child S	mith					
Primary	0.00		Contingent	100.00		



Help Docs

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.

Benefit Review					C→ EXIT WIZARD
Your Information Please review and update for accuracy. Personal	Kelli L Smith Status: In progress Compare Your Costs		9 DAYS LEFT	Shopping cart Pay Mont	h Year
 [™] Beneficiaries and Dependents [™] Health and Wellness 	R. PLAN	CURRENT	ELECTED	Medical PreTax Coverage level EE+FAM	\$150.00
 Preview Current Benefits 	Medical PreTax Dental PreTax	\$0.00 \$12.50	\$150.00 \$50.00	Dental PreTax Coverage level EE+FAM	\$50.00
益 Cost Analysis	Vision Vol Life EE Vol Life SP		\$0.00 \$0.00 \$0.00	Vision Coverage level EE+FAM	\$0.00
Your selections Medical PreTax Dental PreTax	Vol Life CH FSA Medical FSA Deo Care	- -	\$0.00 \$62.50	Vol Life EE Coverage level EE ONLY	\$0.00
 Vision Vol Life EE Vol Life SP 	HSA 401(k)	-	\$62.50 \$2,000.00	Vol Life SP Coverage level SP ONLY	\$0.00
Vol Life CH FSA Medical FSA Dep Care	CoPd STD	-	\$0.00	Vol Life CH Coverage level CH ONLY	\$0.00
 HSA 401(k) CoPd Life 	lotal	S12.50	\$2,325.00	FSA Medical Coverage level EE ONLY	\$62.50
CoPd STD				FSA Dep Care	Waived
Final review Review and submit your benefit selections.	HSA Coverage level EE ONLY	\$62.50			
\$ Compare Costs	** Per Month costs are calculated by taking the annual amount and div schedule is not distributed evenly on a per month basis.	riding it by 12; therefore, the actual monthly cost may vary from the stated a	mount if the deduction	401(k)	\$2,000.00
Tasks to Complete				CoPd Life Coverage level EE ONLY	\$0.00

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 will save your place.

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Help Docs



KS Kelli L Smith Status: In progress	9 DA LEF
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 updatin benefits After you are done with the wizard, this information will be sent to HR for app READ MORE	ig information about your family - enrolling in proval. IMPORTANT NOTE: At the end
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.	
3	

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- When you have finished making your benefit elections, the confirmation page displays.
- 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 appears to ensure you reviewed and verified your elections and will remind you that a copy of the enrollment confirmation is available to you in **Documents**.
- If you wish to submit your benefit elections, select **Yes**. If you wish to go back, select **Cancel**.

	Authorization	×
KS Kelli L Smith Status: In progress	By selecting Yes, you certify that you have reviewed and ver benefit elections. Once you submit, a copy of the enrollment confirmation will be available in Employee Documents.	ified your t 9 LEFT
Benefit Election and	s are you sure you wish to submit your benefit elections?	
 I have elected to participate c I authorize my Employer to de 	CANCEL YES	
I understand that most pre-tax "Change in Status" as defined	elections cannot be changed or revoked prior to the next pla under the Internal Revenue Code	n anniversary date unless I experience a
Updates to these elections car	n be made until the final day of the enrollment period	
	SUBMIT BENEFITS	

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

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People Cloud

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

- o 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.
- o Benefit Services: This takes you to COBRA.



Marketplace Integrations



The links within the Marketplace Integrations tile log you in through SSO (single sign-on) to any integrations your company may have set up with 3rd party companies, or companies isolved partners with.