GROWING WITH ISOLVED WEBINAR SERIES: ISOLVED 6.6 RELEASE & COVID-19 UPDATES

Welcome…

We will begin shortly.

Some Housekeeping Items:

- All participants have been placed on mute
- All registrants will receive a follow up email with a link to the recorded webinar and any training documentation
- Stay updated and register for upcoming webinars on our COVID-19 INFO Center here: https://ctrhcm.com/home/covid-19-information-center/
- This training is intended for educational and informational purpose. We hope that you learn a lot, but the information should not be construed as legal or tax advice.
- If you have any questions or want to request training, please email training@ctrhcm.com

Presenter: Kara Stivason, CTR Trainer

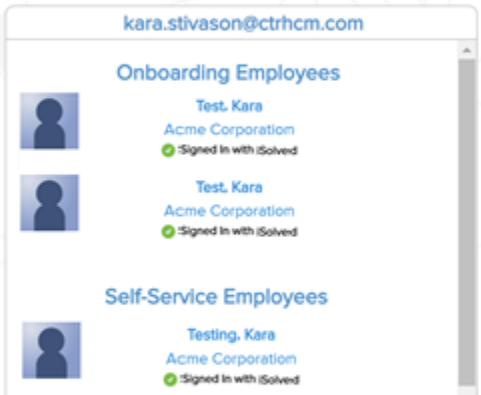
AGENDA

- ✓ iSolved 6.6 Release Items
  - ✓ Multi-User Option
  - ✓ iSolved GO! MFA
  - ✓ Employee Number & Timeclock ID
  - ✓ Onboarding Enhancements
    - ✓ I-9 Update (temporary rules)
  - ✓ Benefit Updates
- ✓ COVID-19 Updates
  - ✓ Resources
  - ✓ Support's COVID-19 FAQs

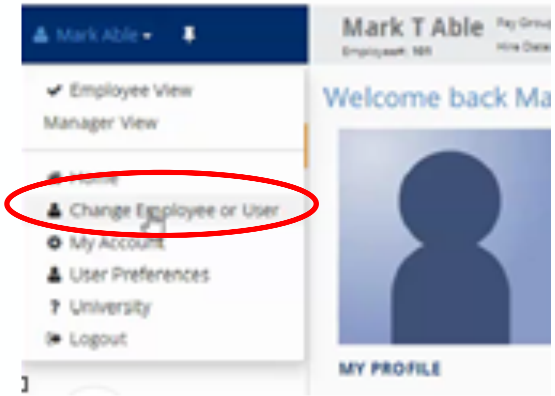
Multi-User Option

If you have multiple users attached to an e-mail/log-in, you will be prompted after logging in as to which user you want to utilize.

The screen now looks like this:



If you need to switch users after logging in, toggle your view by utilizing the dropdown under you name and select, “Change Employee or User”.



iSolved GO! Update

The iSolved GO! App now has Multi-Factor Authentication (MTA). The guide to instruct employees on how to update the app is located under Quick Links on the Client Landing Page:

QUICK LINKS

NEW! Updated PPP Loan Report

NEW! SBA Guidance on PPP Loan Calculation & Application Process

NEW! iSolved GO Mobile App Updated

Employee Number & Timeclock ID Update

We now can auto-assign the Employee Number Upon ‘SAVE’ instead of the number generating once the NH Wizard/Quick Hire is started.

So if two users are hiring at the same time, this will prevent duplicate employee numbers.
In addition, we can also Default the Timeclock ID to match the Employee Number.

If this is something you want to be automatically set up for you, please let us know.

Onboarding Updates

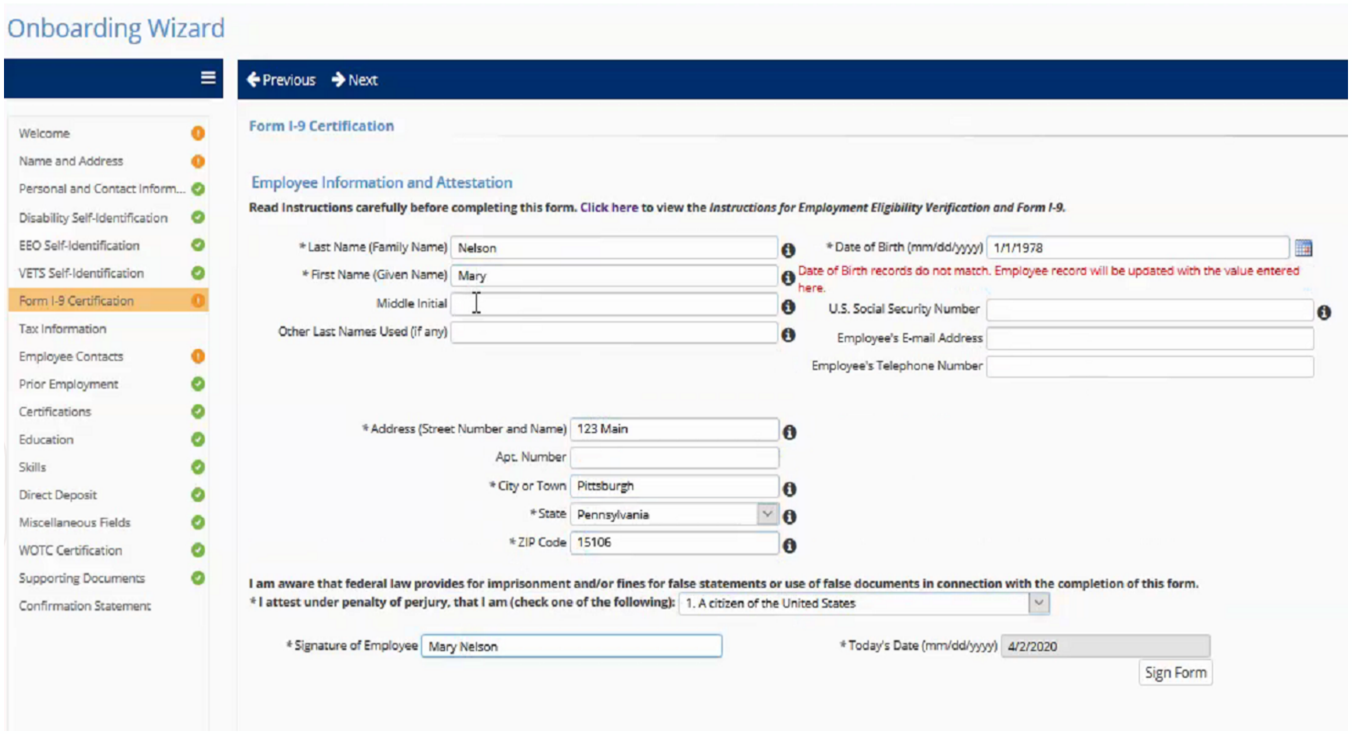
Enhanced Employee Experience:
→ Update look and feel of onboarding

Messages now allowed on eligible pages of wizard and they will display in a new format.

Let's see it in action…

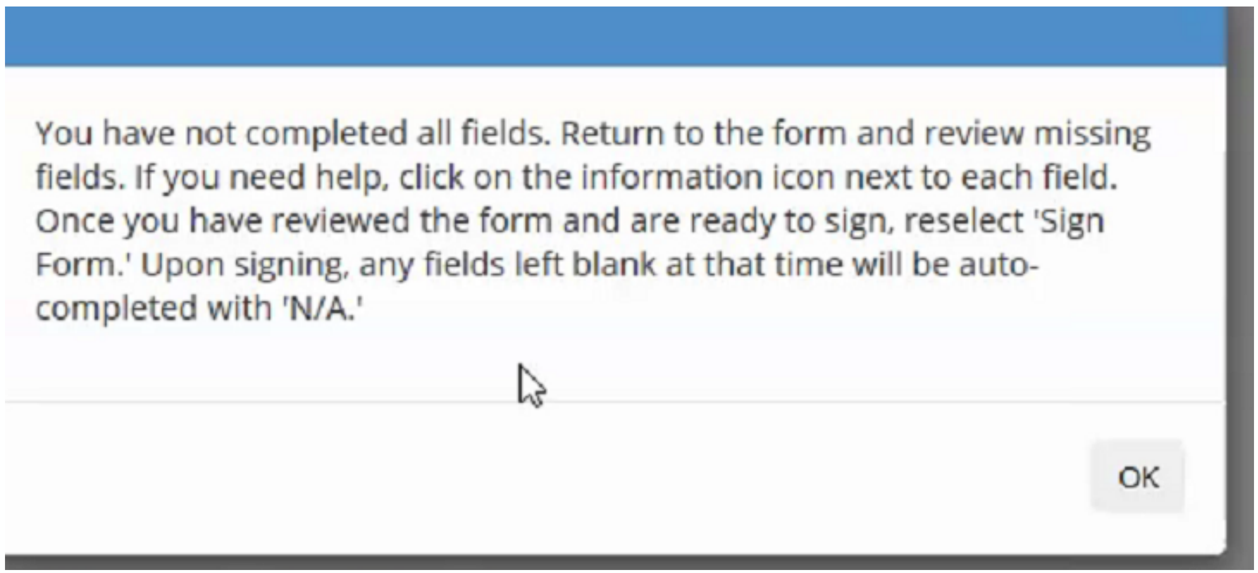
Onboarding Updates

Form I-9 Certification: Field Help (info button) has been added to explain the usage of the information submitted on the I-9. If all fields haven't been completed, the user will receive the error message listed below.



Onboarding Updates

Form I-9 Certification: If all fields haven't been completed, the user will receive the error message listed below.



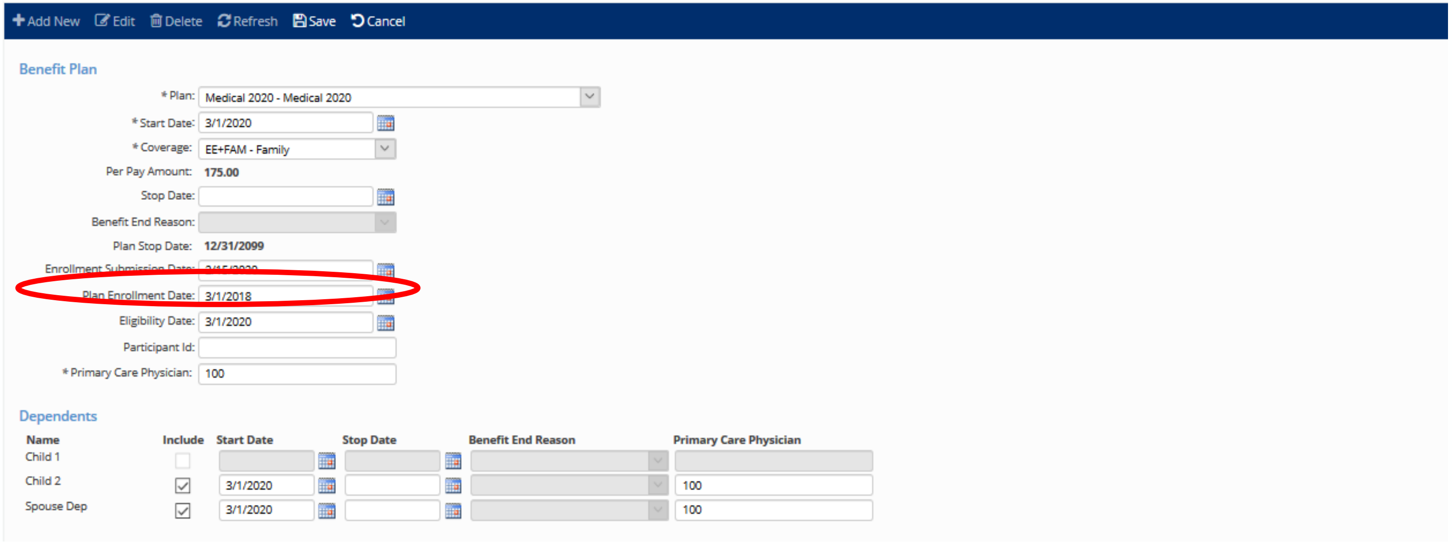
I-9 FORM

New I-9 Form Must be Used Effective May 1, 2020-this is updated in iSolved. Temporary Pandemic Guidelines-See the Client Landing Page or visit the USCIS FAQs here.

The USCIS also just revised their "Guidance for Completing Form I-9" Handbook this month. You can find that here.

Benefit Update

On the Benefit Plans UI, the Enrollment Date field has been renamed to Enrollment Submission Date. A new field, called Plan Enrollment Date, has also been added in order to track the original date in which the employee was enrolled in the plan.



COVID-19 RESOURCES: CLIENT LANDING PAGE INFO

- UPDATED PPP Loan Report PDF: This covers the CARES Paycheck Protection Program Report in iSolved. This report pulls the information for your Loan Application.

- SBA Guidance on Paycheck Protection Program Loan Calculation & Application Process

- Updated Guidance on Tracking FFCRA Leave within iSolved-Recap Process for Adding FFCRA Extended FMLA & Sick Leave, Process for Tracking FFCRA Qualified Health Expenses & Calculating & Applying Associated Tax Credits

- Update on the PPP Loan (from the Dept of Treasury and Additional Tax Relief-Overview of the Dept of Treasury FAQs and Other Tax Relief Options

- IRS Clarification of Tax Deferral and Acknowledgement Form

COVID-19 RESCOURCES:
CTR COVID-19 INFO CENTER

COVID-19 INFORMATION CENTER

for Business & Employers

CTR COVID-19 Info Center

Let's take a second to explore…

COVID-19 RESOURCES:
iSolved University

Let’s take a second to explore…

COVID-19 SUPPORT FAQs

Q: How can we calculate the Average Wage or Average Hours for our Employees?

A: FFCRA Average Hours & Wage Report in iSolved

See the Complete Guide here.

COVID-19 SUPPORT FAQs

Q: How do the FFCRA Credit Calculations Work and where can we see them?

A: If you are using the FFCRA Earnings Codes we set up, the calculation is as follows:

Credit calculation is -
COVID-Sick or FMLA earnings x 1.45% - Medicare tax credit
COVID Sick or FMLA earnings
Qualified Healthcare Expense - Sick or FMLA.
FFCRA Average Hours & Wage Report in iSolved

You can see these on your Payroll Summary & Business Credits Screen-let's take a look…

COVID-19 SUPPORT FAQs

Client ID: MargieDemo - Margie's Wine Company Inc.	**PAYROLL SUMMARY PREVIEW**	**Period Begin Date:** 3/16/2020	
Pay Group: Hourly EE	Margie's Wine Company Inc.	**Period End Date:** 3/29/2020	
Check Date: 4/3/2020		**Pay Period:** 1	
Run Date: 4/12/2020		**Payroll Type:** Regular Payroll	

***** PAYROLL FUNDING *****

Debit Type	Bank Name	Transit Routing #	Bank Account #	Counts	Amount	ACH Debit
Checks	BANK OF AMERICA, N.A.	*****0196	******7813	6	$4,578.02	$0.00
Direct Deposits	BANK OF AMERICA, N.A.	*****0196	******7813	21	$0.00	$30,764.58
Totals:				**27**	**$4,578.02**	**$30,764.58**
Tax Liabilities	BANK OF AMERICA, N.A.	*****0196	******7813		$0.00	$14,464.52
Tax Liabilities - Client's Responsibility					$9.21 #	$0.00
Third Party Checks	BANK OF AMERICA, N.A.	*****0196	******7813	1	$661.54	$0.00
Third Party Electronic Payment	BANK OF AMERICA, N.A.	*****0196	******7813	1	$0.00	$78.81
Payroll Billing	BANK OF AMERICA, N.A.	*****0196	******7813		$0.00	$15.00
Tax Adjustment (FFCR Act - FMLA)	BANK OF AMERICA, N.A.	*****0196	******7813		$0.00	($1,479.14)
Tax Adjustment (FFCR Act - SickPay)	BANK OF AMERICA, N.A.	*****0196	******7813		$0.00	($1,417.40)
Totals:				**2**	**$670.75**	**$11,661.79**
Total ACH Debit:					**Impound Date: 4/13/2020**	**$42,426.37**
Total Payroll Funding (all items):						**$47,675.14**

~ Indicates Tax Amount Not Impounded - Client's Responsibility

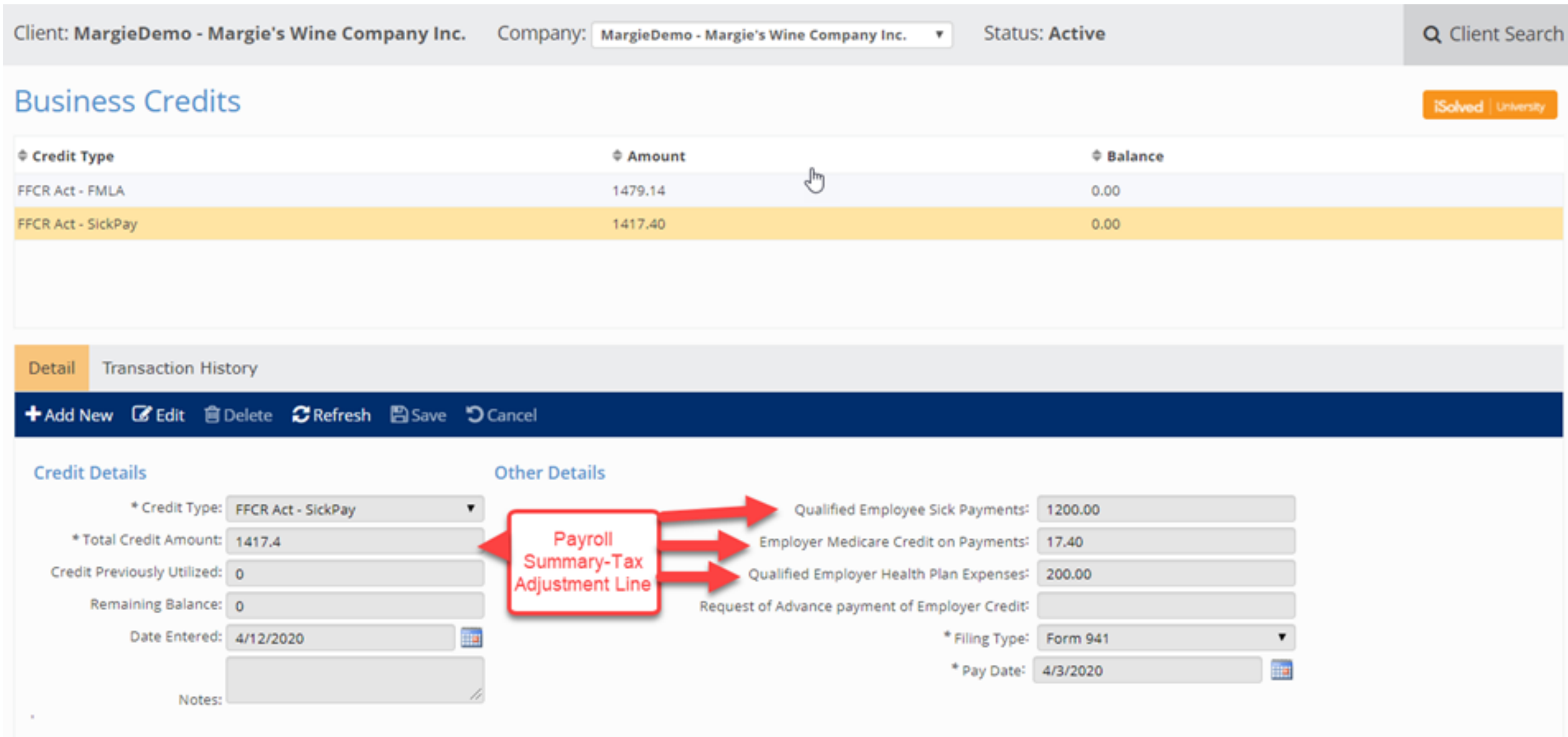
COVID-19 SUPPORT FAQs

Allotment	0.00	1,500.00	0.00	1,500.00	0.00	1,500.00	0.00	1,500.00
Bonus	0.00	150.00	0.00	150.00	0.00	150.00	0.00	150.00
Overtime - Blen	34.27	1,393.49	34.27	1,393.49	34.27	1,393.49	34.27	1,393.49
NonTax Exp Reim	0.00	1,500.00	0.00	[illegible]	[illegible]	1,500.00	0.00	1,500.00
Heart & Lung Fi	40.00	756.00	40.00	[illegible]	[illegible]	756.00	40.00	756.00
COVSick-EE-100	80.00	1,200.00	[illegible]	[illegible]	[illegible]	1,200.00	80.00	1,200.00
COVID-19 FMLA	80.00	1,260.86	80.00	[illegible]	[illegible]	1,260.86	80.00	1,260.86
Total Earnings	**2,912.43**	**51,389.24**	**2,912.43**	[illegible]	[illegible]	**51,389.24**	**2,912.43**	**51,389.24**
Memo Calculations	Hours	Dollars	Hours	[illegible]	[illegible]	Dollars	Hours	Dollars
ER Medical	0.00	17,603.20	[illegible]	[illegible]	[illegible]	17,603.20	0.00	17,603.20
ER Dental	0.00	1,080.00	0.00	1,080.00	0.00	1,080.00	0.00	1,080.00
StopLoss	0.00	1,726.27	0.00	1,726.27	0.00	1,726.27	0.00	1,726.27
EEMEDMonthly	0.00	323.26	0.00	323.26	0.00	323.26	0.00	323.26
401K Match	0.00	1,452.70	0.00	1,452.70	0.00	1,452.70	0.00	1,452.70
Med&Ben Fund	0.00	13,995.91	0.00	13,995.91	0.00	13,995.91	0.00	13,995.91
Union Gross	0.00	663.54	0.00	663.54	0.00	663.54	0.00	663.54
COV19-QHlthSick	0.00	200.00	0.00	200.00	0.00	200.00	0.00	200.00
COV19-QHlthFMLA	0.00	200.00	0.00	200.00	0.00	200.00	0.00	200.00
Total Memo Calculations	**0.00**	**37,244.88**	**0.00**	**37,244.88**	**0.00**	**37,244.88**	**0.00**	**37,244.88**

$1417.40-FFCRA-Sick Credit =
Medicare Tax Credit -
1200.00 * .0145= $17.40
Plus
$1200 - Sick
$200 - Qual Health Exp

COVID-19 SUPPORT FAQs

Client Management > Taxes > Business Credits.



See the complete guide here.

COVID-19 SUPPORT FAQs

Q: When an employee hits their hour limit for covid 2/3 earnings code (80) do they go to FMLA covid next in iSolved?

A: No, this does not happen automatically. Typically, the employee needs to ask for the FMLA and then the earning code needs to be applied in iSolved.

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COVID-19 SUPPORT FAQs

Q: How do I know what tax credits I'm eligible for?

A: CTR conducted a webinar on the different tax credits. The webinar and powerpoint presentation can be found on our COVID-19 page under Past Webinars.

In addition, we will be designing a matrix that will help you determine this. Look for this to be communicated today or tomorrow!

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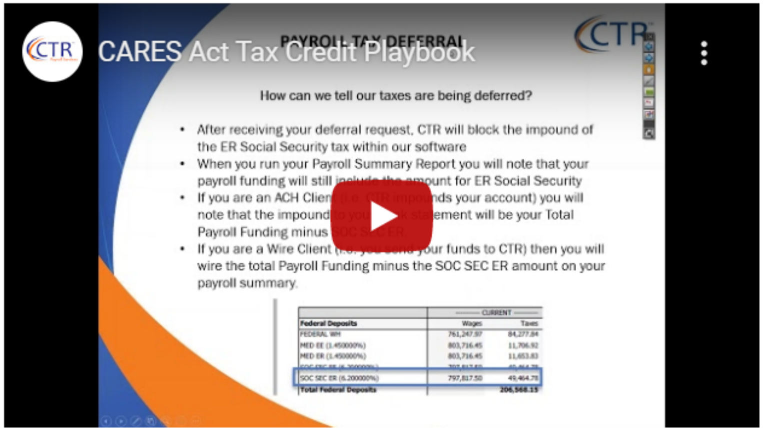
CARES Act Tax Credit Playbook



DOWNLOAD PDF

COVID-19 SUPPORT FAQs

Q: Do you have sample employee documentation/forms to use for COVID-19 related requirements?

A: Absolutely. This is under our Additional Resources on our COVID-19 Info Center.

Let's take a look…

COVID-19 FEEDBACK FROM YOU!

We will conduct another COVID-19 Update Webinar next week with the latest and greatest and do a recap of some more items.

We want your feedback. What would you like us to cover? We want to make sure we are getting the information you need!

Please submit your feedback/questions to training@ctrhcm.com so we can include those. Please have those submitted by Monday (5/4) at noon. We will send an invitation for this webinar shortly.

In addition to that webinar….

UPCOMING WEBINARS:

COVID-19 Industry Spotlight: Healthcare

Friday, May 1 @ 11 am – 12 pm

Join us for this interactive webinar highlighting the Healthcare Industry. We will be interviewing special guest panelists from the Healthcare field to discuss how COVID-19 has impacted their industry and their specific businesses, as well as legislative and/or challenging issues.

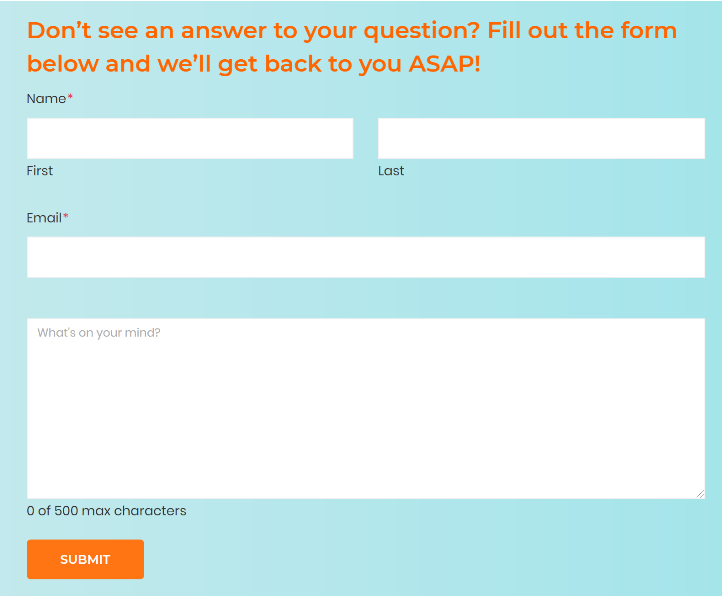
COVID-19 Industry Spotlight: Non-Profits

Wednesday, May 6 @ 11 am -12 pm

Join us for this interactive webinar highlighting the Non-Profit Industry. We will be interviewing special guest panelists from the Non-Profit sector to discuss how COVID-19 has impacted their industry and their specific businesses, as well as legislative and/or challenging issues. We will also use this as a time to share ideas and best practices.

MORE COVID-19 QUESTIONS?

Reach out to your CTR Support Representative or submit your question on our COVID-19 INFO PAGE to receive the answer to your most-pressing questions.


Don't see an answer to your question? Fill out the form below and we'll get back to you ASAP!

Name*

First

Last

Email*

What's on your mind?

0 of 500 max characters

SUBMIT

From all of us at CTR:

Stay SAFE from COVID-19

Stay SMART and INFORMED

Stay KIND and support one another