GROWING WITH ISOLVED (JUNE 2020 UPDATE)

Some Housekeeping Items:

➢ All participants have been placed on mute.
➢ All registrants will receive a follow up e-mail with a link to the recorded webinar and any training documentation.
➢ If you have any questions or want to request training, please e-mail training@ctrhcm.com

- iSolved Release Calendar
- June iSolved Updates
- New Scheduling Option for iTime Users
- FAQs & Tips
- University Update

ISOLVED RELEASE DATES

iSolved Release Calendar	
Month/Release	Release Date
July/6.8	7/17/2020
September/6.9	9/18/2020
November/6.10	11/13/2020
December 6.11	12/18/2020

JUNE UPDATES

CARES Act PPP Loan Forgiveness Report Update
-Constant Updates due to changing legislation
-Another update expected to happen 6/26/2020

Detailed instructions can be found here.
It's important to check back as updates are being continually made!

If you haven't requested the report, ask your customer support rep to add this report.
Please be sure to include your loan disbursement date in your request.

EXCITING ANNOUNCEMENT: SCHEDULING IS HERE!

Great News: Enhanced scheduling functionality is now in iSolved Time! Scheduling is the latest module that makes it easier for you to build and manage employee shifts.

Interested? Reach out to us! E-mail Jason Simmons @ Jason.simmons@ctrhcm.com

Highlights of Scheduling:
- Schedule permission rules, identifying who is eligible to be assigned to a particular shift
- At-a-glance details of employee availability and unavailability
- Instant alerts when schedules are created and pushed live
- Coverage requests for employees to ask for shift coverage within a pool of fellow employees
- Maintain draft status of edited or added shifts

FAQS

Q: Why Do I Keep Getting Asked For An Authorization Code?

A: Authorization code prompting is a dual-authentication security feature designed to prevent unauthorized persons from gaining access to a user's account without their knowledge.
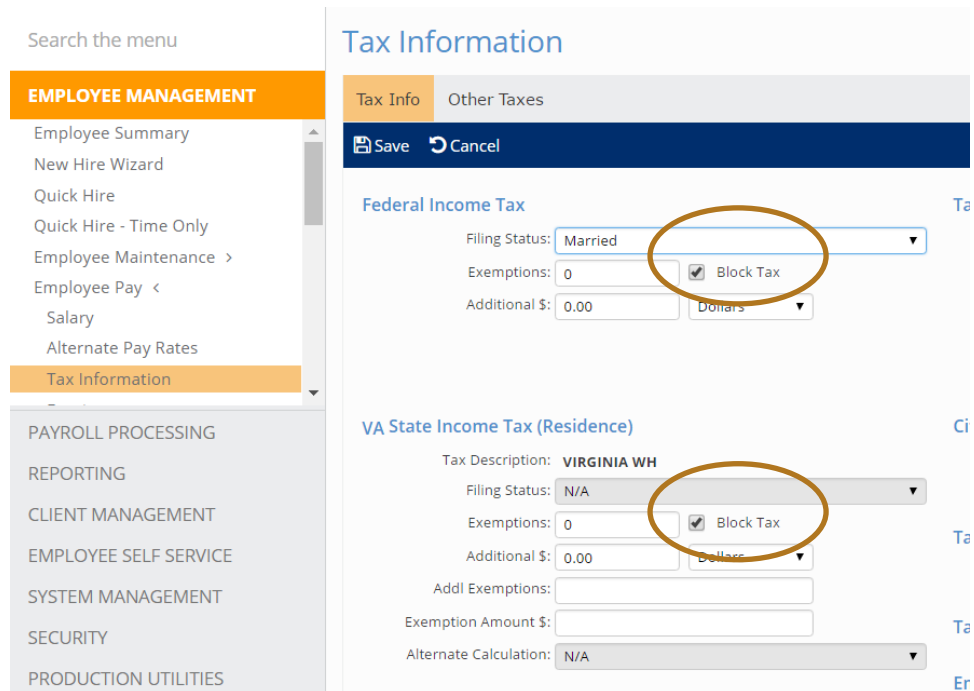
If a user is logging in from an IP address that they haven't logged in from in the last 30 days (e.g. a different internet connection), iSolved will prompt them for an authorization code. The authorization codes can be delivered by email to the email address attached to the account or by text message to a cell phone number provided in the My Account section of the user's profile.

FAQS

Q: How Do I Mark An Employee As Exempt For Withholding Taxes?

A: If an employee marks on their W-4 (or equivalent state withholding tax form) that they are to be considered exempt from withholding taxes, you will need to make an adjustment to their records within iSolved.
Employee Management >> Employee Pay >> Tax Information.
To make an employee exempt for Federal Withholding, check the "Block Tax" box in the Federal Income Tax section of the page. Do the same thing under the State Income Tax section if they've claimed exempt for State Withholding.

FAQS

Q: How Do I Change An Employee's Tax Withholding?

A: To change taxes, go to Employee Management > Employee Pay > Tax Information.

Change the exemptions or add additional taxes where desired. If you are missing a tax jurisdiction you think should be available, double check the Resident Location (home address) and Work Location.

(Make sure you have the employee complete the new W-4! You can do this through the Tax Updates Wizard in ESS!)

FAQS

Q: How Do I Update An Employee's Deduction?

A: Employee Pay > Deductions
Once you're in that screen and have chosen the employee you wish to work with, you will see a list of available deductions on the left side of the screen. If you are making a change that should be effective the next time you run a payroll, here's how to make an update:

1. Choose the deduction you wish to update on the left side of the screen.
2. On the right side of the screen, enter the new deduction rate (percent or amount).
3. Leave the Start Date and Stop Date blank.
4. Hit Save in the blue bar at the top.

FAQS

Q: How Do I Update An Employee's Deduction?

A: (Continued from Previous Slide)

If you want to schedule a deduction to start (or stop) on a future pay period, you can use the Start (or Stop) Date feature in step 3 instead of leaving them blank.
Keep in mind that the effective dates refer to pay periods rather than check dates. This comes into play if you pay your employees in arrears.
Example: If the pay period for your 3/31/20 check date is 3/7/20 - 3/21/20, a Start Date of 3/31/20 would make a deduction start on the next payroll ... pay period 3/21/20 - 4/4/20, check date 4/14/20, when 3/31 is within the pay period dates.

FAQS

Q: How Do I Update An Employee's Deduction?

A: (Continued from Previous Slide)
If you get this message when you select the deduction, you need to make the update in Employee Benefits > Benefit Plans:

> This deduction is associated with a benefit calculation so it must be managed on the employee benefit plan setup screen. The data below represents the calculated values as of the last payroll.

1. Go to Employee Benefits > Benefit Plans
2. Choose the benefit you wish to update
3. Hit Edit in the blue action bar across the middle of the screen
4. Update the plan.
5. Hit Save in the blue action bar.

If you are uncomfortable or unfamiliar with the Employee Benefits of iSolved, please contact your customer support rep for assistance!

UNIVERSITY UPDATES

iSolved University is a training library at your fingertips. Be sure to reference it daily!

LIVE DEMO!

NEW CTR OPPORTUNITIES

Managed Payroll

- Dedicated Payroll Specialist to Assist with Day to Day Payroll Changes
- Dedicated Employee Contact
- CTR Enters EE and ER Contributions Per Data Provided by Client
- Hour Entry or Import of Your Payroll
- Input all Payroll Adjustments Per Client Direction
- Review and Run Payroll Exception and Preprocessing Reports
- Prepare Payroll for Final Client Approval
- Process & Upload 401k Files
- Process & Upload Work Comp Reporting (If Available with Carrier)
- Year-end Adjustments and Processing

HR Consulting

- Full remote HR Support, available to help by phone or e-mail for all HR & COVID-19 related questions
- Review of current HR practices and policies and recommended policies related to COVID-19 Legislation
- Employee Relations coaching and training for COVID-19 related work issues
- Assisting with State and Federal workplace regulations resulting from COVID-19
- Assistance with return to work planning and evolving workplace rules
- Completion of a customized employee handbook
- Providing documents and forms needed for employee communications, HR support, and payroll processing associated with furloughs and/or return-to-work
- Editing job descriptions and work requirements to reflect special considerations

E-mail Jason.simmons@ctrhcm.com !

UPCOMING WEBINARS:

COVID-19 Benefit Plan Guidance

JULY 2

11am-12pm EDT

Join CTR and guest speakers from the law firm Dentons Cohen & Grigsby, Lauren Crossett, Shareholder and Co-Leader, Employee Benefits & Executive Compensation (EBEC) National Practice Group and Gabrielle Farkosh, Associate, EBEC, as we review key employer points from the benefit plan relief available to employers and employees during the COVID-19 pandemic. Our experts will address questions and concerns you may have regarding eligibility, availability, and changes employers must make to the administration of their plans to comply with this guidance. You won't want to miss it!

Coming Soon: Revised 2020 Webinar Schedule!

QUESTIONS?

Please be sure to check out iSolved University and feel free to contact your CTR Support Representative! Your Support Representative and contact information can be found on the Client Landing Page in iSolved.

Any questions or comments should be sent to training@ctrhcm.com

Thank you for attending!