

## Employee Summary

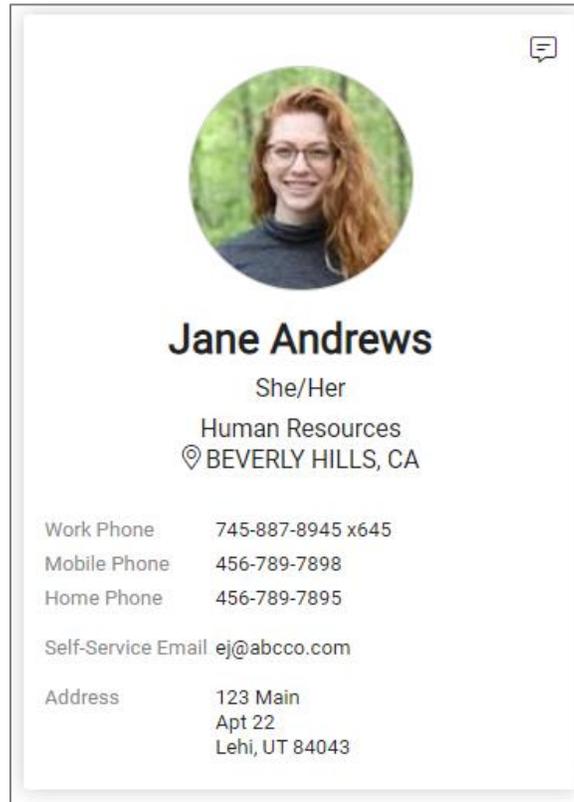
The Employee Summary in isolved is a hub for easy access to the employee's current date active information. Quickly navigate and link to the most accessed and pertinent information all from one screen, this document will go through the areas that can be seen and linked to as well as how to update pictures, and other information. Access this screen by navigating to Employee Management > Employee Summary or simply search the menu for "Employee Summary."

The screenshot shows the Employee Summary page for Jane Andrews. The page is divided into several sections:

- Header:** Displays the user name (Megan Nielsen), navigation (5 of 16), search, and employee details for Elisa (Jane) A Andrews (Employee # 1336, Status: Active, Hire Date: 9/1/2018). It also shows Salary (865.38), Work Location (BEVERLY HILLS, CA), Division (01-01), Department (05-05), and Client (Danielle Test Company).
- Left Navigation Menu:** Includes EMPLOYEE MANAGEMENT (Employee Summary, New Hire Wizard, Quick Hire, etc.), EMPLOYEE ADMIN TOOLS, EMPLOYEE SELF-SERVICE, CLIENT MANAGEMENT, PAYROLL PROCESSING, REPORTING, SYSTEM MANAGEMENT, SECURITY, PRODUCTION UTILITIES, CONVERSION MANAGEMENT, CUSTOMER SERVICE, and TAX FILING MANAGEMENT.
- Employee Profile Card:** Features a photo of Jane Andrews, her name in bold, preferred pronoun (She/Her), Job Title (Human Resources), and Work Location (BEVERLY HILLS, CA). It also lists contact information: Work Phone (745-887-8945 x645), Mobile Phone (456-789-7898), Home Phone (456-789-7895), Self-Service Email (ej@abcco.com), and Address (123 Main Apt 22, Lehi, UT 84043).
- Informational Grid:**
  - PERSONAL INFORMATION:** SSN (XXX-XX-XXXX), Birth Date (01/01/XXXX), Gender (Female), Marital Status (Single), Personal Email (eja@gmail.com), Military Status (Reserves).
  - EMPLOYMENT INFORMATION:** Legal Company (ABC Company), DBA (ABC Inc), Employee ID (1336), Timeclock ID (1336), Hire Date (09/01/2018, 2 years, 11 months, 30 days), Adjusted Service Date (09/01/2010, 10 years, 11 months, 30 d...), Status (Active), Employment Category (Full Time), ACA Status (ACA Full Time).
  - JOB INFORMATION:** Job (1065 - Human Resources), Effective Date (09/01/2018), Length of Service in Job (2 years, 11 months, 30 days), Job Group, EEO Category (Administrative Support W...), Workers' Comp (2003 - Bakeries & Cracker ...).
  - PAY INFORMATION:** Pay Group (Weekly), Frequency (Weekly), Pay Type (Salary), Normal Hours (40.00), Effective Date (09/01/2018), Salary (###.## annually, ###.## per pay, ##.### per hour), Direct Deposit (Full Direct Deposit), Printed Voucher (Yes), Alternate Address (123 Main Street, Orem, UT 84058).
  - TAX INFORMATION:** Federal (Single, 1 Exemptions, \$15.00 Additional), State (Residence) (Utah, Single, \$100.00 (Exemptions), 1 Exemptions), State (Work) (California, Single or Married With Tw..., 1 Exemptions), Location (BEVERLY HILLS, CA (Work), UT0490110 (Resident)), School District, Tax Exemption (FICA Exempt), Alternate Address (123 Main Street, Orem, UT 84058).
  - MANAGERIAL ASSIGNMENTS:** Assigned Manager (Cedence B Allison), Assigned Supervisor (Liam C Jones), Organization Manager(s), Organization Supervisor(s) (Suzy Q, Sanyah B Zhang, Carissa A Zavala).

### Add/Update your Picture

The Employee Summary places the employee picture and employee contact information together in a contact card. Putting ease of access at the forefront. The employee's name is in bold with their preferred pronoun directly below. Job Title and Work Location is also displayed with phone numbers, email and address also taking up residence in the contact card. The employee profile picture can easily be edited or uploaded by clicking on the picture space and then uploading the picture and selecting **Save**.



The image shows a digital employee profile card for Jane Andrews. At the top is a circular profile picture of a woman with red hair and glasses. Below the photo is the name 'Jane Andrews' in a large, bold font, followed by 'She/Her' in a smaller font. Underneath is the department 'Human Resources' and the location 'BEVERLY HILLS, CA' with a location pin icon. A list of contact information follows: Work Phone (745-887-8945 x645), Mobile Phone (456-789-7898), Home Phone (456-789-7895), Self-Service Email (ej@abcco.com), and Address (123 Main, Apt 22, Lehi, UT 84043). A small speech bubble icon is in the top right corner of the card.

Select the built-in links to quickly navigate to Work Phone, Mobile Phone, Home Phone, Self-Service Email, or Address to make any necessary changes on that employee records regarding those items, if the user has access to those screens. Select the  icon in the upper right corner to quickly link to the Employee Notes for that employee.

### Personal Information

Personal information is displayed under the section titled **Personal Information** in the Employee Summary. This information will include Social Security Number, Date of Birth, Gender, Marital Status, Personal Email, and Military Status.

- SSN will be masked based on restriction preferences, if the SSN is masked and there is an  icon, select and hold down the icon to view the SSN if access is granted to the user.
- Birthdate will also be masked Month and Day will be viewable, but year will be masked. If access is available, the user may select and hold down the  icon to view the complete Date of Birth including the year.

<b>PERSONAL INFORMATION</b>	SSN XXX-XX-XXXX 	Birth Date 01/01/XXXX 	Gender Female	Marital Status Single	Personal Email eja@gmail.com
	Military Status Reserves				

All information headers will change to blue and allow the user to link to that information directly in the employee's account for easy access and information can be easily updated if needed. This will link to the **General** screen.

## Employment Information

Employment Information is displayed under the sections title **Employment Information** in the Employee Summary. This information will include Legal Company, DBA, Employee ID, Timeclock ID, Hire Date, Adjusted Service Date, Status, Employment Category and ACA Status. If no value exists, headers will keep displaying title with no value underneath. All information headers will change to Blue and allow the user to link to that information directly in the Employees Account if user has access to that screen. This is based on user security and preferences. These items will link the **General** and the **Employment** screen.

- **Legal Company:** Displays the legal company that you are currently looking at for that individual employee at the current date in time.
- **Employee ID:** Displays the current isolved Employee ID associated with that employment record.
- **Timeclock ID:** Display the current isolved ID if isolved I Time is enabled.
- **Hire Date:** Displays the closest/most current hire date as of current date when viewed. This is followed by number of years, months, and days of service as of most recent hire date, making it easy to manage company anniversary acknowledgments and other HR core functions.
- **Adjusted Service Date:** Displays the closest/most current Adjusted Service date as of current date when viewed. This is followed by number of years, months, and days of service as of most recent Adjusted Service date. This can be very useful for functions surrounding PTO and other Time, or benefit related items.
- **Status:** Displays employment status as of current date. If employee is terminated this item will not display.
- **Employment Category:** Displays Employment Category as of current date. If the employee is terminated this item will not display. This is helpful with Verifications of Employment and to help manage ACA, benefits and other items that utilize this area often.
- **ACA Status:** This displays current ACA Status that is associated with the current employment category. If employee is terminated this value will not display. Use this area to help troubleshoot and quickly help you manage your ACA periods and ACA eligibility.
- **ACA Hours Met:** If the Client Employment Category is set up with one of the following values in the "ACA Employment Status" type field display section to user:
  - ACA Part Time
  - ACA Variable
  - ACA Variable Adjunct
  - ACA Variable Seasonal

This field will also return "Yes" if the checkbox is selected and "No" if the checkbox is deselected, helping you further manage your ACA and knowing if the employee has hit their ACA hours average during the last measurement period.

<b>EMPLOYMENT INFORMATION</b>	Legal Company ABC Company	DBA ABC Inc	Employee ID 1336	Timeclock ID 1336	Hire Date 09/01/2018 2 years, 11 months, 30 days
	Adjusted Service Date 09/01/2010 10 years, 11 months, 30 d...	Status Active	Employment Category Full Time	ACA Status ACA Full Time	

### Job Information

Job Information is displayed under the section title **Job Information** in the Employee Summary. This information includes Job, (Job) Effective Date, Length of Service in Job, Job Group, EEO Category, and Worker's Comp. If no value exists, headers will keep displaying title with no value underneath. All information headers will change to Blue and allow the user to link to that information directly in the Employees Account to the **Jobs** screen if user has access to that screen. This is based on user security and preferences.

- **Job:** This displays the current Job based on the current date viewed.
- **Effective Date:** Displays the effective date of the current job.
- **Length of Service in Job:** Displays the Length of service in years, months, and days.
- **Job Group:** Job Group assignments are displayed.
- **EEO Category:** Shows the Category that is currently assigned to the employee.
- **Workers' Comp:** Displays the current value assigned to the employee.

JOB INFORMATION	Job	Effective Date	Length of Service in Job	Job Group	EEO Category
	1065 - Human Resources	09/01/2018	2 years, 11 months, 30 days		Administrative Support W...
	Workers' Comp 2003 - Bakeries & Cracker ...				

All these items in conjunction together show a good view of the employee's job assignment, helping to make quicker HR decisions and streamline the process. Quick access can help verify employment and any other validating documents easily.

### Pay Information

Pay Information is displayed under the section title **Pay Information** in the Employee Summary. This information includes Pay Group, Frequency, Pay Type, Normal Hours, Effective Date, Salary, Direct Deposit, Printed Voucher, and Alternate Address. If no value exists, headers will keep displaying title with no value underneath. All information headers will change to Blue and allow the user to link to that information directly in the Employees Account if user has access to the **Salary, General, Direct Deposit** and **Override Address** screen. This is based on user security and preferences. This information will give quick access and information to again help with Verification of Employee or verification of salary or other validating documents. Understanding the employee's salary and mode of payment can help HR streamline processes and simplify the number of screens needed to navigate to manage employees effectively.

- **Normal Hours:** Displays Normal Hours scheduled to work. Will not show actual hours worked.
- **Effective Date:** Displays the current effective pay records date.
- **Salary:** Salary can be "Restricted with Mask," "Restricted without Mask" or not restricted. Depending on the level of access, the user can select and hold the  icon to view the salary information. This view includes an Annual, Per Pay and Per Hour value.

- **Direct Deposit:** There are three values that might be displayed under Direct Deposit.
  - **Full Direct Deposit:** Active Direct Deposit (s) with frequency of "every pay" with "remaining net" selected.
  - **Partial Direct Deposit:** Active Direct Deposit (s) with frequency of "every pay" but not set to "remaining net" so a physical check may also be issued as part of the total payment to the employee.
  - **None:** No active direct deposit with frequency of 'every pay' exist.
- **Printed Voucher:** This section will not display if the pay group is not set up with "ESSPint Option" and is not tied to the "Print Based on ESS Selection" option. A "Yes" or "No" may display depending on option selected of "True" or "False."
- **Alternate Address:** Only displays if override address is set up with "use for paychecks" and is enabled.

<b>PAY INFORMATION</b>	Pay Group Weekly	Frequency Weekly	Pay Type Salary	Normal Hours 40.00	Effective Date 09/01/2018
	Salary ⓘ ##### annually ###.## per pay #.#### per hour	Direct Deposit Full Direct Deposit	Printed Voucher Yes	Alternate Address 123 Main Street Orem, UT 84058	

## Tax Information

Tax Information is displayed under the section title **Tax Information** in the Employee Summary. This information includes Federal Tax, State (residence) tax, State (work) Tax decisions, Location, School District, Tax Exemption, and Alternate Address. If no value exists, headers will keep displaying title with no value underneath. All information headers will change to Blue and allow the user to link to that information directly in the Employees Account if user has access to the **Tax Information** or **Override Address** screen. This is based on user security and preferences.

- **Federal/State Filing Status:** This section displays all fields under federal/state filing that have values. Federal will be in its' own section. If the employee has residence and work locations with the same state, one section displays for both. If residence and work locations are different states, a section for residence state and a section for work state is displayed.
  - **Example 1:** Federal filing with same stat for residence and work

<b>TAX INFORMATION</b>	<b>Federal using new fields</b>	<b>same state for res and work</b>	Location Orem, UT (Work) UT123456 (Resident)	School District 22275	Tax Exemption FICA Exempt	Alternate Address 9889 St Charles Place #655 Provo, Utah 84056
	Federal Married Block Tax: Y \$2,000.00 (Dependents) \$1,000.00 (Other Income) \$3,250 (Deductions) 10% Additional	State North Carolina Married Block Tax: Y \$2,000.00 (Dependents) \$1,000.00 (Other Income) \$3,250 (Deductions) 10% Additional				

o **Example 2:** Federal filing with residence work location in different states

TAX INFORMATION	Federal using old fields	State (Residence) Different state for res and work	State (Work)	Location	School District	Tax Exemption
	Federal Married Block Tax: Y 2 Exemptions \$10.00 Additional	Arizona 2%	No FL income tax	Orem, UT (Work) UT123456 (Resident)	22275	FICA Exempt
	Alternate Address 9889 St Charles Place #655 Provo, Utah 84056					

- **Location:** Work Location is displayed.
- **School District:** If no value exists will keep displaying header.
- **Tax Exemption:** If no value exists will not display header.
- **Alternate Address:** Only displays if override address is enabled for "Use for tax forms: w-2, 1099, ACA Form 1095."

TAX INFORMATION	Federal	State (Residence)	State (Work)	Location	School District
	Single 1 Exemptions \$15.00 Additional	Utah Single \$100.00 (Exemptions) 1 Exemptions	California Single or Married With Tw...	BEVERLY HILLS, CA (Work) UT0490110 (Resident)	
	Tax Exemption FICA Exempt	Alternate Address 123 Main Street Orem, UT 84058			

**Managerial Assignments**

Managerial Assignments is displayed under the section title **Managerial Assignments** in the Employee Summary. This information includes Assigned Manager, Assigned Supervisor, Organization Manager, and Organization Supervisor. If no value exists, headers will keep displaying title with no value underneath. All information headers will change to Blue and allow the user to link to that information directly in the Employees Account if user has access to the **Jobs** screen. This will only link directly for the Assigned Manager and Supervisor and will not link directly for Organization Manager, and Supervisor This is based on user security and preferences. Quickly view and access assignments. The  icon displays if a manager or a supervisor is currently terminated warning you quickly if updates are needed.

MANAGERIAL ASSIGNMENTS	Assigned Manager	Assigned Supervisor	Organization Manager(s)	Organization Supervisor(s)
	Cadence B Allison	Liam C Jones 		Suzy Q Saniyah B Zhang Carissa A Zavala

**Organization Information**

Organization Information is displayed under the section title **Organization Information** in the Employee Summary. This information shows organization information that is set for the client, this list may change based on client needs. If no value exists, headers will keep displaying title with no value underneath. All information headers will change to Blue and allow the user to link to that information directly in the Employees Account if user has access to the **Organizations** screen. The left and right arrows are used if more than four levels of organization structure are configured for the client. This will display in the order that is defined for the organization. If no organizations exist for the company this section will not display.

ORGANIZATION INFORMATION	<	Division 01 - 01	Benefit Class	Department 05 - 05	Location	>
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### Labor Information

Labor Information is displayed under the section title **Labor Information** in the Employee Summary. This information displays labor information that is set for the client, this list may change based on client needs. If no value exists, headers will keep displaying title with no value underneath. All information headers will change to Blue and allow the user to link to that information directly in the Employees Account if user has access to the **Labor** screen. The left and right arrows are used if more than four levels of labor structure are configured for the client. This will display in the order that is defined for the client. If no Labor exist for the company this section will not display.

LABOR INFORMATION	<	Task 1 - 1	>
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