Introduction

The purpose of this article is to outline the process of adding a new contact and the corresponding type of contact classification, depending on their permission level within isolved. Based on the type of contact, they may also populate on various screens within isolved.

Add New Contact

The **Contacts** screen in isolved is used to input a contact, based on the Legal Company or Pay Group, if the client has multiple legal companies and pay groups, that have authority to communicate with isolved about that company. Contacts can also be set up to receive various payroll notification types.

To add a new contact follow the below steps:

Note: All fields marked with an asterisk are required.

1. Navigate to **Client Management > Client Maintenance > Contacts**
2. Click **Add New**
3. **First Name**: Input contact's first name
4. **Last Name**: Input contact's last name
5. **Title**: Input contact's title
6. **Email Address**: Input contact's email address
7. **Update Birth Date**: Input contact's birthday
8. **Profile Picture**: Click on the ... icon to upload a picture
9. **Phone Numbers**: Input all desired numbers (primary, mobile, alternate, fax, etc.)
10. **Notes**: Input desired notes for the contact, if applicable
11. Click **Next**
12. **Contact Types by Pay Group:** Select all that apply to the contract, based on each Pay Group that a client has.
    - **Payroll:** This contact is contacted for any payroll-related information or requests and is the contact that is displayed on the **Payroll Dashboard**.
    - **HR and HR/PR**: This contact is notified for any Human Resource (HR) related information or requests.
    - **Certified Payroll Report**: When a customer is using the "Certified Payroll Report," the name of this contact appears on the report.
    - **Include on Timesheet**: For phone or fax-in customers, the customer contact name appears on the timesheet.
    - **Share and Perform Admin**: This contact has administrator rights within Share and Perform for the entire Client associated with this Pay Group.
    - **Show on Employee Landing Page**: This contact's name appears on the landing page of **Employee Self-Service.** Employees, managers, and supervisors see the name, phone number, and email if they are added under **Contacts**.
13. **Contact Types by Legal:** Select all that apply to the contact, based on each Legal Company that a client has.
    - **Primary**: This contact is the main contact and receives any email correspondence generated by the Service Bureau.
    - **Tax Filing**: This contact is notified of any tax-related notices and/or questions.
    - **Show on Client Summary**: This contact's name appears on the **Client Summary** screen in isolved. Customer service representatives can identify a contact and their role if it is listed here.

- **1096/W3/WOTC**: This contact name appears on the 1096/W3/WOTC reports as a company contact when filed with the agency. For 1096 and W3, only one Contact can be selected for each Legal Company for each type. If one Contact has the W3 option selected for a Legal Company, the W3 option will not be available to select for that Legal in another Contact.
  Note: Contact Types by Pay Group and Legal must never be deleted or inactivated in **System Management > Contact Types**. These contact types should not be renamed.

14. **Other Contact Types:** These contact types are used for informational purposes. These contact types can be renamed, if needed.
15. Click **Next**
16. **Notifications**: Select all that apply
    - **Client Processor Notifications**: Select for each contact involved in the payroll process who needs to receive the required notifications based on the input method.
    - **Client Transmission Alert**: An email generated when any errors on automatic transmissions set up for the client.
    - **Duplicate Direct Deposit Notification**: When selected, this generates an email to the contact if the same direct deposit information is added twice.
    - **Payroll Notification**: Any contact listed as “primary notification” receives an email when payroll is processed.
    - **Payroll Run Date Reminder**: An email generated when payroll is due but not processed. The time of the emails is determined on the system level setup.
      Note: Notifications will now be sent based on the **Contact > Notifications**. The **Client Users > Pay Group Access** Screen will only be used for Pay Groups the user has access to.
17. Click **Save**.

Edit Contact

If you need to make changes or updates to a current contact, navigate to **Client Management > Client Maintenance > Contacts** and select the pencil icon under Actions. When editing a Contact, each tab must be saved separately.
Note: If a contact needs to be deleted, first ensure that there is a current or new contact that can take over their responsibilities, and then click the red “x” icon under Actions.