




iSolved Overview

This training will cover the navigation of the iSolved system.

The initial screen you will see is the Client Landing Page.

Client: JCBLLC - Jay's Juices Company: Jay's Juices, LLC

Welcome Mary iSolved University



MY PROFILE
Mary Thomas
Manager
dptestemployeejcb@gmail.com

MY REMINDERS

MY ACCOUNT REPS

My Support
Customer Support
Dominion Payroll
804.355.3430
customerservice@dominionpayroll.com

My Sales Rep
Ame Farris
Sales Rep

QUICK LINKS
Click here for more info on the New UI!
iSolved Release Updates
Support
Form W-4
Form I-9

CALENDAR

MAY 2022

-- All Pay Groups --

■ Payroll Due
■ Pay Date
■ Run Date - Off Cycle Run

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

ANNOUNCEMENTS

NEXT SCHEDULED PAYROLL

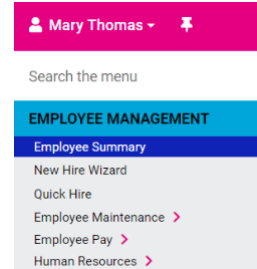
Pay Group	Frequency	Due In Date	Check Date	Period Begin	Period End	Period	Run Type	Processing Schedule
JCBLLC weekly	Weekly	05/11/2022	05/13/2022	05/01/2022	05/07/2022	02	Regular Payroll	View
JCBLLC biweekly	Bi-Weekly	05/25/2022	05/27/2022	05/08/2022	05/21/2022	03	Regular Payroll	View

- You will see your contact information.
- In the “My Reminders” section you will see custom reminders that customer service or your implementation rep will have added.
- The My Account Reps section will have any contacts associated with your account (Customer Support, Sales Rep, Implementation, etc.).
- Quick links gives you easy access to links that will help you run your business more effectively. Forms such as W-4s, links to iSolved info, and the DPS website are available.
- Under the Calendar Section will be your processing calendar.
 - Please be sure to have processed your payroll by 3:00 PM EST on due dates. You can process your payroll prior to the due date. It does not have any effect on when money moves or the pay date. We always pull the money from your account the banking day prior to your check date.
- In the “Announcement” section you will see information about legislative changes such as minimum wage changes. You will also see any dominion payroll closures. We observe all federal banking closures.
- The last section on this page is “Next Scheduled Payroll”. By clicking the view button, you can see one year’s worth of your payroll run schedule. As you process payrolls, the most recent will fall off the schedule and an additional one will be added at the end.

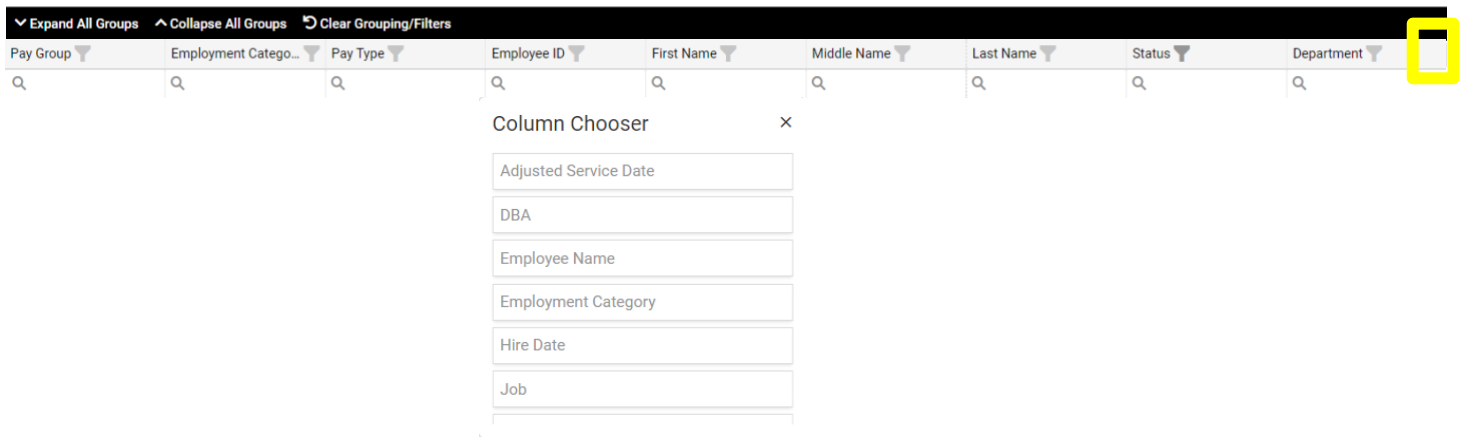


At the top of the navigation menu, you will find **Employee Management**.

- When you first click on an option under employee management, you will see a list of your currently active employees.
- Employee summary is your first option.
 - You can change what you see by clicking the small box in the right-hand corner under the black action bar. This box gives you access to the column chooser. You can drag columns into the column chooser to remove them from your view or drag a column name into the view to add it into your view.



Employee List



- You can alphabetically or numerically sort by any column by clicking on the column name in ascending or descending order.
- You can filter by any column by clicking on the funnel icon.
- You can search within a column by clicking on the magnifying glass.
- You can also group by a column by clicking and dragging the column name(s) into the space below the black action bar.
 - Each grouping provides even more specificity in your search for an employee.
- You can reset your grouping and filters by clicking the Clear Grouping/Filters button located in the black action bar.




To see the summary for a specific employee, select him/her from the list.

Employee Summary

< 7 of 49 > |
Search
Jerry L Cork
Pay Group: JCBLLC weekly
Salary: 480.77
Division:

Employee # 1201 Status: Active
Hire Date: 6/1/1976
Work Location: FREDERICKSBURG, VA
Department: 05 - Cooks

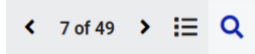


Jerry Cork
Owner
FREDERICKSBURG, VA
Self-Service Email: dptestemployeejcb@gmail.com
Address: 10900 Meadowood Lane, St Helena, VA 23230

PERSONAL INFORMATION			
SSN	XXX-XX-XXXX	Birth Date	10/01/XXXX
Marital Status	Married	Personal Email	
Gender	Male	Military Status	
EMPLOYMENT INFORMATION			
Legal Company	Jay's Juices, LLC	DBA	Jay's Juices
Timeclock ID		Hire Date	06/01/1976
Status	Active	45 years, 11 months, 13 d...	Adjusted Service Date
Employment Category	Full Time	ACA Status	ACA Full Time
JOB INFORMATION			
Job	1 - Owner	Effective Date	06/01/1976
Job Group		EEO Category	
		Length of Service in Job	45 years, 11 months, 13 d...
		Workers' Comp	

- This will show you all the basic information about that employee available in the system.
- You can update the information here by clicking on the field title. Every field is hyperlinked to an editable page. A hand icon will indicate a hyperlink

Navigating to Other Employees



- Using the arrows on either side of the # to #, you can toggle through the employees based on how you sorted the employee list.
- The magnifying glass will allow you to search by last name or employee number.
- The 3 lines and dots will bring you back to the employee list.

iSolved University



- Most screens in the iSolved system have a pink button in the top right corner that will bring you into our Learning Management System platform, aka iSolved University.
- Here you can access how to guides, quick help videos, and classes to aid you in using the iSolved system.

Help Button



- Clicking the Help Button will show you all the help articles that pertain the screen you are actively on.

Employee Self-Service

- To mass manage self-service accounts, navigate to Employee Admin tools → Employee Administration → Self-Service Management.

EMPLOYEE ADMIN TOOLS

Employee Administration ▾

I-9 Management >

Self-Service Management

Employee Analytics >

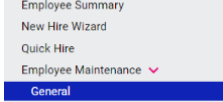
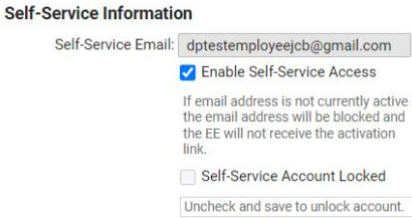
Self-Service Management

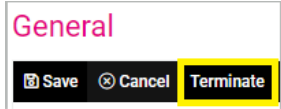
Account Status Enable Access Inactive Accounts Locked Accounts Resend Emails

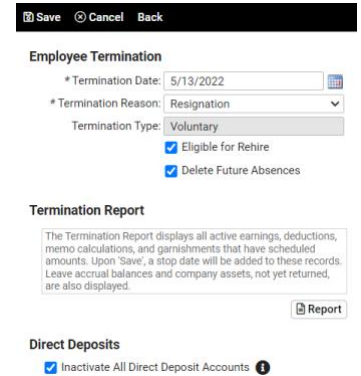
- Under the Account Status tab, we can see who has self-service enabled, the listed self-service emails, and their last login date.
- Under the Enable Access tab, we can enable and send an email to all people who have not yet had the self-service site enabled.
- Under the Inactive Accounts tab are employees who have not authorized their ESS account after the initial email was sent. You can resend the activation email to these employees.
- Under the Locked Accounts tab are employees who have exceeded the allotted number of attempts, and they will need to be reset.
 - The system will reset after 10 minutes.
- Resend emails allows you to search for a specific employee to send an individual email.



General Screen

- The general screen is unique to each employee.
- You can edit any of the information on this
 - The grayed out are encrypted fields.  screen. However, they can still be edited.
- You can individually manage employees' self-service access.
 - To activate an employee's self-service account, fill in the self-service email field and check the box for enable self-service access. The system will send them an email to set up their account. 
 - To update this field, remove the check in the enable self-service access box and save. Then update the email address, recheck the enable self-service access box, and save.
 - You can also reset an employee's account by unchecking the "Enable Self-Service Access" box. Save. Then recheck the box and save again. The employee will receive an email to set up their self service account from scratch.

- You can terminate an employee using the terminate button located in the black action bar.
 - The termination date will default to the current date but can be changed to reflect the actual termination date. 
 - There are built in termination reasons. If you need additional reasons added, reach out to our customer service team.
 - Click eligible for rehire if this applies. You are still able to rehire even if you do not check this box
 - On the termination screen, you can view the termination report.
 - This report will display all active earnings, deductions, memo calculations, and garnishments that have scheduled amounts. Upon 'Save', a stop date will be added to these records.
 - Be sure to contact the garnishment agency when an employee is terminated
 - Leave accrual balances and company assets, not yet returned, and employee loans will also be displayed here.
 - If the 'Inactivate All Direct Deposits' option is selected, upon termination 'Save' all employee direct deposit records will be updated to the 'Inactive' status.
 - This could be used to have the employee return all assets before receiving their final paycheck. This also means the employee's last paycheck will be printed.



Employee Termination

* Termination Date: 5/13/2022

* Termination Reason: Resignation

Termination Type: Voluntary

Eligible for Rehire

Delete Future Absences

Termination Report

The Termination Report displays all active earnings, deductions, memo calculations, and garnishments that have scheduled amounts. Upon 'Save', a stop date will be added to these records. Leave accrual balances and company assets, not yet returned, are also displayed.

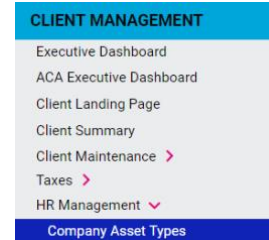
Direct Deposits

Inactivate All Direct Deposit Accounts ⓘ



Company Assets

- To help aid your company to keep track of company assets you can create a list of assets at the client level and then assign them at the employee level
- To create a list of company assets, navigate to Client Management → HR Management → Company Asset Types.
- Click Add New, enter the Asset Type Description, and Save.
- Repeat the process for each of your assets.

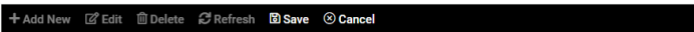


Asset Type

* Asset Type Description:

Is Inactive

- To assign the company assets to employees, navigate to Employee Management → Human Resources → Company Assets.
- Click Add New, select the Asset Type, and provide as much detail as possible in the optional fields.



Asset	Asset Description
* Asset Type: <input type="text" value="Mouse"/> Asset Make: <input type="text" value="Logitech"/> Asset Model: <input type="text" value="M185"/> Serial Number: <input type="text" value="123456789"/> Equipment Number: <input type="text" value="987654321"/> Date Assigned: <input type="text" value="1/1/2020"/> Date Returned: <input type="text"/>	<input type="text"/>

Hiring Employees



- New Hire Wizard uses a series of 6 screens to gather the necessary payroll information. Any field with an asterisk must be filled in.
 - Starting June 3, 2022, New Hire Wizard will be unavailable. If you would like to continue to use the New Hire Wizard, you can talk to your sales rep about the Onboarding ancillary service.
- Quick Hire gathers everything on one screen except for EEO information (gender, ethnic origin, veteran status or disability status). Any field with an asterisk must be filled in.



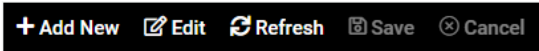
Employee Pay

- On the Salary Screen, when viewing the list of employees, all salaried and hourly employees will populate.
- Dominion Payroll can add an option that allows the system to prorate salary increases that occur mid pay period. Please contact customer service to have this added to each of your pay groups.
 - This is helpful for hires, promotions, or terminations that occur mid pay period. With this feature set up, you won't need to manually calculate an employee's pay for any changes that occur mid-pay period.

EMPLOYEE MANAGEMENT	
Employee Summary	
New Hire Wizard	
Quick Hire	
Employee Maintenance	>
Employee Pay	▼
Salary	
Alternate Pay Rates	
Tax Information	
Earnings	
Deductions	
Garnishments	
Memo Calculations	
Direct Deposit	
Payroll Accumulations	

Add New and Edit

- Many screens will have an add new and an edit button located in the black action bar.
 - Add new keeps the history and should be used when making a change.
 - Edit should only be used for correcting mistakes.



Earnings at the Employee Level

- To add an earning to an employee's pay, navigate to Employee Management > Employee Pay > Earnings
- Add any earnings that are consistent like cell phone allowance
- This screen is not for commissions, bonuses, or tips because they all have varying amounts.

Deductions at the Employee Level

- To add a deduction to an employee's pay, navigate to Employee Management > Employee Pay > Earnings
- Add any deductions that have consistent amounts.
 - Most are managed through the benefits screen except for a deduction like a 401K loan – you can enter a balance and a per pay amount. The system will withdraw from the employee until the balance is reached.

Garnishments

- If you receive any garnishments for your employees, please upload the documents to Confidential Other under employee documents under Human Resources.

Employee Documents

Personnel Payroll I-9 Confidential PHI **Confidential - Other** Signed Acknowledgements Other EE Uploads

- Then email customer service (customerservice@dominionpayroll.com) with the employee's name and that a garnishment document has been uploaded. Dominion Payroll will take care of setting up the garnishment and payee in the system. The correct amount will be withdrawn and sent to the appropriate agency.

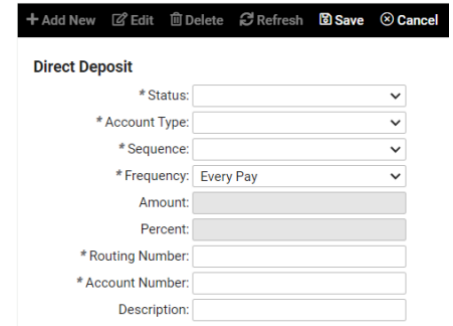
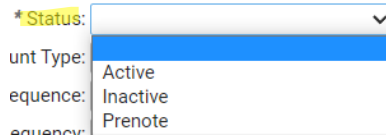


Direct Deposit

- This screen is used to add and edit direct deposit accounts.
- If Dominion Payroll receives a direct deposit rejection due to an inaccurate account or routing number, there will be a fee to correct this error.

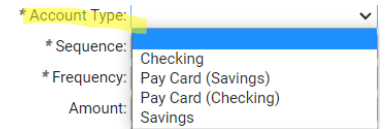
- Status Dropdown Menu

- Active is currently in use.
- Inactive is not currently in use.
- Prenote is a transaction that will ping the account at the bank specified to be sure the account is a viable account. It does mean that the first employee paycheck will be by physical check and not by direct deposit. After which, the account status will be automatically updated to active.



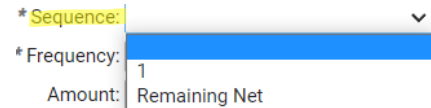
- Account Type Dropdown Menu

- Checking
- Savings
- Pay Card: Reloadable debit card in case the employee does not have a checking or savings account. This also avoids printing physical checks.



- Sequence Dropdown Menu

- One account should be remaining net. If there is only one account, the sequence will be remaining net.
- Sequence 1 would be for an employee splitting their pay between two bank accounts. The first account would be Sequence 1. The second account would be remaining net.



- Frequency Dropdown Menu

- Choose the frequency that the employee's pay will be deposited into the account

