Employee Workspace

A User Guide

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Overview

The objective of this article is to learn how to log in to Employee Workspace (formerly Adaptive Employee Experience), how to navigate Employee Workspace, and view items such as Pay History, Time off and Benefits, as well as how to update Tax Withholdings and punch in/out.

Activating and Logging into your Employee Workspace Account

This section explains the initial activation process of Employee Self-Service (ESS) as well as logging into Employee Workspace for the first time.

Note: If you have already activated your Employee Workspace account you can move on to the Navigating Employee Workspace section of this guide.

Activating Employee Workspace

First, if you have not yet activated your ESS account, an email is sent to your email address on file once your employer activates your ESS account. Click on the link provided in the email.

A new tab opens for you to register your account. Please note that your email address is pre-filled in the form and is your username every time you log into Employee Workspace.

1. Enter your First Name and Last Name.
2. You have the option to add a Mobile Number. If you don't want to add a phone number at this time, you can always add it later under your Profile screen in Employee Workspace, which is shown later in this article.
3. Create a Password. The password requirements are a minimum of 12 characters, at least one lower case alpha [a-z], one upper case alpha [A-Z], one numeric [0-9], and one special character. Spaces are allowed to support the use of passphrases.
4. Re-enter the password you added in the previous field to confirm your password.
   Note: Your password does not expire.
5. Select a Challenge Question, enter your answer, and confirm your answer.
6. Select Create Account.

Once you click on Create Account, a screen pops up letting you know that you will receive an email to confirm your account. This step must be completed in order to access your Self-Service account, it cannot be skipped.

Once you receive the email, click the link to confirm. You are then taken to a confirmation screen.

If a mobile phone number was entered, you will receive a text message verification code which you enter on the Account Verification screen. If you did not enter a phone number, then enter an email address to receive this code. Once you enter the correct code, a message appears letting you know your account has been verified.

Logging into Employee Workspace

Now that your account has been activated, let's take a look at how you log into Employee Workspace.

- If you have just registered your account, you see the option to Continue to isolved. This logs you into Employee Workspace.
- If you have registered your account previously, log into Employee Workspace, navigate to www.aee.myisolved.com and key in your username and password and select the Login button.
- If using the isolved app and Passkey is set up with Face ID, the system automatically logs you in once Face ID is verified.

Note: If you receive an error message stating "You're not configured to use Adaptive at this time" after logging in, please contact your administrator to update your access.

Next, select one of the listed methods to verify your account. Select a verification option and click on **Request Security Code**. If your phone number has not been verified in over a year, the system prompts the user to confirm or update their phone number.

1. Once you receive the security verification code, enter the code in the box provided or select choose another method to receive the code another way.
2. You are given the option for the system to remember you on the device you are currently using. If this option is checked, then your security verification is valid for 12 hours. If the box is not checked, you'll be asked to authenticate at any subsequent login, regardless of the amount of time that has passed. Whatever you elect to do, your selection stays as the default until either a different selection is made, or 30 days has passed with no change, at which time the box reverts to being checked.
3. Click on the **Submit** icon.
4. The option to "Login without a password" appears. You have three options available on this page.
    a. **Set Up Now** allows you to set up a passwordless option. Once this is set up, future logins use what you have added for your options.
    Note: You may be able to use FaceID, Thumbprint, Passcode, PIN, or other options present on your device. Please note you can make changes to this at any time under the **My Account** section. Depending on the security levels setup by your organization, the user is asked to authenticate before updating any information on the **My Account** Screen.
    b. **Maybe Later** allows you to complete this setup later. If this option is selected, you're presented with the opportunity to set up an authenticator app for subsequent logins. You are given the same three options of **Set Up Now**, **Maybe Later**, or **Don't ask me again on this device**. Choosing **Set Up Now** leads you through the steps to set up your authenticator app.
    c. Select **Don't ask again on this device** if you do not want this message to show up again. Please note that this does not allow you to bypass multifactor authentication.

After making your selections, you are then logged into Employee Workspace.

Navigating Employee Workspace

This section goes over Employee Workspace, which includes adjusting your profile settings and the different menu options that are available.

Once you are logged into Employee Workspace, you are taken to Employee Workspace. This page allows the employee to be able to easily punch in, complete any tasks and view their pay.

Please note: The menu items available in your Employee Workspace depend on your company's set-up.

Workspace Options

Quick Punch

If Enabled, allows the user to easily record a punch by selecting the Punch Icon.

To Do

To Do shows a list of any Pending, Past Due or Future Items. The user can easily approve or reject Time Off Requests, navigate to verify timecards or view notifications from other applications from this screen.

Time off Widget

The time off widget shows the user their available, taken, and projected time off balances. The user can also select **request time off** to be taken to the time off page to submit a time off request. The user can select the gear icon to select a default policy to be shown on the widget.

Net Pay

Net Pay shows the user their latest paycheck information. As well as any changes to their paycheck that may have occurred such as an increase in pay.

Recently Visited

Recently Visited displays the last 3 menu items that the user visited in Employee Workspace.

Note: Options displayed on the Workspace depend on the company setup, so your screen may have a limited number of options displayed.

Account Settings

Conversation Virtual Assistant (CVA)

The first option available is Conversational Virtual Assistant (CVA). The CVA chatbot is an add-on service that allows employees to interact with technology, delivering a much simpler way to access information and services. You can ask questions about your time off, benefits, and other information.

Notifications

First let's look at the notifications and setting options you have as an employee in Employee Workspace. When you select the "bell" icon in the upper right corner of the screen, you are taken to a new screen to view any Past or Pending notifications.

Settings

Next to the Bell Icon, you will see your Initials or your profile picture depending on your setup, select this icon to see some additional user options such as:

- **Manage Account**: Allows you to view and update profile information including Preferred Name, Pronouns, Mobile Number, Password, and Security Challenge.
- **Log Out**: Log out of Employee Workspace.
- **Switch Site**: This allows you to toggle between multiple legal companies that you are employed with.
- **User Preferences**: Allows you to update your "Electronic Consent for Communication and Delivery Tax Form."

App Launcher

The last icon is the App Launcher. Here you can also easily log in to different areas in isolved that your company has enabled. Some of these Apps may include Share & Perform, Applicant tracking, or Administration (formerly Classic). Additional Third-Party Apps that are enabled appear at the bottom.

Menu Items

This section explains the menus and items on the left that are available to the employee. To navigate, you can use the icons on the left side of the screen, or use the "Recently Visited" menu in the top right corner which is populated by the menu items you have visited recently.

Each menu item is geared towards the general task you are looking to complete.

- **Manage:** Used by a manager or supervisor to perform functions such as tasks to complete, viewing/adding employee information, viewing teams, and a calendar.
- **Time and Attendance:** Used for all standard time functions such as viewing and verifying your Time Card, requesting time off, and viewing your schedule.
- **Personal:** Used to update your personal information such as address, emergency contacts, dependents, beneficiaries, and federal reporting data.
- **Pay and Tax:** Used to view and edit direct deposit, pay history, year-end tax forms, and update your tax withholdings.
- **Benefits:** Used to view your benefits summary and link you to benefits enrollment.
- **Talent Management:** Includes links to access Learn & Grow, Share & Perform, Giving & Volunteering, and Applicant Tracking.
- **Third Party Apps:** Links you to any 3rd party or legacy isolved applications your company might use.

Now that you know the menu options that are available for you, let's take a look at the functions that are available under each menu.

Time and Attendance

This section covers self-service punching options, reading your Time Card, adding an adjustment, submitting a missed punch, verifying your time, and requesting time off.

Time off Widget

The time off widget is available on the employee workspace main page. This shows the user their available, taken, and projected time off balances. The user can also select **+Request time off** to be taken to the time off page to submit a time off request. The user can select the gear icon to select a default policy to display on the widget.

Note: If an error occurs when retrieving the time off data a message displays on the widget to refresh the page or contact support. The user can still request time off even if no data is displaying.

Punch Options

Once logged in, you can immediately create a punch by using the blue punch button symbol located in the middle of the workspace screen.

Other ways to create a punch can be found on the left navigation menu. The blue clock symbol can be used for: **Quick Punches** or a **Detail Punch**.

Quick Punch

If you select the **Quick Punch** icon, the system automatically clocks the user in or out depending on their last recorded punch.

Detailed Punch

The next type of punch is **Detailed Punch**. When selecting this option, a creation screen opens and displays the current date and time.

Note: The date and time fields are not editable during self-service punching.

The punch options available to you may differ based on your company's permissions. The available options are:

- **Type:** Allows you to specify the punch type for the entry from the drop-down menu. The options are "Normal," "Meal," and "Break."

- **Mode:** Allows you to specify "In," "Out," "Auto," or "Transfer" from the drop-down menu.
  - "In" means you are clocking in and is typically used when you are first in for the day or coming back from a break or meal.
  - "Out" means you are clocking out and is typically used when you are leaving for the day or leaving for your break or meal.
  - "Auto" allows the system to determine the status of the punch based on the punch order.
  - "Transfer" allows you to move from one labor value to another without having to create multiple punches. When using the transfer option isolved creates two punches; one clocking you out of your current labor and one clocking you into the labor you transferred to.
- **Labor:** If the option to enter labor allocations is enabled, select from the allowed labor levels when creating a punch. If no labor is selected, isolved uses your default labor allocation.
- **Notes:** If notes are entered, anyone looking at the Time Card is able to view the details.

Time Card

Once punches have been entered, they appear on the **Time Card** screen.

1. Navigate to **Time and Attendance > Time Card**.
2. When viewing your Time Card, the default view is automatically set to your current **Pay Period**. You can easily adjust this by selecting **Week** or **Day** at the top of the screen. If you need to view a different pay period, week, or day, use the arrows to toggle between dates.
3. Under the **Legal Company** Dropdown, if the company has Multiple Legal ID's the user can toggle between company timecards if necessary.
4. At the bottom is a summary of your Time Card which breaks down your **Earnings**, **Labor**, **Adjustments** (such as "Mileage") and **Alerts**.

Time Card Elements

Verification Status

The status of the Time Card verification is displayed. Verification/approval may be performed by clicking on the "pencil" icon. This opens options for users to verify or object to Time Card data.

- **Not Verified:** Never been verified
- **Unverified:** Was once verified, but a change made it again not verified
- **Partially Verified:** If multiple user verifications are required (Manager/Supervisor/Employee) and at least one but not all have signed off
- **Fully Verified:** All user verifications are complete
- **Objected:** Employee does not agree with the Time Card and must state a reason

Calendar View

Time Cards may be displayed in three different calendar options:

- **Pay Period**: All dates for a selected pay period display on the screen
- **Week**: Only days within a selected week display
- **Day**: Only a single selected date displays

Date Range Navigation

Arrow keys can be used to change dates or date ranges for display depending on calendar view selected. There is also the ability to jump to a specific date by selecting the "calendar" icon to the right of the date range.

+ Add Entry

Depending on permissions, this allows new record types to be entered on the employee Time Card:

- Punch
- Hour
- Adjustments
- Submit Missed Punch Request

Time Card Entry Tiles

- Shift
    - Displays:
        - Assigned Shift Name
        - Shift Start/End (HH:MM)
        - Duration (HH:MM)
- Absence
    - Displays:
        - Start/End (HH:MM)
        - Duration (HH:MM)
- Adjustment
    - Displays:
        - Type (Hours/Dollars)
        - Amount
- Punch
    - Single Punch
        - Displays:
            - Punch Time (HH:MM)
            - Alert Symbol
    - Punch Pair
        - Displays:
            - Punch IN Time (HH:MM)
            - Punch OUT Time (HH:MM)
            - Duration (HH:MM)
            - Alert Symbol
- Hours
    - Displays:
        - Start Time (HH:MM)
        - End Time (HH:MM)
        - Duration (HH:MM)
        - Alert Symbol
- Meal
    - Single Punch
        - Displays:
            - Punch Time (HH:MM)
            - Alert Symbol
    - Punch Pair
        - Displays:
            - Punch IN Time (HH:MM)

            - Punch OUT Time (HH:MM)
            - Duration (HH:MM)
            - Alert Symbol
- Break
    - Single Punch
        - Displays:
            - Punch Time (HH:MM)
            - Alert Symbol
    - Punch Pair
        - Displays:
            - Punch IN Time (HH:MM)
            - Punch OUT Time (HH:MM)
            - Duration (HH:MM)
            - Alert Symbol

Symbols

- () = System Generated Time
    - Parenthesis indicate time that was system generated. For example 7:00a – (11:00a), the 11:00a time was system generated.
- Alert (color coded based on severity)

Tile Actions

When clicking on a tile, additional detail displays. From here a user may edit the details if permitted by clicking on the pencil mark icons.

Clear

If a user has permissions, this allows them to clear the transactions for the day.

Daily Totals

Daily totals display in HH:MM format.

Period Totals

Period totals display in HH:DD (hours and decimals) format.

Summary

A summary of hours for the selected calendar view display at the bottom of the screen. Breakdown options show in four tabs:

- **Earnings:** Breakdown of Earnings/Memos for the period being displayed
- **Labor:** Breakdown of hours associated with labor for the period being displayed
- **Adjustments:** Breakdown of adjustment entries
- **Alerts:** View of all the alerts with a count for the period being displayed

My Calendar

The **Time and Attendance** menu also includes the **My Calendar** option. This allows you to see your absences, scheduled hours, unavailable time, and holidays in a calendar format. The calendar allows you to view items in a "Monthly," "Weekly" or "Daily" format. Select the words at the top of the calendar to adjust your display.

The filters on the left-hand side of the screen allow you to determine what items you want to display on the calendar.

- **All:** Displays all items listed below in the calendar view.
- **Absences:** Displays all approved absences.
- **Pending:** Displays all pending (not approved or denied) absences.
- **Scheduled Hours:** Displays the days and hours you are scheduled to work.
- **Unavailable:** Displays the days and hours you set yourself to "Unavailable."
- **Holidays:** Displays company holidays.
  Note: Hours that are displayed as "Unavailable" are not guaranteed. Managers/supervisors can still schedule you during these times.

The **Hours Summary** at the bottom of the screen totals all the types and hours associated with your current calendar view.

Time Off

Also under the **Time and Attendance** menu is a **Time Off** sub-menu which allows you to view your time balances, as well as submit time off requests.

Time Off Balances

Navigate to **Time and Attendance > Time Off**. This screen shows you a summary of your accrual plans along with the balances. When you select the **Detail** button on the right side, the details of that specific accrual plan are outlined.

- **Service Date:** This lists your hire date (or rehire date, in some cases) that the accrual is being calculated from.
- **Length of Service:** Based on your **Service Date**, this calculates your length of service with the company.
- **Award Schedule:** This lets you know how frequently you are awarded the accrual time.
- **Last Award Date:** This displays the last date you were awarded time for this accrual.
- **Accrual Rate:** This displays how much time you earn on each award schedule.
- **As of Last Pay Period End:** Once expanded using the > on the right side, this displays your available balance as of the last pay period, hours used last pay period, and year to date.
- **Projected Current Pay Period:** Once expanded using the > on the right side, this displays projections for the current pay period. It displays how many hours were taken, how many hours will be accrued, and what hours are pending (requests that have not been approved or are in the future).
  Note: Pending hours are not included in your balance.
- **Projected Current Plan Year:** Once expanded using the > on the right side, this displays projections for the current plan year. It displays how many hours were taken, how many hours will be accrued, and what hours are pending (requests that have not been approved or are in the future).
  Note: Pending hours are not included in your balance.
- **Projected Next Plan Year:** Once expanded using the > on the right side, this displays projections for the next plan year. It displays how many hours were rolled over from the previous plan year, what your current balance is, how many absence hours are approved, how many hours will be accrued, and what hours are pending (requests that have not been approved or are in the future).
  Note: Pending hours are not included in your balance.

Back on the main **Time Off** screen, any upcoming time off requests, pending requests, and past time off entered into the system are shown, as well as company observed holidays.

Submitting a Time Off Request

The last feature covered in **Time and Attendance** is how you can request time off. To submit a time off request, select the **+Time Off** button on the **Time Off** screen (**Time and Attendance > Time Off**).

Fill out the required details of the time off request form.

1. Select the Absence Policy.
2. Select the **From** and **To** dates.
3. Enter the **Start Time** for the request.
4. Update the corresponding days of the week.
5. Enter the number of **Hours Per Day** you are requesting.
6. Double check the **Total Requested** hours.
7. Enter any **Notes** you want the approver to see.
8. Click on **Submit**.

Once the request has been submitted, it goes through your company workflow process for approval.

Pay and Tax

Pay and Tax is the second option available to you as the employee on the left-hand menu. Four sub-menu items are available, **Direct Deposit**, **Pay History**, **Year-end Tax Forms**, and **Tax Updates**.

Direct Deposit

Navigate to **Pay and Tax > Direct Deposit**. Your current direct deposit information appears when you first access this screen.

Note: The details are masked for confidentiality purposes.

As the employee you have several options available to you on this page.

Deactivating Direct Deposit

Use the following instructions to deactivate your direct deposit.

1. Click on the **Active** slider.
2. A confirmation appears asking "Deactivate this account?"
    a. Click **Deactivate** to agree.
    b. Select **Cancel** if you do not wish to deactivate this account.

Viewing Your Current Bank Information

If you wish to view any of your current bank information, select the ellipses and then click on the **Details** icon.

The following bank information appears:

- Routing Number
- Masked Account Number
- Account Type
- Description (if applicable)
- Distribution Details (net pay or partial amount)
- Frequency of Direct Deposit.

If you need to make an adjustment to any of this information:

1. Select the **Close** button to go back on the **My Direct Deposit** screen.
2. Select the ellipses again and click on **Edit**.
3. You can now make any adjustments needed.
4. Click on the **Save** icon to save the changes that you have made.

Adding Direct Deposit

If you would like to add a new direct deposit account into Employee Workspace, select **Add New** from the **My Direct Deposit** screen.

You are prompted to Authenticate the account before making adding or changing direct deposit information.

Once authenticated enter the required fields.

- **Routing Number:** If you enter an incorrect routing number, a message indicating "Routing number is invalid" appears. Correct the number to continue.
- **Account Number:** Enter the account number from your account.
- **Account Type:** Select the applicable check type.
- Distribution Details: Select either:
  - **Flat dollar amount:** If selected, enter the amount.
  - **Percentage of Net Pay:** If selected, enter the percentage.
  - **Remaining Net:** You may only have one Remaining Net account.
- **Frequency:** Select how often you want the funds in this account.
- Click on **Save**.

Sorting Direct Deposit Accounts

If you have multiple bank accounts and wish to re-sort the order in which they are used for direct deposit, click on the symbol in the upper right-hand corner. Instructions appear on how to reorder your accounts. It is a simple drag-and-drop process.

Pay History

The next sub-menu available under **Pay and Tax** is **Pay History**. This screen is where you can obtain and download copies of your check stubs.

- Navigate to Pay and Tax > Pay History.
- Your most recent **Pay Summary** appears at the top of the screen, and, for confidentiality purposes, only the "Gross" and "Net Pay" displays, along with the hours you worked (if applicable).
- The **Pay Date** appears in the center.
- Adjust the pay period by selecting the arrow in the top-left corner and adjust the year by selecting the drop-down menu in the right corner.

Pay Stub Details

Make sure you are viewing in a private location before viewing pay stub details.

- If you would like to see the details of a specific check, click on any of the arrows in the **Pay Stub Detail** section.
- The detailed options include Earnings, Employee Taxes, Employee Deductions, and Direct Deposit.
- To download a copy of your pay stub select **Download Pay Stub** at the bottom of the page.
- If you need to download multiple pay stubs at once select the arrow next to **Download Pay Stub** and select "Multiple Pay Stubs." A list of all pay dates from the current year appears, you can then select the dates needed and select **Download**. You also can add a date range if you wish. Once the file has been downloaded, you can then view a PDF version of your pay stub and save or print.

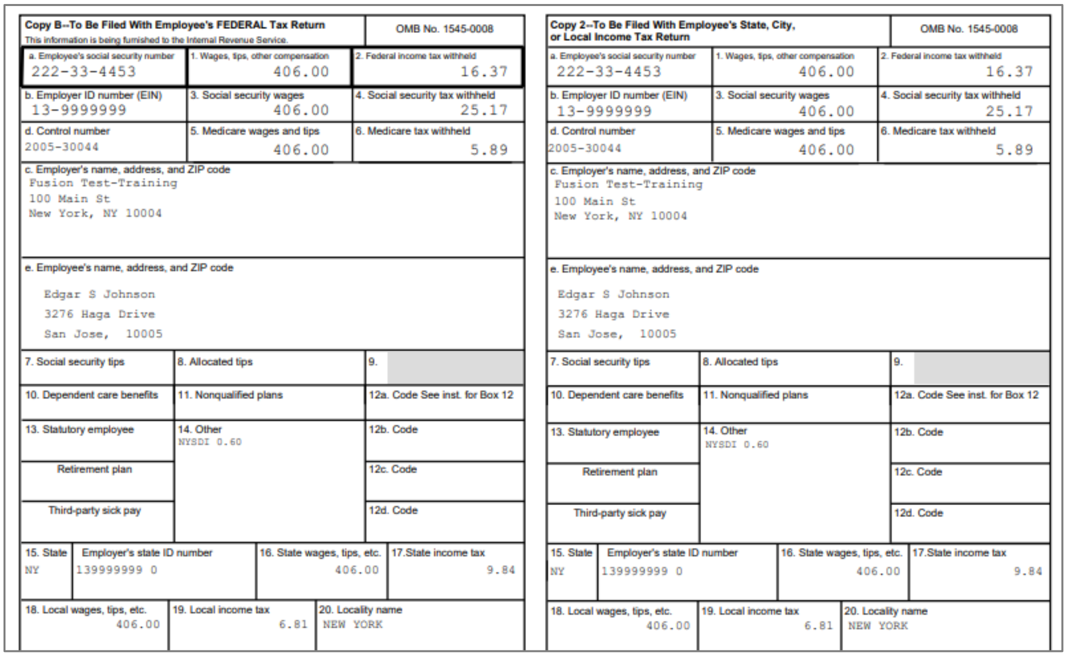
Year-end Tax Forms

The next sub-menu available under **Pay and Tax** is **Year-end Tax Forms**. This screen displays forms for the current year (if closed) and past years. All forms are displayed in the summary layout.

To view your year-end tax form:

- Click on the **Name** of the form in the first column.
- A pop-up appears indicating that your form is generating.
- Once generated, the form is available in PDF. Open the PDF to view and/or print your year-end tax form.
- The cover page on the PDF includes a QR Code for the employee to be able to easily access Turbo Tax.
  Note: If you do not want the QR Code to show, this can be turned off under the Year End Forms Options Tab.

Here is an example of a W-2 stored in this section.



Copy B--To Be Filed With Employee's FEDERAL Tax Return
This information is being furnished to the Internal Revenue Service.
OMB No. 1545-0008

a. Employee's social security number 222-33-4453	1. Wages, tips, other compensation 406.00	2. Federal income tax withheld 16.37
b. Employer ID number (EIN) 13-9999999	3. Social security wages 406.00	4. Social security tax withheld 25.17
d. Control number 2005-30044	5. Medicare wages and tips 406.00	6. Medicare tax withheld 5.89

c. Employer's name, address, and ZIP code
Fusion Test-Training
100 Main St
New York, NY 10004

e. Employee's name, address, and ZIP code
Edgar S Johnson
3276 Haga Drive
San Jose, 10005

7. Social security tips	8. Allocated tips	9.
10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12
13. Statutory employee	14. Other NYSDI 0.60	12b. Code
Retirement plan		12c. Code
Third-party sick pay		12d. Code

15. State	Employer's state ID number	16. State wages, tips, etc.	17.State income tax
NY	139999999 0	406.00	9.84

18. Local wages, tips, etc.	19. Local income tax	20. Locality name
406.00	6.81	NEW YORK

Copy 2--To Be Filed With Employee's State, City, or Local Income Tax Return
OMB No. 1545-0008

a. Employee's social security number 222-33-4453	1. Wages, tips, other compensation 406.00	2. Federal income tax withheld 16.37
b. Employer ID number (EIN) 13-9999999	3. Social security wages 406.00	4. Social security tax withheld 25.17
d. Control number 2005-30044	5. Medicare wages and tips 406.00	6. Medicare tax withheld 5.89

c. Employer's name, address, and ZIP code
Fusion Test-Training
100 Main St
New York, NY 10004

e. Employee's name, address, and ZIP code
Edgar S Johnson
3276 Haga Drive
San Jose, 10005

7. Social security tips	8. Allocated tips	9.
10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12
13. Statutory employee	14. Other NYSDI 0.60	12b. Code
Retirement plan		12c. Code
Third-party sick pay		12d. Code

15. State	Employer's state ID number	16. State wages, tips, etc.	17.State income tax
NY	139999999 0	406.00	9.84

18. Local wages, tips, etc.	19. Local income tax	20. Locality name
406.00	6.81	NEW YORK

Also available under **Summary** are the **Instructions** for the year-end tax form selected. Simply click on the "View" link on the right-hand side for them to populate.

Tax Updates

The **Tax Updates** screen allows you to begin the process of updating your withholdings. Your current tax withholdings for **Federal**, **State**, and **Local** (if applicable) appear when you access the screen.

Tax Wizard

The Tax Wizard is used to change your withholdings or to complete a new tax form.

1. Click on the **Open Tax Wizard** icon on the left side of the screen.
2. The **Tax Withholdings** screen appears, allowing you to **Start** or **Sign Out**. To start a new form, click **Start**.
3. Choose the jurisdiction by selecting the radio buttons and clicking on **Next**.
4. Once the survey is complete, click on the **Start** icon from the **Federal - Summary** screen.
5. Click on the **Back** button if you make an error on your survey or move forward and complete each section in the form by responding to questions on the screen and clicking the **Next** icon. Your progress is saved on the left side, and you can return to any section by using the **Back** button or the side menu.
6. The next page gives you the following options:
   a. "I want to use the worksheet to calculate roughly accurate withholding."
   b. "There are only two jobs total. The option is accurate or jobs with similar pay, otherwise more taxes than necessary may be withheld."

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   c. "None of the above."
7. Select the desired option and click **Next**.
8. Depending on your selection, different options may appear (for example, "None of the above" may be selected if the forms and instructions were already used to determine the withholding).
9. Complete each section by responding to the questions on the screen and clicking **Next**.

Once complete, you can view or print your completed W-4. You must also attest to the accuracy of the W-4 by clicking on:

- "Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete."
- Enter your PIN in the box provided by entering the last 4 digits of your SSN.
- Once complete, click on **Submit Form**.

You receive a confirmation stating "Your form has been submitted. All sections are completed." If you have additional jurisdictions to complete, follow the same procedures.

Once the updates have been confirmed, The **Refresh Changes** button allows users to refresh the **Tax Updates** page and view any recent updates made to the Tax Wizard.

Personal

This section covers updating your personal information such as address, emergency contacts, dependents, beneficiaries, and federal reporting data.

Documents

The **Documents** section is arranged with different clickable categories to get what you're looking for. For example, if you have acknowledged any documents, the acknowledgement would be found in the **Acknowledgements** category.

The categories contain the following information, **Confidential**, **Personnel**, **Acknowledgements**, and **Uploads**.

Any of the document categories give you an opportunity to upload documents. Click the plus button next to the words "Upload Document" to begin the process.

You can either drag and drop a file or upload it by clicking the **Choose File** icon.

Once the file is loaded you can then begin filling out the **Details** section.

1. Select a Category and Subcategory:
   - Personnel
     - Certifications
     - HR Documents
     - Recruiting/New Hire
   - I-9
     - Employee I-9a
     - Employee I-9b
     - Employee I-9c
     - I-9 Documentation
   - Confidential
     - Other
     - WOTC Documentation
   - Personnel – Other

        - Awards
        - Employee Document
        - Onboarding Document
    - EE Uploads
        - EE Uploads
2. Select the **Type** from the drop-down menu.
3. Enter a brief description of the document in the **Description** box.
4. The last step is to allow access to this document. Click the down arrow next to **View** at the bottom of the screen.
5. The **Access** screen gives you options on access allowed for other user types. You can select the following:
    a. Select "Full Access" if the document is something the manager or supervisor could see and edit.
    b. Select "Read Only" if they can read it but not do anything else.
    c. If this is something for your Human Resources or Payroll team and you would not typically share with your supervisor or manager, select "No Access."
6. After you've made your selections, click the **Upload** button to finish the process.
7. A brief message appears at the top of the screen confirming the file has been uploaded and you can see the file under the folder it was saved to in the main **Documents** section.

Personal Information

The **Personal Information** screen allows you to view **Personal**, **Contact** and **Federal Reporting** information.

Personal

If your company allows you to edit/update this information, the **Edit** button appears on the right-hand side, allowing you to edit the details.

Contacts

The **Contacts** section stores any existing "Emergency Contacts," "Beneficiaries" and "Dependents" available.

- If you need to add to any of the categories, click on the **Manage Contacts** button. A new page appears which allows you to **Add New** or **Edit** contacts.
- The ellipsis icon allows you to edit or delete the contact on file, if needed.
- If you need to add a new contact, select **Manage Contacts** then **Add New** and fill out the form.
  Note: You are able to check "Use employee address" or key in a different address.
- Once saved, the information appears under the drop-down menu for the appropriate contact type.

Federal Reporting Data

There are three options under **Federal Reporting Data**:

- Disability Self-Identification
- EEO Self-Identification
- Veteran Self-Identification

By selecting the name of the reporting data, you are able to view the information that your employer currently has recorded for these categories. If you wish to add or change any of the categories, click on the arrow.

Disability Self-Identification

If available, your "Current disability status" is displayed. You are also given the reason why you are being asked to provide this information.

After reading, you can decide to respond:

- “Yes, I have a disability, or have a history/record of having a disability.”
- “No, I don’t have a disability or a history/record of having a disability.”
- “I don’t wish to answer.”

Make your selection and click on Save. The information provided displays as your “Current disability status” upon saving.

EEO Self-Identification

If available, your “Gender” and “Ethnic Origin” displays. You are also given the reason why you are being asked to provide this information.

After reading, you can decide to respond to the Gender Identification using the following selections:

- Female
- Male
- I don’t wish to answer

You can then decide to respond to Race and Ethnicity Identification using the following selections:

- Hispanic or Latino
- White (Not Hispanic or Latino)
- Black or African American or other Pacific islander
- Asian (Not Hispanic or Latino)
- Native American or Alaska (Not Hispanic)
- Two or more races (Not Hispanic or Latino)
- Chose not to answer

If you want to add or change your information, make your selections, and click on Save.

For more information about the race and ethnicity selections or to read the “Anti-Discrimination Notice,” select the “Anti-discrimination notice” which states the following:

“It is an unlawful employment pracice for an employer to fail or refuse to hire or to discharge any individual, or otherwise to disciminate against any individual with respect to that individuals’ terms and conditions of employment, because of such individual’s race, color, religion, sex (including pregnancy), national orgiin, disability, age, genetics, or veteran status.”

Veteran Self-Identification

If available, your “Current Veteran Status” displays. You are also given the reason why you are being asked to provide this information.

After reading the reason, you can add or edit the information by selecting the Veteran status that applies:

- “I am not a veteran.”
- “I belong to the following categories of protected veteran:”
    - Disabled Veteran
    - Recently Separated Veteran (discharge date)
- “I don’t wish to identify my veteran status.”
- “I am a protected veteran, but I choose not to self-identify to which I belong.”
- “I am NOT protected veteran, I served in the military but do not fall into the veteran categories listed above.”

After making your selections, click on Save. Once the information is saved, it replaces your “Current Veteran Status.”

Form I-9

If this option is enabled, you are able to complete your portion of the Form I-9 to confirm your identity and verify your employment eligibility.

Messages

Messages can be accessed in two ways:

- Click on the link located toward the center of the welcome page. New messages are indicated in the window. Click the word "View" to view the messages.
- You can also access Messages through the Personal menu. Select Personal > Messages.

On the Messages page, when users have unread messages or messages that require acknowledgement there will be a red dot indicator added next to the Messages page option when looking at the Home page > Personal.

If there are no new messages, a note reading "There are no new Messages" appears.

Acknowledgements

If a message requires acknowledgement, it is listed at the top of the page.

1. To acknowledge the document, select the hyperlink. A download pop-up appears. Once the document is downloaded, a new message appears with the acknowledgement statement.
2. Click to check the box above the Sign button.
3. Click on the Sign icon.
4. A new window opens allowing you to verify that you're sure you wish to sign the acknowledgement. Click the Yes button to sign the document and click on Cancel if you need to look over the document further.
5. If you ever want to go back to review a document that you've acknowledged in Messages and Electronic Consent is enabled, you can do so by clicking on Documents on the Personal menu.

The employee messages that are present may vary depending on what messages or notices your company has set up to share with the team. If there are multiple messages, you can click the Close button to minimize that section to make more room on your screen. This does not remove the message from your view, but only the title is visible.

Clicking on the document name brings up a pop-up window that lets you know that the download is being generated. Depending on how you have your download settings configured, you may either read the download on the screen or you may need to go to the downloads folder to open the file.

Benefits

This section covers viewing your benefits summary and links you to benefits enrollment.

My Benefits

The My Benefits screen allows you to assess your elected personal benefits package and, at a quick glance, view your annual and per pay deductions for those benefits.

- By selecting the Current tab on the left side of the screen, you can see the benefits you are currently enrolled for in a detailed view with effective dates, per pay amounts, and frequencies.
- When you select the Waived tab on the left, you can see the information on plans that you have waived and the date the waiver took effect.
- When you select the History tab on the left, you can see the information on past plans along with your selection status.

Benefits Enrollment

This topic goes over Open Enrollment in Employee Workspace from an employee's perspective. This Benefit Enrollment adapts to your computer and most mobile devices and provides a truly unique benefit enrollment experience.

Note: Screens may differ based on the mobile device used.

1. Navigate to **Benefits > Benefit Enrollment**.
2. You are taken into the Benefits Enrollment Wizard **Welcome** screen. Note the timeframe for your enrollment so you can be aware of when your enrollment must be finalized. Select the **Continue** button to begin moving through the enrollment screens.
3. Any messages from your employer are displayed under **Messages** below the enrollment period(s) available. These messages display helpful information such as messages, documents, forms, and links from your employer.
   Note: If a document is posted that requires acknowledgment, it appears in its own section, prompting you to acknowledge that document. Select the document name to review. Once reviewed, select **Acknowledge**, and certify that you have read and understood the content of the document. Select **OK**.
4. The Benefits Enrollment Wizard opens. Navigation and process appears on the left side of the screen. The **Shopping Cart** displays your elections so far and any messages attached to the page or item you are on are displayed in their own boxes on the page.

Personal

The **Personal** menu includes all of your current personal information listed to be able to verify before enrollment.

- If you need to edit anything select the **Edit** button.
- A Pop-up menu appears letting you know that you will be taken out of benefit enrollment to make these changes.
- Once the changes are complete, navigate back to **Benefit Enrollment** and click on **Next**.

Beneficiaries and Dependents

You can update or add beneficiaries/dependents so that you can attach them to your coverages, as needed. If you have dependents/beneficiaries listed already, click on the ellipses to edit or delete any information.

To add a new dependent/beneficiary:

1. Select the plus sign next to **Add dependent** or **Add beneficiary**.
2. If you select "dependent," an additional pop-up appears asking if your dependent is an existing contact or a new contact.
3. Use the drop-down menu to select the **Relationship** type.
4. Choose **Dependent** if they are eligible to participate in your benefits coverage.
5. Choose **Beneficiary** if they may be selected as a beneficiary on applicable plans.
6. Complete the remainder of the information, noting the required fields.

Note: If you do not have a social security number, please do not use a fake number as a placeholder, as this can cause issues for future reporting.

Health and Wellness

If your company has enabled **Health and Wellness**, this is the next section to fill out. Select the contacts who are tobacco users.

If this option is not available to you, then you are taken to your current benefits.

Current Benefits

This option may vary based on your employer's setup. Your **Benefits at-a-Glance** are listed here. All **Available plans** are listed, along with your **Currently Enrolled** status, **Coverage**, and the **Cost** associated with the current plan.

Cost Analysis

This section displays the cost of coverages you are eligible to select. You can choose to view each plan type by selecting the **Plan Name**.

Deferred Compensation

Click on **Select** to contribute to the plan or waive. If selected, you must enter in a contribution amount, beneficiary designation, and percentage. The beneficiary percentages must equal 100%.

If you do not wish to not contribute to your deferred compensation plan, select the button at the top.

Company Paid Benefits

If your employer offers benefits such as company-paid life insurance, you may not have an opportunity to waive the coverage. Select the coverage and, if available, enter beneficiary designation and percentage.

Medical, Dental and Vision

Select a plan using the **Select Plan** option. On the **Select Coverage** screen, use the drop-down to select the coverage option.

- Any dependents you may have are listed. Select the dependents you wish to add to the plan. Dependents can be selected based only on the coverage option you choose. For example, if you choose "employee + spouse," only your spouse can be selected. If you do not see your dependents listed, select **Add dependent**. Remember to check the "dependent" box when adding dependents to be added to your plans.
- If you select **Coverage Waived**, you may be required to select a **Waive Reason** from the drop-down menu. Once on the waived screen, you can go back to the election screen by selecting the **Back** option.
- Select the **Cost Analysis** button to return to the **Cost Analysis** screen.

HSA/FSA

When electing HSA, you must select the level of coverage that matches the level of coverage for your medical HDHP plan, whether that plan is offered by your employer or is provided by outside coverage. Enter in the amount you would like to contribute under Amount Per Scheduled Pay or Annual Target Amount.

Based on your company's configuration, you may receive a message that you are not eligible for the FSA since you enrolled in the HSA. Otherwise, you would have the option to enroll in the FSA.

Voluntary Life, Spouse Life and Child Life

Your plan may be configured to alert you if you selected an amount over the guaranteed amount that would require evidence of insurability (EOI). The message includes the amount your coverage is allowed up to until the EOI approval is obtained.

Select beneficiaries and/or those dependents covered by the related plan.

Final Review - Compare Costs

Move to compare your costs. This takes your shopping cart and displays a "current vs. elected" cost analysis. Click on **Next** once you are finished reviewing the information.

Tasks to Complete

- View any task that still requires your attention, such as unverified documents or forms, incorrect plan enrollment, missing required information such as beneficiaries or PCP information.

- Once all tasks have been completed, finish your enrollment by selecting Next.
- You may leave and come back and finish your enrollment at any time during the enrollment period. The wizard saves your place.
- When you have finished making your benefit elections, the confirmation page displays.
- Select Download under Plan Selections to download your elections. Select Submit Benefits when you are ready to complete your enrollment.
- A message appears to ensure you reviewed and verified your elections and reminds you that a copy of the enrollment confirmation is available to you in Documents.

Qualifying Life Events

If the employee needs to make benefit changes due to a Life Event such as a Birth or Marriage. They can do so using the Qualifying Life Events Screen. When the user selects Benefits > Qualifying Life Events it will take the user to the home page of the wizard. The home page contains categories that life events live in: Change in family status, Change in residence, Eligibility: Add coverage, Eligibility: Drop coverage.

Each category will only display to the user if there is at least one life event available to the employee in that respective bucket. Employees may also view previous life event history by selecting the Life event history button from this menu page.

Once the employee selects a category, life events that are configured for the employee to see will display.

- Change in family status
    - Adoption
    - Birth
    - Civil union
    - Divorce
    - Domestic partnership
    - Legal guardianship
    - Legal separation
    - Marriage
- Change in residence
- Eligibility: Add coverage
    - Change to full-time student
    - Dependent becomes eligible
    - Loss of other benefit eligibility
    - Loss of other coverage
    - Loss of spouse's benefit eligibility
- Eligibility: Drop coverage
    - Change in family status
    - Change in residence
    - Eligibility: Add coverage
    - Eligibility: Drop coverage

The employee will choose the appropriate life event and that will bring them to the Event Details page

- The employee will enter in the event date
- Depending on the life event selected, the employee may be able to edit or add a contact, while some life events do not allow a contact

- To Add a new contact, the user will select the 'Add Contact' button which takes the user to the same form for the user to fill out
    - SSN Applied for – selecting this option allows the employee to bypass entering a SSN for their contact if validation is required
      Note: Will be included in benefit enrollment for birth and adoption life events only
- To edit a contact, the user will select one of the existing contacts displayed
    - Based on the life event being selected, certain relationship types display as editable contacts
- After selecting the contact (if applicable) and filling in any other required information, the next page presented to the user is the Documents page. Here the employee can upload one supporting document.
- To finalize the life event, the employee will select Submit. When the employee submits their life event the following occurs:
    - Life event is added to the employee's record
    - Any contact updates are saved
    - Any document that is uploaded is saved to Employee Documents
    - Based on the life event, plans may be ended and COBRA integration may be triggered

The employee will then be presented with additional links

- Tax updates- if the employee has access to the Tax update page in Employee Workspace, the link will display
- Personal- if the employee has access to the Personal page in Employee Workspace, the link will display
- If an enrollment has opened due to this life event, a link to take the employee to the life event will display

Talent Management

This section contains links to access Learn & Grow, Share & Perform, Giving & Volunteering, and Applicant Tracking.

- Share & Perform: This takes you to the engagement and performance management platform.
- Learn & Grow: This takes you to the online LMS (learning management system).
- Applicant Tracking: This takes you to the applicant tracking platform.
- Giving & Volunteering: This takes you to the Giving & Volunteering platform.
- Benefit Services: This takes you to COBRA.
- Performance Reviews: This takes you to the Pending Evaluations screen to be able to complete any pending performance reviews.

Third-party Apps

The links within the Marketplace Integrations tile log you in through SSO (single sign-on) to any integrations your company may have set up with 3rd party companies, or companies isolved partners with.

Employee Workspace Deep Linking

Employees can now access all screens available in Administration through Deep Linking in Employee Workspace. When in Employee Workspace, if an employee selects a deep link, a new tab opens with a Pop-Up letting them know they are being redirected to Administration. The employee's session in Employee Workspace remains active, the employee can then update or view the information in Administration. The Deep Links can appear as Menu Links (EX: Manage › My reports), Sub Nav Links (Such as Training and Development), Page Tabs (Ex: Employees › HR) and On Page Buttons (Team Calendar).

The following links have been added to the Adaptive Setup page as deep links to Administration:

- Updates (Benefits)

- Pay > Salary
- Documents > COBRA Documents
- Personal > Org Chart
- Personal Information > Personal
- Training and Development
- My Calendar > Team Calendar
- My Dashboard
- Time Card - Spreadsheet View
- Advanced Scheduling
- Employee Analytics
- Employees > Absences
- Employees > Employer
- Employees > HR
- Employees > Position
- Employees > Training & Development
- My Reports
- Tasks > Manage
- Tasks > Reports
- Tasks > Time Card > Spreadsheet View

Note: As each of these items are added permanently to Employee Workspace, the deep link is removed.

Admin's can easily view and adjust which items are available to employees as Deep Links under the Adaptive Setup in Administration. Any item currently with a deep link is noted by an "exclamation point" icon .

Managers/Supervisors

As a manager/supervisor, logging into Employee Workspace follows the same process as you would as an employee. This article covers the additional features available to you as a manager/supervisor.

Login

In order to set up default login and pay options in Employee workspace, select the "bell" icon in the top-right corner and click on **Preferences**.

Note: The available options are subject to the manager/supervisor having access to multiple companies, multiple assigned roles, or depending on the pay group configuration.

- **Default Company:** Any legal company that the user is either a member of or has employees assigned to them is listed as available for selection.
- Default Role Options Available: Manager, Supervisor
- Pay Options available for selection: Electronic, Print

Group Punch

The **Group Punch** feature under the **Time** menu allows you to filter a specific group of employees, and then create a punch for them at a specific time. Once logged in, you can immediately create a punch by using the "Punch" icon located in the top-left corner of the page.

1. To create a group punch, select the **Group Punch** option.

2. Select the group of employees you would like to enter a punch for. To do this, select a previously created group from the **Group** menu.
3. Choose the appropriate group of employees and select **Next**.
4. The supervisor is now able to select either all group members or individual employees for the desired punch and select **Save**.
5. Select and enter in the appropriate **Date**, **Type**, **Time**, and **Labor values**, (Detail Punch).
6. Complete the punch by clicking on the **Save** icon.

Manage Groups

The **Group Punch** menu is where the supervisor can create and manage their employees for group punching. To create or edit a group of employees, select the **Manage** button in the top-right corner.

- To edit an existing group, select the **Edit** option to the right of the group's name.
- A group can also be deleted if it is no longer needed.
- To create a group, choose the **Add Group** option. Enter a **Group Name** and click on **Add**. Select the employees that comprise the group and finish by clicking on the **Save** icon.

Tasks

The **Tasks** screen provides an overview of pending requests such as punch requests, Time Card approval, time off requests, and address/contact updates. Each link on this screen expands to view details around the request and allow approval. The total on the left side of the screen considers all the approval and request counts on the right.

Pending Punch Requests

Once you click the **Pending Punch Requests** link, any pending punch requests requiring your attention are displayed.

To approve or reject the request:

- Click on the > icon to expand the request and review the details.
- Selecting the ellipses icon gives you the option to **Approve** or **Reject** the request.
- If you have more than one pending punch request, you can choose the **Approve** button at the bottom of the screen to approve all at the same time.

Once you have completed the tasks, select **Manage** > **Tasks** and choose **I'm Done** at the bottom of the screen. You are redirected back to the main screen.

View and Approve Time Cards

This summary displays a graphic breakdown of all paid earnings, employee verification statuses and unpaid earnings for your employees.

- Click on the **Time Card Approval** link from the **Manage** screen.
- If you have employees in different pay periods, the drop-down in the right corner allows you to change the pay period you are viewing.
- All details from the graphs above are listed underneath with a place for you to review and verify.
- To verify, select the checkbox on the far-right side of the screen.
- Click on the **Approve** button at the bottom if you wish to approve all Time Cards at once.

Note: If an employee has outstanding critical Time Card errors, such as missing punches, the Time Card cannot be verified until the errors are corrected.

Time Card Review

If you'd like to review an individual employee's time, select their name from the list and their Time Card data appears.

- The left side of the screen contains a breakdown of the **Earnings**, **Labor**, **Adjustments** (mileage, bonus or reimbursements), as well as a summary of **Alerts**.
- The default view of the Time Card is a spreadsheet view with expansion options. Select the › icon next to the date to expand the details. When expanded, you can see actual punch times, total hours, and errors.
- To view **Labor** attached to punches choose the › icon in the lower-right corner and the screen expands. **Note:** Labor only displays if outside of the employee's home value.

Editing Punch Records

Use the following instructions to edit an existing record.

- Expand the date, choose the › icon in the lower-right corner, and then choose the "ellipses" icon.
- Select the **Edit** option. You are taken to the **Edit Punch** screen.
- Make adjustments to the existing records as you see fit.
- Click on the **Save** icon once finished.

Adding Records

Various types of records can be added to an employee's Time Card. Click on the **Create New** icon in the top-right corner of the screen. You are prompted to choose what type of record you are adding; "Punch," "Hours," "Adjustment," or "Absence."

Adding Hours

1. Select "Hours" from the **Choose Record Type** drop-down menu.
2. Click on the **Next** icon to fill out the hours details.
3. Enter the **Start Date**.
4. Enter the **Start Time**.
5. Enter the **End Date**.
6. Enter the **End Time**.
7. The **Duration** auto populates based on the starting and ending times.
8. **Type** allows you to specify if the hour type is "Normal," "Meal," or "Break."
9. If **Notes** are entered, anyone looking at the Time Card is able to view the details.
10. If the option to enter labor allocations is enabled, you can select from the allowed labor levels when creating a punch. If no labor is selected, isolved uses the default labor allocation.
11. Click on **Save** to add the hours record to the employee's Time Card.

Adding Punches

1. Select "Punch" from the Choose Record Type drop-down menu.
2. Click on the Next icon to fill out the punch details.
3. Select the Punch Date.
4. Enter the Punch Time.
5. Type allows you to specify the punch type for the entry. The options are "Normal," "Meal," and "Break."
6. Mode allows you to specify if the punch is an "In," "Out," Auto," or Transfer."
    a. "In" means you are creating a punch in and is typically used when you the punch you are creating is the first in for the day or coming back from a break or meal.

   b. "Out" means you are clocking out and is typically used when the punch you are creating is for when the employee is leaving for the day or leaving for break or meal.
   c. "Auto" allows the system to determine the in/out status based on the order of the punches.
   d. "Transfer" is used to move from one labor value to another without having to create multiple punches. When using the transfer option isolved creates two punches; one clocking the employee out of their current labor and one clocking them into the labor transferred to.
7. Under Labor Group, if the option to enter labor allocations is enabled, you can select from the allowed labor levels when creating a punch. If no labor is selected, isolved uses the default labor allocation.
8. If Notes are entered, anyone looking at the Time Card can view the details.
9. Click on Save to add the punch record to the employee's Time Card.

Adding Adjustments

1. Adjustments are typically used (if enabled by your company) to enter mileage, bonus or reimbursements.
2. Select "Adjustment" from the Choose Record Type drop-down menu.
3. Click on the Next icon to fill out the adjustment details.
4. Enter the Punch Date.
5. Select the type of Adjustment from the drop-down menu.
6. Choose whether you are entering this adjustment as "Hours" or "Dollars" (there may only be one option based on your company setup).
7. Enter the Amount.
8. If Notes are entered, anyone looking at the Time Card can view the details.
9. Under Labor Group, if the option to enter labor allocations is enabled, you can select from the allowed labor levels when creating a punch. If no labor is selected, isolved uses the default labor allocation.
10. Click on the Save icon to add the adjustment record to the employee's Time Card.

Adding Absences

1. Select "Absence" from the **Choose Record Type** drop-down menu.
2. Click on the **Next** icon to fill out the absence details.
3. Select the Absence Policy.
4. Enter the **Date** for the absence.
5. Enter the number of **Hours** being taken.
6. Choose the **Start Time** for the absence.
7. If the absence is tied to an accrual plan, the **Available Balance** and **Balance After Request** fields populate.
8. If **Notes** are entered, anyone looking at the Time Card can view the details.
9. Click on **Save** to add the absence to the employee's Time Card.

Reviewing/Excusing Alerts

If an employee has an alert on their Time Card (missing meal, missed shift etc.) you can set the alert to "Reviewed" or "Excused."

When viewing the employee's Time Card, the color code icon lets you know there is an alert pending your attention.

- To review or excuse the alert, choose the › icon to expand the date.
- Select the "pencil" icon to edit.
- The **Edit Alert** screen opens, allowing you to set the **Status** and add any **Notes**.

Verification

Use the Approve button on the left side of the screen once you have completed the review of the Time Card. Once approved, a date and time stamp appears.

Depending upon how your employer has set up the verification rules, your employees may have an option to object to their Time Card data. The best practice is to watch for objections and act upon them as soon as possible after the objection has been entered. Employees are required to enter a reason for the objection.

Once you have verified the time, you can choose the I'm Done link at the bottom of the Time Card to be brought back to the man Tasks screen.

Note: The system does not allow you to verify the Time Card if there are outstanding high or critical alerts pending your review and correction (for example, "Missing Punch" alerts).

Time Off Requests

Click the Time Off Request link from the Manage screen. All pending time off requests appear for your review.

The basic details are listed on the main screen, but you can select the employee's name to view the full request details.

- If the request is attached to an accrual plan, the employees current available balance and what their balance will be if the request is approved displays.
- The Show icon next to the calendar icon allows you to see if any other employees assigned to you have this day off.
- Use the buttons on the left side of the screen to Approve or Decline the request.
- Once approved the absence is automatically added to the employee's Time Card.

Employees

Once you click the Employees link from the Manage screen, a listing of all employees who report to you populates. You can select the employee's name from the list and their Personal Information populates for review.

Employee

The Employee section allows you to view (based on company permissions) the selected employee's information such as address, contact information, personal (DOB, marital status, gender, and military status), and tax.

Employer

The employer section allows you to view (based on company permissions) the selected employee's employment, management and pay information.

Position

The position section allows you to view (based on company permissions) the selected employee's job and organization and labor information.

Absences

The Absences section allows you to view an overview of the employees' accrual plans, any current absences, and a list of historical absences. The overview screen allows you to see any assigned accrual plans as well as the hours earned, current, and projected balance details for the selected employee.

The Current screen allows you to see lists of any upcoming and pending absences. You can use the ellipsis symbol to edit or delete these absences from the system.

The History screen allows you to see a list of historical absences for the selected employee.

Assignments

The **Assignments** screen allows you to assign messages and notices to your employees. You also have the ability to edit the display order, effective date, expiration date, and message details.

Documents

The **Documents** section allows you to upload, delete, and edit employee documents. To turn this functionality on, navigate to **Client Management > Client Utilities > ESS Settings > Adaptive Setup**. Under **Manage** check the "**Full**" box next to Employees > Documents. Once complete, managers have the ability to add, edit or delete a document under **Manage > Employees Documents**. To add a new document, select **Upload** and fill in **Category**, **Subcategory**, **Type**, **Description** and **Access Level**. To edit or delete a document select the ellipsis icon.

Calendar

The Calendar allows you to view your employees' absences, scheduled hours, unavailable time, and holidays in a calendar format.

The calendar provides the ability to view items in a Monthly, Weekly, or Daily view. Simply select the words at the top of the calendar to adjust your display. The filters on the left allow you to determine what items you want to display on the calendar.

The options are as follows:

- **All Employees:** Displays all items listed below in the calendar view for all your employees.
- **Scheduled:** Displays the days and hours your employees are scheduled to work.
- **Absences:** Display all approved absences.
- **Pending:** Displays all pending (not approved or denied) absences.
- **Holidays:** Displays company holidays.

The Summary at the bottom totals up all the types associated to your current calendar view.

Schedule

The Schedule screen will give you access to manage your employee's schedule. Navigating to **Manage > Schedules** allows you to view, edit, delete, or assign schedules to your employees. On the left, you can select filters to sort the employees that you are viewing. These are helpful if you wish to filter by specific employee types, status labor, pay group, policy group, and so on. For example, if you only want to view the schedules for hourly employees, change the **EE Type** drop-down menu to Hourly and select **Apply**.

To add a shift for an employee for a specific day, select the arrow next to the employee's name to expand the view and select **Assign Shift**. Here you can select from any of the shifts that you have created. There is also a drop-down option next to "assign shift" where you can add a default schedule or view Time Card.

On the weekly scheduler, you can view multiple days and shifts for which an employee is scheduled. You have the option to select a specific day/shift, or you can click the **Assign Shift** button and select a specific day or multiple days to assign. The weekly view starts on Sunday and goes through Saturday; therefore, this option may not necessarily reflect your programmed payroll run schedule. An override option is also available that you can select as you assign the shift, and it follows the same process that was described in the daily view option.

The **Copy Forward** option is useful if you would like to copy a specific schedule and apply it to future dates. When you select **Copy Forward**, you are presented with a list from which you can choose your employee. Select the employee(s) for whom you would like to apply these changes and click **Next**.

If you would like to download a schedule, simply click the circled arrow button next to **Copy Forward**. This opens a new screen where you can view the weekly schedule report for all of your employees for the selected week. As mentioned previously, the schedule runs from Sunday to Saturday, and you can see the total number of scheduled hours for each employee, as well as the total number of scheduled hours for all employees at the bottom of the report.