isolved v7.0/7.1 Features and Development Items

The following new features and development items are included in this isolved release. This summary is intended to provide you with a basic overview of the changes made to the program with this release.

Items that reference a NetSuite Case # will display as shown below:

[NS Issue/Case#] – Item Description

General Featured Items:

isolved Rebranding

Update the isolved core product for rebranding.

New Role: SB-New Menu Administrator

Add a new role to all environments to allow system administrators to control access to new menu items.

Menu Updates

Update and add menu items for enhanced organization, including Client Utilities (existing) and Employee Admin Tools (new.)

Employee List and Template

Add functionality to allow the client employee list to be configurable.

Benefits/HR – Featured Items:

Workflow-SB user groups as assigned users

Add functionality to allow service group users to be included as assigned users in the workflow process.

System Level Workflow Dashboard

Add a system level dashboard to allow service users to monitor workflow where service users are designated as assigned users.

Emergency Contact Dashboard

Create an employee emergency contacts list.

Employee Birthday Dashboard

Create an employee birthday list.

Benefits/HR – Other Release Items:

Description	Item #
Issue: Users need a way to identify who is involved in workflow and which workflow routes are associated with user groups. **Resolution:** Update client user groups to display the names of the client and partner users assigned to the client user group and workflow routes associated with the client user group. **Resolution:** Update service user groups to display the names of the service users assigned to the service user group.	127628 125589
[899]**Issue:** Need a change log for fields on the Benefit Enrollment Setup UI. **Resolution:** Add new table to Client Change Log and add fields from Benefit Enrollment Setup UI.	62071
[7149]**Issue:** When an EE is terminated on the day their benefit plan begins and benefit ends on day of termination, the EE is not synced over to COBRA environment. **Resolution:** Allow EE to sync over to COBRA environment when plan ends the same day it begins.	121881
[6898]**Issue:** When user submits a Divorce life event and the plan syncs over for the ex-spouse, the loss of coverage date is the life event date minus 1 day. **Resolution:** The loss of coverage date for the divorce life event should match the life event date.	108017
[7631]**Issue:** MO updated filing statuses and Married Spouse Does Not Work returns a filing status of M from Symmetry and maps to an outdated status of Married, Spouse Works. **Resolution:** Update the filing status of M from Symmetry to map to Married Spouse Does Not Work.	130632
[6561]**Issue:** Beneficiary allocations throw a validation error when percentages do add up to 100. **Resolution:** Round the sum to the same number of decimal places the field allows (4) when comparing sum to 100 for validation.	110914
[6521]**Issue:** When user tries to stop 401k contributions through benefit updates when workflow setup exists, user receives 'Error updating benefit' message. **Resolution:** Allow the change to be saved.	116816
[7003]**Issue:** The date picker allows users to enter a start or stop date on the deduction UI when the deduction is tied to the benefit plan. **Resolution:** Disable the date picker for deductions managed through benefit plans.	120218
[6887]**Issue:** When trying to import a rate * coverage plan with non-uniform increments, the system does not recognize the amount. **Resolution:** Allow non-uniform increments to be imported.	116479
[6892]**Issue:** Dependents are showing as included in coverage when the EE first selects dependents to be included on the plan and then changes coverage codes to a code that does not include those dependent types. **Resolution:** The benefit confirmation should reflect correctly when no dependents are selected for a plan.	99831

Payroll – Featured Items:

Jobs and Jobs Updates screens will allow access for Salary Restricted Users

Client users that are salary restricted were restricted from Jobs screen because the salary grade fields are on the screen.

If a Client or Supervisor/Manager has a role that gives them access to the Jobs or Jobs Updates screens, and the user is salary restricted, we will hide the salary grade fields on the Jobs and Jobs Updates screens. If the salary field is erstricted with or without mask the salary grade fields will just not display.

Paystub update

In response to state regulations regarding paycheck display the following updates were made to employee paystubs.

- The SSN will be removed from all check formats
- Updated Company Id field to always display company code (not client code).
- The employee's pay type will show on each stub.

Payroll – Other Release Items:

Description	Item #
[7060]Request: Timecard import: Automatically calculate the Week Number when the pay group has an Average Overtime Weeks value (Time Entry Options) and the import includes a labor value where the Labor field has the Certified Payroll Code = Date and the WeekNumber column does not have a value for the transaction. (For Semi and Monthly and there is a value selected for the First Day of Work Week option on the Pay Group screen)	122938
[7034]Issue: Partner Users that have the ability to submit the payroll should not see the Submit option on the Preview Payroll screen, this should only be available on the ProcessPayroll screen for the pay groups that have the input method using where the Allow Client Payroll Submit is checked.	121029
[2263]Issue: Taxable state and local wages vary when overriding the work location on the ITE screen and there is a pretax deduction Example: Employee has a default work location in NM the employee has a 401K Deduction and a match. On the ITE we are entering 1500.00 in regular earnings and overriding to the work location Westminster, CO the Colorado wages are calculating higher than the wages for NM/Fed.	48194
[4259]Issue: FICA exempt employees showing on FICA Tip Credit Reports Following Reports are including employees that are FICA exempt (No Employee Social Security/Medicare Wages) : FICA Tip Credit Report (As of Date & Payroll run) QTD FICA Tip Credit Report YTD FICA Tip Credit Report Tip Allocation 8846 Resolution: Exclude employees with YTD Employee Social Security and Medicare Taxable Wages = 0.00	76518

Service Bureau – Featured Items:

Restrict Service User access to Client Reports:

Ability to restrict access to client level reports based on the report group assigned to the Service User.

- Added client report types to the Service User Report Groups.
- Added an option to the Service Users to select a client report group.
- The list of client reports include Report Writer report types and sub-report types. "(Report Writer)" will show at the end of the description.
- The screens on which this restriction will apply are Client Reports, Report Archive, My Reports, and Continuous Reports Archive.
- All service users will default to full access when this is deployed.

Note: As part of this, the options under Reporting are being consolidated and the menu items for Reports On-Demand and Date Range Reports are being removed.

Service Bureau - Other Release Items:

Description	Item #
[6121]Issue: New Jersey has multiple Min Wage Rules, When adding a New Jersey work location we are using the Minimum Wage Rule that is not the most common as the default and causing an invalid value to be saved if the user doesn't realize it is the wrong one. Resolution: Make the Minimum Wage option required - when there are multiple options available based on the state do not default. This will apply to all Screens impacted: Add legal company, Add Work Location , New Client Wizard	114684
Request: Add the ability to delete a client, that was started and no longer needed, from the New Client Wizard. Resolution: When the user selects the 'Continue Previous Client Setup', on the first page of the New Client Wizard, and clicks on 'Next', the list of client setups that have been started displays. Added a 'Delete' button to the toolbar on this page.	112456
[7090]Issue: Report selection parameters selected for any Service Bureau report do not show in the My Reports queue - Report parameters section. It just shows the name of the report and the report type. Resolution: Update My Reports Queue to show the Report Parameters selected for the Service Bureau reports.	112823
[7204]Request: Create a combined New Hire file for Ohio (OH). Resolution: Create a combined New Hire file for Ohio. Added Service for New Hire Combined File - OH	123591
[6206] New Hire Reporting file that is associated with the Legal Service 'New Hire Filing' for the state of Maine has been updated based on changes to their specs.	113365