# **NCR Payroll & HR Solutions**

# Adaptive Employee Experience (AEE) Guide



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# Introduction

Providing application and data access anywhere on any device is more important than ever before. Whether working from home, in the office or on the go, employee experience impacts your customer experience and business success.

Welcome to the isolved AEE personalized user experience, a consumer-grade app that exceeds employees' usability expectations and makes it a breeze to access important information. This modern experience is user-friendly, intuitive, and fully responsive across all devices. Employees and managers get instant access to the tools they need, from HR to payroll, to talent and performance, to time-tracking.

It's all built into one seamless technology and contains the best of both worlds. The modern user interface empowers your employees to control their information from anywhere, on any device.



What's included in the personalized user interface?

- Year-end form, available at your employees' fingertips
- Pay history to view earnings at a glance
- Full paycheck details and an archive
- Modern Time Cards with **simplified tracking**
- Filterable calendar with access to schedules, absences, and an hourly summary
- Time-off balances and requests
- Emergency contacts, beneficiaries, and dependents
- Federal **reporting** data
- A customized experience at every login

# **Transitioning to the New isolved Interface**

Separate **"Hot Sheets"** for both iPhones and Androids are available below to provide a step-bystep guide to transition to the new isolved interface. It provides the QRC code, login, and instructions for saving the App icon to your **Home** screen.

Please refer to the **Appendix** for printable **"Hot Sheets"** that can be extracted from this document and provided to your employees.

#### iPhone



#### Android



## **General Login and Navigation**

Navigate to the isolved Adaptive Employee Experience (AEE) website using a web browser of your choice.

1. Key in your "Username" (this is your Self-Service email address).



2. Click on the "**Next"** icon after entering your username.

**Note:** If you entered your username incorrectly, choose **"This is not my username,"** which brings you back to the Main Login page.

3. Key in your **Password**.

**Note:** If you have forgotten your password, choose **"Forgot my password"** which allows you to reset your password after answering your security questions.

4. Click on the "**Next**" icon which logs you into Adaptive Employee Experience.

#### Logging in on a Smart Phone

You may log into AEE on a mobile device in two different ways:

1. Log into **ESS** and select the **"Try our new look"** link. The screen below appears:



- 2. Key in the URL of the ESS plus "/cloudservice.com." This opens AEE where you can select to add it to your **Home** page (See above image).
  - For example, the normal ESS login is <u>https://ncr.myisolved.com</u>. For AEE you would use <u>https://ncr.myisolved.com/cloudservice</u>.
- 3. Select "Add to Home Screen"

Сору	Ф
Add to Reading List	00
Add Bookmark	Ш
Add to Favorites	☆
Find on Page	Q
Add to Home Screen	ŧ
Markup	۲
Print	ē
Edit Actions	

4. After you select the "Add to Home Screen" option, the screen below becomes available:

Cancel	Add to Home Screen	Add
2	isolved	0
An icon wi	https://training.myisolved.co libe added to your Home Screen so y	m/clouds
citeria activitation		
"isolve	d" is	isn't
q w	ertyu	іор
a	sdfghj	k I
	zxcvbn	m 👁
123	space	done
		Ŷ

5. Click "**Add**" at the top, right-hand side of the phone screen.

## Welcome Page Navigation

The Welcome page allows you to see all items you have access to in one screen.



Each card is geared towards the general task you are looking to complete:

- **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.
- **People Cloud:** Has links to access Learn & Grow, Share and Perform, Benefit Services, and Applicant Tracking.
- **Marketplace Integrations:** Links you to any 3rd party or legacy isolved applications your company might use.

To navigate, you can use the icons on the left-hand side of the screen, click on the cards in the center, or use the **"Recently Visited"** card in the top right-hand corner which is populated by the cards you have visited recently.

The ellipses icon allows you to navigate to more preferences and items inside People Cloud

- Switch Companies: If an employee is employed in multiple legal companies for one Client.
- **Classic View:** Allows you to toggle to the **isolved Employee Self-Service "Classic View."** This view is only available if you are using a Desktop and is not compatible with other devices. This view requires that the **Self-Service "Classic View"** roles are set up to view and access any data or items. If this is not set up, the employee receives a message that this view is not configured.
- **Profile:** This allows the employee to view and update their profile information including:
  - Preferred Name
  - Pronouns
  - Mobile Number
  - Password
  - Security Challenge
- Preferences: Allows the employee to update their "Electronic Consent for Communication and Delivery of Tax-Forms".
- **Notifications:** Shows any current company notifications.
- **Feedback:** Provide feedback on the site.
- Sign-out: Log out of the site.

Isol	ved		
e -	Good evening, V J	Å	Recently Vuited
eant days 20	<u>s.</u>	Messages Notification 1 New D	Q Matter
ant Tan Al Namani Walta	Time and Attendance Time Series Sty Decem Time Series	Manage Tang Carola Carola Contac	Isolved DA
El annun Segunden Segunden	Pay and Tax     Event Departer     Fernit Departer     Text Sectory     Tax sector Tax Forms     Tax sectors	Personal     Datarrem     Personal     Datarrem     Personal     Description     description     description	Professional and the second seco

## **Self-Service Punching**

Once logged in, you can immediately create a punch by using the pink <sup>9</sup> symbol located at the top-left corner of the page, as seen below. In this menu, a punch can be created using two different methods:

## 1. Quick Punch

If you select **"Quick Punch,"** the system immediately brings you to a page to create a punch for the current date and time, without the option to add punch notes or any other punch options. Once the page loads click the pink + to create the quick punch. Once the punch is created you will see a punch confirmation on the screen as shown below:



## 2. Detailed Punch

If you select **"Detailed Punch"**, the system opens a creation screen and displays the current date and time.

**Note:** The **Date** and **Time** fields are not editable during Self-Service punching. The punch options available in the detailed punch screen are as follows (options on this screen may differ based on your company permissions).

- **Type:** Allows you to specify the Punch Type for the entry. The options are **"Normal"**, **"Meal"**, and **"Break"**.
- Mode: Allows you to specify if the punch is an "IN", "OUT", "AUTO", or "TRANSFER".
  - 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.
  - 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 can view the details.



# **Time and Attendance**

## Time and Attendance > Time Card

The following is a breakdown of the different areas located on the Time Card and their functions:



#### **Time Card Date Range**

The default view of the Time Card is automatically set to the current **"Pay Period"**. You can change the view by selecting the **"Pay Period"**, **"Week"**, and **"Day"** buttons in the top-center of the screen. You can toggle between dates by selecting the **<>** buttons with the date next to them.

#### **Data Summary**

A breakdown of the **"Earnings"**, **"Labor"**, **"Adjustments"** (mileage, bonus, or reimbursements) as well as a **"Summary"** of alerts are located on the left-hand side of the screen.

#### **Daily Breakdown**

The default view of the Time Card is a Gantt chart of your time. You can select the > icon next to the date to expand the details. When expanded, you can see actual punch times, total hours, errors, and labor associated to the punches.

The color-coding of items on the Time Card are as follows:



#### Adding an Adjustment

Timecard adjustments allow employees to add hour/unit or dollar amounts to their Time Card that exist outside of regular hours worked. This includes items such as mileage or tips.

May 30 - June 12, 2022		ADD RECORD V
		ADJUSTMENT
12:00a	12:00p	12:00a Total

Once you select **Adjustment**, fill in the requested details and select **Save**.

- **Date:** Date of the adjustment entry.
- **Adjustment:** Select the appropriate adjustment.
- **Type:** Select whether the entry will be either **"Hours/Units"** or **"Dollars"**. Depending on configuration, you may only see one option in the drop-down menu.
- **Amount:** Input the adjustment amount correlated with the Type selected.
- Labor: Should the "hours/units" or "dollars" be tied to a certain labor field such as "Department", "Job" or "Task"?
- **Notes:** If needed, add any notes related to your adjustment entry.

Adjustment					
Date			Adjustment	Tips 🗸	
Туре	Dollars	~	Amount		
Notes					
Labor Group	)				C REFRESH
Loc/Dept	None				
Proj/WorkClss	None				

#### Submitting a Missing Punch

Should you miss a punch at any time, you can select the **"Missing Punch"** button at the bottom of the Time Card. This option allows you to submit a request that routes directly to your manager/supervisor to approve the missing punch.

Once you select the "Missing Punch" button, fill in the requested details and select "Save".

- **Punch Date:** Date of the missing punch.
- **Punch Time:** Time of the missing punch.
- **Type:** Designate if it should be a "**Normal**" (standard in/out), "**Meal**" or "**Break**" punch.
- Mode: "Auto", "In", "Out", or "Transfer".
- Labor: Should the time be tied to a certain labor field such as "Department", "Job" or "Task"?
- **Notes:** Add any notes for your manager/supervisor to view during the approval process.

Type	Nomal		~	Møde	Auto		v
abor G	10110						
cabor o	Toop						
Corporate	None			Becticians	1-1161		
Labor Fi	leids						
bepartment.	BUSDEV - Business Development	~		Division	Central	v	
Task	01	~		Greup	G1	~	

#### **Time Card Verification**

Time Card Verification is an optional feature that allows you to electronically sign off on the Time Card prior to the data being populated to the Time Entry Grid for payroll processing.

The button to verify is in the top right-hand corner of the Time Card. Select the squared radio button next to the **"Employee"** section to verify.

	🙁 Not verified 🗸
Employee	
Supervisor	
Manager	
0	

**Note:** The system does not allow you to verify your Time Card if there are outstanding high or critical alerts pending manager or supervisor's review.

## Time and Attendance > My Calendar

**"My Calendar"** allows you to view your absences, scheduled hours, unavailable time, and holidays in a calendar format.



Below is a screenshot and details of the "My Calendar" screen:

The calendar allows you to view items in a **"Monthly**", **"Weekly" or "Daily"** format. Select the applicable category 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.

The options are as follows:

- **All:** Displays the 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 as being "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 up all the types and hours associated with your current calendar view.

#### Time and Attendance > Time-Off

The **"Time-Off"** screen can be opened by selecting the "**Time-Off"** button at the top of the Time Card view. This allows you to view details of your accrual plans, upcoming, pending, and past time-off requests.

The first section provides a summary of your accrual plans with balances, and if selected, a detailed outline of when you last accrued time, any upcoming accrued time, etc.

Summary					
UPDATED AS OF LAST PAY PERIO 8/24/2020 - 8/30/2020	D END				+ TIME OFF
	PTD				
	YTD balance: 330.33 hours				
	TAKEN: 4.00	REMAINING 200-33	334.33	DETAIL	

When you select the "**Detail**" button on the right-hand side, the details around that specific accrual plan will be outlined.

	+ TIME OFF
01/01/2019	
1 Years, 11 Months (23 Months)	
Scheduled (Every Pay) period	
8/28/2020	
1.33 hours	
	>
	>
	>
	01,01/2019 1 Years, 11 Months (23 Months) Schedules (Every Pay) period 8/28/2020 1.33 hours

- Service Date: This lists your hire date or rehire date, in some case where 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.

The bottom of the "**Time-Off**" screen outlines any upcoming time off requests, pending requests, and historical time off entered via the system, as well as company observed holidays.

#### **Requesting Time Off**

To submit a time off request, select the **Time-Off** button in the top-right corner of the screen.

	Time Card	My Calendar	Time Off	
Summary				
UPDATED AS OF LAST PAY PERIOD END 8/24/2020 - 8/26/2020			+ TBAE CO	Ŧ

- Select the **"Policy"**.
- Select the **"From"** and **"To"** dates.
- Enter the **"Start Time"** for the request.
- Update the corresponding "Requested Days Off" field
- Enter the number of "Hours per Day" you are requesting.
- Double check the **"Total Requested"** hours.
- Enter any "**Notes**" you want the approver to see.
- Choose "Submit".

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



# Pay

#### Pay and Tax > Direct Deposit

Your current Direct Deposit account(s) appear when you access this screen. The details are masked for confidentiality purposes. There are several options when using this screen:

To deactivate this account, click on the Symbol. You will receive confirmation stating,
 "Deactivate this account"? Click on "Deactivate" to agree. Click on "Cancel" if you do not wish to deactivate this account.

- To **view** or **edit** your current accounts, click on the **"Details"** button.
  - Your Bank details appear, including:
    - Routing Number
    - Masked Account Number
    - Account Type
    - Description (if applicable)
    - Distribution Details (net pay or partial amount)
    - Frequency of Direct Deposit

		Your deposit information		
Savings		0		
WACHOVIA BANK N.A.		Bank details		
Active account ending in 9456		Routing	Azoouni	
		number 021200025	namber	
		Accesunt Servings Type	Description	0000000000125(*6*%5##
		Deposit details		
		Distribution details Flat dollar amount \$72.73		
Active		Prequency Every Pay		
DETAILS		CLOSE		EDIT
			DELETE	

If you need to make an adjustment to the account, select the **"Edit"** button, make your adjustments, and choose **"Save".** 

nk detai	s			
Routing number	021200025		Account number	789456
Account type	Select	*	Description (optional)	0000000000123)(%8/%\$##
posit de	tails net pay may be issued by paper ch	eck		
posit de remaining stribution details	tails net pay may be issued by paper ch	eck		
posit de remaining stribution details	tails net pay may be issued by paper ch Flat dollar amount Percentage of net pay	eck		
remaining stribution details	tails net pay may be issued by paper ch Flat dollar amount Percentage of net pay Remaining net	eck		
eposit de remaining intribution details	tails net pay may be issued by paper ch	eck		

If you need to add a new direct deposit account:

- Click on the **"Add New"** button from the main direct deposit screen and add the following:
  - 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".

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. See the instructions below.



#### Payroll and Tax > Pay History

The **Pay History** screen is where you can obtain and download copies of your check stubs. 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"** also appears in the center.

To see the details of your check, you may click on any of the sections of your Paystub Detail. Please make sure you are viewing in a private location. The details include:

- Earnings
- Employee Taxes
- Employee Deductions
- Direct Deposit

PAY PERIOD August 24-30, 2028		2020
å \$1,135.57	PWr DMTE August 31, 2000	୍ତ 40
Paystub Detail		
Earnings and memos		→
Employee taxes Employee deductions		> >
Time off		>
Direct deposit		>
	DOWNLOAD V	

If you choose the > next to the applicable listing of items under the **"Paystub Detail"** section, the area will expand with full details. You can change the check detail by using the < in the top left-hand corner to move backward through pay dates. You can also toggle between years on the right-hand side of the screen.

To download a copy of your pay stub, navigate to the bottom of the screen and click the arrow next to **"Download"**.

• If **Multiple Pay Stubs** are selected, a list of checks in the current year appears. You may also add a date range at the top of the screen. Select the checks you wish to download by clicking on the box in front of the check date.

download.	o enow your avenues gay outon within that time period and a hill will be generated. Check the ones you would like and und
From	Date
To	Data
0	Vey Period: Aug 24 - 30, 2020 Poy Onte: August 31, 2028
0.	Wy Period. Mar 23 - 29, 2020 Pay Date: March 30, 2020
0.1	wy Period. Mar 16 - 22, 2520 Pay Date: March 23, 2020
01	by Panind. Peb 17 - 23, 2020 Pay Date: Hebriary 24, 2020
01	lay Paniszt. Peb 10 - 16, 2020 Pay Date: February 14, 2020

• Once your selection is complete, click on "Download".

- If you select "This Check", a copy of your current check begins downloading.
- Once the file has been downloaded, open the PDF version of your Pay Stub, and save or print.



## Pay and Tax > Year-end Tax Forms

The **Year-end Tax Form** screen displays forms for the current year (if closed) and past years. All forms are displayed in the **"Summary"** layout.

Summary			
Name 11	Year 11	Instructions	
1095-C	2019	View	
W-2	2019	View	

To view your **Year-end Tax Form**, click on the name of the form in the **"Name"** column. A popup appears indicating that your form is generating. Once available, the form is available in PDF. Open the PDF and view and/or print your Year-end Tax Form. Here is an example of a W-2 stored in this section.

Copy BTo Be Filed With Empl This information is being furnished to the	oyee's FEDERAL Tax Return Internal Revenue Service.	OMB No. 1545-0008	Copy 2To Be Filed With Emplo or Local Income Tax Return	oyee's State, City,	OMB No. 1545-0008
a. Empkyoe's social security number 222-33-4453	1. Wages, tips, other compensation 406.00	2. Federal income tax withheld 16.37	a. Employee's social security number 222-33-4453	1. Wages, tips, other compensation 406.00	2. Federal income tax withheld 1.6.37
b. Employer ID number (EIN) 13-9999999	3. Social security wages 406.00	4. Social security tax withheld 25.17	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 . 8 9	d. Control number 2005-30044	5. Medicare wages and tips 406.00	6. Medicare tax withheld 5 . 8 9
c. Employer's name, address, and Fusion Test-Training 100 Main St New York, NY 10004	t ZiP code		c.Employer's name, address, and Fusion Test-Training 100 Main St New York, NY 10004	d ZIP code	
e. Employee's name, address, an Edgar S Johnson 3276 Raga Drive San Jose, 10005	d ZP code		e.Empkyee'sname.address.an Edgar S Johnson 3276 Raga Drive San Jose, 10005	d ZIP code	
7. Social security tips	I. Allocated tips	9.	7. Social security tips	<ol> <li>Allocated tips</li> </ol>	9.
10. Dependent care benefits	1. Nonqualified plans	12a. Code See inst. for Box 12	10. Dependent care benefits	11. Nonqualified plans	12a. Code See inst. for Box 12
13. Statutory employee	14. Other MSDI 0. 60	12h. Code	13. Statutory employee	14. Other MYSDI 0.60	12b. Code
Retirement plan		12s. Code	Retirement plan		12c. Code
Third-party sick pay		12d. Code	Third-party sick pay		124. Code
15. State Employer's state ID m NY 139999999 0	umber 16. State wages, tip 401	s, etc. 17.State income tax 5.00 9.84	15. State Employer's state ID n NY 139999999 0	umber 16. State wages, tips 406	a, etc. 17.State income tax 1.00 9.84
18. Local wages, tips, etc. 19 406.00	8. Local income tax 6.81 NEW	ality name YORK	18. Local wages, tips, etc. 1 406.00	9. Local income tax 6.91 NEW	cality name YORK

Also available under the **"Summary"** page are the instructions provided for the **"Year-end Tax"** form selected. Simply choose the **"View"** icon on the right-hand side for them to populate.

Name II         Year II         Instructions           1095-C         2019         View           W-2         2019         View	Summary		
Name II         Year II         Instructions           1095-C         2019         View           W-2         2019         View			
1095-C         2019         View           W-2         2019         View	Name 11	Year 11	Instructions
W-2 2019 View	1095-C	2019	View
	W-2	2019	View

## Pay and Tax > 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 Updates Wizard	Federal		~
414	🖻 Greek we		
Vake changes and updates to your tax withholdings	Filing status	Married Filing Jointly	
START WIZARD	Dependent exemption amount	\$7,503.00	
	Additional income amount	83.00	
Dakks bid party coolines in your browner settings if the wissed above "your sensition is meeting"	Additional withholding	\$234.00	
	State		~
	Non Resident State		~
	State	NJ	
	Tax description	NEW JERSEY WH	
	(B) thenk tax		
	Filing status	Married/Civil Union Partner Separate	
	Exemptions	18	
	Additional withholding	\$3.00	

If you need to change your Tax Withholdings and complete a new tax form, click on the **"Start Wizard"** button on the left-hand side of the screen as outlined above.

 Note: Please read the message below "Start Wizard" to ensure you have the correct settings in your browser.

Once you select **"Start Wizard"**, you are presented with the **"Tax Withholdings"** screen to **"Start"** or **"Sign Out"**. To start a new form, click **"Start"**.



You can then choose the jurisdiction by selecting the radio buttons and clicking on **"Continue".** If you wish to change your Federal withholding, click on **"Help me determine which withholding forms apply to me"** and take the Survey.

Once the survey is complete, click on the "Start" icon in the "Federal-Summary" screen.

eral withh	olding form	n(s) may a	pply to you.	
_	Locality	Name	Title	Status
Start	Federal	W-4	Employee's Withholding Certificate	Not completed

You can click on the **"Back"** button if you made 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.

★ Wizard	
Check my progress	Select a filing status
Nonresident Alien	<ul> <li>Single or Married filing separately</li> <li>Married Filing Jointly</li> </ul>
Exemption	Head of Household
Filing Status	Back Next >

The next page gives you the following options:

- "I want to use the worksheet to calculate roughly accurate withholding."
- "There are only two jobs total. The option is accurate or jobs with similar pay, otherwise more taxes than necessary may be withheld."
- "None of the above."



Select the desired option and click on **"Next".** Depending on your selection, different options may appear. In the example below, **"None of the above"** was selected since the Forms and Instructions were already used to determine the withholding.

Complete each section by responding to the questions on the screen and clicking "Next"

Once complete, **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".**

* Wizard O Form and instructions	
Please review the document below If you would like to make any changes, you may return to the previous page. If you would like to submit this form, please agree to the terms below.	
Under penalties of perjury. I declare that this certificate, to the best of my knowledge an Please verify the accuracy of your tax forms and electronically sign the documents by entering a 1234	nd belief, is true, correct, and complete. PIN. Your PIN is the last four digits of your SSN.
Submit Form	

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

# Personal

## Personal > Personal Information

The **"Personal Information"** screen allows you to view your **"Name"**, **"Date of Birth"**, **"SSN"** (masked), and **"Marital Status"**. There is also a drop-down menu for viewing your **"Address"** and **"Contact"** information.

Personal Inform	ation		
	S Masc	on Doe	
	Date of birth SSN	1/1/25	
	Marital status	Married	
Address			>
Contact			>

By selecting the > you can expand your address and contact info to see the details on file. If your company allows you to **edit/update** this information, the <sup>I</sup> icon appears on the right-hand side, allowing you to edit the details.

Address		×
Street address	27 Serpentine Lane	
Street address 2	kjdfkjdfkd	
City	Levittown	
State	NY	
Zip code	11756	
Contact		•
Contact Work phone	(609) 553-2265	•
Contact Work phone Mobile phone	(609) 553-2285 (722) 251-2275	, 1
Contact Work phone Mobile phone Home phone	(809) 553-5265 (722) 251-6275 (764) 555-7895	
Contact Work phone Mobile phone Home phone Self-service email	(609) 553-2265 (732) 251-0275 (704) 555-7895 deemanaget@otommail.com	

#### Contacts

The next section, labeled **"Contacts"**, 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.

Contacts		
Emergency contacts		>
Beneficiaries		>
Dependents		>
	MANAGE CONTACTS	

The symbol i allows you to **edit** or **delete** the contact on file if needed.

Manage Contacts					
Name	Beneficiary	Dependent	Emergency	$\frown$	
McCorkle, Josiah	~	~	~	i	

If you need to **"Add New"**, choose the button at the bottom of the screen and fill out the form that opens.

	t type		
Beneficiar			
Dependent			
_ Emergency			
General			
Relationship	Select ¥		
	Select other Y adding trust-lestate as a beneficiary		
Firstname		Last name	
Prefix		Suffix	
Contact			
Work number		Mobile number	
Home		Enal	
number	an address	address	
Address	19 400/H22	kideer 3	
Address		Addition 6	
Zip code		City	
State			
State			
Bate			
ture Personal		16-1 000	
State Personal SSN		Update SSN	

**Note:** You can 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 using the arrow symbol, you can 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.

	Current disability status
	Not Disabled
Why	are you being asked to complete this form?
We are to roles have a least e	a federal contractor or subcommutur required by low to provide equal employment opportunity to qualified people with disabilities. We are also required sure our progress toward having at least 7% of our worldforce be individuals with disabilities. To do this, we must ask applicants and employees if they disability or have even thad a disability. Because a person may become disabilities at any time, we ask all of our employees to update their information at even free peak.
Identifi not be regard under	ping pocketli as an individual with a disability in reductance and an longe that you not discharge to dis so. Your amove will be matalised confidentially and seen to selecting officials or anyone elast involved in making persistent discharge. Completing the form, will not regularing/prover colligations of features and any of whether you have cell-identials in the past. To more information dowed this form or the equal englishment collections of the collecting based on 20 of the Seababilization Act, what the U.S. Department of Labor's Office of Redenal Contexts Completion Programs (DPOCP) whiches at socials 200 of the Seababilization Act, what the U.S. Department of Labor's Office of Redenal Contexts Completion Programs (DPOCP) whiches at socials 200 of the Seababilization Programs (DPOCP) whiches at Socials 200 of the Seababilization Programs (DPOCP) whiches at Section 200 of the Seababilization Programs (DPOCP) which we at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is at Section 200 of the Seababilization Programs (DPOCP) which is a Section 200 of the Seababilization Programs (DPOCP) which is
Selec	s an option
	Yes, I Have A Disability, Or Have A History/Record D <sup>2</sup> Having A Disability
	No, I Dan't Heve & Disability, Or & History/Record Of Having & Disability
	15 or / Wild To Annual

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 **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 selection, and click on "Save".

For more information about the **Race and Ethnicity** selections or to read the **"Anti-Discrimination Notice"**, select the following:



#### 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".

# **Appendices**



# A better employee experience, by design.

Providing application and data access anywhere on any device is more important now than ever before. Whether working from home, in the office or on the go, employee experience impacts your customer experience and business success.

Welcome to the isolved People Cloud personalized user experience, a consumer-grade app that exceeds employees' usability expectations and makes it a breeze to access important information. This modern experience is user-friendly, intuitive, and fully responsive acress all devices

Employees and managers get instant access to the tools they need, from HR to payroll, talent and performance to time tracking. It's all built into one seamless technology. The modern user interface empowers your employees to control their information from anywhere, on any device.

#### What's included in the personalized user interface?

- Year-and form, available at your employees' fingertips
- Pay history to view earnings at a glance
- Full paycheck details and an archive
- Modern time cerds with simplified tracking
- Filterable calendar with access to schedules, absences, and an hourly summary
- Time-off belances and requests
- Emergency contacts, beneficiaries, and dependents
- Federal reporting data
- A customized experience at every login

#### Contact us for more information!



Your Information/Herei

Deliver a streamlined experience for your workforce with a personalized and modern user experience. Whether you're on iOS, Android or desktop, you'll find a consistent and engaging interface that responds to your needs in the office, at home, and on the go. Futureproof your business with a comprehensive, employee-focused platform.

YOUR LOGO

HERE

# Adaptive Employee Experience Guide (Apple)

Step-by-step guide to get started with the isolved Adaptive Mobile Experience



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## Adaptive Employee Experience Guide (Android)

Step-by-step guide to get started with the isolved Adaptive Mobile Experience



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