

Latest isolved Updates—now live November 2021!

View Peers
ACA Updates- UI/UX
Document Analytic

View Peers

We are introducing an exciting new set up functionality and feature for organization managers and supervisors. Our current system does not permit managers and supervisors who manage or supervise overlapping sections of the organization to view each other. This new opt in feature, which is enabled by selecting the “View Peers” checkbox on the individual Organization Supervisor/Manager screen, will grant the selected user the ability to view the other manager or supervisor.

Here's a commonplace restaurant scenario to illustrate the new functionality. Restaurant Manager Riley Baldino reports into Regional Restaurant Manager Hazel D Arnold. All of Riley's direct reports within her restaurant are subsumed under Hazel's entire regional collection of Utah based restaurants. Clicking the “View Peers” checkbox on Hazel's Organization Supervisor/Manager screen shot for ACA Company means that she can now view Riley's individual record. The same functionality has not been extended to Riley because the system defaults to no access.

The image displays two side-by-side screenshots of the 'Organization Supervisor/Manager' interface. The left screenshot is for Hazel D Arnold (Employee # 1229, Status: Active, Hire Date: 7/19/2005, Work Location: EAGLE MOUNTAIN, UT, Department: 30 - 30). The right screenshot is for Riley Baldino (Employee # 1230, Status: Active, Hire Date: 9/3/2008, Work Location: EAGLE MOUNTAIN, UT, Department: 30 - 30). Both screens show a table with columns for Legal, Organization Field, and Organization Value. Below the table is a 'Manager / Supervisor Organizations' section with dropdown menus for Legal, Organization Field, and Organization Value, and checkboxes for 'Is Manager Role', 'Is Supervisor Role', and 'View Peers'. In the left screenshot, 'View Peers' is checked. In the right screenshot, 'View Peers' is unchecked. A list of bullet points is visible on the right side of each screenshot, providing details about the system's functionality.

Regional Restaurant Manager

Restaurant Manager

ACA Updates- UI/UX

We updated the “ACA Reporting Groups” screen found at Client Management > ACA Setup Options > Reporting Groups to utilize the new flyover menu. The cosmetic addition of “+ Add Legal” under the “Additional Group Members” header allows our clients to seamlessly add the “Legal Name” and “FEIN” group members as needed.

ACA Reporting Groups

Group Type	Group Name	Group Members
Aggregate ALE Group	One	Compass, Measurements, INC, The Rulers

+ Add New Edit Delete Refresh Save Cancel

Identification

* Group Name:

* Group Type:

Group Members

Available Legal Companies:

- Select All Values >
- Select Filtered Values >
- Calendars >

Selected Legal Companies:

- Deselect All Values x
- Deselect Filtered Values x
- Compass x
- Measurements, INC x
- The Rulers x

Additional Group Members

* Legal Name	* FEIN	Actions
Legal Abc company has a long name long name long n...	984213251	...
Legal Z	123546798	...

[+ Add Legal](#)

We understand managing ACA reporting can be an onerous, time-intensive process. A new screen titled “Client ACA Management” has been added under Client Management > ACA Setup Options > Client ACA Management to help you track ACA status for your Legal Companies by reporting years. It allows you to quickly determine where each legal company is in their respective ACA reporting processes.

The “Client ACA Management” screen defaults to the current reporting year in the drop-down box labeled “Reporting Year”. The associated legal companies are then listed for the selected reporting year. The security rules on this page are respected for users. If a client user has access to at least one pay group within a legal company, he or she will then see the legal company on this screen.

Client ACA Management

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Reporting Year:

Expand All Groups Collapse All Groups Clear Grouping/Filters

Drag a column header here to group by that column

Legal Name	Reporting Year	Approval Status	Last Approved Date	IRS Receipt ID	Acceptance Status	Legal Effective Date	Legal Status
Compass						6/27/2016	Active
Calendars	2018	Approved	11/15/2018 1:00:45 PM			10/26/2017	Active
Measurements, INC	2018	Unapproved	11/15/2018 1:01:57 PM			6/1/2016	Active
The Rulers	2018	Approved	11/21/2018 10:34:01 AM			8/26/2015	Active



Document Analytic

A new analytic screen has been added to help track documents on file. The Documents on File screen found by navigating to Employee Admin Tools > Employee Analytics > Documents on File permits users to group, filter, search, and export with the purpose of identifying which documents are attached to employee records.

After selecting a Document Category such as Confidential PHI, you will be presented with two additional drop-down menus: "Document Subcategory" and "Document Type". You will be required to select an option from both or one of these two newly presented drop down menus. Please note, all users will have a "Document Subcategory" titled "Unassigned". The optional, radio buttons below the title "Document Name/Description" allow you to search for custom text that either "Contains" or "Does not contain" the specified, entered value.

Clicking the "Filter" button returns the list of values. Selecting the check box entitled "Include employees with no results" will include those employees sans documents who meet the "Filter Option" search criteria selected on the left-hand navigation bar on the Documents on File screen.

This is a great analytic feature to help you track those employees who have uploaded COVID vaccination or testing results.

Documents on File

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Expand All Groups Collapse All Groups Clear Grouping/Filters

Drag a column header here to group by that column

Legal Name	Employee Name	Employee ID	Payroll Status	Document Category	Document Subcate...	Document Type	Document Name	Document Descript...	Upload Date
ABC Company	Jenny A Allison	1666	Active	Confidential PHI	COVID Vaccination	Covid Documentation	No_password_editable...	COVID Vaccination Card	10/21/2021
ABC Company	Xander B Alvarado	2363	Active	Confidential PHI	COVID Vaccination	Covid Documentation	No_password_editable...	Vaccination Card	10/21/2021
ABC Company	John Jones	18133	Active	Confidential PHI	COVID Vaccination	Covid Documentation	No_password_editable...	COVID Vaccination Card	10/21/2021

Filter Options

*Document Category
Confidential PHI

Subcategory or Type is required

*Document Subcategory
COVID Vaccination

*Document Type
Covid Documentation

Document Name/Description
 Contains
 Does not contain

*Employee Status
 Active
 Inactive
 Terminated

Include employees with no results

Filter