



CLA iSolved Employee Self-Service Guide

Welcome to iSolved Employee Self-Service (ESS)!

This document will outline the ESS log in information and maintenance. It will also review some of the screens that your employer has given you access to. Below is a summary of the screens available:

- **Time:** The area where you will find your Time Card, Employee Absences, Time Off Balances and where you can request time off using the Time Off Requests menu item.
- **Employee Messages:** An area where your employer may post messages for your review.
- **Employee Profile Picture**
- **Employee Profile:** A summary of employment consisting of name and address, employment information, tax information, job information, personal information, EEO & Veteran information, organizational fields and labor fields
- **Pay History:** A screen where you are able to view your pay stubs with all details. You are also able to print the stub for your records.
- **W2/ACA/1099 Forms:** A screen where you are able to view your W2, ACA or 1099 forms. You are also to print the form but it is not printed on the IRS approved paper. You must contact your employer if you need an IRS approved form.
- **Salary:** A screen where you are able to view your current and past salary
- **Jobs:** A screen where you will see your current and past job titles

Employee Self-Service Initial Email

Your employer will initiate a system-generated email to you upon the activation of Employee Self-Service. This email is from a no-reply email address. Below is an example.

New Self-Service User:

Welcome to CliftonLarsonAllen LLP. A client account has been created for you by an administrator. To access CliftonLarsonAllen LLP, click on the link below to activate your account. In order to activate your account, you will need to enter a challenge question and answer. Click the following link to begin the activation process.

[https://claconnect.myisolved.com//AuthenticateUser.aspx?ticket=f783a4d3-6990-4f3d-980b-d6f4cc8dac2c&eid=&peid=&Username:Catherine.Schmidt@claconnect.com- AB E Client Code: 223-603270](https://claconnect.myisolved.com//AuthenticateUser.aspx?ticket=f783a4d3-6990-4f3d-980b-d6f4cc8dac2c&eid=&peid=&Username:Catherine.Schmidt@claconnect.com-AB%20E%20Client%20Code:223-603270)

The CliftonLarsonAllen LLP Team

The link in this email is for one-time use. After setup <https://claconnect.myisolved.com/> should be used.

You must click on the one-time use link provided in the email. The **User Name** is the email address provided or given to you by your employer which is usually your work email address. A personal email address may be used. Whichever email address is provided in the email will be your user name each time you log into Employee Self- Service.

Your one-time authorization code for your initial sign-on is the last four digits of your SSN.

Employee Self-Service Initial Sign-on

Once you click on the link provided, the **User Name** and **Client Code** will be pre-filled.

- You must add your **Authorization Pin** number (the last 4 digits of your SSN)
- Create and verify a **Password**.
- You then must select a challenge question/answer and verify your response.
- It is best to add your cell phone number in order to receive text messages if you are accessing your Employee Self-Service from a different IP address, or if you need to reset your password.

New User Account Setup

To activate your new account please enter the following information into the fields below and click the Continue button.

Account Information

User Name:	<input type="text" value="catherine.schmidt@claconnect.com"/>
Client Code:	<input type="text" value="T108"/>
Company Name:	<input type="text" value="SCHMIDT TRAINING COMPANY"/>
Employee Name:	<input type="text" value="Olivia Benson"/>

Identity Confirmation

* Authorization Code/Pin:

This information is located in the activation email sent to you.

Setup Account Password

* New Password:

Choose a password for your new account. Please ensure that passwords 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 easier to remember passphrases. Going forward, your password will not expire.

* Confirm New Password:

Re-enter your password to ensure it is correct.

* Challenge Question:

Choose a question only you would know the answer to. You will be prompted to answer this question if you need to reset your password.

* Challenge Answer:

Specify the answer to the challenge question you created above.

* Confirm Answer:

Re-enter the answer from above to ensure it is correct.

Contact Information

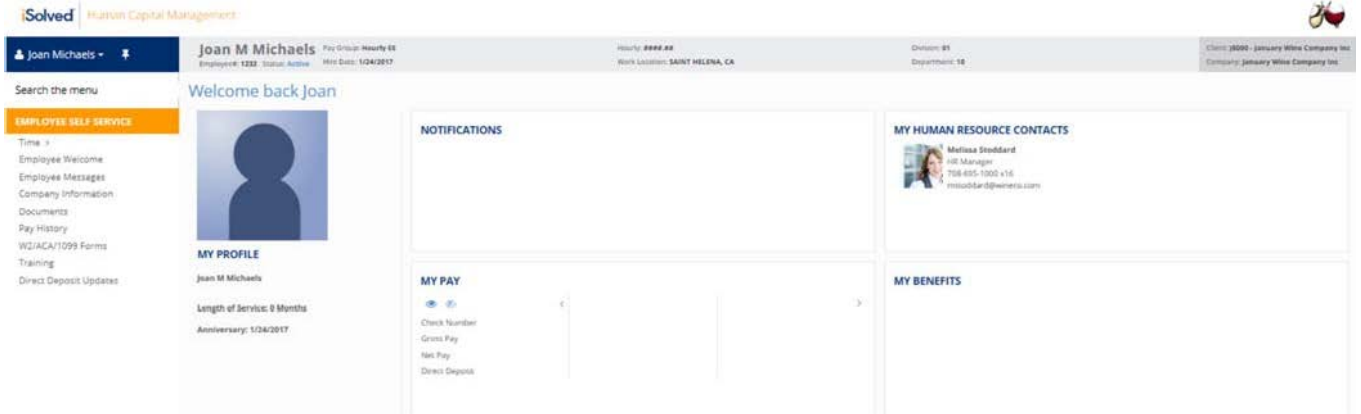
Mobile Phone:

Registering a cell phone number will give you the option to have login Authorization Codes texted to you.

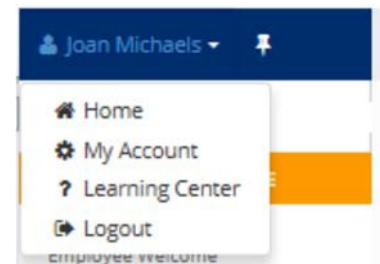


First Time Log-in

Once you click on **Continue** from the initial New User Account Setup, it will log you into Employee Self-Service. Depending on the roles set up for you by your employer, your screen could have one, two, or more subjects listed on the left side menu. Below is an example:



- Click on **My Account** to add or change your mobile phone number, change your password, or change your security question.
- Click on the **Learning Center** to create an account for access to help documents or recorded videos about the iSolved system.
- **Home** will take you back to your **Welcome** page.
- **Logout** is used when you have completed your activities



Please remember to save the URL <https://claconnect.myisolved.com/> to your favorites or bookmark the page. The link provided in your activation email was a one-time use link.

If you are trying to log in and you key your password incorrect 3 or more times, it will lock you out of the system. Please ask your System Administer to unlock your account. However, if you forget your password, you can reset it yourself before the 4th try by clicking on the **Forgot Password** link.

- Type in your **User Name**.
- You can then request a new **Authorization Code** by email or text.
- Type in the **Authorization Code** received.
- Verify the answer to your **Challenge Question**.
- Create a new **Password**.
- Confirm the new **Password**.
- Click **Next** and log on using the new password.



Pay History

Pay History is a record of each check stub available in iSolved. The history at the top of the page is by year and check date. It includes **Gross Pay, Total Hours, Net Pay, Check or Voucher Number, Check Amount, Description and Payroll Run #.**

Pay History

Year: 2016

Check Date	Gross Pay	Total Hours	Net Pay	Check/Voucher #	Check Amount	Description	PR Run #
7/29/2016	2769.23	86.67	324.42	V001790	0.00	Regular Check	54
7/29/2016	900.00	0.00	708.92	V001789	0.00	No Deductions	54
6/15/2016	2769.23	86.67	324.41	V001460	0.00	Regular Check	53
5/31/2016	2769.23	86.67	282.81	V001452	0.00	Regular Check	52
5/13/2016	2769.23	86.67	49.09	V001423	0.00	Regular Check	50

In order to see more Pay History, use the scroll bar on the right-hand side of the menu, or change the **Year** in the drop-down box.

The screen default will be a view of your most current pay stub. The top of the pay stub is a summary of dates and employee information, including withholding status.

Check Type: Regular Check	Gross Pay: 2769.23	Caprice C Benedict 13 Katherine Way Norwalk, OH 44857 May Network Company Inc.	Employee #: 1222	Division: 01
Check Date: 7/29/2016	Gross Wage: 2772.97		Soc Sec #: XXX-XX-3534	Department: 106
Period End: 7/31/2016	Net Pay: 324.42		Fed Filing: Single	St Filing:
Period Begin: 7/16/2016	Check Amt: 0.00		Fed Exemptions: 0	St Exemptions: 0
Payroll Run #: 54	Voucher #: V001790		Fed Additional:	St Additional:

The next section contains **Earnings or Memos, Deductions and Taxes.** These figures include the current pay hours or dollars and the YTD hours or dollars. It also includes the current and taxable wages in the Tax section for each type of tax listed.

Earnings & Memos*				Deductions		Taxes						
	Curr Hours	Curr Dollars	YTD Hours	YTD Dollars		Curr Dollars	YTD Dollars		Curr Dollars	Curr Wages	YTD Dollars	YTD Wages
Regular	86.67	2769.23	1016.04	33005.07	Child Support	500.00	2000.00	SOC SEC EE	171.92	2772.97	2073.89	33449.90
Sick			8.00	268.39	Child Support 2	250.00	1000.00	MED EE	40.20	2772.97	485.02	33449.90
GTL	0.00	3.74	0.00	46.12	Medical Pre-tax		2760.90	FEDERAL WH	464.94	2662.05	5665.54	32784.38
Holiday			16.00	511.22	HSA Pre-tax		300.00	OHIO WH	80.29	2662.05	994.76	32784.38
Commission			0.00	900.00	401K	110.92	665.52	NORWALK			459.67	33449.90
Bonus			0.00	1580.00	401K Loan	813.25	9759.00	NORWALK CITY SD	13.29	2662.05	163.70	32784.38
Gift Cards			0.00	200.00								
HSA ER Contribu*			0.00	100.00								
401K Match*	0.00	97.05	0.00	582.30								

The second section at the bottom of the pay stub is your Direct Deposit information, if applicable. It will list any direct deposit accounts along with the amount deposited into each account.

Direct Deposit		
	Account	Deposit Amount
Checking	####2243	324.42

The bottom left side of the pay stub includes the current dollars and taxable wages and the YTD dollars and taxable wages for any Employer Taxes paid on your behalf.

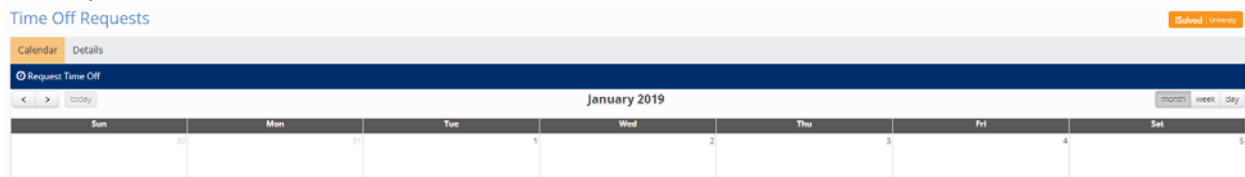
Employer Taxes				
	Curr Dollars	Curr Wages	YTD Dollars	YTD Wages
SOC SEC ER	171.92	2772.97	2073.89	33449.90
MED ER	40.20	2772.97	485.02	33449.90
FUTA ER			42.00	7000.00
OHIO SUI ER			243.00	9000.00



Time Off Requests

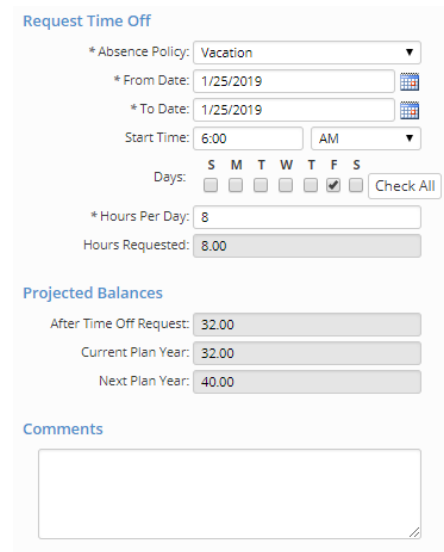
Time Off Requests are used by an employee to enter a request for time off into the iSolved system. After an employee enters a request, the manager or supervisor will then approve or deny the request as appropriate.

To create a Time Off Request, navigate to Employee Self-Service → Time → Employee Calendar → Time Off Requests



Request Time Off

1. Click on the **Request Time Off** icon at the top-left corner of the calendar to create a Time Off Request.
2. Enter the following request details:
 - a. Select **Vacation** from the Absence Policy drop-down
 - b. Select the **From** and **To Dates**. Select a single date, or a date range for the request.
 - c. Enter a **Start Time** for the absences. This field is not required, but is recommended to add.
 - d. Update the corresponding **Days of the Week**. This section will auto-populate based on the dates selected above. Any desired days of the week can be unselected.
 - e. Enter the number of **Hours Per Day**. This is the number of hours for each day that are being requested off. **Note:** If a week is being requested off, 8 hours per day would be entered in this field (as opposed to a 40 hours total).
3. Review the **Projected Balances**.
 - a. **After Time Off Request:** What the employee's balance will be after the request is made. This is simply the current balance minus the request.
 - b. **Current Plan Year:** This balance takes all current requests/future awards/pending approvals/limits into consideration to the end of the current plan year.
 - c. **Next Plan Year:** This balance takes all current requests/future awards/pending approvals/limits/carryover into consideration through the end of the next plan year.



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Create Opportunities