

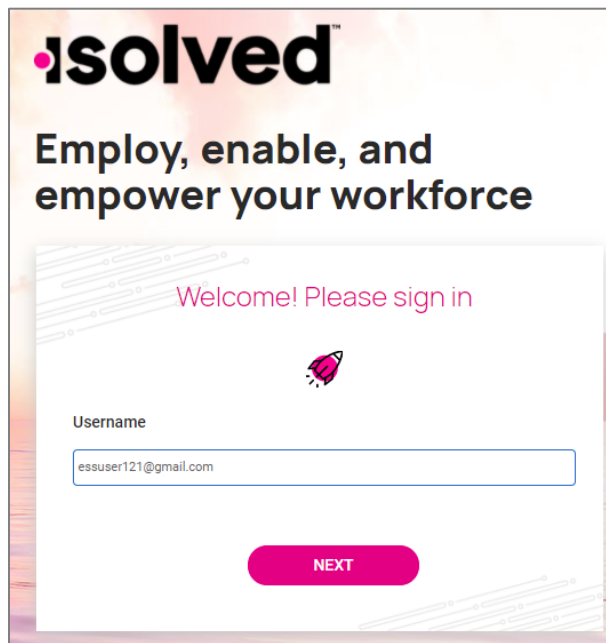
Introduction

The purpose of this article is to review how you can access and use the Documents feature in the Adaptive Employee Experience. When enabled, this feature will allow you to view documents such as tax withholding forms, signed acknowledgements, and more.

Navigation

In order to access your punch options, log into isolved using your email address and password you created upon authentication. 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. Passwords may also not duplicate any of your previous 10 passwords.

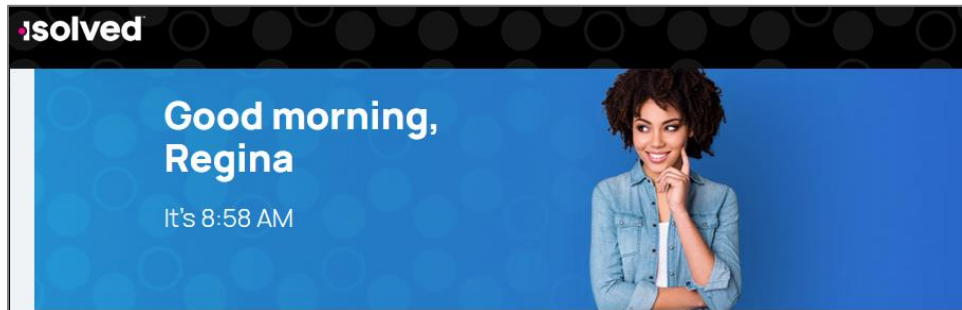
1. Your first step will be to key in your **Username**.



2. Click on the **Next** icon.
3. Your username will appear and give you the option to rekey it by clicking on "This is not my username." If the username is correct, enter the **Password**.
4. If you have forgotten your password, click on "Forgot my password" and create a new password.
5. Once the correct password is entered, click on the **Next** icon.

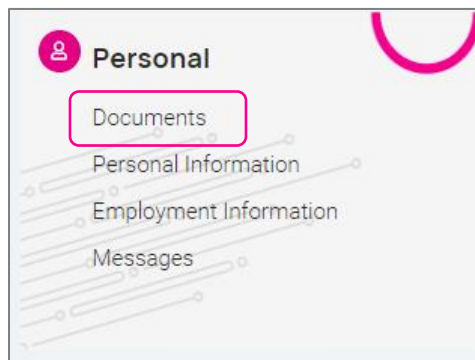
Welcome Page

Once logged in, you will be greeted by the system. Your name and time will display based on your time zone. See the example below.

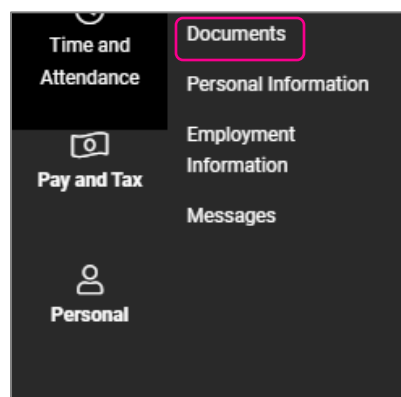


Accessing Documents

One of the ways to access Documents is through the Personal card.

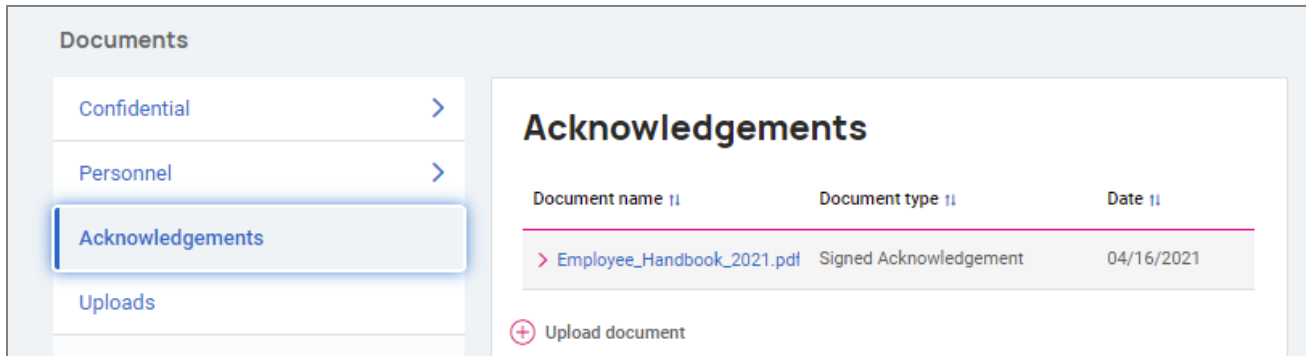


Documents can also be accessed via the side menu item for Personal then selecting Documents.



Viewing Documents

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

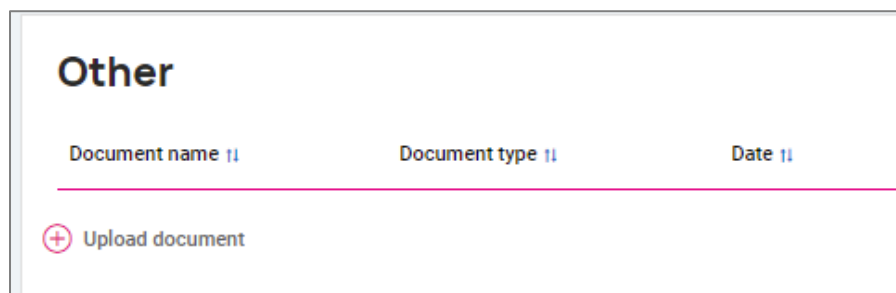


The categories will contain the following information:

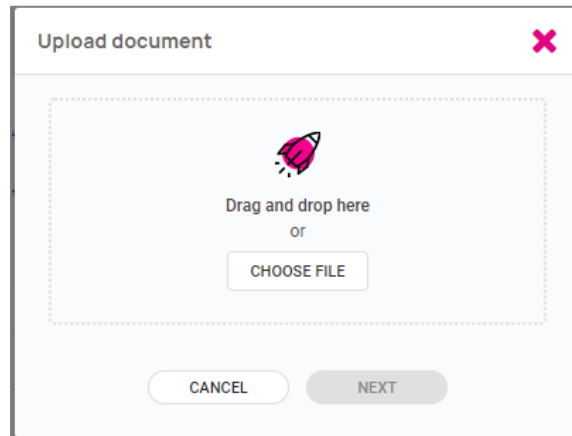
- Confidential:
 - I-9 documents
 - PHI
 - Other
- Personnel
 - Personnel
 - Payroll
 - Other
- Acknowledgements
- Uploads

Uploading Documents

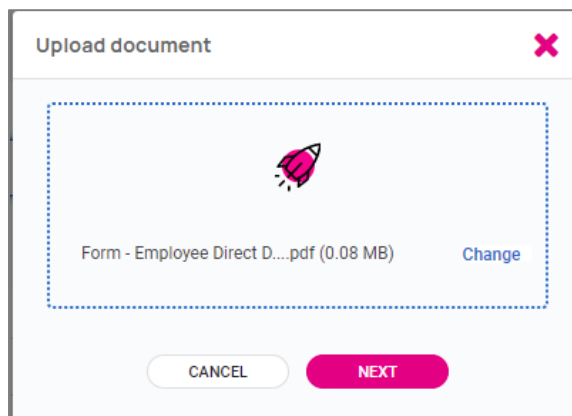
Any of the document categories will give you an opportunity to upload documents. Click the plus (+) button next to the words "Upload Document" to begin the process.



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



When a file has loaded, it will show a confirmation screen of the file you're trying to load. Click **Next**.



The next screen will bring a drop-down list of folders.

- 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

Select a **Folder**, **Type**, and then enter a brief description of the document in the **Description** box, then click **Next**.

The screenshot shows a modal window titled "Upload document" with a close button (X) in the top right corner. Inside the modal, there is a dashed blue box containing a rocket icon and the text "Form - Employee Direct D...pdf (0.08 MB)" with a "Change" link to its right. Below this box, the "Details" section contains three input fields: "Folder" with a dropdown menu showing "Personnel - Other", "Type" with a dropdown menu showing "Employee Document", and "Description" with a text box containing "Direct Deposit Authorization". At the bottom of the modal, there are two buttons: "CANCEL" and "NEXT". A mouse cursor is pointing at the "NEXT" button.

The next screen gives you options on access allowed for other user types. You can select the following:

- Select "Full Access" if the document is something the manager or supervisor could see and edit.
- Select "Read Only" if they can read it but not do anything else.
- 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."

After you've made your selections, click the **Upload** button to finish the process.

Upload document [Close]

Form - Employee Direct D...pdf (0.08 MB) [Change](#)

Access

	FULL ACCESS	READ ONLY	NO ACCESS
You	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supervisor	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Manager	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>

You'll see a brief message 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.

Documents | Personal Information | Employment Information | Messages

Documents

- Confidential
- Personnel**
- Personnel
- Payroll
- Other

Other

Document name	Document type	Date
Form - Employee Direct Deposit Authorization.pdf	Employee Document	04/16/2021