

People Cloud Solutions

Streamline employee administration all in
one place.



FIRSTCHOICE

A MARSHBERRY COMPANY

Explore Our Solutions



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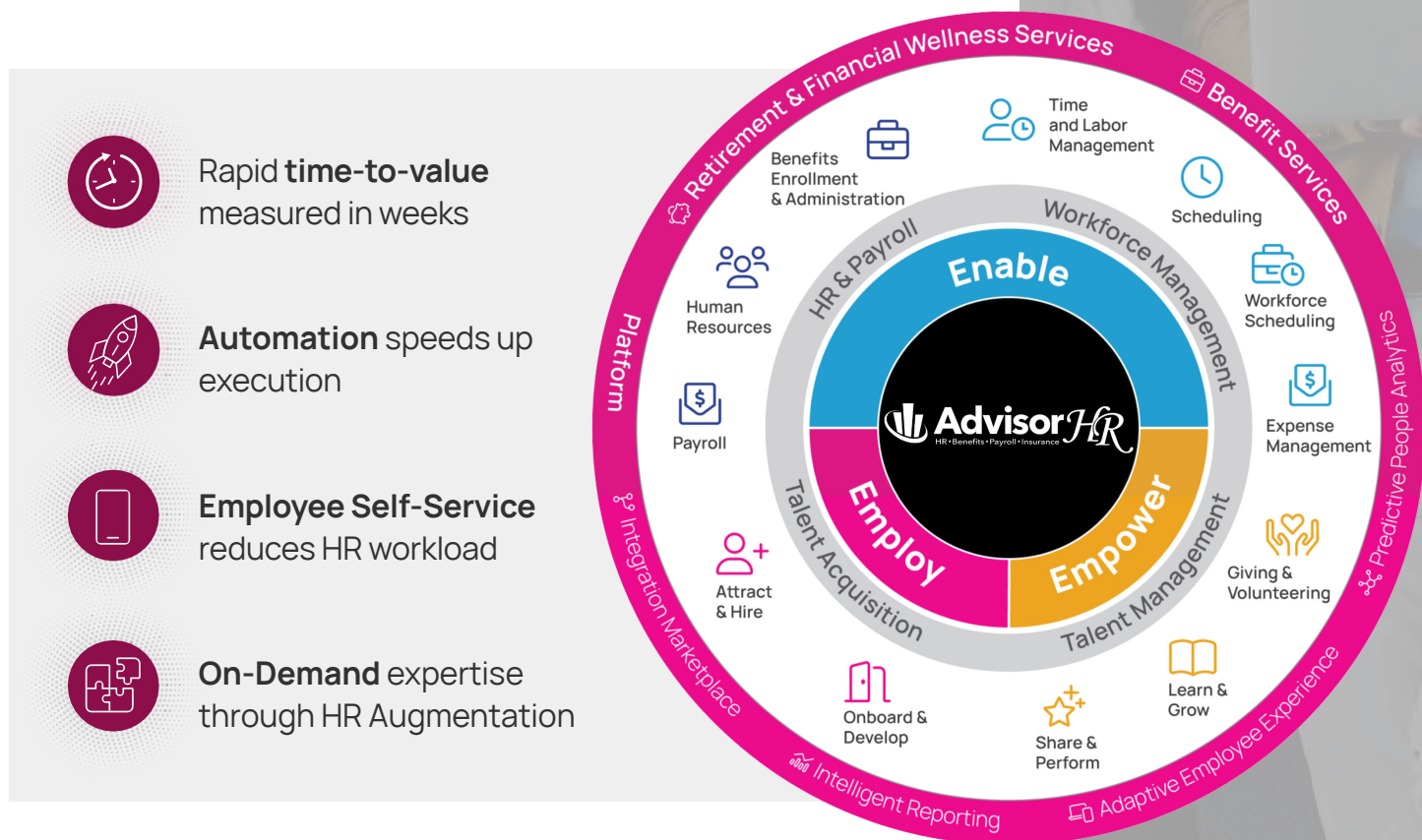
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FirstChoice partnership with Advisor HR delivers agility.

Our partnership presents businesses with a single, consistent source of truth for all employees, throughout the entire employee lifecycle. Integrated technology means HR and business leaders can make informed people decisions with real-time data. Workflows are connected and automated, enabling faster, error-free responses to operational needs, and freeing HR teams to focus on strategic business objectives.

With rapid deployment and time-to-value, your business never has to slow down or compromise in risk management or employee experience.

Beyond technology, Advisor HR Services can be deployed to quickly close operational or strategic gaps in HR processes and teams to enable the business to move swiftly and stay compliant.



FIRST CHOICE



ADVISOR HR



Talent Acquisition

Attract and hire award-winning talent

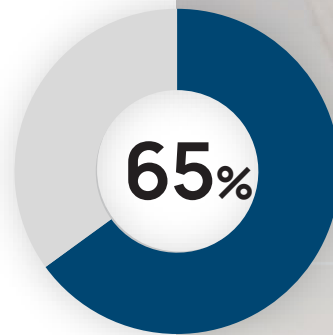
As the future of work continues to evolve, employers must be agile in adopting the tools required to quickly attract, hire and onboard the very best talent. With Talent Acquisition solutions, convey a positive employee experience, impart the culture and values of your organization and realize quick time-

Attract & Hire

Attract & Hire is a customizable Applicant Tracking System (ATS) built to help you optimize every stage of your recruiting process. Whether you want to scale your team quickly, source remote candidates or reach diverse talent, Attract & Hire gives you the technology to find the best-fit candidates for your open roles. Save time for the things that matter the most while making sure nothing falls through the cracks.

Onboard & Develop

From the moment a candidate accepts your offer and joins your organization to the point of their departure, their interactions and impressions matter. Onboard & Develop solutions provide analytics, templates, and wizards to ensure consistency and compliance as you onboard new employees and connect with them in more meaningful ways.



65% of HR Leaders expect recruitment to be just as difficult or more difficult in 2024 than 2023

isolved's 2024 HR Leaders Report

Features and benefits:

Attract & Hire

- Company career page
- AI-powered job ad writing and candidate matching
- Access to more than 5,000 job boards
- Assessments and skills testing
- Background and reference checks
- Video interviews
- Offer letters

Onboard &

- Custom welcome message and links
- Digital, fillable forms
- Employee acknowledgments
- Compliance documents
- Workflow automation
- Pending employee dashboard



HR, Payroll & Benefits Administration

Achieve efficiency and compliance

Advisor HR Payroll enables you to add more value with less redundancy, fewer errors, decreased risk and deeper analytics. Self-service capabilities put the power in the employee's hands, freeing up time to turn your HR function into a strategic business driver.

Human Resources

No matter your industry or location, your employees are increasingly asking for more engaging, personalized workplace experiences; including anytime, anywhere access. With our HR solutions, automate tedious tasks while improving HR agility and impact. Automated workflows, configurable forms and reports, and real-time access to accurate and consistent employee information enable you to reduce your administrative workload and minimize compliance risk.

Payroll

Today's evolving workforce requires self-service actions for managing compensation and quickly accessing pay. Process payroll in a few clicks and reduce the burden of keeping up with employment tax rates, calculating liabilities, creating reports, and making payments. Customize your employee experience and enable self-service onboarding, changes to direct deposit and personal information, tax filing and more.

Benefits Administration

Benefits Administration enables employees to research, select and enroll in the benefits that suit them—without having to rely on your HR team. Enhance your employee experience, simplify enrollment, and relieve headaches by consolidating HR and benefit administration to gain efficiencies and marketplace competitiveness.

Features and benefits:

Human Resources

- New-hire reporting
- PTO/vacation accrual management
- Job and salary history
- Certifications tracking
- Skills, education, and training tracking
- Audit and compliance
- Document management

Payroll

- Real-time payroll preview
- Garnishment management
- Year-end W-2/1099 processing
- Automated tax filing
- Employee and manager self-service
- Complete payroll-related tax service
- Check, direct deposit or pay card payment options

Benefits

- Streamline open enrollment
- Real-time integration
- Carrier-specific reports
- Automated process
- Benefit-cost analysis
- Life-event wizard



Value-Add Capabilities

Data Integration

Integrating with third-party vendors for General Ledger, 401(k) and benefits carriers can be an enormous time saver for human resources and payroll departments. You will eliminate the time-consuming and tedious task of benefits communications, all while going paperless. Your enrollments and change requests are processed promptly and accurately and communicated by a variety of vendor communication options to carriers when using an integrated connection. Our integration bundle provides the ability to integrate with up to three connections of your choice.

Tax Filing Solutions

Penalties and fees for misfiling or inaccurate payroll tax deposits can be steep, and oftentimes HR teams struggle with a lack of time and systems for handling taxes efficiently. Integrated with our Payroll, our tax filing solutions eliminate the need for multiple tax processing services, simplify processes as you add new locations, and reduce data errors and liability to achieve compliance.

Compliance Solutions

Our compliance solutions help you remain compliant with the ever-changing tangle of regulations and legal requirements. It includes:

- **ACA Print & File:** Applicable large employers are required to file returns with the IRS each year documenting their compliance with IRC sections 6055 (if self-insured) and 6056. With ACA Print & File, the data you provide is used to produce hard copy 1094 and 1095 forms and eFile those forms with the IRS on your behalf.
- **ACA Compliance:** Our most complete ACA solution available to you. ACA Compliance provides additional functionality that automates employees' benefits as dictated by the ACA, alleviating the confusion and stress of tracking employees through measurement periods and subsequent management of the benefits enrollment and dis-enrollment process.



Workforce Management

Empower your people

With Workforce Management, accurately track and process time, attendance and expenses for your entire workforce. Employees participate in their success with collaborative scheduling, expense submittal and payroll integration.

Time and Labor Management

Time and Labor Management ensures accurate payroll and compliance while efficiently managing time, labor and attendance across your entire workforce; even employees who are remote or on the go.

Scheduling

Empower staffing managers to assign schedules and collaborate with employees from any connected device; mobile, tablet or workstation. All while managing requests and making shift adjustments on the fly.

Workforce Scheduling

Workforce Scheduling allows employers to quickly schedule employees as large groups or an entire organization. Quickly categorize employees, set schedules, communicate shift shortages and requirements, and predict future workforce needs.

Expense Management

Employers need to ensure alignment with company budget goals and policies while gaining visibility into what funds are moving in and out of the business. With Expense Management, automate processes, comply with regulations and maximize employee participation in expense reporting without the need for additional software.

Occurrence Tracking

As a tool to optimize employee performance and effectiveness, Occurrence Tracking enables you to increase visibility on time and attendance patterns. Provide managers with comprehensive insights into workforce attendance habits and improve communication between your HR team and employees. Easily monitor employee occurrences and automate your corrective actions.



Workforce Management

Features and benefits:

Time & Labor Management

- Time tracking
- Time clocks, with flexible collection methods
- Geofencing
- Configurable allocation rules
- Team calendar
- Error Alerts

Scheduling

- Shift eligibility and scheduling
- Scheduler alerts
- Shift swapping
- Coverage dashboard

Workforce Scheduling

- Large group scheduling
- Staff count types
- Staffing rules and summary
- Notifications to fill open shifts

Expense Management

- Expense tracking
- Payroll reimbursement
- Mileage and per diem tracking
- Optical Character Recognition (OCR)

Occurrence Tracking

- Infraction definition and management
- Corrective action automation



Talent Management

Connect, align, and engage

Enable your employees to stay connected, share ideas, seek feedback and collaborate, all while improving productivity and boosting performance. Talent Management solutions allow employees to learn, share, innovate and grow to be the best they can be.

Share & Perform

Share & Perform enables multi-directional employee communication that drives toward a transformative company culture. Built-in employee recognition and performance management tools allow both employees and managers to engage in maximum business success.

Learn & Grow

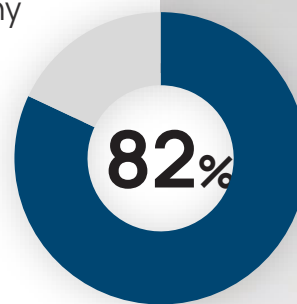
Employees are looking for more value from their employers, with learning opportunities being at the top of their lists. Execute your organization's online education and growth objectives with Learn & Grow, an end-to-end learning management system for continuous career growth and up-skilling.

Compensation Management

With Compensation Management, you have the power to plan, manage and execute your entire compensation process for merit increases, bonuses, and more from start to finish within Advisor HR's intelligently connected platform. This comprehensive solution lets you drive employee motivation, engagement, performance and retention, while improving operational efficiency and ultimately, your bottom line.

Giving & Volunteering

Giving & Volunteering provides both employees and employers what they are asking for; alignment with charitable causes plus simple, seamless methods for managing giving programs, processing contributions, and reporting social responsibility. Now, even as a small employer, you can compete for top talent while fostering employee loyalty and retention.



82% of employees say they feel engaged at work – and learning opportunities are what's keeping them engaged

Source: Voice of the Workforce Report 2023 - 2024



Talent Management

Connect, align, and

Features and benefits:

Share & Perform

- Collaborative feed wall
- Knowledge-sharing tools
- Pulse surveys
- Rewards and recognition
- Goal setting
- 360 reviews
- Performance reviews
- Nine Box

Learn & Grow

- 85,000+ pre-built courses
- Gamification
- Learning paths, quizzes, certifications
- Custom content
- AI-powered chatbot and search ability options
- SCORM compliant

Compensation Management

- Automated processes
- Eligibility rules configuration
- Option to enter a total amount or percent increase
- Notifications and reminders
- Automatic payroll integration
- Analytics, such as compa-ratio comparisons, average annual base salary, and more

Giving & Volunteering

- Corporate giving and volunteering campaigns
- Automated processes from campaign launch through tax reporting
- Payroll integration
- Over 2 million non-profit organizations
- Promote company-sponsored nonprofits and social causes



Intelligently Connected Platform

Deliver employee experience by design

Employing intelligently connected systems that provide a fully rounded view of employees and their work, HR teams can bring together performance metrics and behavioral drivers, presenting meaningful, data-driven and actionable insight to leaders making complex but critical decisions regarding the workforce.

Intelligent Reporting

With Advisor HR, you'll get over 300 standard reports that help you track key metrics for your organization. Reports such as Payroll Summary, Employee Census and OSHA Incidents give HR administrators the data needed to make

Predictive People Analytics

With the power of AI-based solutions, HR teams can now visualize workforce metrics to better plan for changes in the employment landscape. Predictive People Analytics provides comprehensive benchmark data to help source and secure top talent and predict attrition across individuals and groups, all resulting in improved employee experience and operational goal alignment.

Benchmark Insights

Benchmark Insights eliminates the guesswork in your talent strategy by identifying where you stand in terms of position-specific salary, tenure and turnover, with respect to similar organizations. Gain a point of reference using aggregated data from over 5 million employee records across thousands of organizations.

Conversational Virtual Assistant

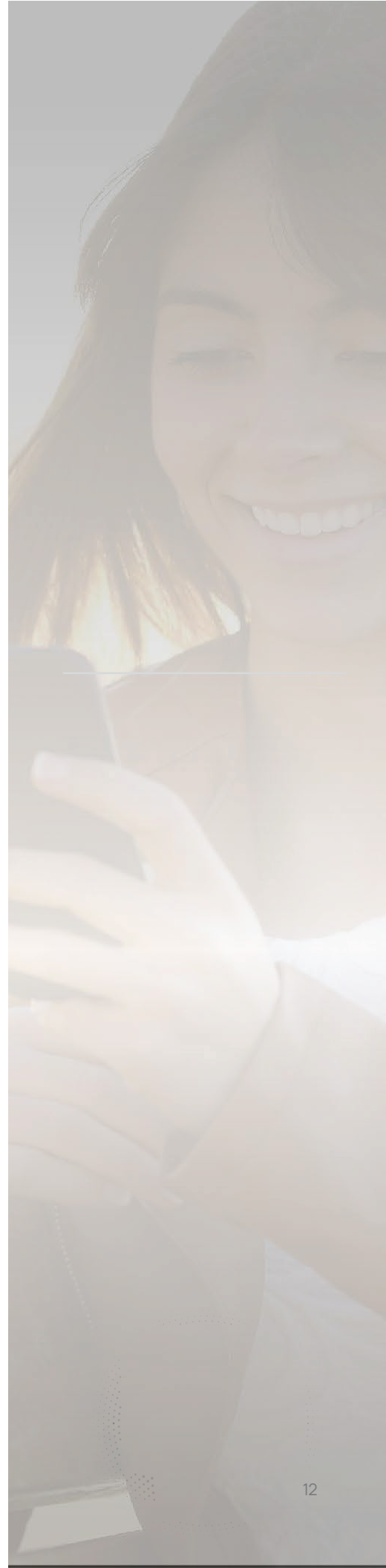
With Conversational Virtual Assistant (VA), employees can find answers to common questions about their work schedule, timecard information, their elected benefits and even payroll matters they need quickly. The VA helps with requests in a fun, chat-like way keeping basic HR service desk requests to a minimum, all from within popular work apps your employees already use.

Marketplace

In the Marketplace, you'll find a collection of additional HCM modules, apps and integrations that help create the ideal solution for your organization's needs.

On-the-Go Adaptability for a Better Employee Experience

The Advisor HR **Adaptive Employee Experience** delivers a crisp and consumer grade user interface that's simple to navigate and intuitive to so your people have anytime, anywhere access to view and request time off, update address and banking information, and complete other standard HR tasks directly from any device. This secure, self-service environment makes use of progressive web application (PWA) technology and accessible design to save your HR resources time and effort, enabling them to focus on more strategic initiatives.



People Cloud Services

On-demand advice and support

A Partner to Extend Your HR Capabilities

HR Services

Whether you are looking to become compliant in a single aspect of employment or require a full-scale partner for strategic HR management, Advisor HR Services provides you the resources required to achieve simple, secure and seamless business value.

Benefit Administration Services

Managing benefits can be complex and time consuming, but with Benefit Administration Services from Advisor HR, it's easier than ever to stay compliant while giving employees the benefits they want and need. With Advisor HR, COBRA management, flexible spending accounts, health savings accounts, health reimbursement and transportation/parking plans are delivered hassle-free.

Retirement Services

No longer exclusively accessible to larger organizations, retirement benefits enable you to gain a competitive edge by attracting and retaining engaged talent. Advisor HR makes offering a 401(k) plan simple, compliant and cost effective for employers of all sizes.

Financial Wellness Services

Employee well-being is critical to business success, and a big part of that revolves around financial wellness. Advisor HR offers a range of financial wellness solutions, from earned wage access to pay card options for electronic deposits

2nd

Highest
Outsourced

HR
Compliance
and
efficiency
analysis

The government keeps changing the rules, compliance mandates are complex, and many businesses miss out on tax credits. The second most likely task for HR leaders to outsource this year is HR compliance and efficiency analysis.

isolved's 2022 Transforming
Employee Experience Report



Benefit Services

Save time & reduce risk with competitive plans

Continuation Services

Advisor HR has been providing COBRA Administration for years now, and we help employers remain compliant while simplifying the process.

- Easy to use employer & participant portal
- COBRA event management
- Online enrollment and payment options for participant
- COBRA appropriate Notices to Qualified Beneficiaries
- Carrier notification of COBRA terminations and COBRA elections
- Premium Collection and disbursement
- Real-time reporting
- Initial Notices
- Daily regulations review and management

Leave Management

Advisor HR has broad FMLA administration expertise, ensuring our comprehensive leave management service is easy to use and minimizes customer spend by monitoring and ensuring compliance. Ease the burden of FMLA while providing employees with a service they deserve

- Review/Development of Leave of Absence Policies and Procedures
- Coordination between FMLA & ADA requirements
- Documentation of all FMLA communications
- FMLA Leave Qualification and Tracking
- FMLA Event and Leave Request Processing
- Non-biased application of FMLA regulations
- Denial Notification
- Compliance with state & federal regulations
- FMLA Activity Reports



Our Clients Are at the Center of What We Do



The FirstChoice partnership with Advisor HR ensures our clients are at the center of everything we do. We care deeply, we're passionate about delivering results, and we work as one team to support each other and the businesses we serve. That means we hold ourselves accountable, not just for your success, but for the long-term partnerships we're committed to building.

Thank you for the opportunity to earn your trust. If you have any questions as you consider your options, or, more importantly, should you choose to partner with us, we are always available to support you.

Warm regards,

Advisor HR Management Team

📞 704-626-5960



The Results Are In.

