

Broker Workbench

Client data at your fingertips!

The Broker Workbench is a set of tools and reports within iSolved that provides powerful insight into your clients. You can view your client data and produce reports in just one click! Quick, accessible reports enable you to continue providing the superior service you are known for!

It's simple: when you login, a list of your clients will appear - yes, it's that easy.

Your Broker Workbench provides quick access to:

Client Summary Broker View

Lists company information, contacts, processing information and more.

Client Landing Page Broker View

Displays reminders, payroll due dates, payroll run dates, contacts, quick links and announcements.

Clients Reports Broker View and Report Queue

Report Name	Report Type
ACA Affordable Coverage Determination Report	As Of Date
ACA Full Time Look-Back Report	Date Range
ACA Large Employer Compliance Test	Date Range
Benefit Statement	As Of Date
Broker Census with Dependents	By Payroll Run
Broker Census with Dependents	As Of Date

Lets you run reports you need and retrieve them from the queue.

Executive Dashboard Broker View

Allows you to choose the parameters and obtain demographics on one client or all clients.

For more information on the Broker Workbench, call us at **866.992.5205** or visit us at **pcspay.com**