

View and Upload Documents - Admin



This guide walks through viewing your employee's documents in their profile as a Manager or Supervisor

1 Navigate to <https://connect.threadhcm.com/default.aspx>

The screenshot shows the Thread HCM interface for an employee profile. At the top, it says "welcome back ryan" and "isoived university". On the left is a navigation menu with options like "Employee Self-Service", "Employee Welcome", "Pay History", "Employee Profile", "Employee Messages", "Direct Deposits", "Human Resources", "EE Performance Reviews", "Update Information", "EE Benefits", "ZayZoon On-Demand Pay", and "Time". The main content area is divided into several sections: "MY PROFILE" (Ryan Reynolds, Finance Manager, Length of Service: 8 Months, Anniversary: 4/9/2025), "NOTIFICATIONS" (Documents requiring your review), "MY HUMAN RESOURCE CONTACTS", "MY PAY" (table with columns for dates and values for Check Number, Gross Pay, Net Pay, and Direct Deposit), and "MY BENEFITS".

	10/10/2025	7/18/2025
Check Number	18	29
Gross Pay		
Net Pay		
Direct Deposit		

2 Click "Employee Self-Service"

The screenshot shows the 'isolved' HR system interface. At the top, it says 'Delivered by thread' and 'Client: CYN22 - CynTech Legal: Cynkar Technologies'. The user is identified as 'Ryan Rey...'. The main dashboard area is titled 'My Dashboard' and includes a section for 'Options' with several status messages: 'You have Pending Time Off Requests!', 'You have No Pending Transactions', 'You have No Pending Shift Requests between 10/11/2025 - 4/2/2026', and 'You have Pending Punches between 12/22/2025 - 1/12/2026!'. On the left sidebar, the 'Employee Self-Service' menu item is circled in orange.

3 Click "Human Resources"

This screenshot is similar to the previous one, showing the 'isolved' HR system interface. In this view, the 'Human Resources' menu item in the left sidebar is circled in orange. The main dashboard area remains the same, displaying the 'My Dashboard' and 'Options' sections with the same status messages.

4 Click "Documents"

The screenshot shows a dashboard with a left sidebar and a main content area. The sidebar includes the following items:

- Employee Admin Tools
- Employee Management
- Client Management
- Employee Self-Service
- Employee Welcome
- My Dashboard**
- Pay History
- Employee Profile
- Employee Messages
- Company Information
- Human Resources
 - Documents** (highlighted with an orange circle)
 - ESS Misc Data Sets
 - ESS Misc Fields
- EE Performance Reviews
- Update Information
- EE Benefits
- Time
- Occurrences
- Corrective Actions

The main content area displays several status messages:

- ✓ You have No Pending Transactions
- ✓ You have No Pending Shift Requests between 10/11/2025 - 4/2/2026
- ⓘ You have Pending Punches between 12/22/2025 - 1/12/2026! Click here to view.

Below these messages is a list of menu items:

- Pending Transactions
- Pending Punches
- Alert Monitoring
- Employee Punch Status
- Punch Note Response
- Scheduled Vs Worked Hou...
- Earnings Summary of Hou...

5 Click the employee you'd like to view

The screenshot shows the 'Employee List' page for client CYN22 - CynTech. The page includes a search bar and a table of employees. The table has the following columns:

Legal N...	Pay Gro...	Employ...	First Na...	Preferre...	Middle ...	Last Na...	Status	Team	Depart...
Cynkar Tec...	Bi-Weekly	0006	Christopher	Chris		Bailey	Active		
Cynkar Tec...	Bi-Weekly	0025	Benjamin	Ben		Button IV	Active		
Cynkar Tec...	Bi-Weekly	520	George			Clooney	Active		
Cynkar Tec...	Bi-Weekly	0013	David			Dooly IV	Active		
Cynkar Tec...	Bi-Weekly	0024	Samuel			Doore	Active		
Cynkar Tec...	Bi-Weekly	516	Mel			Employee	Active		
Cynkar Tec...	Bi-Weekly	2354	Penn			Employee	Active		
Cynkar Tec...	Bi-Weekly	2391	Test			Employee	Active		
Cynkar Tec...	Bi-Weekly	2395	TestOnboar...			Employee	Active		
Cynkar Tec...	Bi-Weekly	0003	Guy		R	Fieri	Active		
Cynkar Tec...	Bi-Weekly	2365	Rickie			Fowler	Active		

The name 'Christopher' in the first row is highlighted with an orange circle.

6

Click the Tab you'd like to view.
Under All Documents, you can see the full list and Download.

The screenshot shows the 'Employee Documents' interface for 'Ryan Onboarding'. The top navigation bar includes the 'isolved' logo and user information. The main content area displays a table of documents. The 'All Documents' tab is selected, and a document titled 'Electronic Consent' is highlighted with an orange circle.

Actions	Document Type	Document Name	Document Description	Document Upload Date
...	Electronic Consent	ElectronicSignatureConsent.pdf	Accepted	4/2/2026

7

Click the document you'd like to view and it will download.

The screenshot shows the 'Documents' interface for 'Chris Bailey'. The page displays a table of documents. The 'All Documents' tab is selected, and a document titled 'Electronic Consent' is highlighted with an orange circle.

Actions	Document Type	Document Name	Document Description	Document Upload Date
...	Electronic Consent	ElectronicSignatureConsent.pdf	Accepted	8/15/2025

8 Click **Add New** to upload documents on any of these tabs

The screenshot shows the 'Employee Documents' interface. At the top, there's a navigation bar with 'Personnel', 'Payroll', 'I-9', 'Confidential PHI', 'Confidential - Other', 'Signed Acknowledgements', 'Other', 'EE Uploads', and 'All Documents'. Below this is a table with columns: 'Actions', 'Document Type', 'Document Name', 'Document Description', and 'Document Upload Date'. A table row is visible with 'Electronic Consent' as the document name and '4/2/2026' as the upload date. The '+ Add New' button is circled in orange.

9 Here you can upload, choose the category and choose who has access to this doc

The screenshot shows the 'Add New' dialog box. It has fields for 'Category' (set to 'Personnel'), 'Subcategory', 'Document Type', and 'Description'. There are also radio buttons for 'Read Only', 'Full Access', and 'Not Permitted'. The 'Not Permitted' radio button is selected. The 'Upload File' field is also visible. The dialog box is circled in orange.

10 Click "All Documents" to view a list of all of them.

The screenshot shows the 'Employee Documents' interface for 'Ryan Onboarding'. The 'All Documents' tab is selected and highlighted with an orange circle. The table below shows the following document:

Actions	Document Type	Document Name	Document Description	Document Upload Date
...	Electronic Consent	ElectronicSignatureConsent.pdf	Accepted	4/2/2026

11 Here you can select which documents you'd like to Download.

The screenshot shows the 'Employee Documents' interface with the 'All Documents' tab selected. A 'Download Documents' button is highlighted with an orange circle. The table below shows the following documents:

Category	Document Type	Document Name	Document Description
Category: Confidential-Other (2)			
Subcategory: (2)			
<input type="checkbox"/>	Onboarding Audit Report	OnboardingAuditReport.xlsx	Onboarding Audit Report
<input type="checkbox"/>	Onboarding Confirmation	OnboardingConfirmationStmnt.pdf	Onboarding Confirmation Statement
Category: I-9 (2)			
Subcategory: (2)			
<input type="checkbox"/>	Employee I-9 Document	PPA vs Analytics Hub.pdf	
<input type="checkbox"/>	Employer I-9	EmployerI9Form.pdf	Employer I9 Form
Category: Payroll (2)			
Subcategory: (2)			
<input type="checkbox"/>	Employee Tax Documents	FEDERAL W-4.pdf	Employee's Withholding Certificate
<input type="checkbox"/>	Employee Tax Documents	GA G-4.pdf	Employee's Withholding Allowance Certificate
Category: Personnel (1)			
Subcategory: (1)			

12 Click "Download Documents"

The screenshot displays the 'Employee Documents' interface. At the top, the 'isolved' logo is visible, along with the text 'Delivered by thread'. The main header includes the employee's name 'Ryan Onboarding', employee number '2423', and various details like 'Pay Group: Bi-Weekly', 'Status: Active', 'Hire Date: 4/2/2026', 'Work Location: August...', 'Department: Location:', and 'Client: CYN22 - CynTech Company: Cynkar Technologies (Active)'. A navigation menu on the left lists various HR functions, with 'Employee Documents' selected. The main content area shows a table of documents with columns for 'Document Type', 'Document Name', and 'Document Description'. A 'Download Documents' button is highlighted with an orange circle. The table lists documents under categories like 'Confidential-Other', 'I-9', 'Payroll', and 'Personnel'.

Document Type	Document Name	Document Description
Category: Confidential-Other (2)		
Subcategory: (2)		
<input checked="" type="checkbox"/>	Onboarding Audit Report	OnboardingAuditReport.xlsx
<input checked="" type="checkbox"/>	Onboarding Confirmation	OnboardingConfirmationStmnt.pdf
Category: I-9 (2)		
Subcategory: (2)		
<input checked="" type="checkbox"/>	Employee I-9 Document	PPA vs Analytics Hub.pdf
<input checked="" type="checkbox"/>	Employer I-9	EmployerI9Form.pdf
Category: Payroll (2)		
Subcategory: (2)		
<input checked="" type="checkbox"/>	Employee Tax Documents	FEDERAL W-4.pdf
<input checked="" type="checkbox"/>	Employee Tax Documents	GA G-4.pdf
Category: Personnel (1)		
Subcategory: (1)		