

# Mineral Upgrade Client FAQ

## Introduction

### What are you changing about Mineral Platform™?

Your QuickBooks HR experience, brought to you by Intuit QuickBooks, is changing to the Mineral Platform, the first-ever intelligent HR and compliance platform that's powered by technology, data, and human expertise. With the Mineral Platform, you'll benefit from proactive and vigilant HR and compliance guidance and recommendations, including all the QuickBooks HR resources you've come to rely on, along with many new enhancements.

### When will I upgrade to the new platform?

Your QuickBooks HR experience, brought to you by Intuit QuickBooks, will be upgraded to the Mineral Platform on Monday, March 18, 2024.

### Is the upgrade required?

Yes, your access to QuickBooks HR will be automatically updated.

### Is there any "down time" during my upgrade to the Mineral Platform?

Upgrades will occur during non-business hours over a weekend, and you will be able to resume regular use of the Mineral Platform beginning the next business day. Should there be unexpected downtimes, we will do our best to notify you in advance, if possible.

## New Platform Login and Data

### How do I log in after receiving the upgrade?

Get started with the steps below, or [watch our tutorial video](#) on where you can find the Mineral Platform:

- Sign into QuickBooks
- Click on "Payroll" on the left navigation menu, then click on "HR Advisor" under HR & Benefits
- Click on any of the HR resources to access the Mineral Platform

### My sign in credentials aren't working on the new platform, how do I get help?

On the login screen you can reset your password or fill out a Contact Us form to connect with our Technical Support team for assistance.

## Will I lose anything once I'm moved to the new platform?

We specifically built the new platform to be an enhanced experience for you. You'll experience many new and improved enhancements of the products you already love and trust.

## As I get access to the Mineral Platform, will my data still be there?

All data will be transferred to the new Mineral Platform for a seamless experience.

## New and Enhanced Platform Features

### I now have access to the Mineral Platform. How do I log back into my previous platform experience?

Similar to when you have an app update on your phone, you have been upgraded to the Mineral Platform which is the new experience of the same platform you used previously. Your data, handbooks and more will still be available, all with a new look and experience. Once your upgrade is complete, there is no way to revert back to the old HR Support Center experience.

### Some of the product names have changed, how can I find what I need?

The navigation at the top of the Mineral Platform has been updated to make it easier to find what you are looking for. In addition, some of our product names have been changed in the Mineral Platform. For an overview of what's available in QuickBooks Online Payroll, view our [Mineral Flyer – What's Included in QuickBooks Online Payroll](#) resource.

### Which Mineral products and features are available in QuickBooks Online Payroll Premium vs Elite?

The following Mineral products and features are available in QuickBooks Online Payroll Premium:

- Mineral Platform: Mineral Platform provides the tools, resources, and easy-to-understand actionable information you and your clients need to stay on top of your HR and compliance challenges.
- HR Compliance Library: Access to federal and state laws and regulations, paired with a robust document library containing how-to guides, actionable checklists, sample letters as well as government forms to address HR questions and needs.
- [Mineral Intelligence™](#): Stay ahead of the compliance curve with proactive notifications and tangible action items tailored to your business.
- Notifications: Receive notifications of important updates to laws and regulations specifically impacting each business through in-platform alerts and email communications.
- Smart Employee Handbook: Create and maintain compliant employee handbooks with real-time policy notifications and in-platform updates.
- Learn: Assign and engage employees through the integrated learning management system and e-learning course catalog.

QuickBooks Online Payroll Elite includes the following Mineral products and features, in addition to above:

- Core Courses: The Core Courses catalog for Learn fosters continuous learning, improves workforce skills, and helps increase employee engagement by providing courses covering the

basics of compliance, human resources, customer service, cybersecurity, professional development and much more.

- Mineral Experts: Mineral Experts provides unlimited access to a team of experts, ready to answer your and your clients' HR and compliance questions.

### What is Mineral Intelligence?

Mineral Intelligence helps you prepare for upcoming HR compliance challenges. Based on your employee count and locations, Mineral Intelligence provides just those HR and compliance insights you need. These insights contain distilled summaries and bite-sized action items so that you can interpret your requirements and quickly take action. To learn more about Mineral Intelligence, view our [Mineral Intelligence brochure](#).

### What is Learn?

Learn is Mineral's Learning Management System (LMS) that makes it easy to assign, track and manage employee training courses, meaning you have the tools necessary to effectively deliver training and automate your tasks. Additionally, Mineral provides a robust curriculum of employee training courses\* in popular business topics such as Compliance and Legal, Safety, Professional Development and more.

\*Availability of courses is dependent on payroll package. For an overview of what's available in QuickBooks Online Payroll, view our [Mineral Flyer – What's Included in QuickBooks Online Payroll](#) resource.

### How has the handbook experience been updated?

As part of the transition, your handbook experience will be upgraded to Smart Employee Handbook, which enables a more streamlined experience for creating and maintaining your employee handbook. With Smart Employee Handbook, you'll be able to build a handbook to suit your company needs that can be customized directly within the platform, then downloaded in Word or PDF format. When a policy requires updating due to a legislative or regulatory change, you'll receive a notification so you can automatically update applicable policies in your handbook. Unlike the previous handbook wizard, you'll no longer be limited to one handbook creation per year. You are free to create as many handbooks as needed for your business as your circumstances change.

Note: dedicated one-hour consultations are not included with the Smart Employee Handbook.

If you need any assistance, our Mineral Experts (available in QuickBooks Payroll Elite) are happy to answer any specific policy questions or discuss handbook administration best practices.

### How do I access a handbook I created on my previous platform?

Your last handbook will be accessible on the Mineral Platform for download by navigating to *Company Policies*, and then selecting *Archived Handbooks*. To fully take advantage of the Smart Employee Handbook policy auto-update features, you will need to create a new version. When you access the Mineral Platform, you'll be able to easily create a new handbook by filling out a handbook wizard with basic information about your organization.

### I want to make a change to a handbook I created on the previous platform, how do I make this change?

Your previous handbook(s) have been saved within Mineral so you can continue to access or download in Word format, which then can be edited manually. They are a one-time creation, meaning as laws and regulations change, the handbook will not reflect those changes.

With Smart Employee Handbook, you can easily create a handbook by answering questions in the wizard. From there, you can modify certain sections and policies to make it work for your organization. Once completed, as laws or regulations change, you will be alerted of the recommended updates and can accept the changes which are then applied to your handbook.

### **What has been updated with policy and document questions?**

We've updated the scope of Mineral Expert services (available in QuickBooks Payroll Elite) to focus on providing expertise and guidance and no longer customizing or creating individual policies and documents, so that we can better serve our clients at scale. This enables a more streamlined experience for creating and maintaining your important documents and delivers a ready-to-use, finalized version.

With the Mineral Platform, you will have access to hundreds of policies and documents you can customize for your specific business needs as well as Mineral Experts to answer your questions and provide best practice guidance. In addition, you'll have access to new tools to build out documents and resources according to your unique needs, including a Job Description Builder, Benefits Document Creator, and more.

Our Experts are still here to provide expertise along the way and can answer questions on policy/document best practices, and or talk through considerations for drafting any resources that suit your business goals. In addition, our team is happy to point you towards specific resources available within the platform that can be customized to suit your needs.

## **Mineral Experts and Technical Support Teams**

### **What are Mineral Experts? How do I access Mineral Experts?**

Mineral Experts provides unlimited access to a team of experts, ready to answer your HR and compliance questions. This feature is available in the QuickBooks Online Payroll Elite package.

### **How do I contact a Mineral Expert for guidance? Is there a new phone number to contact Mineral Experts?**

For QuickBooks Online Payroll Elite users, all Expert questions can be submitted either by phone or through the platform. Mineral Experts are available Monday through Friday from 5 AM to 5 PM PST.

### **Where can I find Mineral Expert responses on the new platform? Will I get notified of responses through email?**

When a response is posted to your question, either from the Technical Support team or Mineral Experts, you will receive an alert via email. Click on the link in the email to view the response to

your question in the My Cases area of the Mineral Platform. All of your responses from both Mineral Experts and the Technical Support team will be available in the same area, making it easier to view all historical information.

### **How do I contact Technical Support once I am upgraded to the Mineral Platform?**

In the Mineral Platform, click the Get Help button on the bottom right corner to contact or chat with Technical Support within the platform. In addition, you can email us at [support@trustmineral.com](mailto:support@trustmineral.com) or call 844-413-2468 for support. When a response is posted to your question, you will receive an alert via email. Click on the link in the email to view the response to your question in the My Cases area of the Mineral Platform.