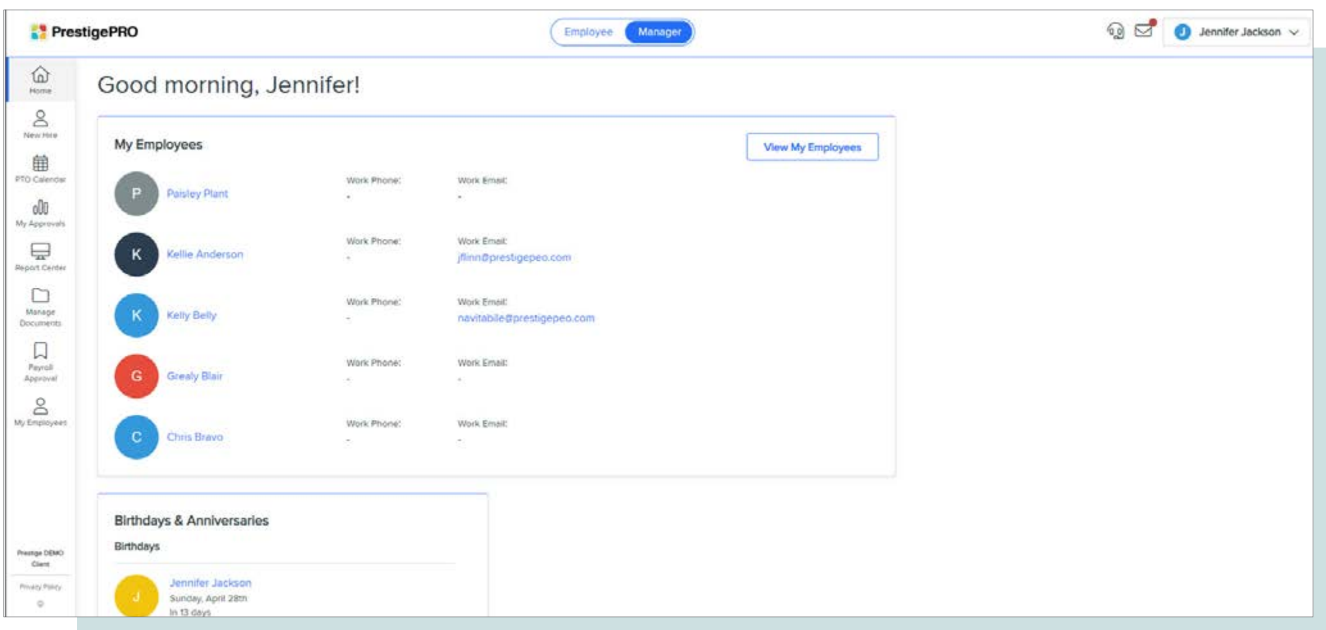
Manager Self-Service (MSS) User Guide

To login to the employee self-service site, go to
https://pea-ep.prismhr.com

If you forgot either your username or password, please click on the "Forgot Username?" or "Forgot Password?" links.



Your dashboard will display widgets for quick access to information. You can view the My Employees widget, Birthdays & Anniversaries, and My Approvals. Please Note: The My Approvals widget will only display if you have approvals outstanding.

On the left-hand side, you will see menu items in which information can be reviewed and, in some cases, updated. What menu items you see will depend on your company access.

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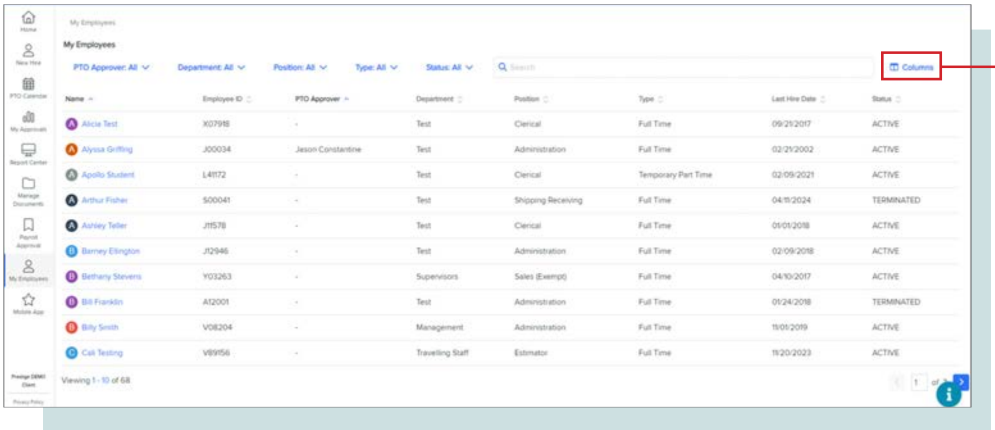
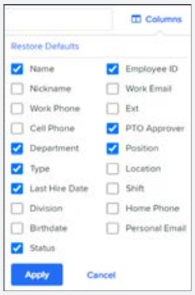
My Employees

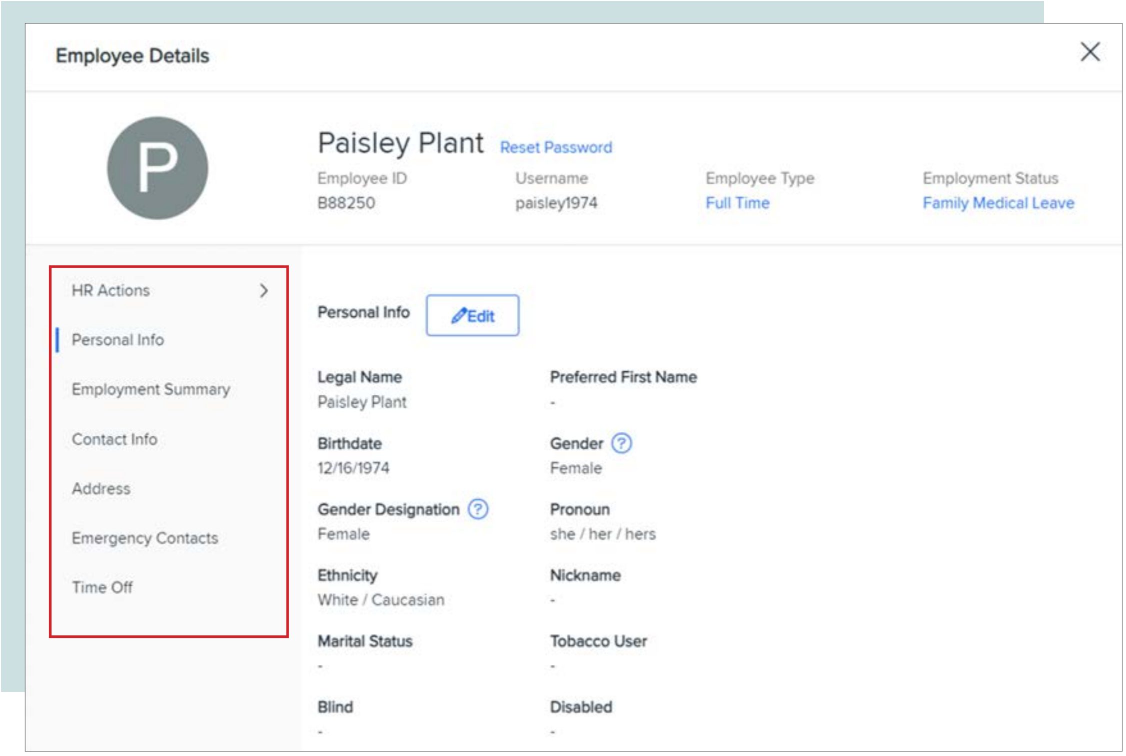
From the “My Employees” menu item you will see an overview of your employees. You can filter this information by PTO Approver, Department, Position, Type, and Status.





You also have the ability to personalize your dashboard by adding/removing columns.

Clicking on an employee will open the employee details record. You can click on the different menu items to review the information for the employee you’re working with.



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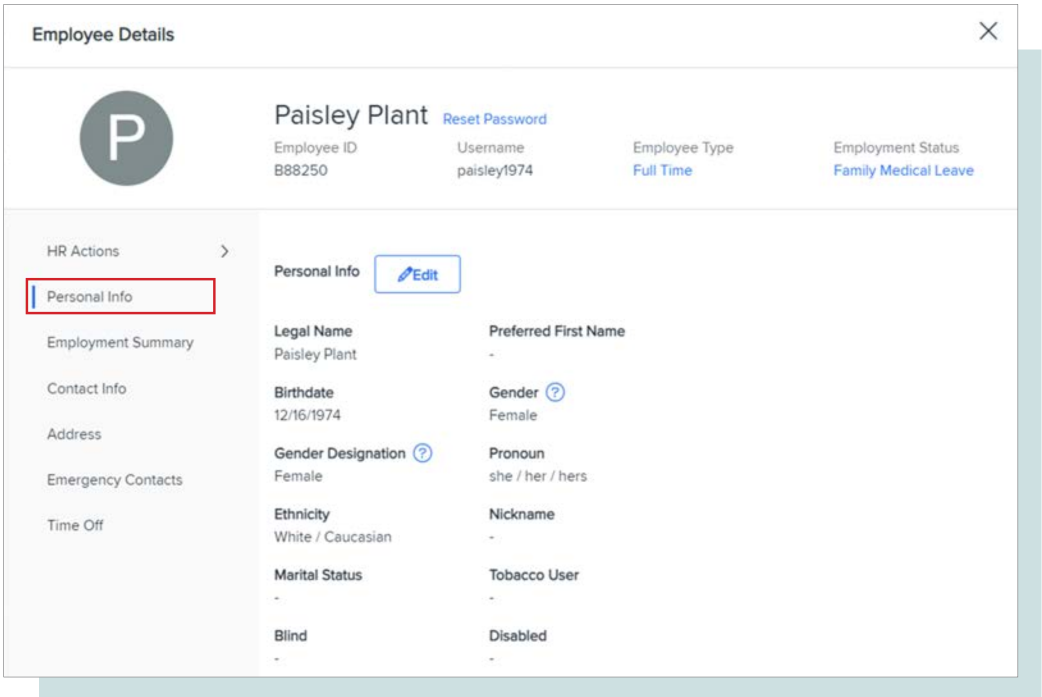
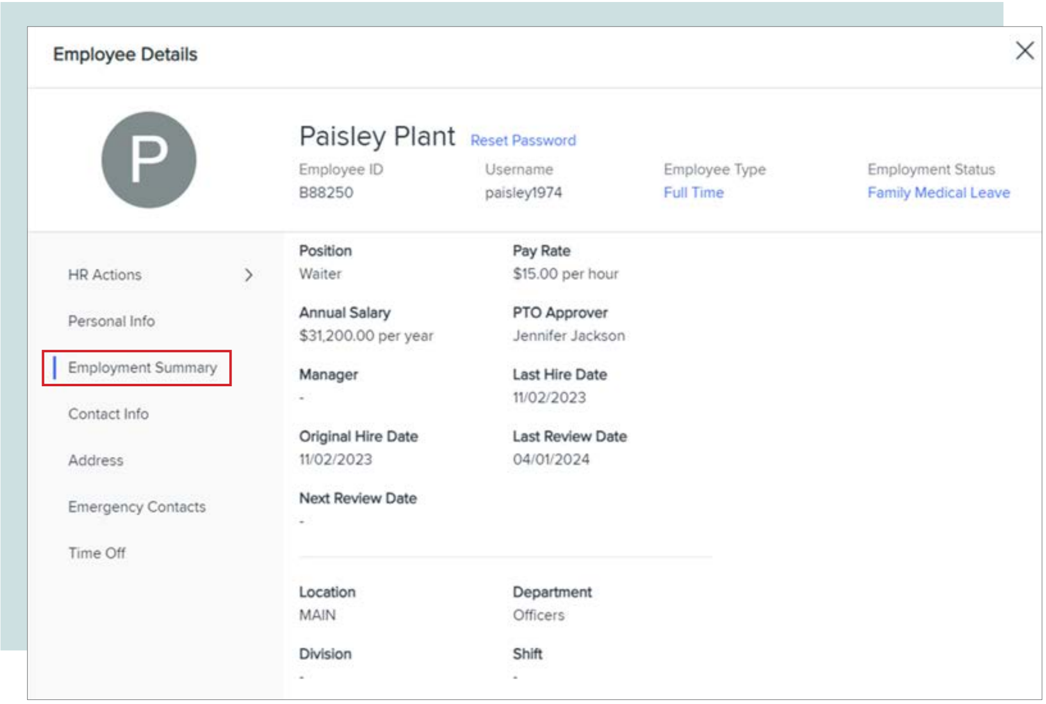
Personal Info

Shows an overview of the employees' personal information.



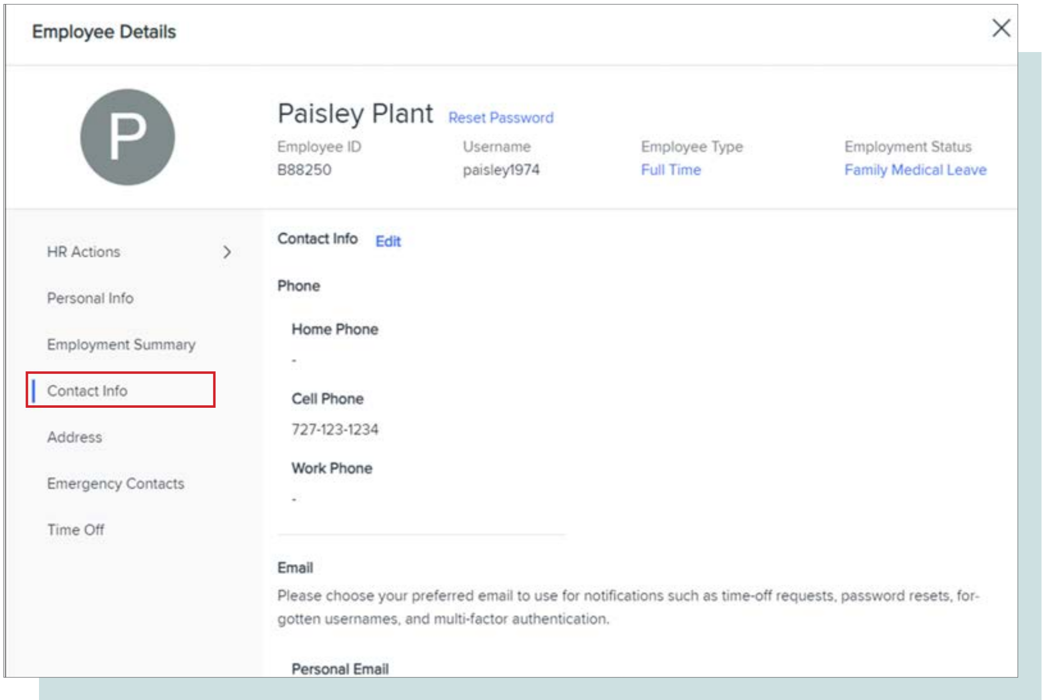
Employment Summary

Provides an overview of the employee's work information such as position, pay rate, etc...



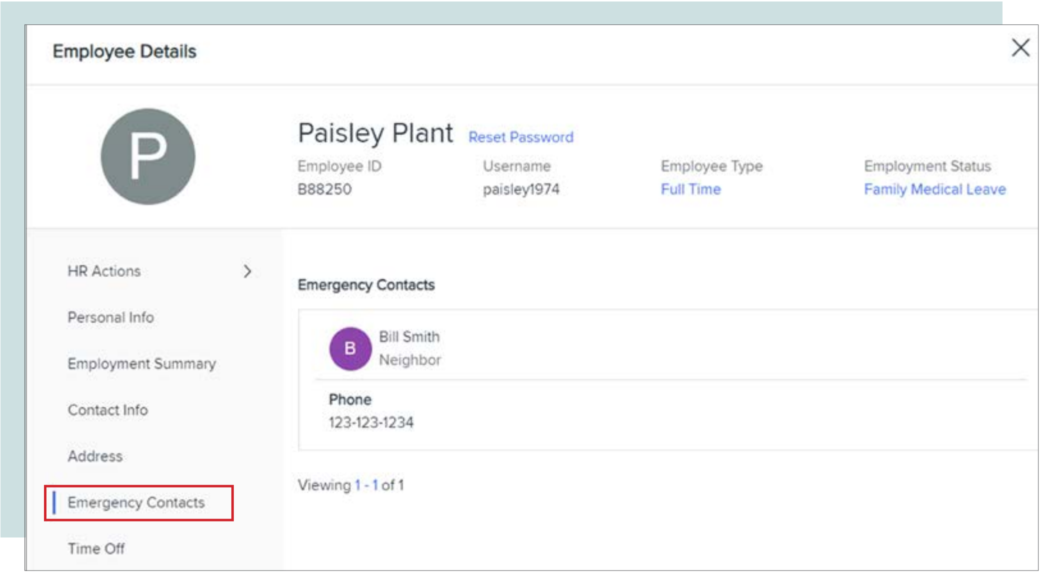
Contact Info

Displays an overview of the employee's contact information.



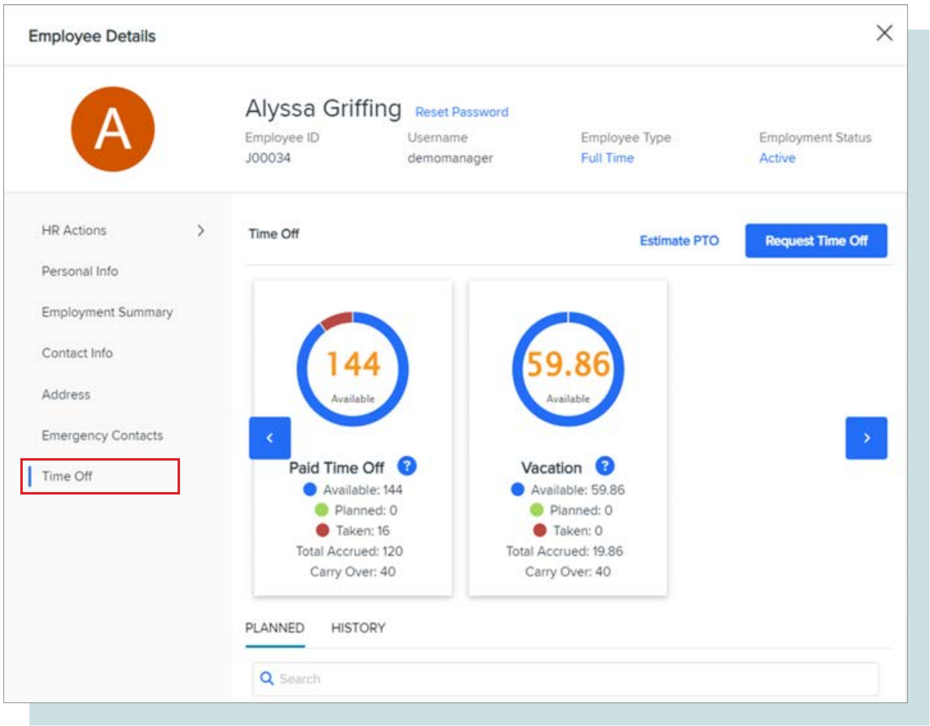
Emergency Contacts

The Emergency Contacts tab will display the emergency contact for the employee. Any changes to the emergency contacts will need to be made within PrestigePRO.



Time Off

Managers can now place PTO requests for employees from the Time Off form on the Employee Details screen. Select the Request Time Off button to place a PTO request for the employee. Once the PTO request is submitted, the employee is notified about the PTO status just like a normal request.



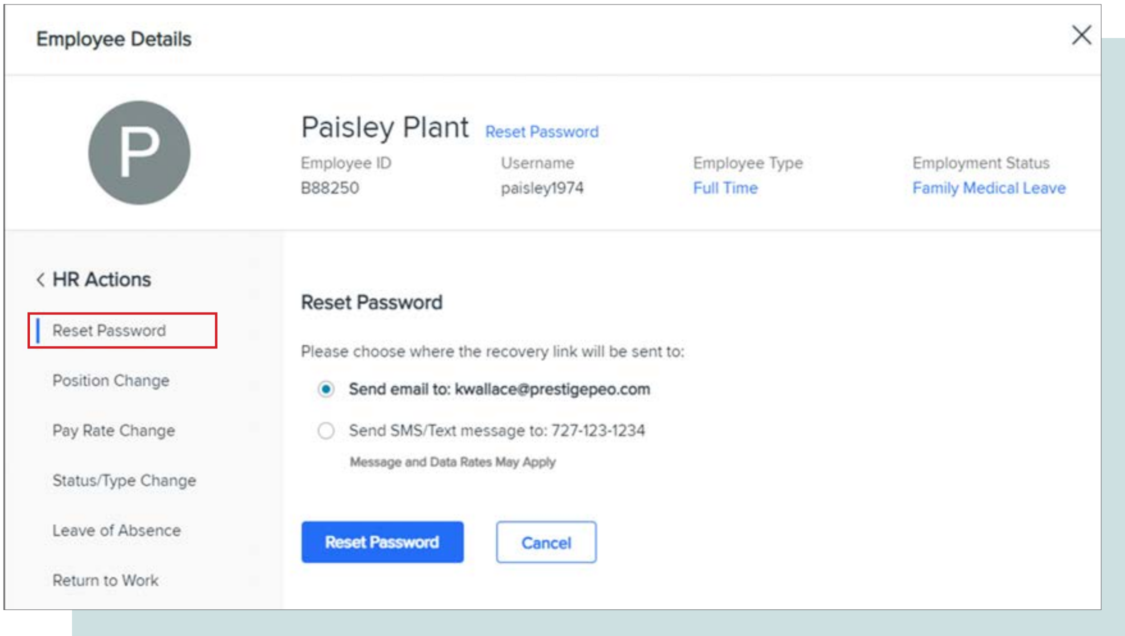
HR Actions

To complete the actions available to you, click on the HR Actions menu item. These items can include Reset Password, Position Change, Pay Rate Change, Status/Type Change, Leave of Absence, Rehire, and Return to Work. Please Note: You will only see the Rehire option if the employee you are viewing has a status of Terminated. You will only see the Return to Work option if the employee you are viewing has a status of LOA.

Password Reset

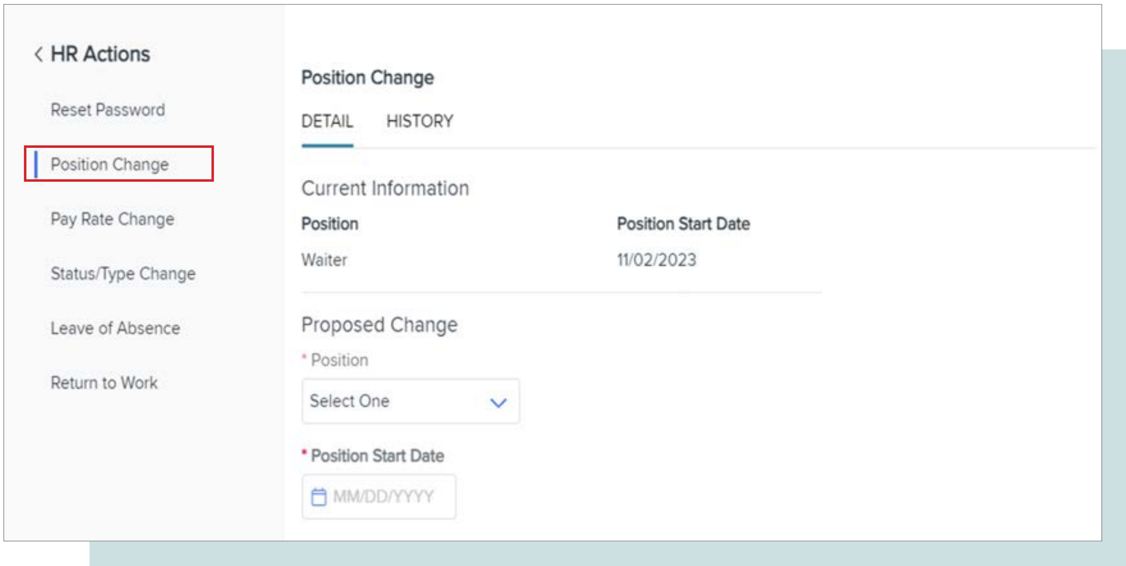
To reset a password for an employee choose Reset Password from the menu to the left under HR Actions or at the top of the screen right next to the employee's name. It will ask you to choose how to send the reset password link either email or SMS/Text (only if we have the phone number on file).

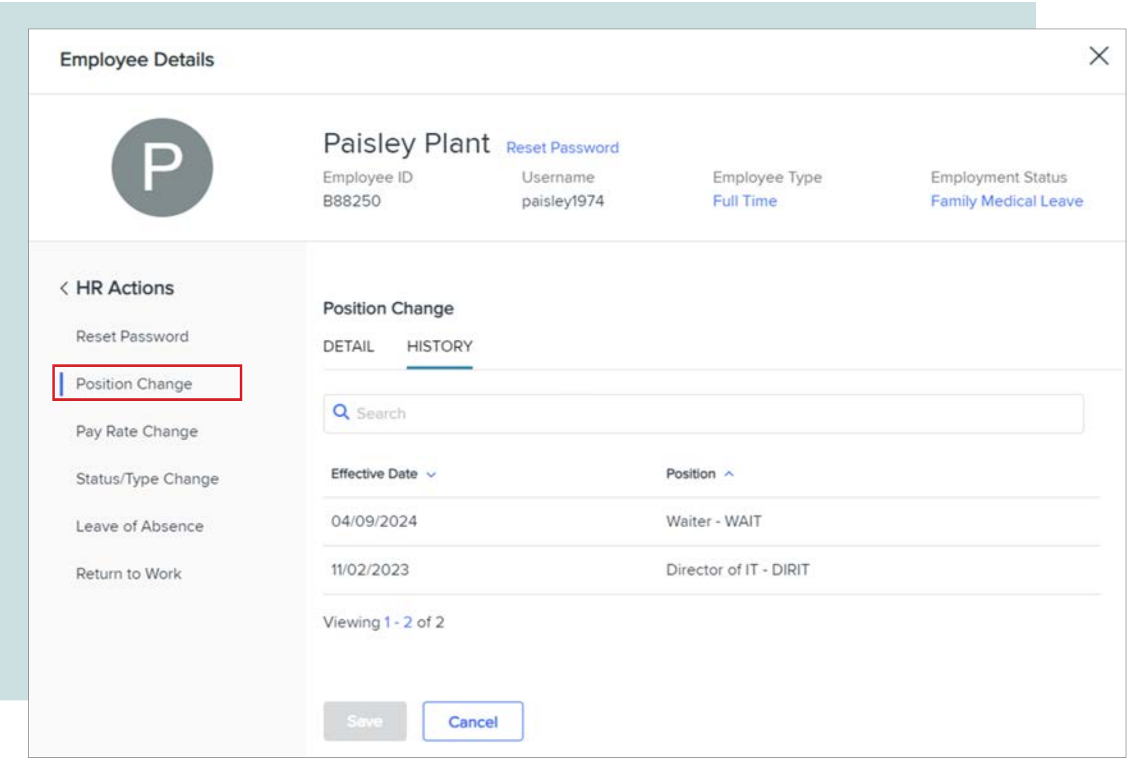
Once you click Reset Password the employee will receive an email or SMS/Text prompting them to change their password.



Position Change – HR Actions

The position change menu item displays the current position information on the Detail tab and a position history on the History tab. To complete a Position Change, select the new position, position start date, reason code, and enter a date if the position change is based on a recent review. Then click **Save**.





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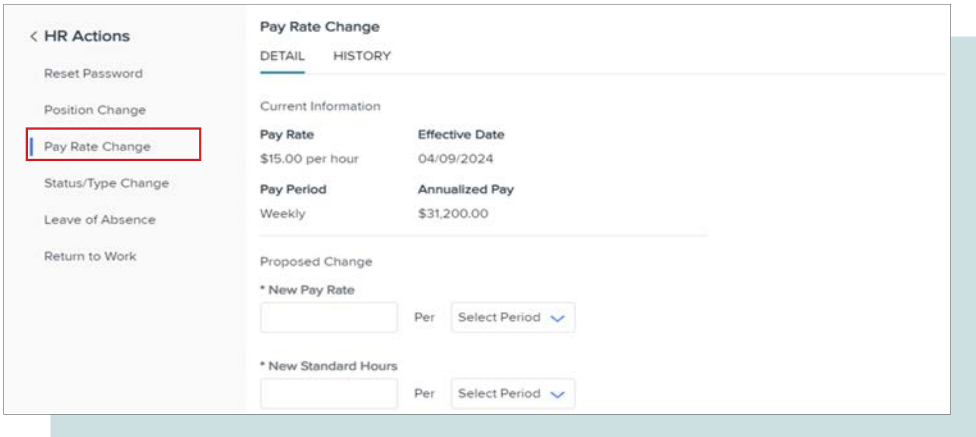
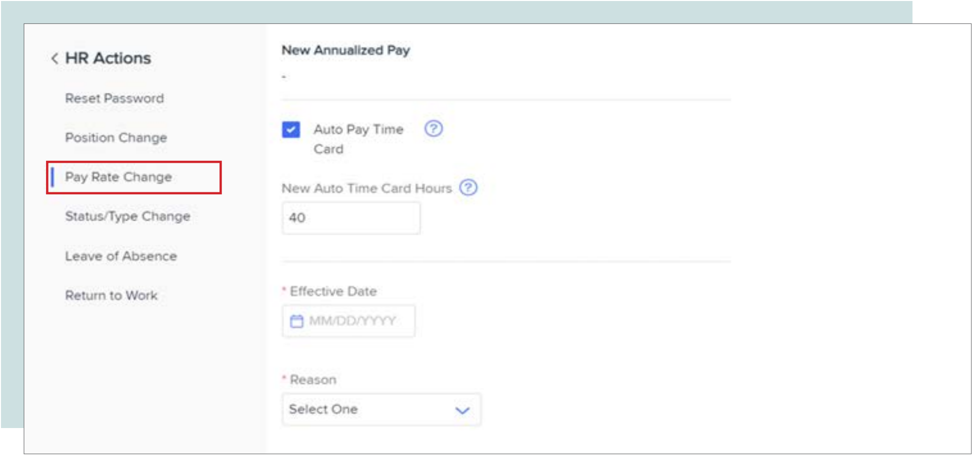
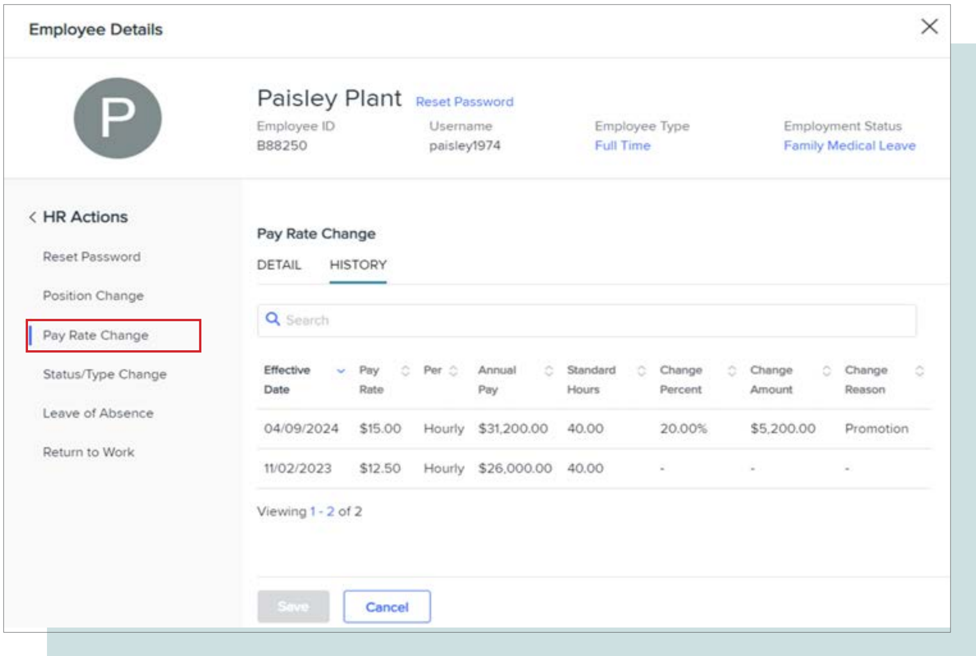
Pay Rate Change – HR Actions

Using the Pay Rate Change feature, you can update the employees new pay, standard hours, auto-pay if needed, the effective date, the reason for the change and then click **Save**.







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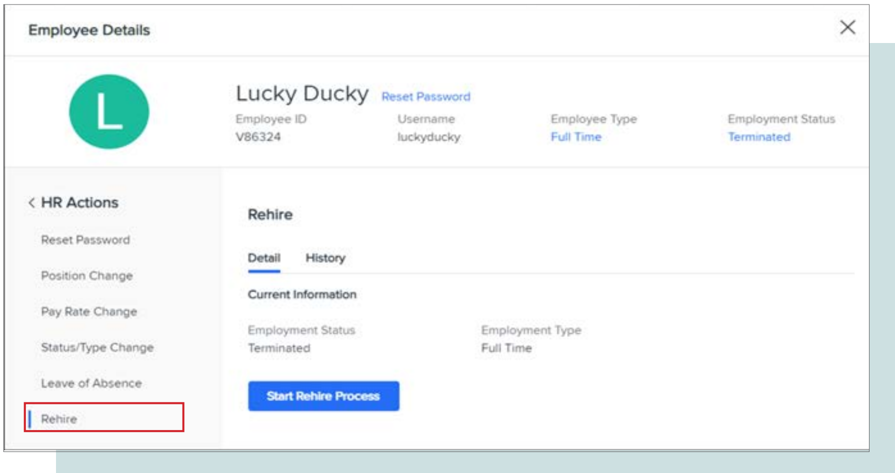
Rehire - HR Actions

Managers can now use the Rehire form to rehire a previously terminated employee and return the employee to a normal work status. To access this form, select an employee on the My Employees form who has the Terminated Status. On the Employee Details form that displays, select **HR Actions > Rehire**.



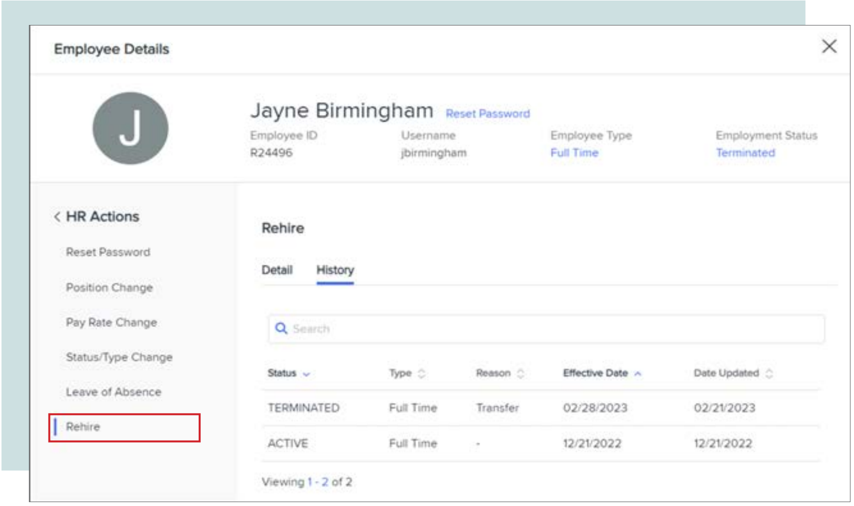
The Details panel on this form shows the status and the employment type. The History panel displays the history of the employee's statuses, including the status type, reasons for changes, and effective dates. To rehire an employee, click the **Start Rehire Process** button. The Proposed Change section displays, where you can enter information for an employee's rehiring.

The form is divided into sections, much like hiring an employee.

- **Proposed Change**: You fill in the employee's new status, employment type, rehire date, and reason, as well as selecting whether to use previous information for deductions, direct deposits, and benefits.
- **Employment Details**: You fill in the employee's new location, position, benefit groups, and organizational information such as department, division, or shift.
- **Pay Details**: You fill in the employee's new pay group, method, rate, and standard hours.
- **Personal Information**: You fill in a personal email address, work email address, and mobile phone number for the employee, as well as confirming whether to use previous information for E-Verification, Onboarding, and Benefits Enrollment.

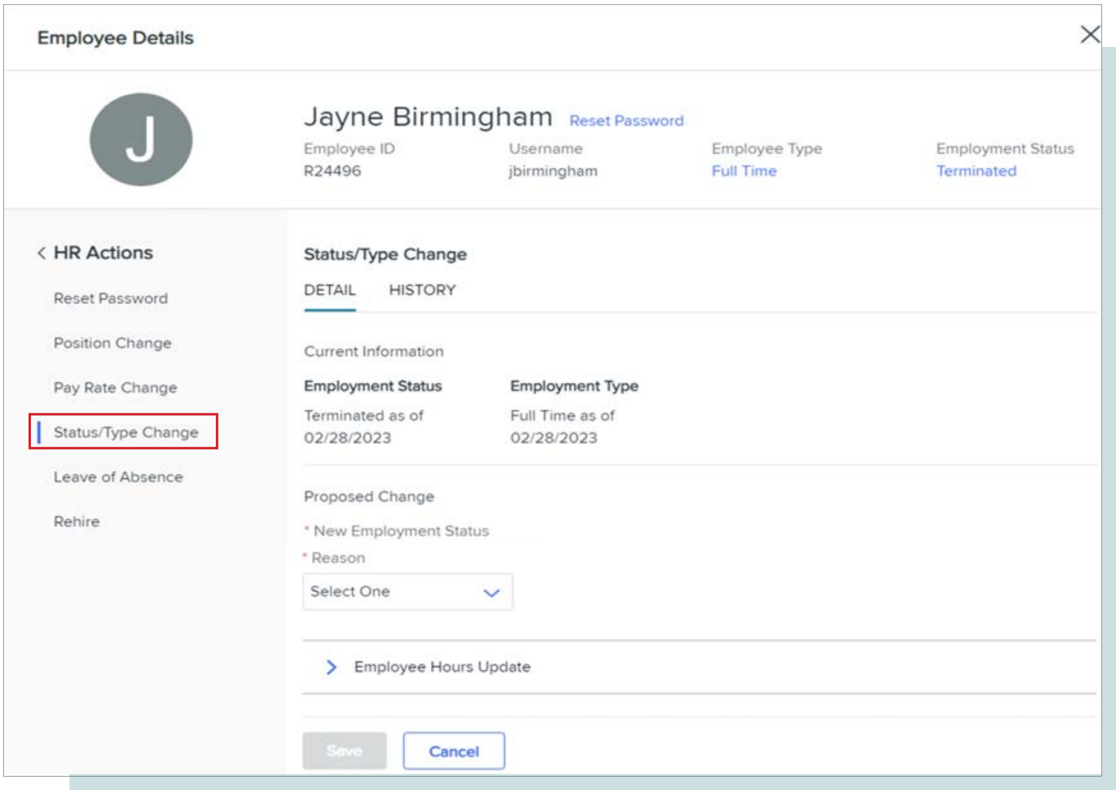
If the New Hire process includes custom questions, these questions also appear on the Rehire form.

Once these fields are completed, click **Save** to return the employee to a work status and start the onboarding process.

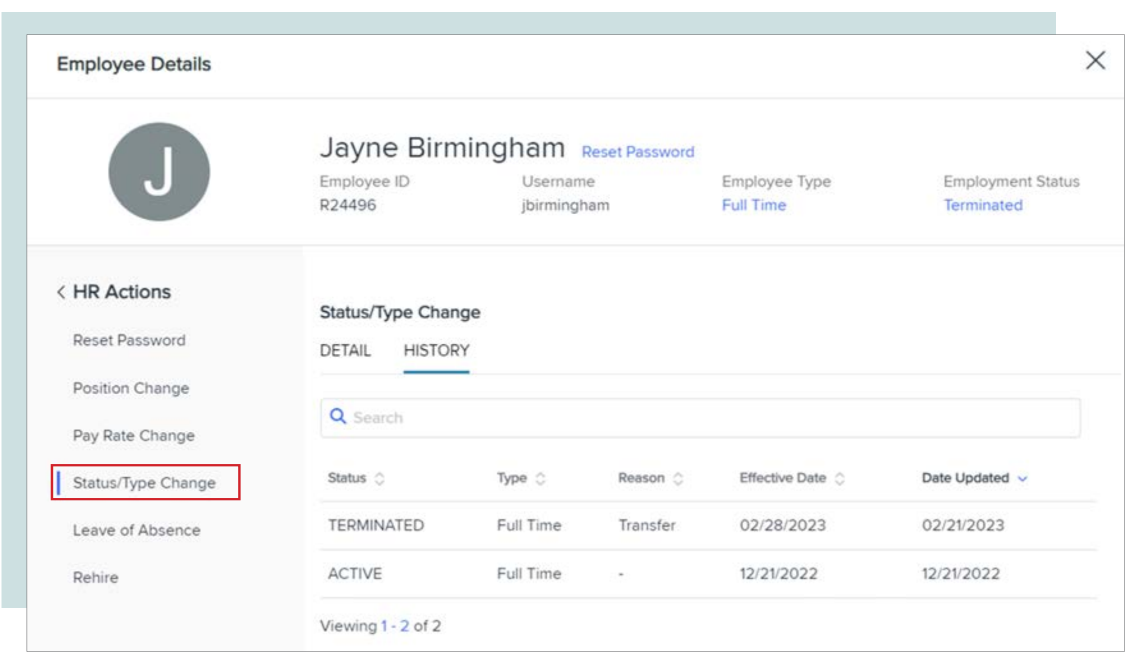


Status/Type Change – HR Actions

Managers can use the new Status/Type form to view and change an employee's status and employment type. This form, found under Employee Details in the HR Actions menu, displays the employment status and employment type of the employee. Managers can propose a change to these attributes, assign both a proposed change date and reason for the change, and enter new hours for the employee if applicable.



In addition, the History tab on this form displays the history of status changes, dates, and reasons provided for this employee.



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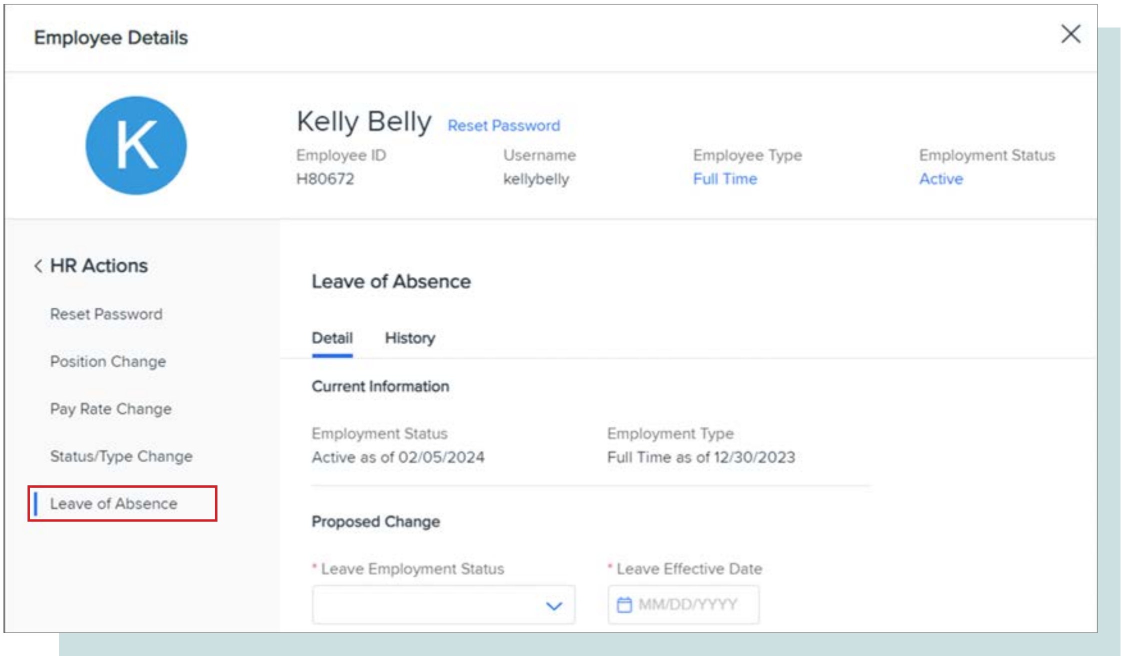
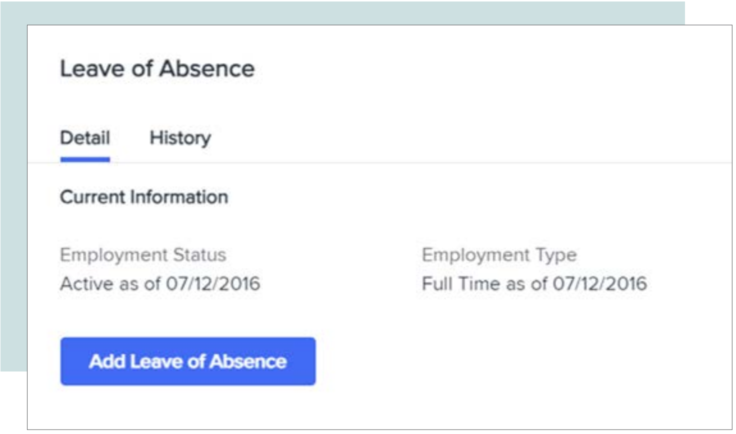
Leave of Absence - HR Actions

Managers can now use the Leave of Absence form to place an employee on a leave of absence and review information for employees on leave. To access this form, select an on the My Employees form. On the Employee Details form that displays, select **HR Actions > Leave of Absence**.

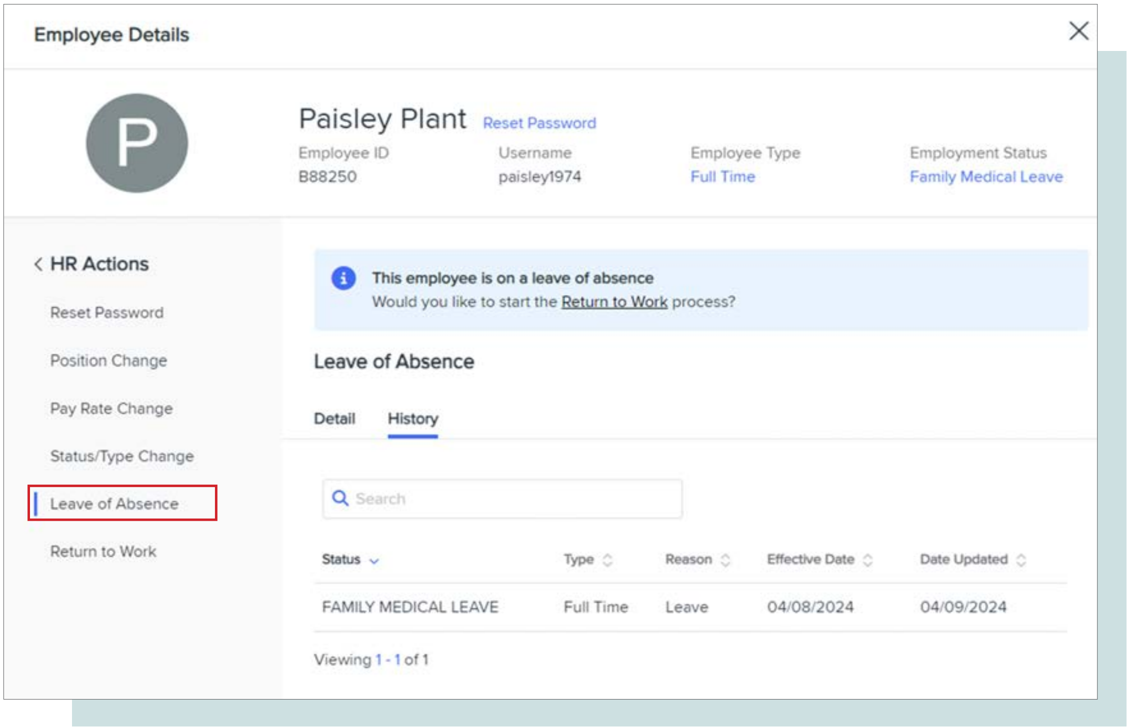


To place an employee on a leave of absence, click the Add **Leave of Absence** button. The Proposed Change section displays, where you can change the employee's status, specify a date when the leave of absence occurs, cite a reason, and indicate a proposed date for the leave to end. Once these fields are completed, click **Save** to place the employee on a leave of absence.



If the employee is enrolled in one or more PTO registers and the leave of absence is set to the current day or before the current day, the PTO Accruals section displays. Managers can use this section to ensure that sick time and PTO accruals for the employee are accurate.

The Details panel on this form shows the status and type of the employee. The History panel displays the history of the employee's leaves of absences.



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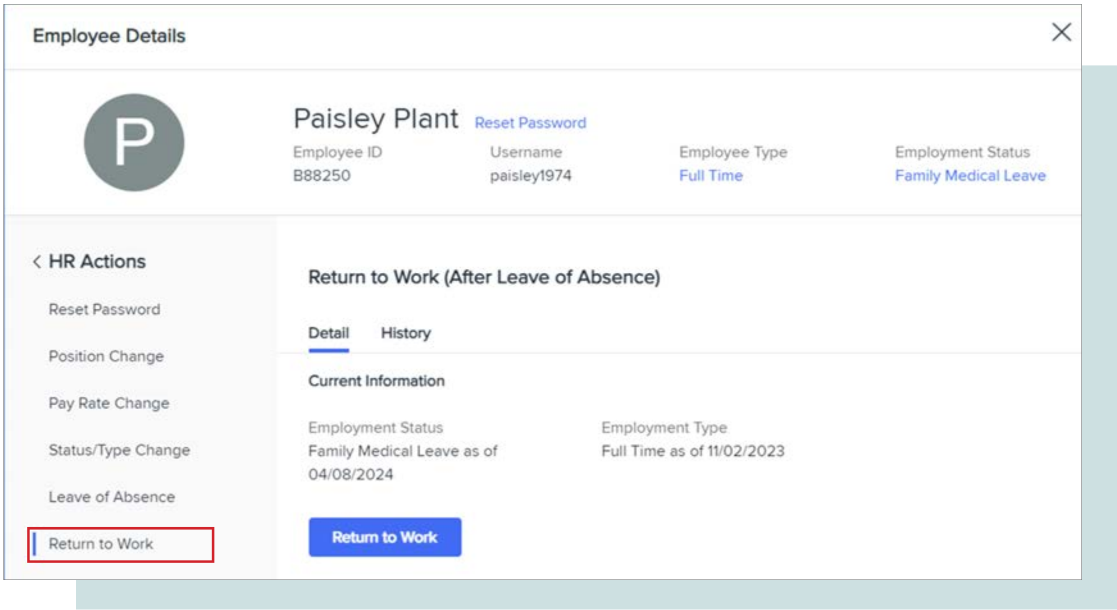
Return to Work - HR Actions

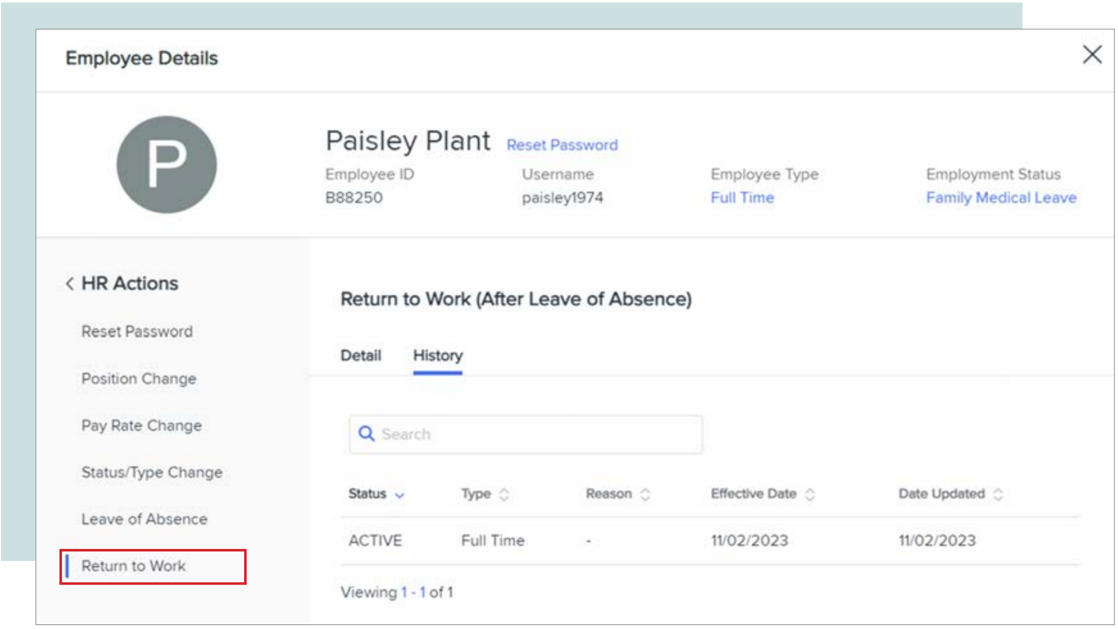
You can now use the Return to Work (After Leave of Absence) form to conclude an employee's leave of absence and return the employee to their normal work status. To access this form, select an employee who is on a leave of absence on the My Employees form. On the Employee Details form that displays, select **HR Actions > Return to Work**.

The Details panel on this form shows the status and type of the employee. The History panel displays the history of the employee's leaves of absences.



To return an employee to work, click the Return-to-Work button. The Proposed Change section displays, where a manager can change the employee's status and employment type upon return, specify a date for the return, and cite a reason. Once these fields are completed, click Save to return the employee to a work status.

If the employee is enrolled in one or more PTO registers and the return date is set to the current day or before the current day, the PTO Accruals section displays. Managers can use this section to ensure that sick time and PTO accruals for the employee are accurate.



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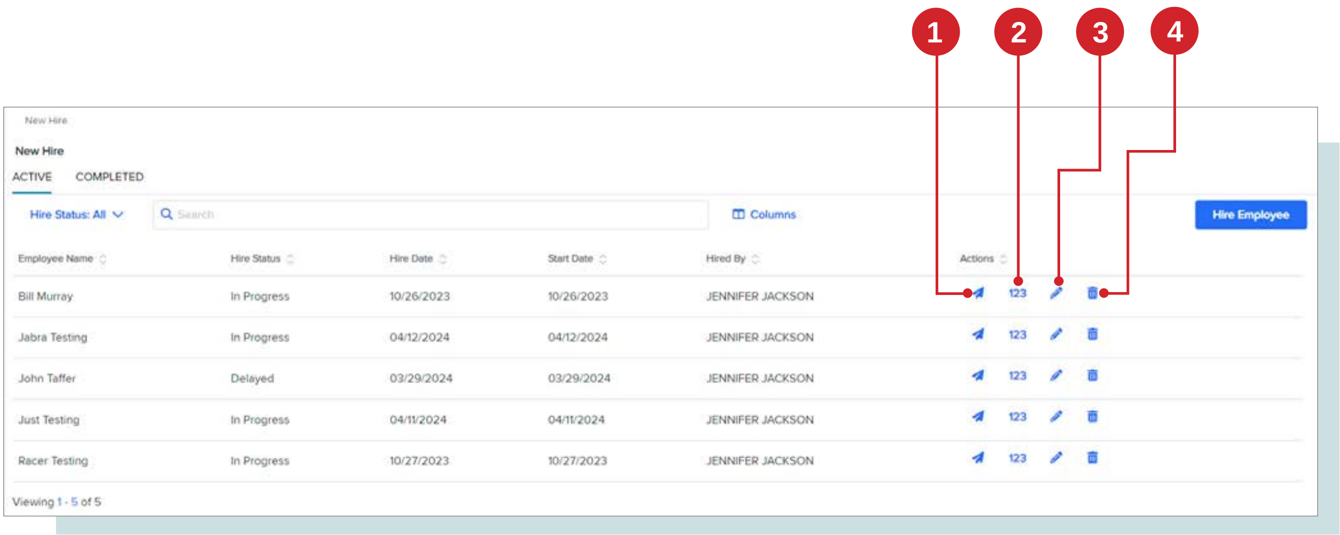
New Hire

After clicking on the New Hire menu, you will see a dashboard view of your employees currently going through Onboarding. From the dashboard you can see the Hire Status, Hire Date, Start Date, and Hired By for each employee.



The following items can be completed from Actions on the New Hire Dashboard.

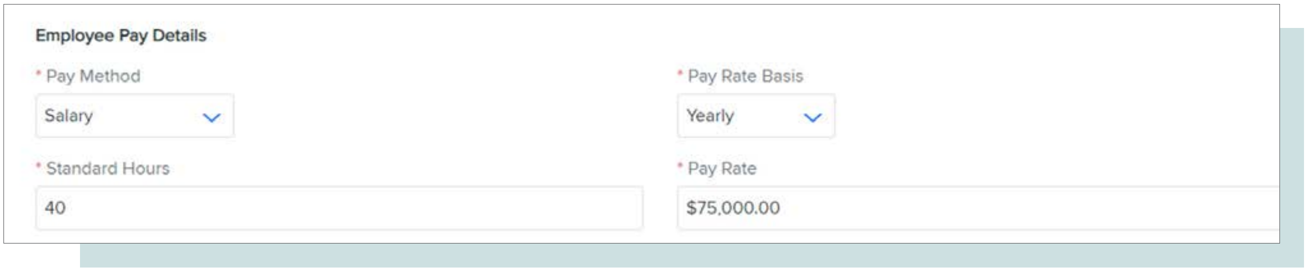
1. Resend Welcome email
2. View Kiosk Code – (TBD)
3. Edit New Hire
   a. **Employee Personal Information**
      i. First Name, Last Name, Personal Email, Mobile Phone,Middle Name, Preferred Language, and Nickname.
   b. **Employment Details**
      i. Work Location, Benefit Group Employment Status, Position, Start Date, Employee Type, Employee Number, and Department Code, PTO Approver, Manager, Work Shift, Work Group, Project, and Seniority Date.
   c. **Employee Pay Details**
      i. Pay Method, Pay Rate Basis, Standard Hours, and Pay Rate
4. Delete New Hire

To start the New Hire process, click the Hire Employee [Hire Employee] button located in the upper right corner of the dashboard. All the mandatory fields are marked with an asterisk. Depending on whether your company has departments, divisions, etc. will determine which additional fields are mandatory.

Under **Employee Personal Info** and **Employment Details** is a button which will expand displaying additional fields to be entered.

- **Employment Status**: You MUST always choose Active for a new employee, or the onboarding email will not be sent to the employee.
- **Employment Type**: This will depend on the type of employee you are hiring. (Full Time, Part Time, Temporary Full Time, etc.)
- **Benefit Group**: You are able to place employees in the appropriate benefit group according to the group set-up in the system for your company and their benefit eligibility.
- **Department** (if applicable): You can place the employee in the appropriate department within your company.
- **Pay Group**: Please select the pay group. There should only be one option unless your company has multiple pay groups set-up, in which case you will select the one that applies to that employee.

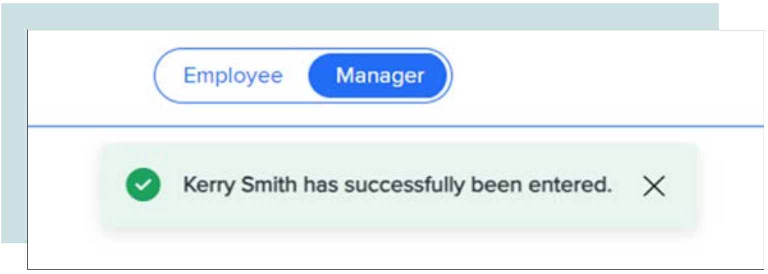
**IMPORTANT NOTE: Please contact your HRBP to have a new worksite location entered into PrestigePRO. Please note, new locations can take 24-48 hours to be added.



After these selections are made, you will add in the Pay Method (Hourly, Salary or Commission), and Pay Rate, which would be just the hourly rate for an hourly employee.

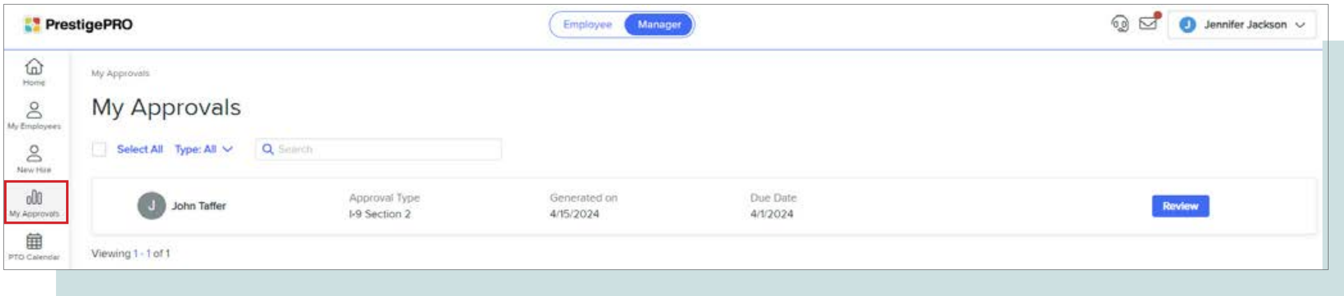
For a salaried employee you can input the full annual amount, but you **MUST** select Yearly in the Pay Rate Basis drop down for the salary to calculate correctly.

Once all of the information is entered, click **'Save'** at the bottom and the system will show a message confirming the email address to send the Welcome email to. Check the box to mark the email address and click "Send Message". You will receive a pop-up message confirming that the employee has been successfully entered.



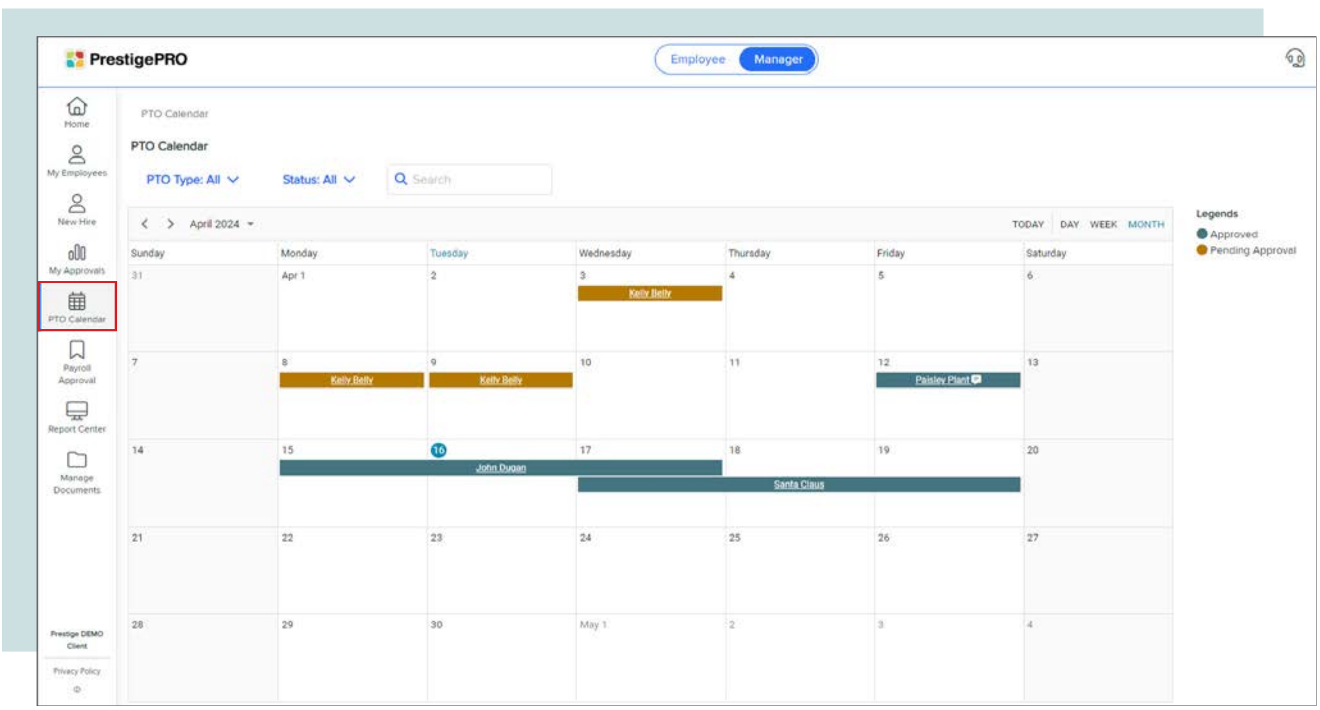
My Approvals

From the My Approvals menu item you can process the following approvals: Section II of the I-9, Leave Request (PTO), Position Change, Pay Rate Change, and Status/Type changes.



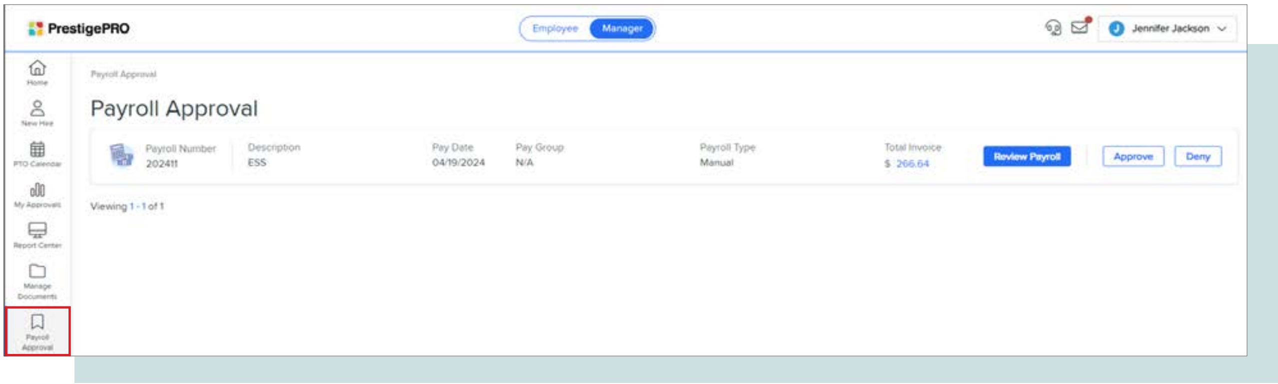
PTO Calendar

The PTO Calendar displays Approved and Pending Approval PTO requests. Which employees you see will depend on the Data Security within Prism.



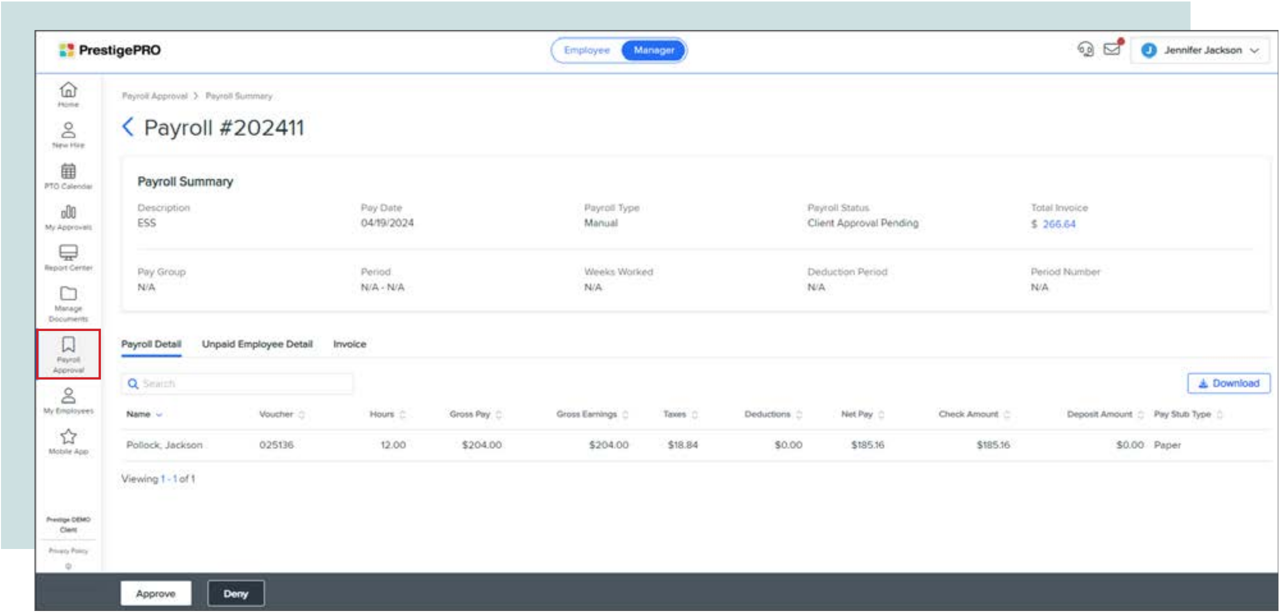
Payroll Approval

The Payroll Approval form displays a list of payrolls in Pending Client Approval status that are ready for review and approval. This form displays summary information for each payroll, including the number, description, pay date and type, and invoice amount. Using this form, you can view details on the payroll, approve it, or deny it.



Select Review Payroll to display the Payroll Summary form, where you can review more specific details for the payroll. The Payroll Summary section on this form shows additional information, such as the pay period and deduction period.

The Payroll Detail tab on the Payroll Summary form displays payment records for individual employees on the payroll.



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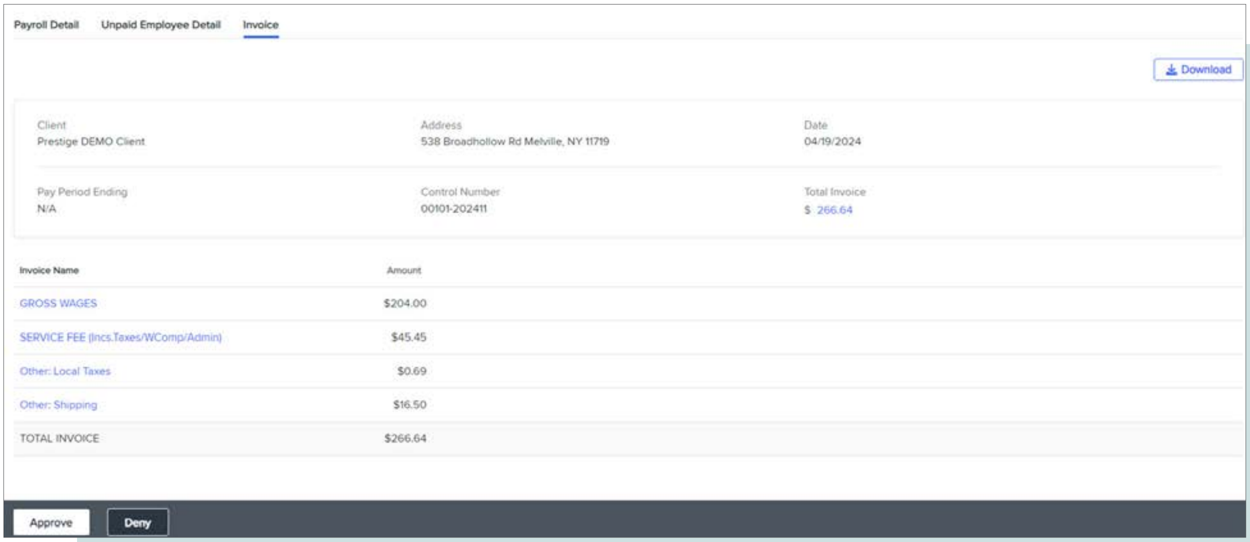
The Unpaid Employee Detail tab shows information about any employees who are marked as unpaid on the payroll.

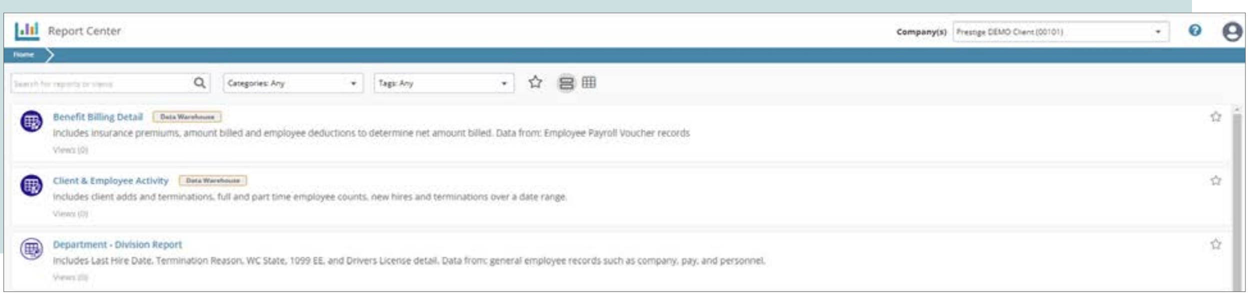
The Invoice tab shows a complete breakdown of payment amounts, taxes, and fees on the invoice. Information from each of these tabs can be downloaded as a CSV file by clicking the **Download** button.



You can approve a payroll by clicking the Approve button for the payroll on the Payroll Approval form, or by displaying the Payroll Summary form for a payroll and clicking the Approve button on the bottom of the screen. You can also deny the payroll using the same processes. If you deny a payroll, the Deny Payroll # form displays, where you must enter a reason to deny the payroll.

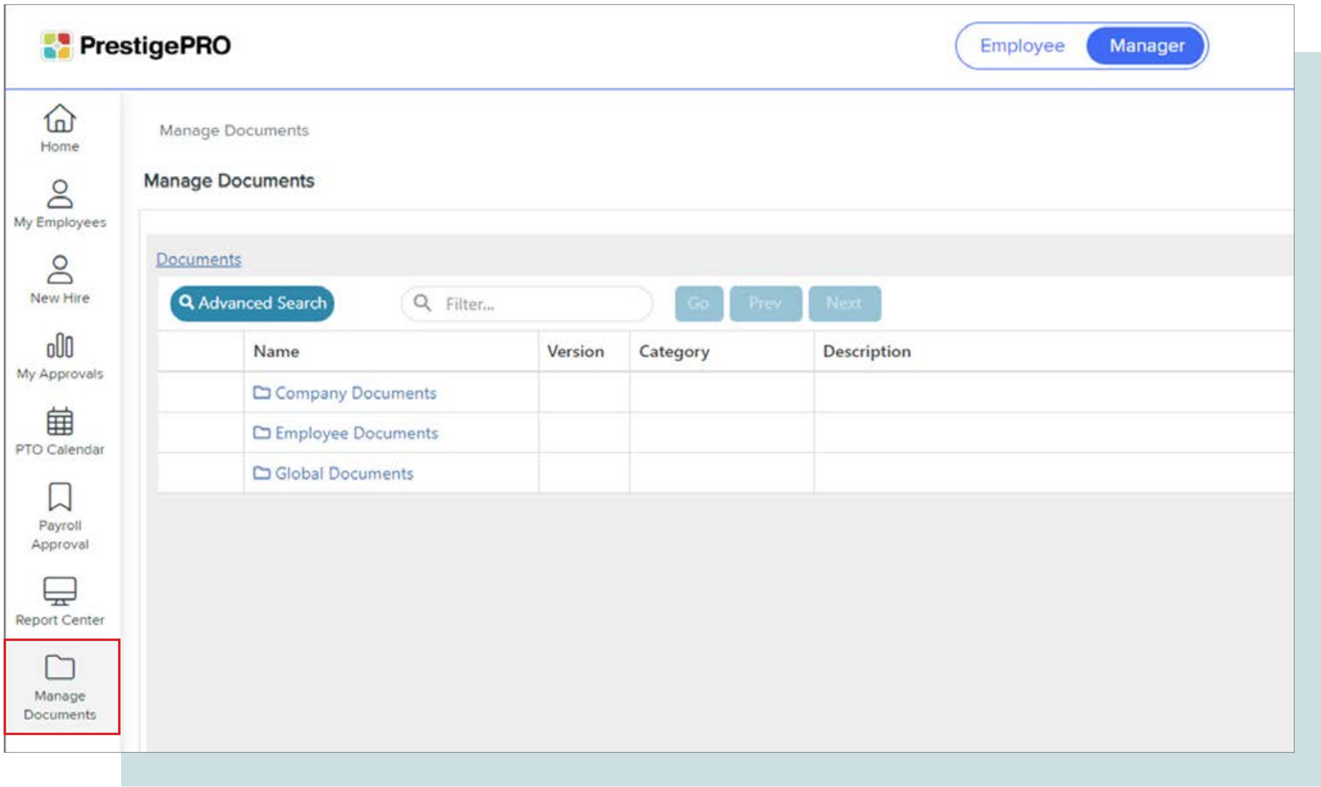
Report Center

Report Center functions the same as it does within PrestigePRO. When you click on the menu item, it will open Report Center in a new window.



Manage Documents

To manage employee documents in Employee Portal (EP), use the Manage Documents form. The documents shown depend on the document categories assigned to your user role.



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