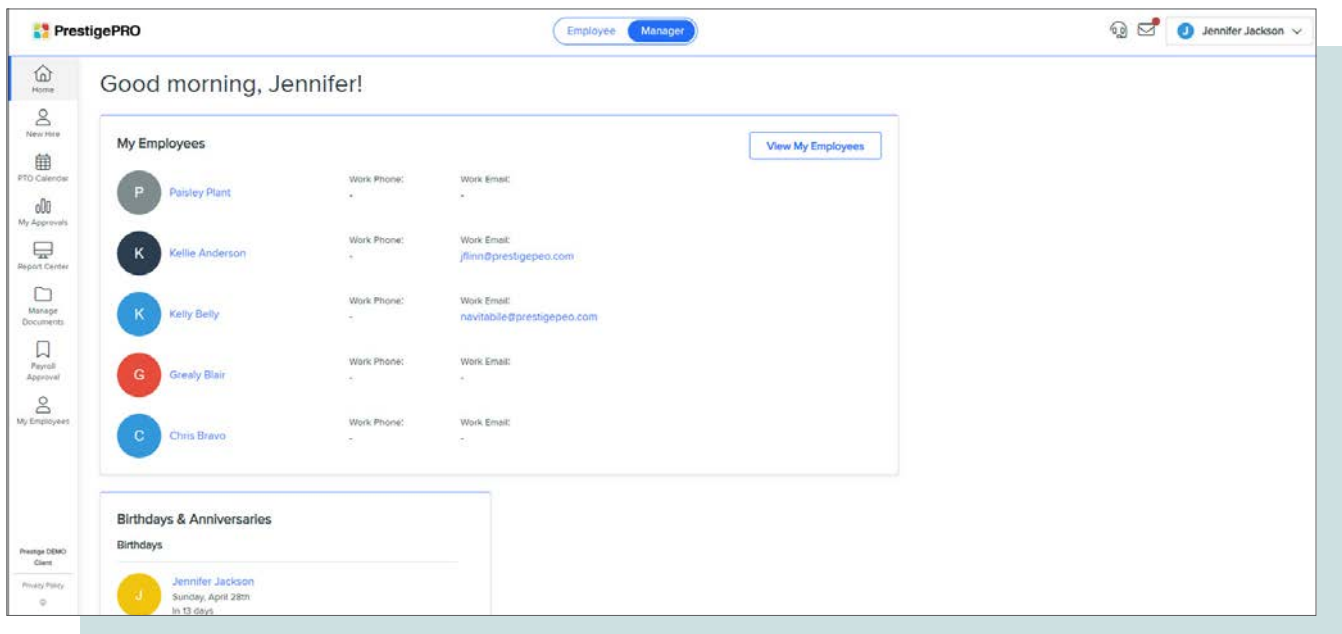


# Manager Self-Service (MSS) User Guide

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.

# 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.

The screenshot shows the 'My Employees' dashboard with a table of employee records. A red box highlights the 'Columns' button in the top right corner of the table. To the right, a 'Columns' configuration dialog box is shown, allowing users to customize the columns displayed in the table. The dialog has a 'Restore Defaults' button and a 'Columns' header. It contains two columns of checkboxes for selecting which columns to display. The 'Apply' button is highlighted in blue.

Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Alicia Test	X07918	-	Test	Clerical	Full Time	09/29/2017	ACTIVE
Alyssa Grilling	J00034	Jason Constantine	Test	Administration	Full Time	02/29/2002	ACTIVE
Apollo Student	L41172	-	Test	Clerical	Temporary Part Time	02/09/2021	ACTIVE
Arthur Fisher	S00041	-	Test	Shipping Receiving	Full Time	04/15/2024	TERMINATED
Ashley Teller	J15178	-	Test	Clerical	Full Time	05/01/2018	ACTIVE
Bernay Ellington	J12946	-	Test	Administration	Full Time	02/09/2018	ACTIVE
Bethany Stevens	Y03263	-	Supervisors	Sales (Exempt)	Full Time	04/10/2017	ACTIVE
Bill Franklin	A12001	-	Test	Administration	Full Time	01/24/2018	TERMINATED
Billy Smith	V08204	-	Management	Administration	Full Time	11/01/2019	ACTIVE
Call Testing	V89156	-	Travelling Staff	Estimator	Full Time	11/20/2023	ACTIVE

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

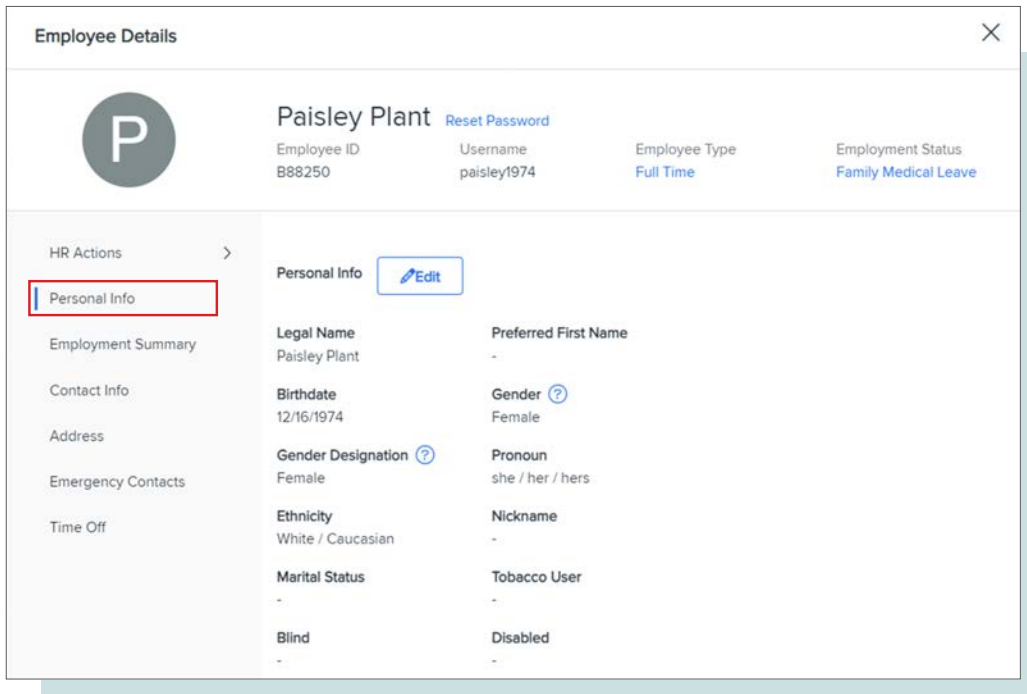
Clicking on an employee will open the employee details record. You can click on the different menu items to review the information for the employee you’re working with.

The screenshot shows the 'Employee Details' record for Paisley Plant. The record includes a profile picture (a circle with the letter 'P'), the employee's name, and a 'Reset Password' link. Below this, there are four key-value pairs: Employee ID (B88250), Username (paisley1974), Employee Type (Full Time), and Employment Status (Family Medical Leave). A sidebar menu on the left contains several options, with 'Personal Info' highlighted. The main content area shows 'Personal Info' with an 'Edit' button. Below this, there are two columns of fields for personal information, including Legal Name, Birthdate, Gender, Gender Designation, Ethnicity, Marital Status, Preferred First Name, Pronoun, Nickname, Tobacco User, and Disabled status.

Field	Value
Employee ID	B88250
Username	paisley1974
Employee Type	Full Time
Employment Status	Family Medical Leave
Legal Name	Paisley Plant
Preferred First Name	-
Birthdate	12/16/1974
Gender	Female
Gender Designation	Female
Pronoun	she / her / hers
Ethnicity	White / Caucasian
Nickname	-
Marital Status	-
Tobacco User	-
Blind	-
Disabled	-

## Personal Info

Shows an overview of the employees' personal information.

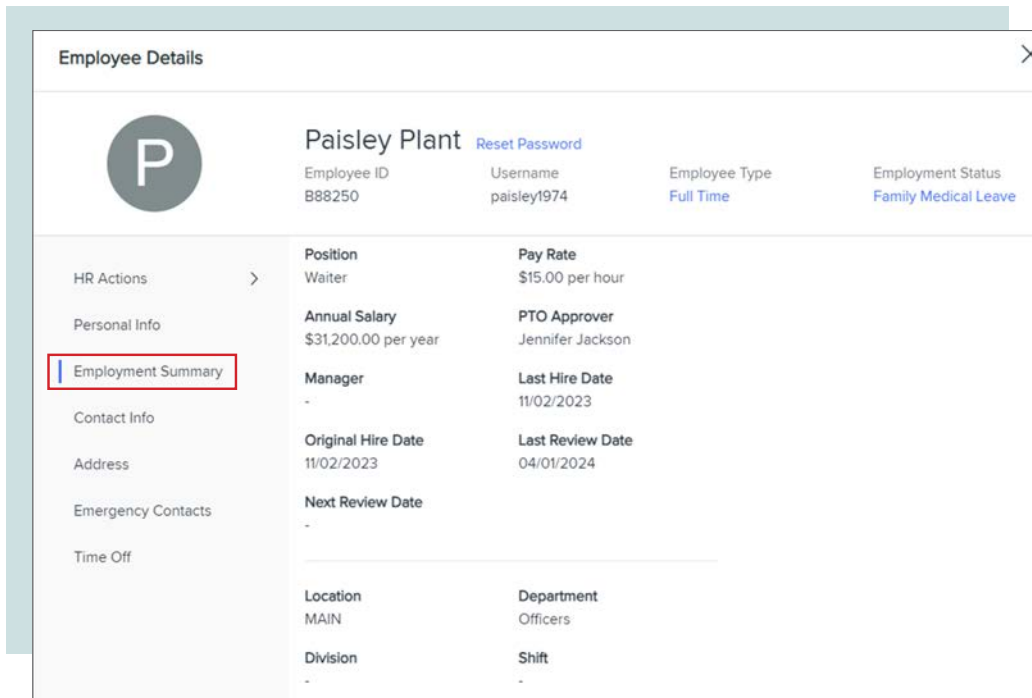


The screenshot shows the 'Employee Details' window for Paisley Plant. The 'Personal Info' section is highlighted with a red box in the left-hand menu. The main content area displays various personal details for the employee.

Field	Value
Employee ID	B88250
Username	paisley1974
Employee Type	Full Time
Employment Status	Family Medical Leave
Legal Name	Paisley Plant
Preferred First Name	-
Birthdate	12/16/1974
Gender	Female
Gender Designation	Female
Pronoun	she / her / hers
Ethnicity	White / Caucasian
Nickname	-
Marital Status	-
Tobacco User	-
Blind	-
Disabled	-

## Employment Summary

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



The screenshot shows the 'Employee Details' window for Paisley Plant. The 'Employment Summary' section is highlighted with a red box in the left-hand menu. The main content area displays various employment details for the employee.

Field	Value
Position	Waiter
Pay Rate	\$15.00 per hour
Annual Salary	\$31,200.00 per year
PTO Approver	Jennifer Jackson
Manager	-
Last Hire Date	11/02/2023
Original Hire Date	11/02/2023
Last Review Date	04/01/2024
Next Review Date	-
Location	MAIN
Department	Officers
Division	-
Shift	-

## Contact Info

Displays an overview of the employee's contact information.

The screenshot shows the 'Employee Details' window for Paisley Plant. The 'Contact Info' tab is selected and highlighted with a red box. The contact information is as follows:

Field	Value
Employee ID	B88250
Username	paisley1974
Employee Type	Full Time
Employment Status	Family Medical Leave
Home Phone	-
Cell Phone	727-123-1234
Work Phone	-

The 'Email' section contains the text: "Please choose your preferred email to use for notifications such as time-off requests, password resets, forgotten usernames, and multi-factor authentication." The 'Personal Email' field is currently empty.

## 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.

The screenshot shows the 'Employee Details' window for Paisley Plant. The 'Emergency Contacts' tab is selected and highlighted with a red box. The emergency contact information is as follows:

Field	Value
Emergency Contact Name	Bill Smith Neighbor
Phone	123-123-1234

Viewing 1 - 1 of 1

# 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.

The screenshot displays the 'Employee Details' interface for Alyssa Griffing. The top section includes her name, a 'Reset Password' link, and fields for Employee ID (J00034), Username (demomanager), Employee Type (Full Time), and Employment Status (Active). A left-hand navigation menu lists various HR actions, with 'Time Off' highlighted in a red box. The main content area is titled 'Time Off' and features two circular progress indicators. The first indicator, labeled 'Paid Time Off', shows 144 available units, with 16 taken and 120 total accrued. The second indicator, labeled 'Vacation', shows 59.86 available units, with 0 taken and 19.86 total accrued. Both indicators include a 'Carry Over: 40' value. A 'Request Time Off' button is visible in the top right of the section. Below the indicators are tabs for 'PLANNED' and 'HISTORY', and a search bar.

Metric	Available	Planned	Taken	Total Accrued	Carry Over
Paid Time Off	144	0	16	120	40
Vacation	59.86	0	0	19.86	40

# 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.

The screenshot shows a web interface for 'Employee Details' for 'Paisley Plant'. The employee's information is displayed as follows:

Employee ID	Username	Employee Type	Employment Status
B88250	paisley1974	Full Time	Family Medical Leave

On the left, the 'HR Actions' menu is visible, with 'Reset Password' highlighted by a red box. The 'Reset Password' dialog box is open, showing the following options:

**Reset Password**

Please choose where the recovery link will be sent to:

- Send email to: kwallace@prestigepeo.com
- Send SMS/Text message to: 727-123-1234

Message and Data Rates May Apply

Buttons: **Reset Password** (blue), **Cancel** (white)

## 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**.

This screenshot shows the 'Position Change' form within the 'HR Actions' menu. The 'Position Change' menu item is highlighted with a red box. The form is divided into two tabs: 'DETAIL' (selected) and 'HISTORY'. Under 'Current Information', the current position is 'Waiter' and the start date is '11/02/2023'. The 'Proposed Change' section includes a dropdown for 'Position' (currently set to 'Select One') and a date input field for 'Position Start Date' with a calendar icon and the format 'MM/DD/YYYY'.

This screenshot shows the 'Employee Details' page for 'Paisley Plant'. The 'HR Actions' menu is on the left, with 'Position Change' highlighted. The main content area shows the 'Position Change' history. It includes a search bar, a table with columns for 'Effective Date' and 'Position', and a 'Viewing 1 - 2 of 2' indicator. The table lists two entries: one for 'Waiter - WAIT' effective 04/09/2024, and another for 'Director of IT - DIRIT' effective 11/02/2023. 'Save' and 'Cancel' buttons are at the bottom.

Effective Date	Position
04/09/2024	Waiter - WAIT
11/02/2023	Director of IT - DIRIT

## 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**.

**Pay Rate Change**

DETAIL HISTORY

Current Information

<b>Pay Rate</b>	<b>Effective Date</b>
\$15.00 per hour	04/09/2024
<b>Pay Period</b>	<b>Annualized Pay</b>
Weekly	\$31,200.00

Proposed Change

\* New Pay Rate  
 Per

\* New Standard Hours  
 Per

**New Annualized Pay**

-

Auto Pay Time   
 Card

New Auto Time Card Hours

\* Effective Date

\* Reason

**Employee Details**

**Paisley Plant** [Reset Password](#)

Employee ID: B88250 Username: paisley1974 Employee Type: Full Time Employment Status: Family Medical Leave

**Pay Rate Change**

DETAIL HISTORY

Search

Effective Date	Pay Rate	Per	Annual Pay	Standard Hours	Change Percent	Change Amount	Change Reason
04/09/2024	\$15.00	Hourly	\$31,200.00	40.00	20.00%	\$5,200.00	Promotion
11/02/2023	\$12.50	Hourly	\$26,000.00	40.00	-	-	-

Viewing 1 - 2 of 2



## 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 screenshot shows the 'Employee Details' form for 'Lucky Ducky'. The employee's status is 'Terminated' and their employment type is 'Full Time'. In the left-hand 'HR Actions' menu, the 'Rehire' option is highlighted with a red box. The main content area shows the 'Rehire' section with a 'Start Rehire Process' button.

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.

The screenshot shows the 'Employee Details' form for 'Jayne Birmingham'. The employee's status is 'Terminated' and their employment type is 'Full Time'. In the left-hand 'HR Actions' menu, the 'Rehire' option is highlighted with a red box. The main content area shows the 'Rehire' section with a 'History' tab selected, displaying a table of the employee's status changes.

Status	Type	Reason	Effective Date	Date Updated
TERMINATED	Full Time	Transfer	02/28/2023	02/21/2023
ACTIVE	Full Time	-	12/21/2022	12/21/2022

## 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.

The screenshot shows the 'Employee Details' window for Jayne Birmingham. The 'HR Actions' menu on the left has 'Status/Type Change' highlighted with a red box. The main content area is titled 'Status/Type Change' and has two tabs: 'DETAIL' (selected) and 'HISTORY'. Under 'Current Information', there are two columns: 'Employment Status' (Terminated as of 02/28/2023) and 'Employment Type' (Full Time as of 02/28/2023). Below this is the 'Proposed Change' section with fields for '\* New Employment Status' and '\* Reason' (a dropdown menu showing 'Select One'). There is also a link for 'Employee Hours Update' and 'Save' and 'Cancel' buttons at the bottom.

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

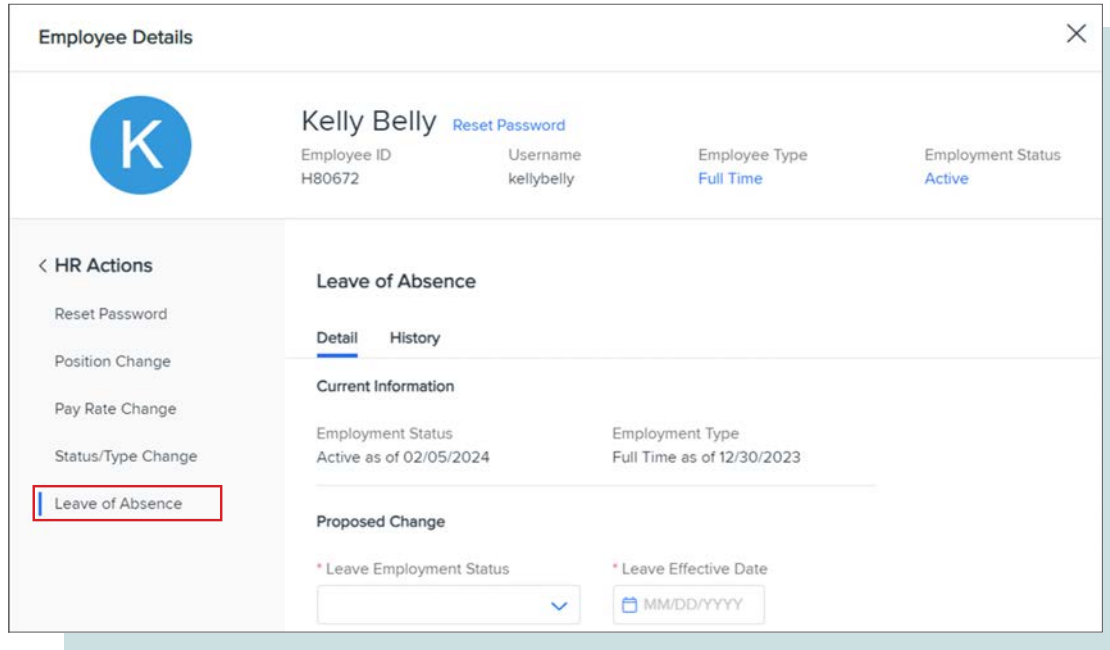
The screenshot shows the 'Employee Details' window for Jayne Birmingham. The 'HR Actions' menu on the left has 'Status/Type Change' highlighted with a red box. The main content area is titled 'Status/Type Change' and has two tabs: 'DETAIL' and 'HISTORY' (selected). Below the tabs is a search bar. A table displays the history of status changes:

Status	Type	Reason	Effective Date	Date Updated
TERMINATED	Full Time	Transfer	02/28/2023	02/21/2023
ACTIVE	Full Time	-	12/21/2022	12/21/2022

Viewing 1 - 2 of 2

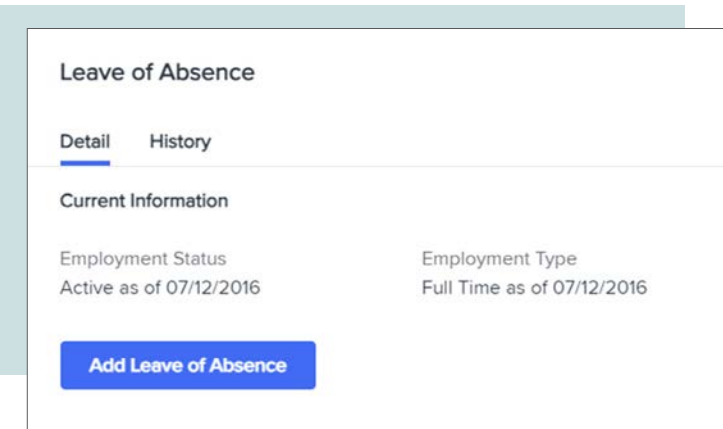
## Leave of Absence - HR Actions

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**.



The screenshot shows the 'Employee Details' form for Kelly Belly. The employee's information includes Employee ID H80672, Username kellybelly, Employee Type Full Time, and Employment Status Active. The 'HR Actions' sidebar on the left has 'Leave of Absence' highlighted with a red box. The 'Leave of Absence' section is active, showing 'Current Information' (Employment Status: Active as of 02/05/2024, Employment Type: Full Time as of 12/30/2023) and a 'Proposed Change' section with dropdown menus for 'Leave Employment Status' and 'Leave Effective Date' (MM/DD/YYYY).

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.




The screenshot shows the 'Leave of Absence' form for Kelly Belly. The 'Current Information' section displays Employment Status: Active as of 07/12/2016 and Employment Type: Full Time as of 07/12/2016. A blue button labeled 'Add Leave of Absence' is visible at the bottom of the form.

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.

### Employee Details



## Paisley Plant

[Reset Password](#)

Employee ID	Username	Employee Type	Employment Status
B88250	paisley1974	Full Time	Family Medical Leave

#### < HR Actions

- Reset Password
- Position Change
- Pay Rate Change
- Status/Type Change
- Leave of Absence**
- Return to Work

**This employee is on a leave of absence**  
Would you like to start the [Return to Work](#) process?

### Leave of Absence

Detail History

Status	Type	Reason	Effective Date	Date Updated
FAMILY MEDICAL LEAVE	Full Time	Leave	04/08/2024	04/09/2024

Viewing 1 - 1 of 1

## 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.

The screenshot shows the 'Employee Details' form for Paisley Plant. The top section displays the employee's profile with a 'P' icon, name, and various details: Employee ID (B88250), Username (paisley1974), Employee Type (Full Time), and Employment Status (Family Medical Leave). A 'Reset Password' link is also visible. Below this, the 'HR Actions' menu is shown on the left, with 'Return to Work' highlighted in a red box. The main content area is titled 'Return to Work (After Leave of Absence)' and has two tabs: 'Detail' (selected) and 'History'. Under the 'Detail' tab, there is a 'Current Information' section with fields for 'Employment Status' (Family Medical Leave as of 04/08/2024) and 'Employment Type' (Full Time as of 11/02/2023). A blue 'Return to Work' button is located at the bottom of this section.

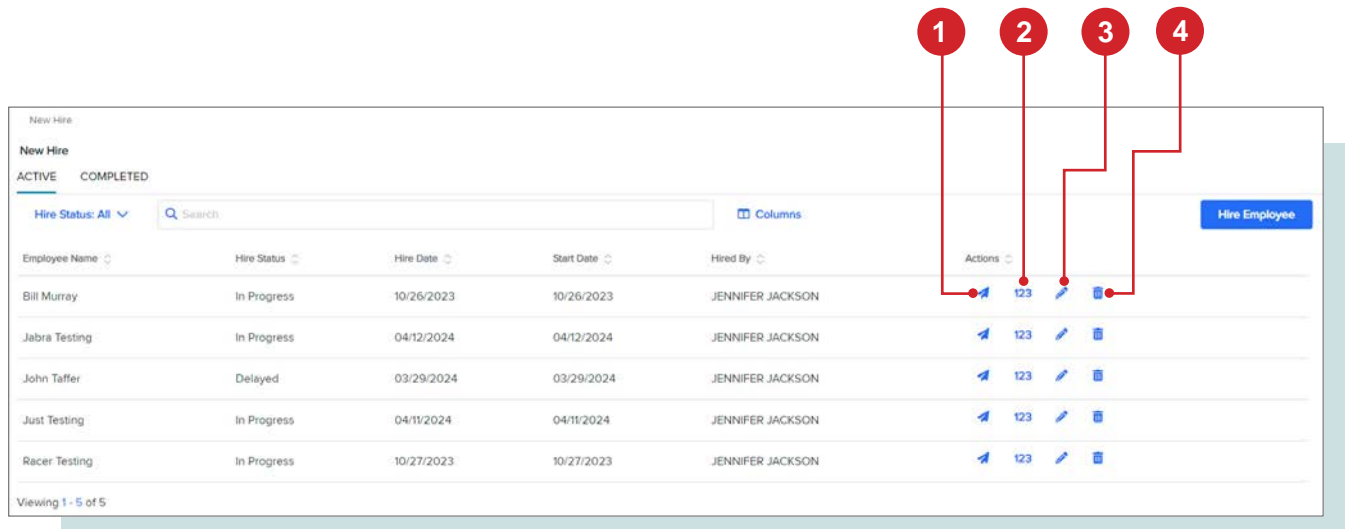
To return an employee to work, click the Return-to-Work button. The Proposed Change section displays, where a manager can change the employee's status and employment type upon return, specify a date for the return, and cite a reason. Once these fields are completed, click Save to return the employee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

This screenshot shows the same 'Employee Details' form for Paisley Plant, but with the 'History' tab selected under the 'Return to Work (After Leave of Absence)' section. The 'Detail' tab is now greyed out. Below the search bar, there is a table with columns: Status, Type, Reason, Effective Date, and Date Updated. The table contains one entry: ACTIVE, Full Time, -, 11/02/2023, 11/02/2023. At the bottom, it says 'Viewing 1 - 1 of 1'. The 'Return to Work' button in the HR Actions menu is still highlighted in a red box.

# 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.

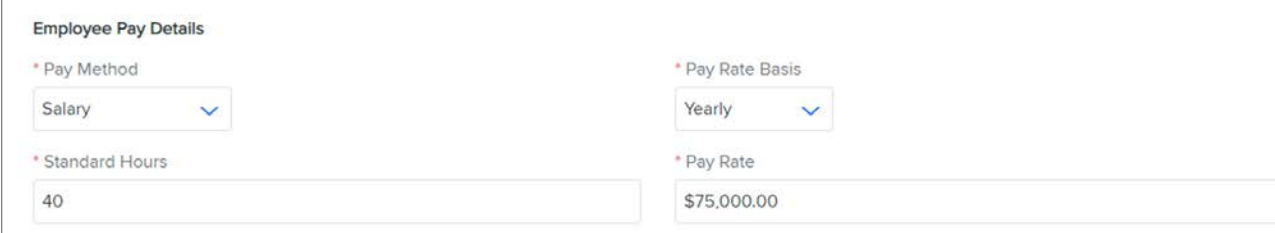
1. Resend Welcome email
2. View Kiosk Code – (TBD)
3. Edit New Hire
  - a. **Employee Personal Information**
    - i. First Name, Last Name, Personal Email, Mobile Phone, Middle Name, Preferred Language, and Nickname.
  - b. **Employment Details**
    - i. Work Location, Benefit Group Employment Status, 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  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.



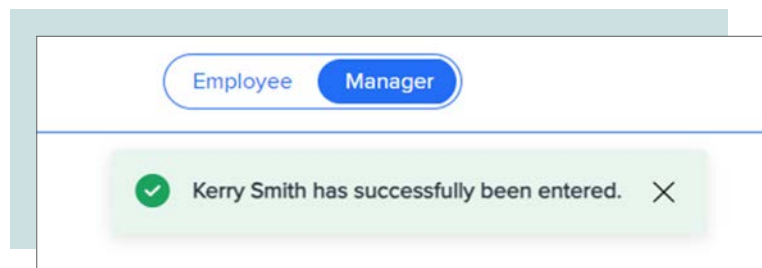
The screenshot shows the 'Employee Pay Details' section of a form. It contains four fields:

* Pay Method	* Pay Rate Basis
Salary	Yearly
* Standard Hours	* Pay Rate
40	\$75,000.00

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.

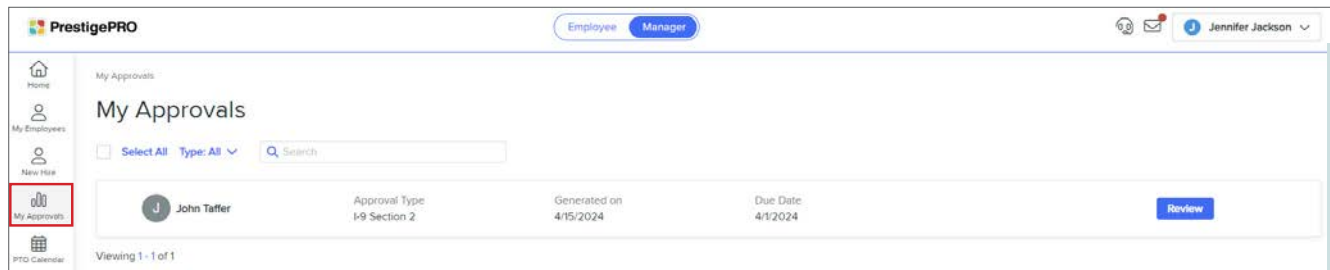
For a salaried employee you can input the full annual amount, but you **MUST** select Yearly in the Pay Rate Basis drop down for the salary to calculate correctly.

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.



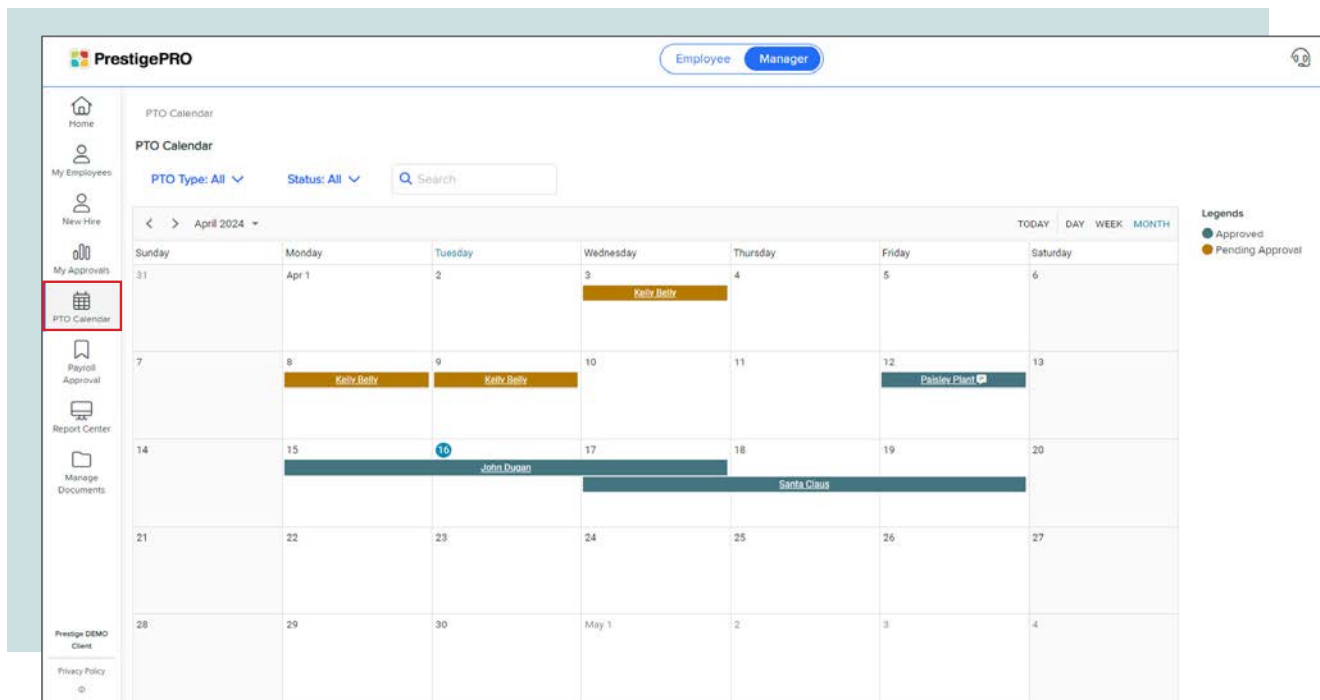
# My Approvals

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

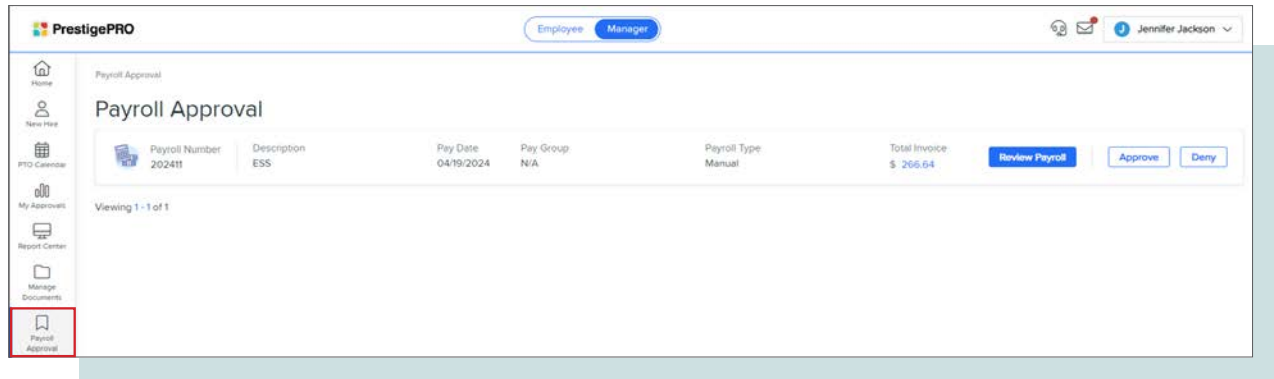
The PTO Calendar displays Approved and Pending Approval PTO requests. Which employees you see will depend on the Data Security within Prism.





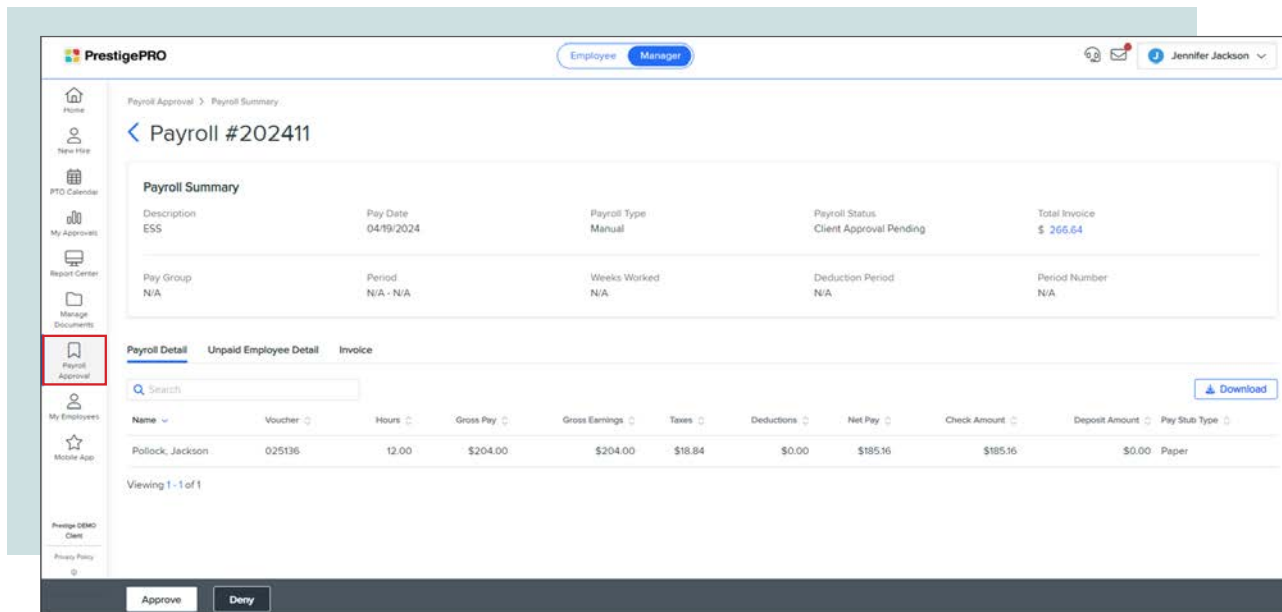
# Payroll Approval

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.



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.

Client	Address	Date
Prestige DEMO Client	538 Broadhollow Rd Melville, NY 11719	04/19/2024

Pay Period Ending	Control Number	Total Invoice
N/A	00101-202411	\$ 266.64

Invoice Name	Amount
GROSS WAGES	\$204.00
SERVICE FEE (Incs.Taxes/WCompi/Admin)	\$45.45
Other: Local Taxes	\$0.69
Other: Shipping	\$16.50
TOTAL INVOICE	\$266.64

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.

Report Name	Description	Views
Benefit Billing Detail	Includes insurance premiums, amount billed and employee deductions to determine net amount billed. Data from: Employee Payroll Voucher records	0
Client & Employee Activity	Includes client adds and terminations, full and part time employee counts, new hires and terminations over a date range.	0
Department - Division Report	Includes Last Hire Date, Termination Reason, WC State, 1099 EE, and Drivers License detail. Data from: general employee records such as company, pay, and personnel.	0

# 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.

The screenshot shows the PrestigePRO interface for managing documents. At the top right, there are buttons for 'Employee' and 'Manager'. The left sidebar contains several navigation options, with 'Manage Documents' highlighted in a red box. The main content area is titled 'Manage Documents' and includes a search bar with 'Advanced Search' and 'Filter...' options, and a table with columns for Name, Version, Category, and Description. The table lists 'Company Documents', 'Employee Documents', and 'Global Documents'.

Name	Version	Category	Description
Company Documents			
Employee Documents			
Global Documents			