

WEBINAR SERIES

2024 PrestigePRO Enhancements

May 7, 2024



Today's Presenter



Joe Dodgson

Chief Information & Technology Officer
PrestigePEO

I have 25 years of experience in business service outsourcing industries. I have worked in PEO, Workers' Compensation, and technology industries. Prior to Prestige, I served as the COO of a PEO in St. Petersburg, FL. I worked in the workers' compensation space providing insurance to over 100 PEO's. I co-founded a PEO in Arizona. I have served as a technology and operations leader throughout my career. My success, has been and will continue to be, providing technology solutions to companies and clients to create a world class customer experience.

Today's Agenda

- Manager Functionality within the Employee Portal
- Report Center Update

Webinar Forum

All participants are muted.

Please type questions in the side navigation panel and we will try to address most questions during today's session.

Today's presentation will be posted Online at prestigepeo.com/webinars

PrestigePRO Employee Portal | New Manager Functionality

- Reset Employee Password
- Position Change
- Pay Rate Change
- Status Type Change (full/part time)
- Submit Employee PTO Request
- Leave of Absence
- Return to Work
- New Hire w/o SSN – Onboarding Clients Only
- I-9 Section 2 Approval
- Payroll Approval
- Rehire
- HR Approvals: PTO, Position Change, Pay Rate Change, Status Type Change

My Employees

- Dashboard Overview
- Add / Remove Columns
- Follows Data Security in PrismHR

Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Alicia Test	X07918	-	Test	Clerical	Full Time	09/21/2017	ACTIVE
Alyssa Griffing	J00034	Jason Constantine	Test	Administration	Full Time	02/21/2002	ACTIVE
Apollo Student	L41172	-	Test	Clerical	Temporary Part Time	02/09/2021	ACTIVE
Arthur Fisher	S00041	-	Test	Shipping Receiving	Full Time	04/11/2024	TERMINATED
Ashley Teller	J11578	-	Test	Clerical	Full Time	01/01/2018	ACTIVE
Barney 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
Cali Testing	V89156	-	Travelling Staff	Estimator	Full Time	11/20/2023	ACTIVE

Columns

Restore Defaults

<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Employee ID
<input type="checkbox"/> Nickname	<input type="checkbox"/> Work Email
<input type="checkbox"/> Work Phone	<input type="checkbox"/> Ext
<input type="checkbox"/> Cell Phone	<input checked="" type="checkbox"/> PTO Approver
<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Position
<input checked="" type="checkbox"/> Type	<input type="checkbox"/> Location
<input checked="" type="checkbox"/> Last Hire Date	<input type="checkbox"/> Shift
<input type="checkbox"/> Division	<input type="checkbox"/> Home Phone
<input type="checkbox"/> Birthdate	<input type="checkbox"/> Personal Email
<input checked="" type="checkbox"/> Status	

Apply Cancel

Employee Details | HR Actions

- Empowering clients to act reducing unnecessary touch points
- Status/Type Change and Leave of Absence will be leveraged using Global Approval Policies
- Request PTO on behalf of the employee

Employee Details

Paisley Plant [Reset Password](#)

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

HR Actions

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

Time Off [Estimate PTO](#) [Request Time Off](#)

36 Available

Paid Time Off

- Available: 36
- Planned: 8
- Taken: 0
- Total Accrued: 40
- Carry Over: 4

PLANNED HISTORY

Type: All Requester: All Status: All Approver: All

New Hire w/o SSN – Onboarding Clients Only

- Dashboard Overview of New Hires
- Enter New Hire w/o SSN – Registration Email is sent to the Employee Requesting the SSN and Date of Birth
- Provides Manager's the ability to edit the employee's information and resend the Welcome Email, if needed

The screenshot displays the PrestigePRO interface for managing new hires. The top navigation bar includes the PrestigePRO logo, user role buttons for 'Employee' and 'Manager', and a user profile for Jennifer Jackson. The left sidebar contains navigation icons for Home, New Hire, PTO Calendar, My Approvals, Report Center, Manage Documents, Payroll Approval, My Employees, and Mobile App. The main content area is titled 'New Hire' and features tabs for 'ACTIVE' and 'COMPLETED'. Below these tabs is a search bar and a 'Columns' button. A table lists five new hires with columns for Employee Name, Hire Status, Hire Date, Start Date, and Hired By. Each row includes an 'Actions' column with icons for sending a message, editing, and deleting. A modal form is overlaid on the right, titled 'Welcome Jabra, this hiring process is started by Prestige DEMO Client'. The form contains a text box for the last name (filled with 'Testing'), a social security number field with a 'Show' button, a confirmation field for the social security number, and a birthdate field (filled with '07/09/1979'). A 'Continue' button is at the bottom of the form. A summary box on the right of the modal indicates the entry was made by Jennifer Jackson, supervised by Alyssa Griffing, and the position is Estimator.


Employee Name	Hire Status	Hire Date	Start Date	Hired By	Actions
Bill Murray	In Progress	10/26/2023	10/26/2023	JENNIFER JACKSON	123
Jabra Testing	In Progress	04/12/2024	04/12/2024	JENNIFER JACKSON	123
John Taffer	Delayed	03/29/2024	03/29/2024	JENNIFER JACKSON	123
Just Testing	In Progress	04/11/2024	04/11/2024	JENNIFER JACKSON	123
Racer Testing	In Progress	10/27/2023	10/27/2023	JENNIFER JACKSON	123

Payroll Approval

- Displays summary information for each payroll, including the number, description, pay date, type, and invoice amount
- Payroll Detail, Unpaid Employee Detail, and Invoice details available
- Information from each tab can be downloaded as a CSV file

Payroll Approval

Payroll Approval

 Payroll Number 202411	Description ESS	Pay Date 04/15/2024	Pay Group N/A	Payroll Type Manual	Total Invoice \$ 266.64	Review Payroll	Approve	Deny
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Viewing 1 - 1 of 1

Payroll Approval > Payroll Summary

< Payroll #202411

Payroll Summary

Description ESS	Pay Date 04/15/2024	Payroll Type Manual	Payroll Status Client Approval Pending	Total Invoice \$ 266.64
Pay Group N/A	Period N/A - N/A	Weeks Worked N/A	Deduction Period N/A	Period Number N/A

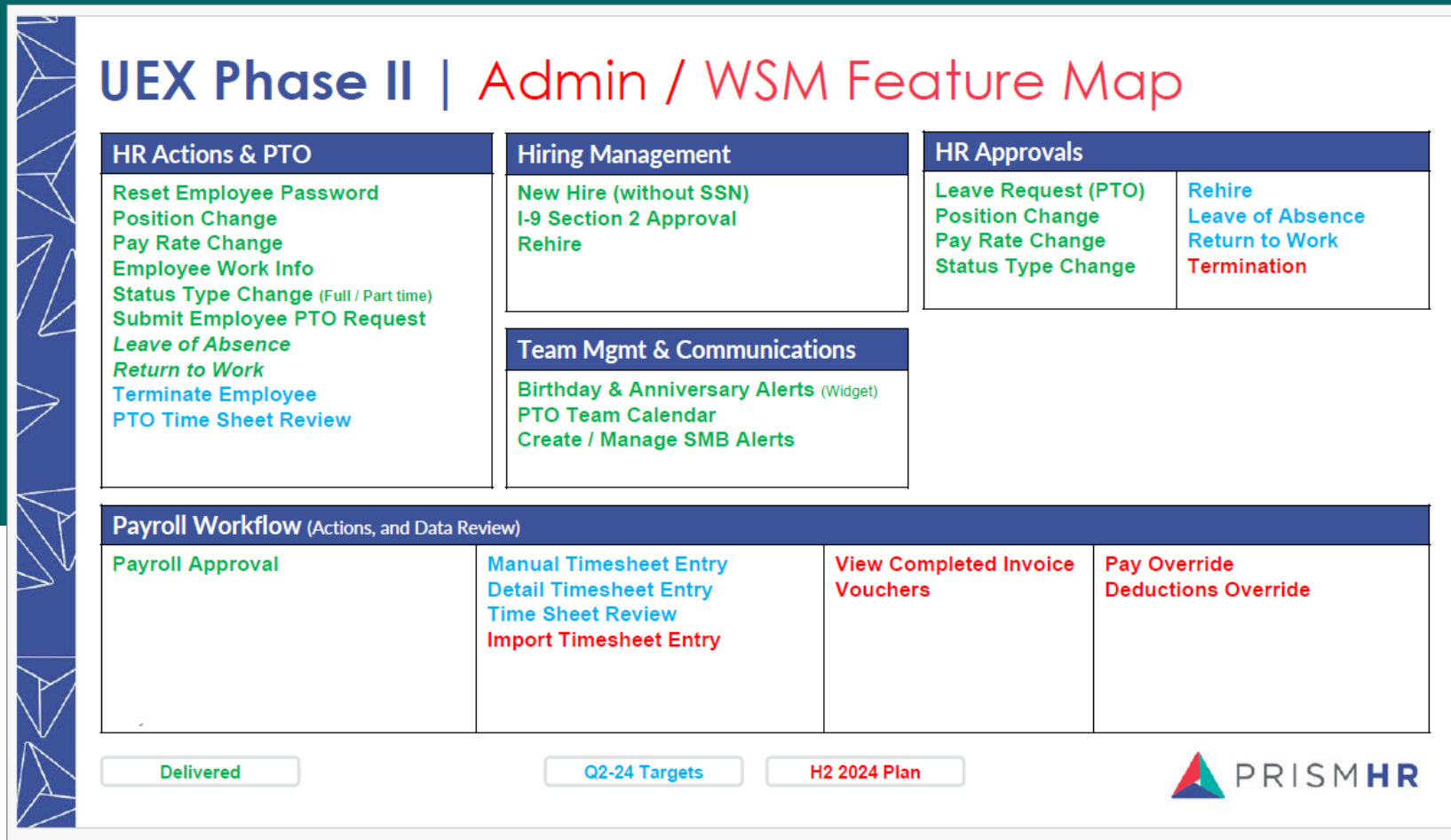
[Payroll Detail](#) [Unpaid Employee Detail](#) [Invoice](#)

[Download](#)

Name	Voucher	Hours	Gross Pay	Gross Earnings	Taxes	Deductions	Net Pay	Check Amount	Deposit Amount	Pay Stub Type
Pollock, Jackson	025134	12.00	\$204.00	\$204.00	\$18.84	\$0.00	\$185.16	\$185.16	\$0.00	Paper

Viewing 1 - 1 of 1

Roadmap Highlights



Report Center | Platform Evolution

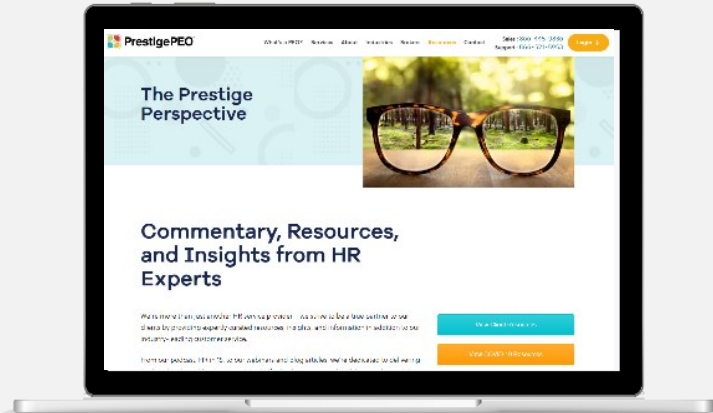
Next Phase

- Report migration to consolidate client report platforms through 3rd qtr. 2024
- Client training webinar series beginning July / August 2024
- Client phased release beginning July / August 2024
- Advanced dashboard and visualization development through the 4th qtr. 2024

Report Center | New Future Functionality

- Multi-level user roles
 - Basic Viewers
 - Explorer licenses with the ability to modify existing reports
 - Rename Column Headers
 - Add Custom Field Calculations
 - Create Data Visualizations
 - Model Data
 - Schedule Reports in New Ways
 - Create Business Rules
- Optimized data storage utilizing Snowflake for faster report rendering

Questions / Comments / Discussion?



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<https://www.prestigepeo.com/webinars>



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Human Resources, Employee Benefits, and Payroll Simplified

You started your business because you had a great idea. We started our business to handle the rest.