WEBINAR SERIES

2024 PrestigePRO Enhancements

May 7, 2024

PrestigePEO™

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.

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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

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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

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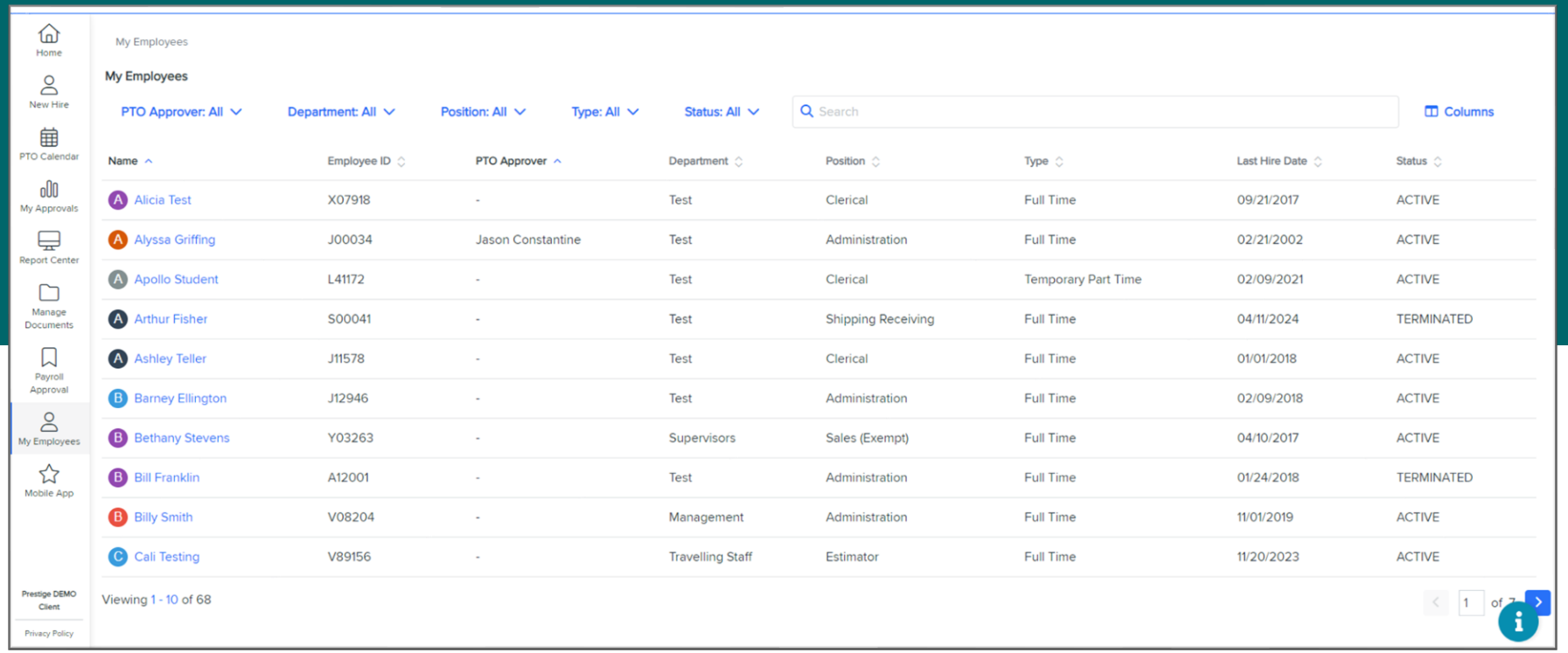
My Employees

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



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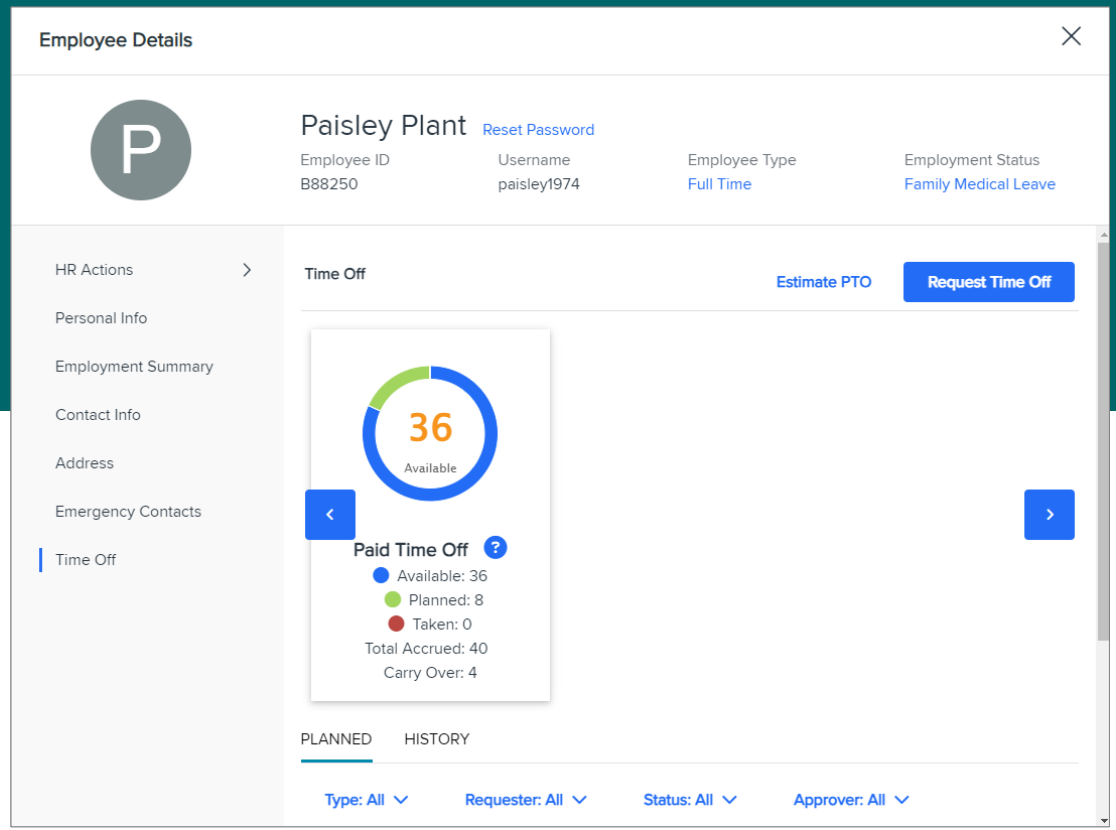
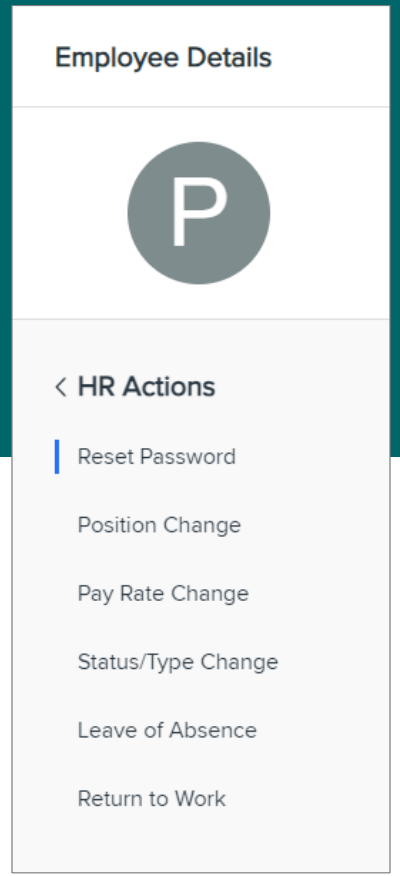
Employee Details | HR Actions

- 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





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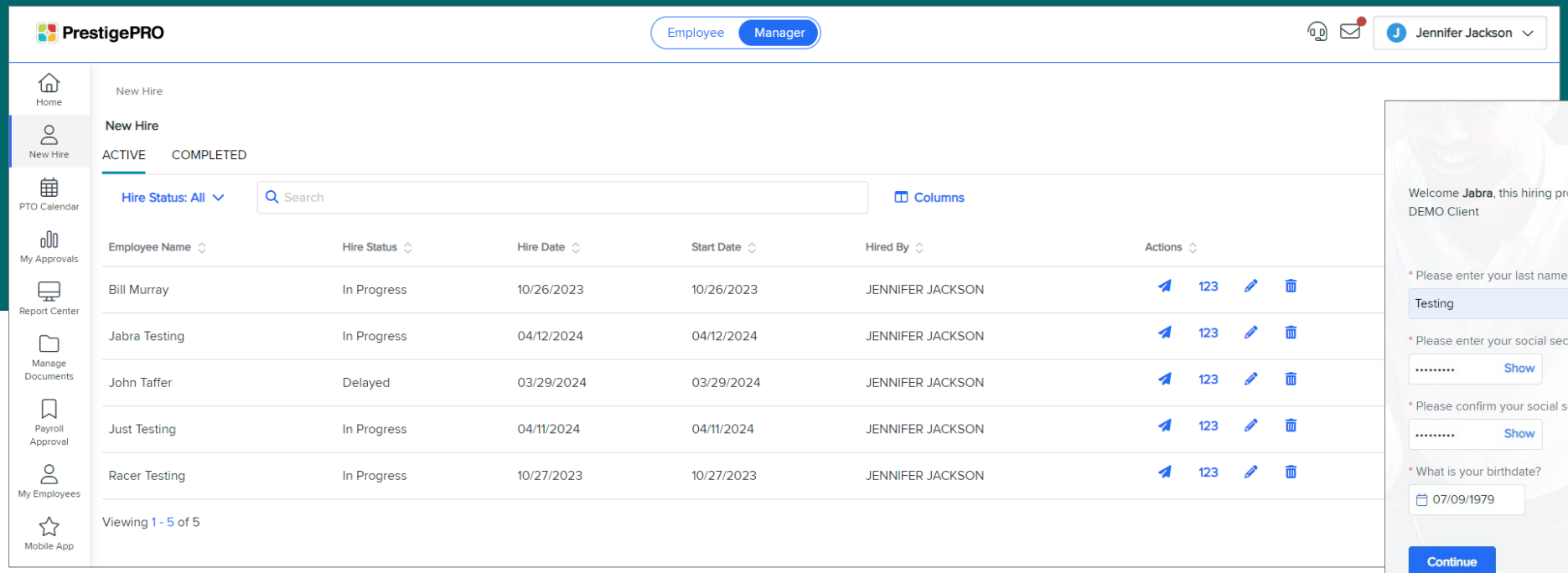
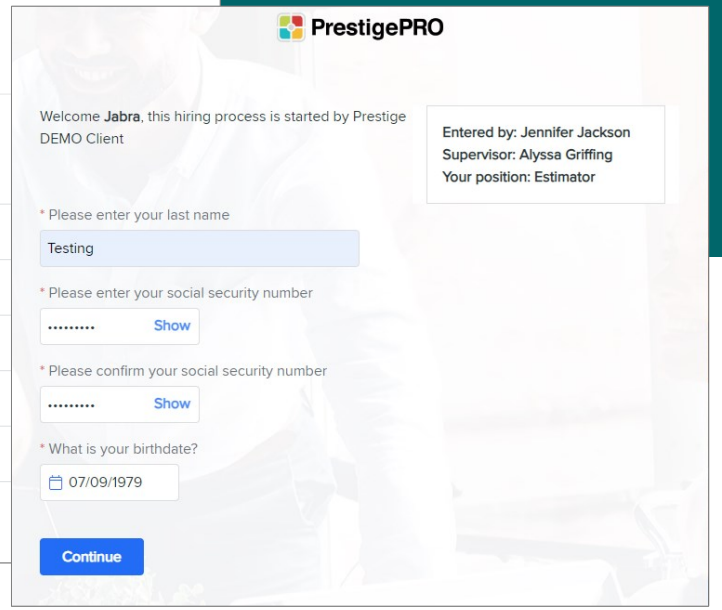
New Hire w/o SSN – Onboarding Clients Only

- 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





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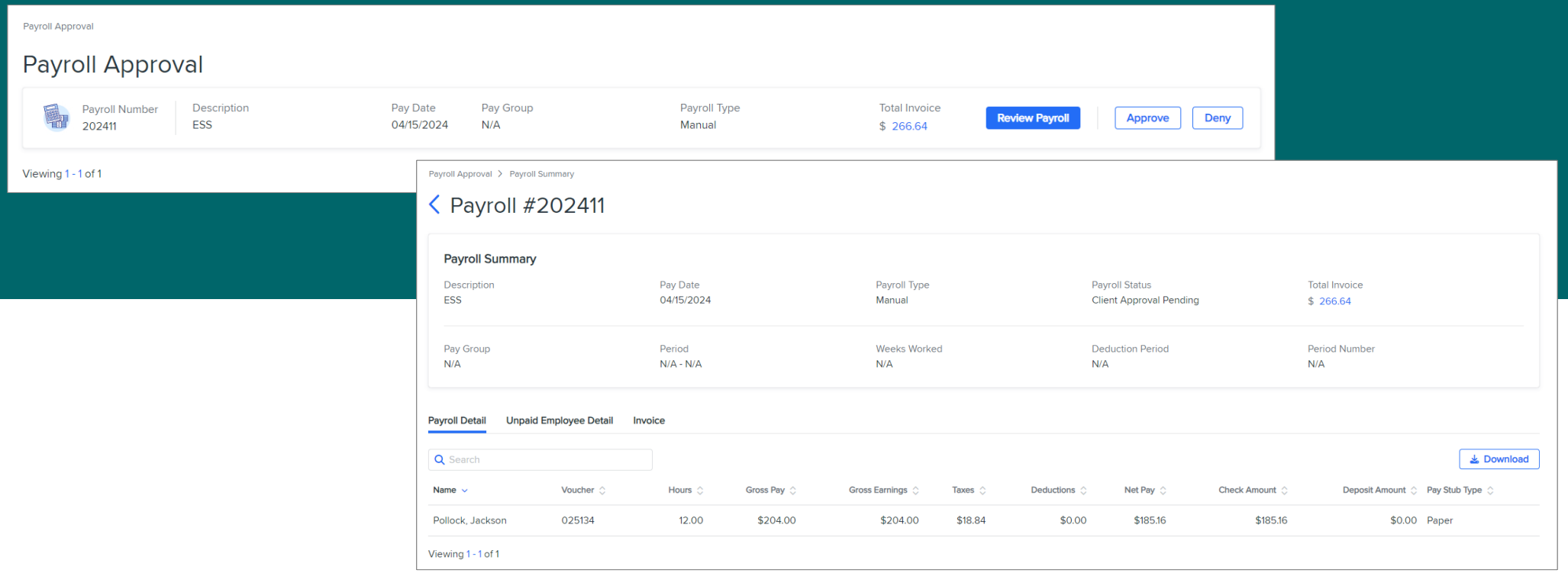
Payroll Approval

- 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



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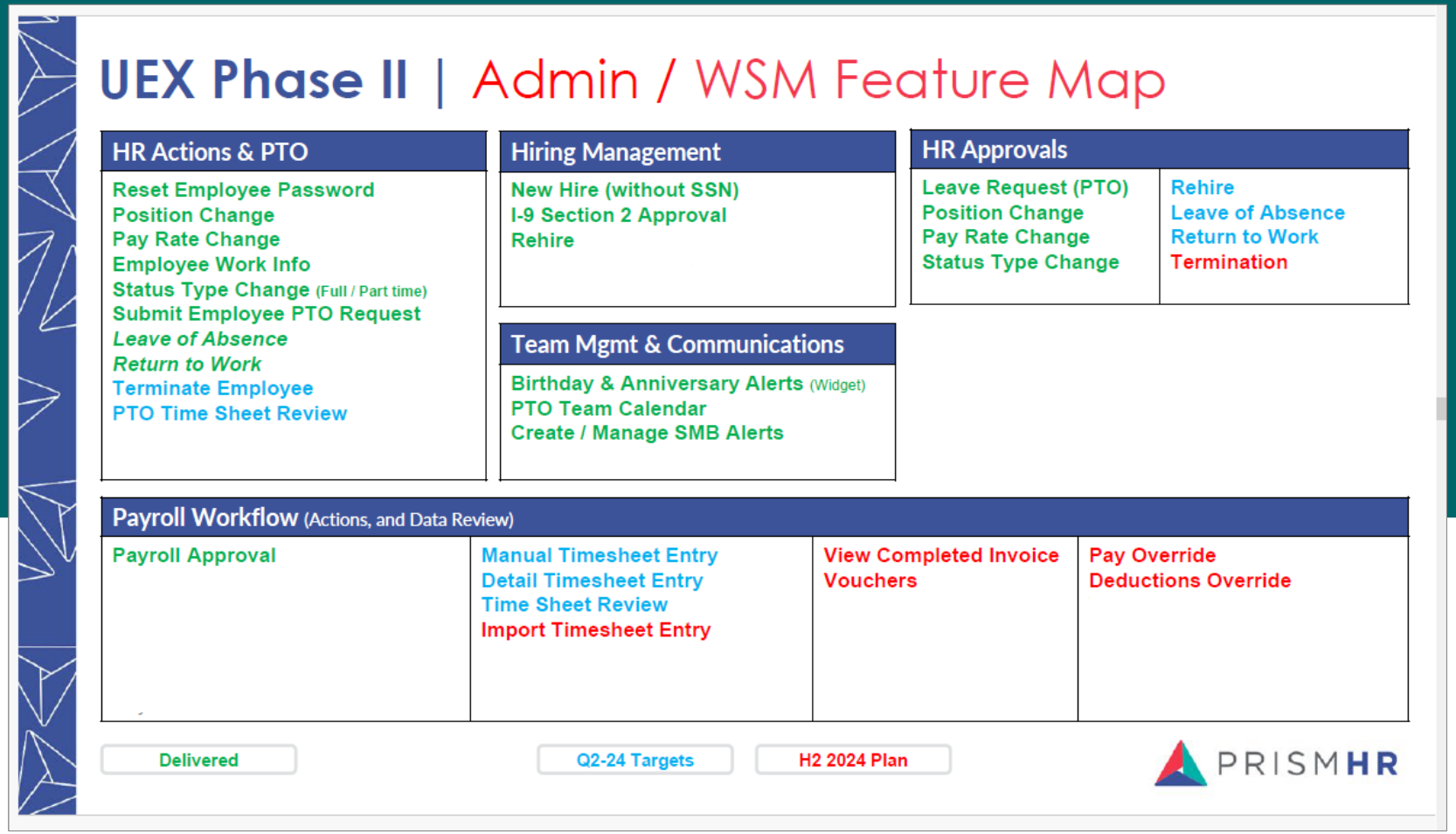
Roadmap Highlights



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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

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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

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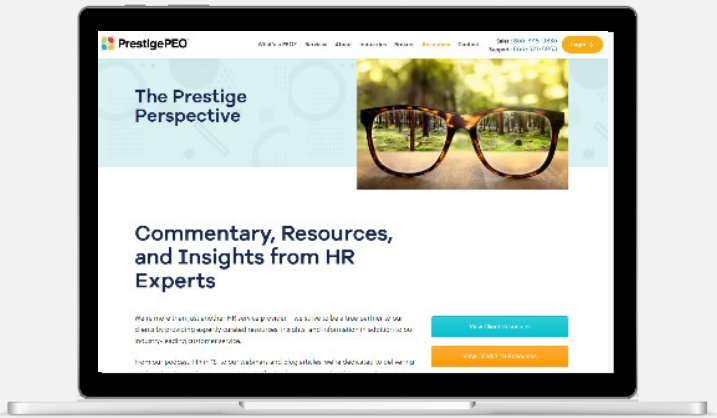
Questions / Comments / Discussion?



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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.