



PrestigePRO Manager Enhancements

USER GUIDE

prestigepeo.com



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GETTING STARTED WITH THE EMPLOYEE PORTAL FOR MANAGERS

This guide is designed to help managers navigate the Employee Portal and find key details on payroll, benefits, taxes, paid time off, documents, and manager-specific tools in a more streamlined way.

It highlights the dashboard, key navigation areas, messages, settings, and where to review or update personal information, pay information, benefits, and timekeeping details when available. Use this guide to save time, keep records accurate, and stay informed about important employer communications and required actions.

When Would I Use This?

Use this guide when you:

- Sign in to the Employee Portal for the first time.
- Need help finding payroll, benefits, tax, or time-off information
- Want a quick refresher on where key features are located
- Are new to using manager tools within the portal

Before You Begin

- You must have an active Employee Portal account.
- Available features may vary based on your **role, permissions, and company configuration**.

Important Notes

- Portal features and menu options may vary based on company setup and your role.
- If you see options that differ from this guide or need help completing a task, contact your dedicated **PrestigePEO HR Business Partner**.

PORTAL FUNDAMENTALS & EMPLOYEE SELF SERVICE

Employee Dashboard (Your Home Page)

The Employee Dashboard is the main landing page after the employee signs in. It provides a high-level snapshot of the employee's most important information, such as:

- Recent and upcoming pay information
- Paid Time Off balances
- Benefits summaries
- Company announcements and reminders

Use the dashboard to quickly check updates without navigating through multiple menus.

The screenshot displays the Employee Dashboard for Alethia Prism. The interface includes a top navigation bar with 'Employee' and 'Manager' tabs, and a user profile dropdown for Alethia Prism. A left sidebar contains icons for Home, Personal, Benefits, Benefits Center, Benefits Plan, Web Links, Pay, Paid Time Off, Documents, Events, Taxes, Training, Retirement, Federal/State, Posting Notices, and Timekeeping. The main content area is titled 'Good evening, Alethia!' and features several sections: 'Contact us' with contact information for Abe Lincoln, Betsy Ross, and Jane Seymour; 'Pay' section showing the latest pay and upcoming paycheck; 'Paid Time Off' section with a 'Request Time Off' button; 'Benefits' section with a 'View Benefits Summary' button; 'Life Events' section with a 'Review' button; 'PrismONE App!' section with instructions for downloading the app and setting up the account; and 'New Messages' section with a 'View Messages' button.

Employee Manager

Alethia Prism
Fleetwood Mac Logistics D...

Home Personal Benefits Benefits Center Benefits Plan Web Links Pay Paid Time Off Documents Events Taxes Training Retirement Federal/State Posting Notices Timekeeping

Good evening, Alethia!

Contact us

A Abe Lincoln | HR Business Partner
alincoln@prestigepeo.com
954-782-5289

B Betsy Ross | Benefits Specialist
bross@prestigepeo.com
727-458-7532

J Jane Seymour | Payroll Specialist
jsymour@prestigepeo.com
954-852-7532

Pay Show Amounts

Latest Pay \$ 9,999.99
Pay Date 05/31/2026

Upcoming Paycheck
Pay Date --

Breakdown

Gross Pay	Taxes	Deductions
\$ 9,999.99	\$ 9,999.99	\$ 9.99

[View All Payouts](#)

Paid Time Off [Request Time Off](#)

Upcoming Time Off
[View All](#)

Available Time Off
PTO: 42.17 Hours
SICK: 0 Hours

Benefits [View Benefits Summary](#)

Not Enrolled In Benefits

Life Events

You can change your benefits based on your qualifying life event by starting the process here.

✓ Not Available
[Review](#)

PrismONE App!

1. Download the App
[Download on the App Store](#) [GET IT ON Google Play](#)

2. One-Time Account Setup
When you open the app for the first time:

- Complete the **one-time setup** process.
- Create a secure **4-digit PIN**.
- Enable **biometric login** (Face ID or fingerprint) - highly recommended for fast and secure access.

3. Link Your Account
To connect your mobile app with your Portal account:

- Log into the Portal on your computer.
- Click your **account dropdown** in the upper-right corner.
- Select **Mobile App QR Code**.
- Open the PrismONE Mobile App and **scan the QR code** when prompted.

You'll be automatically logged in! From now on, just use your biometric login for quick access.

New Messages [View Messages](#)

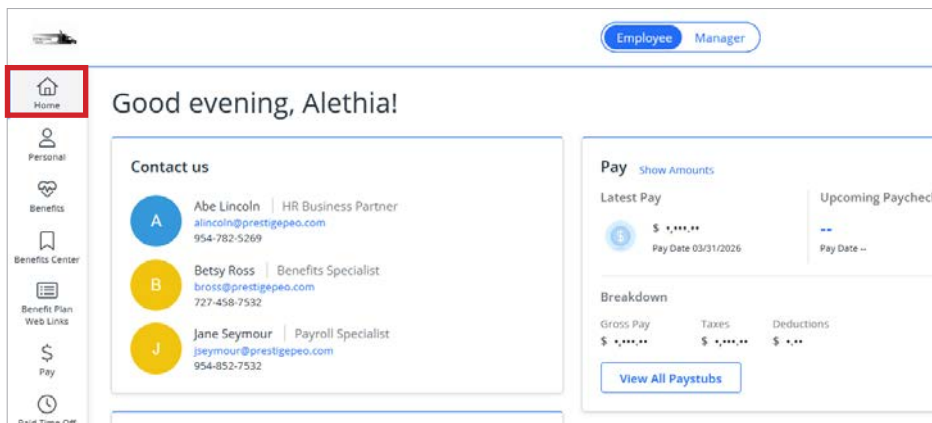
06/18/2026
New Employee Hired

06/18/2026
I-9 Section 2 Approval needed (Fleetwood Mac Logistics Demo)

Navigation Basics

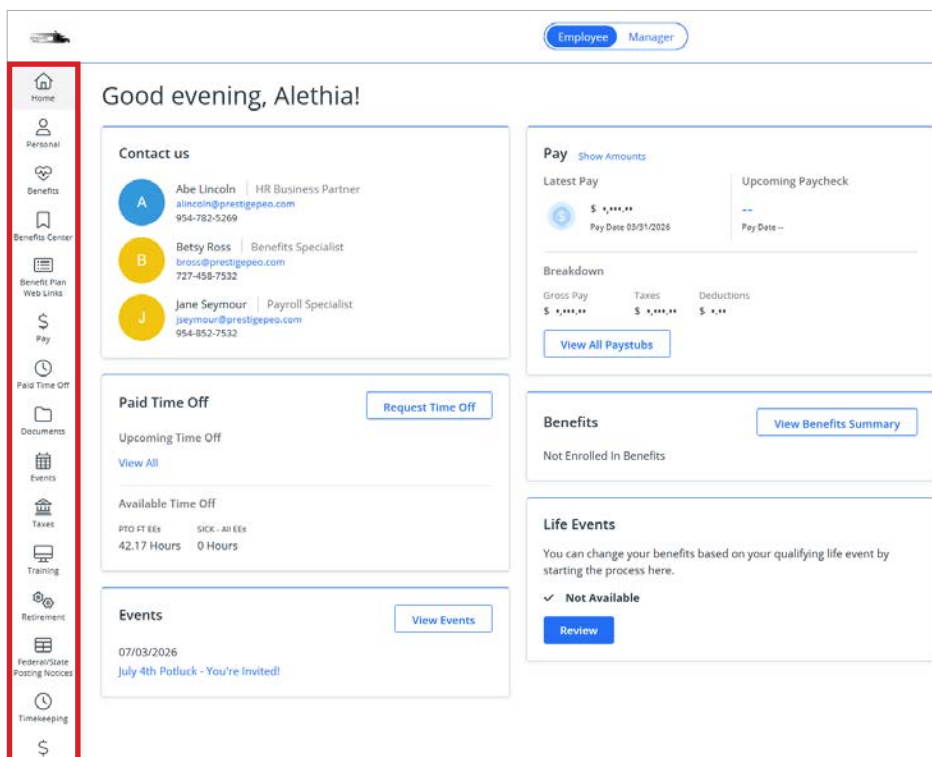
Home Icon

The **Home** icon returns the employee to the Employee Dashboard from anywhere in the portal.



Left-Hand Toolbar

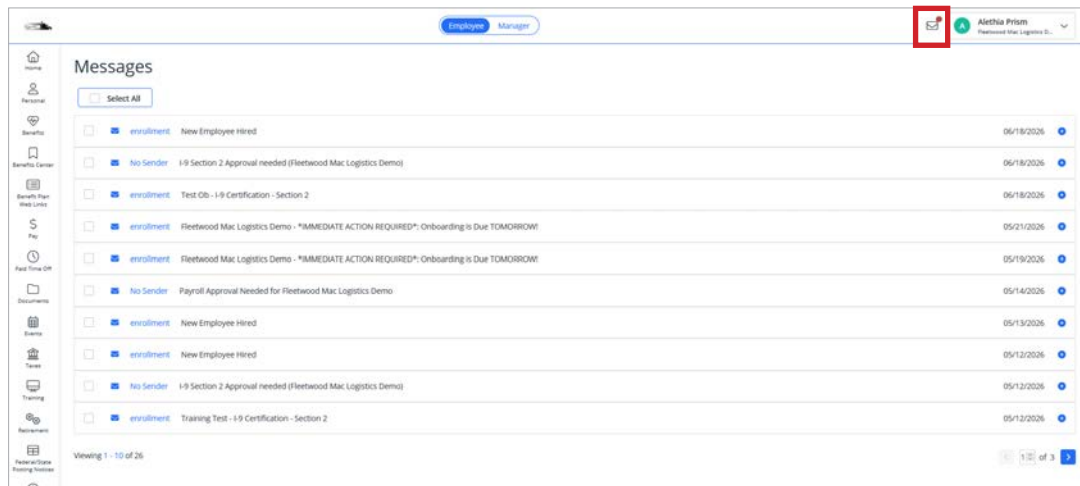
The **left-hand toolbar** is the primary navigation menu. Each icon opens a different section of the portal, such as Personal Information, Benefits, Pay, Time Off, Documents, and Training.



Messages

The **Messages** area contains important communications from the employer or HR team, including announcements, reminders, and time-sensitive updates.

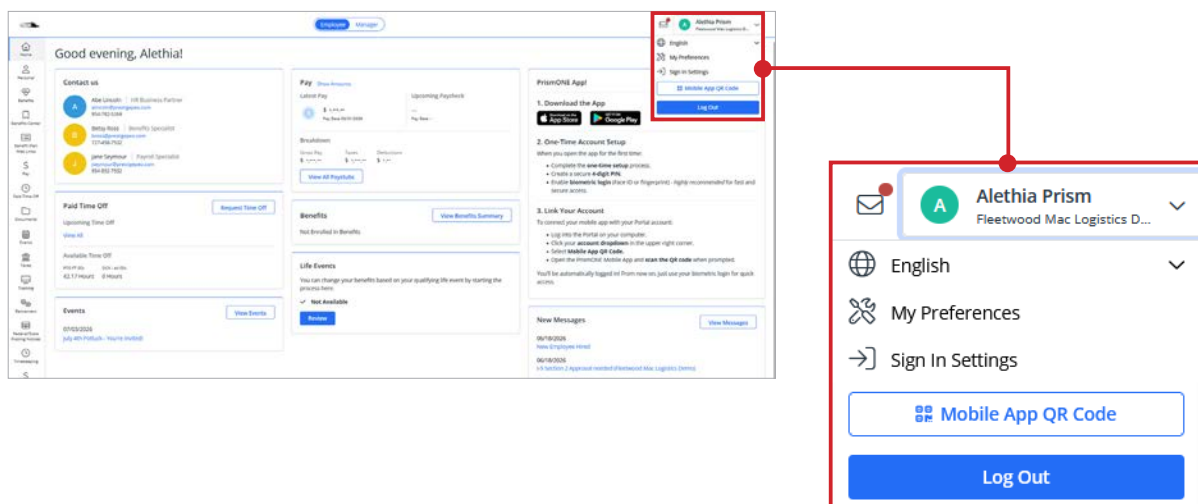
Check messages regularly to avoid missing required actions.



Employee Settings Menu

Access the **Employee Settings Menu** from the dropdown in the top-right corner of the portal. From here, the employee can:

- Change the language preference
- Update notification settings
- Download a QR code for the mobile app
- Log out securely



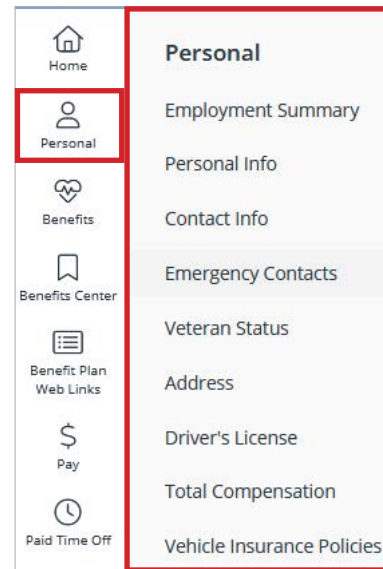
Key Portal Sections

Personal Information

The **Personal Information** section allows the employee to view and update your employment and personal records, including:

- Employment summary
- Personal Information
- Contact information
- Emergency contacts
- Address
- Total Compensation
- Driver's License
- Vehicle & Vehicle Insurance Policy information

Keeping this information up to date ensures accurate records and communication.

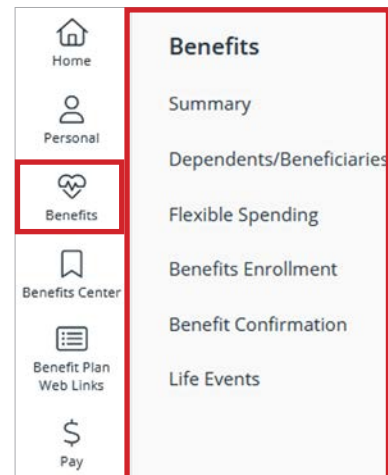


Benefits

If the organization offers benefits, the **Benefits** section provides access to the enrolled benefit plans.

From here, the employee can:

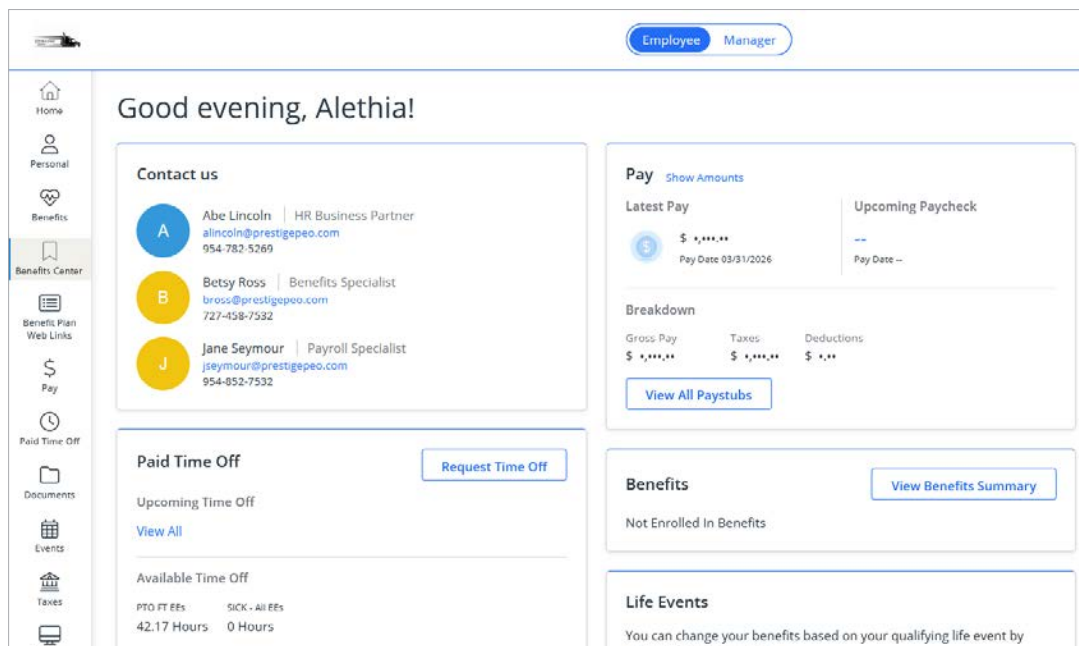
- Review the benefits summary
- Manage dependents and beneficiaries
- Complete benefits enrollment during open enrollment or qualifying life events
- View benefits confirmations



Benefits Center

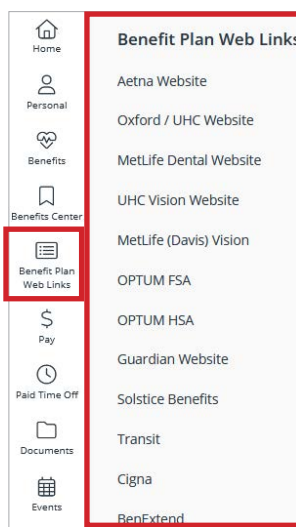
The **Benefits Center** is a one-stop resource for understanding and managing the employee benefits. Here, the employee can find helpful information about the benefits available to them, access important resources, and get guidance to help them make informed decisions throughout the year.

Use this icon to open detailed information in a new window.



Benefit Plan Web Links

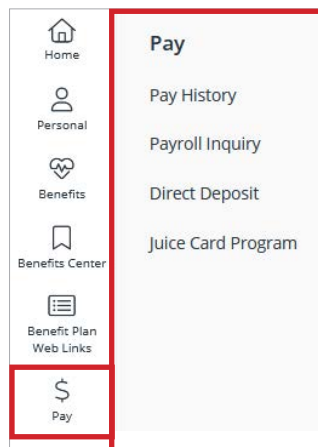
The **Benefit Plan Web Links** reflects direct links to benefit carrier websites where the employee can manage accounts, view claims, and access ID cards.



Pay Information

The **Pay** section allows the employee to manage payroll-related information, such as:

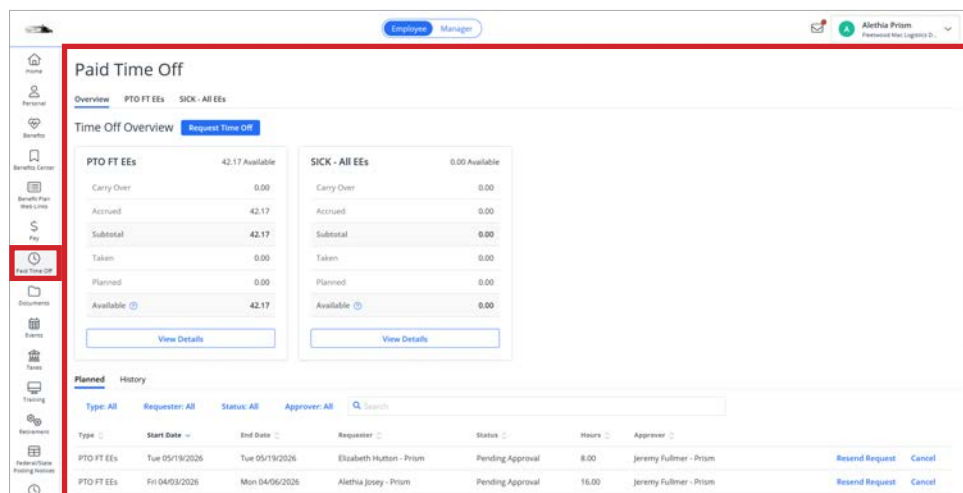
- Viewing pay history and pay statements
- Managing direct deposit accounts
- Accessing additional pay programs (if available)



Paid Time Off

The **Paid Time Off** section allows the employee to:

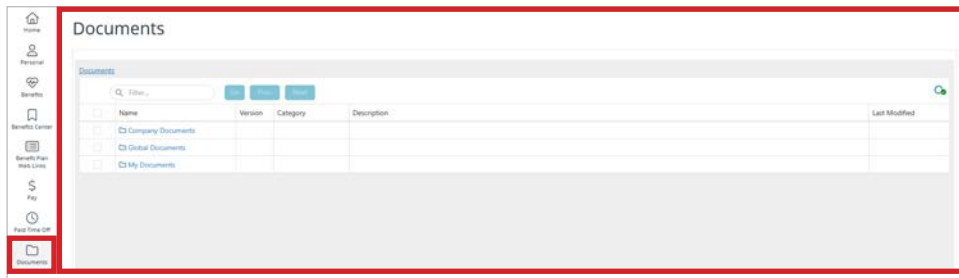
- View available PTO balances
- Submit time-off requests
- Review past and upcoming PTO



Documents

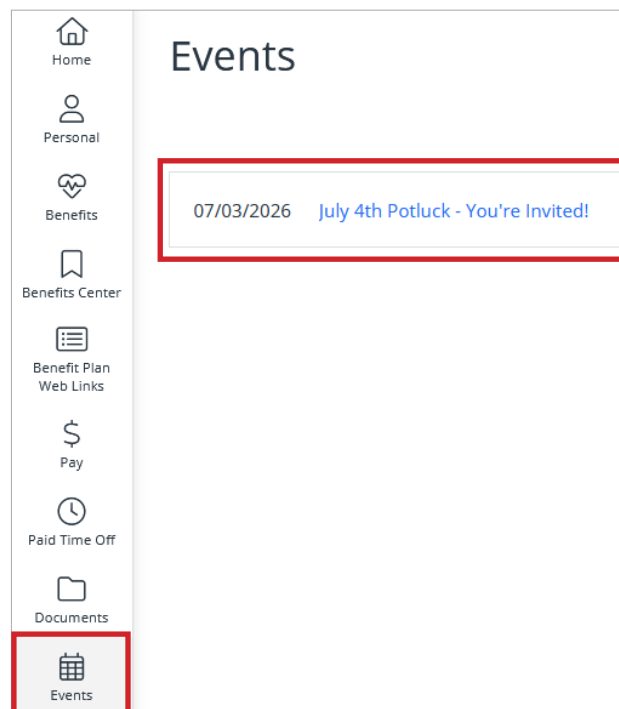
The **Documents** section provides access to important files shared by the employer, including company forms, policy acknowledgments, and other employment-related documents. Documents can be viewed online or downloaded for employee records.

When the employee opens this section, they may see multiple folders. These folders organize documents that may be stored in different locations based on the employer's configuration, and each folder may contain different employment documents.



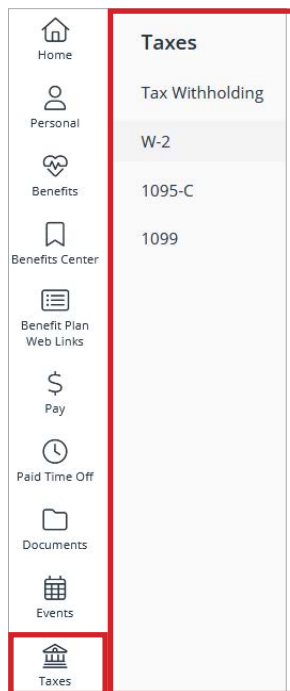
Events

The **Events** section displays company events and announcements so the employee can stay informed about upcoming activities.



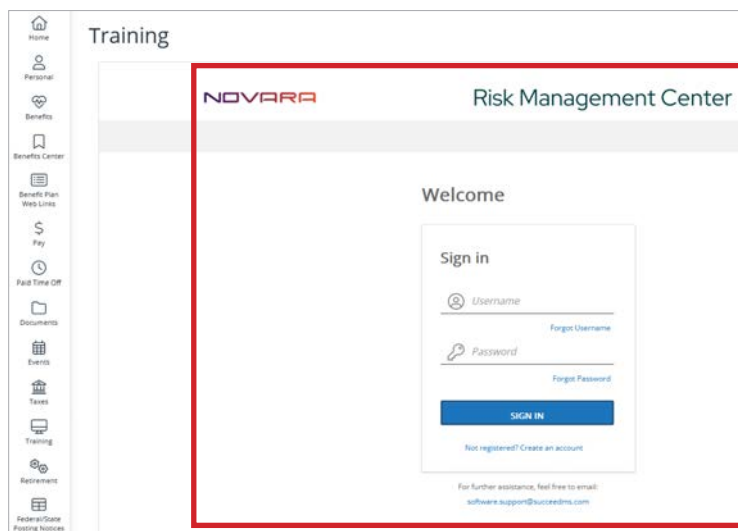
Tax Information

The **Taxes** section allows the employee to review your tax documents and current withholding information, including W-2s, 1099s, and 1095-Cs (as applicable). They can also update their tax elections at any time by submitting changes within this section.



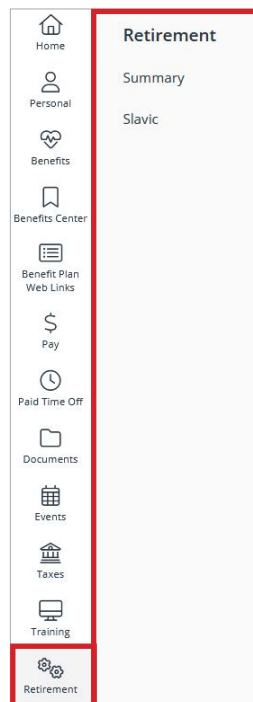
Training

The **Training** section connects the employee to the organization's training or risk management platform, where they can complete required or optional courses.



Retirement Information

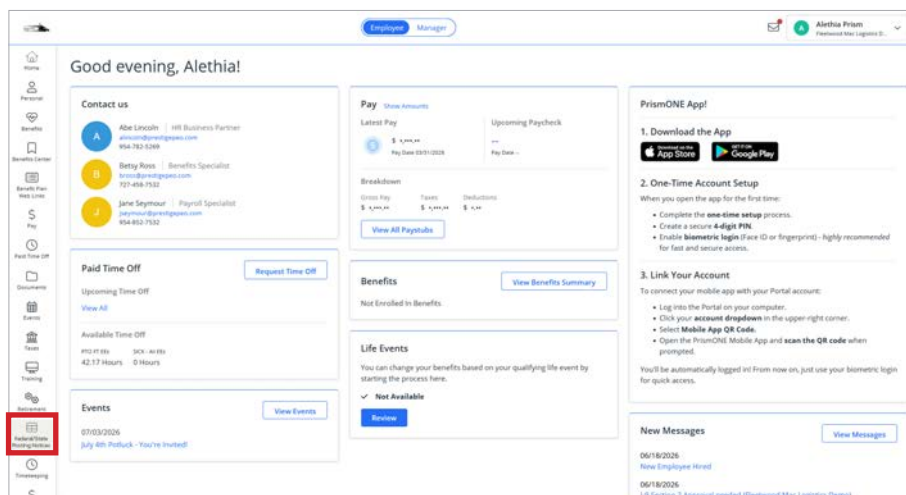
If the organization offers a retirement plan, the **Retirement** section displays contribution totals and balances so the employee can monitor your savings.



Federal State Posting Notices

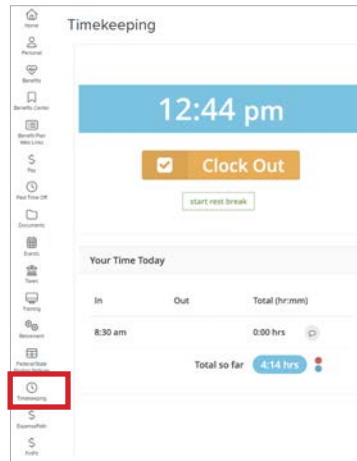
The **Federal/State Posting Notices** section provides access to required employment posters based on the work location.

Note: These notices open in a new window.



Timekeeping

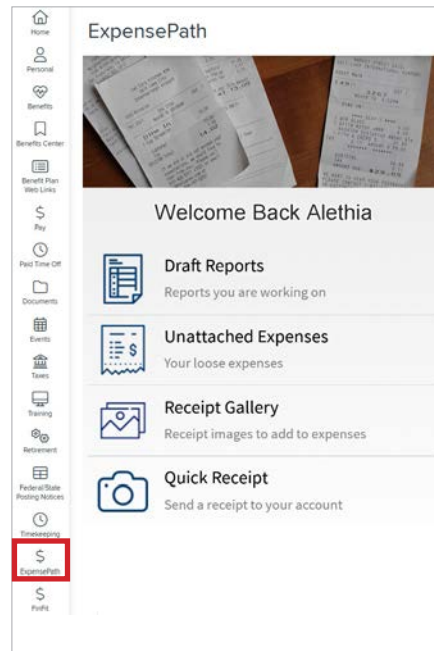
The **Timekeeping** options and actions available to the employee may vary based on the company's time tracking configuration, including how they record time (such as clocking in/out or entering hours manually), available pay or earning codes, scheduling features, and the employee's assigned permissions.



ExpensePath

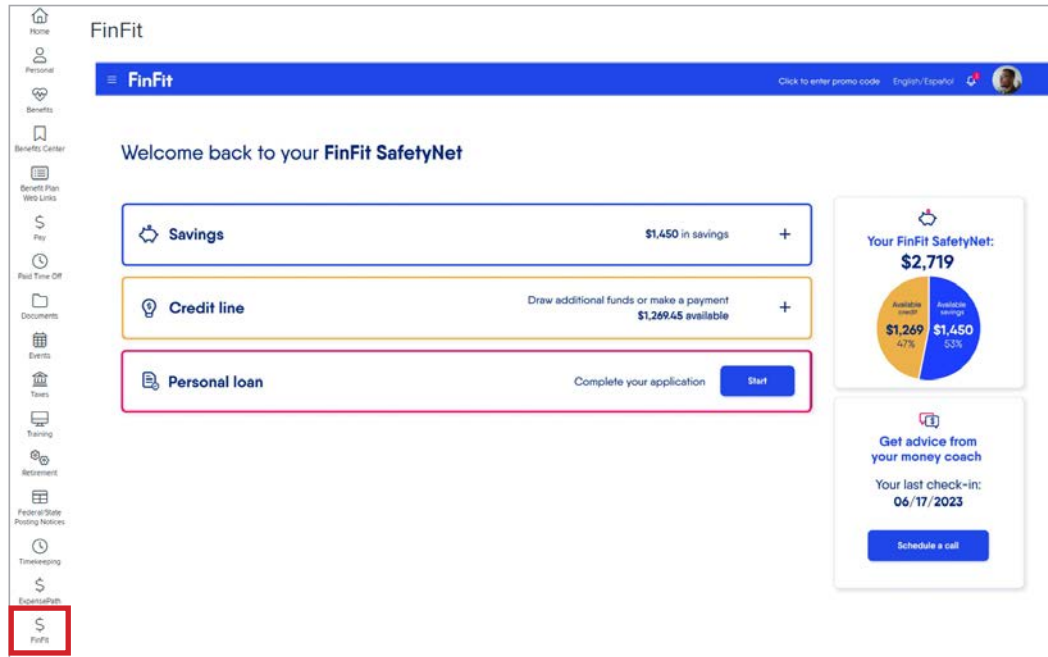
The **ExpensePath** options available in this section may vary depending on the company's configuration.

This includes how the company creates and submits expenses, what information is required, and how the reports are reviewed and approved.



FinFit

The options available in the **FinFit** section may vary depending on how the company has configured financial wellness programs. This includes access to tools and resources designed to support budgeting, financial planning, and overall financial well-being.

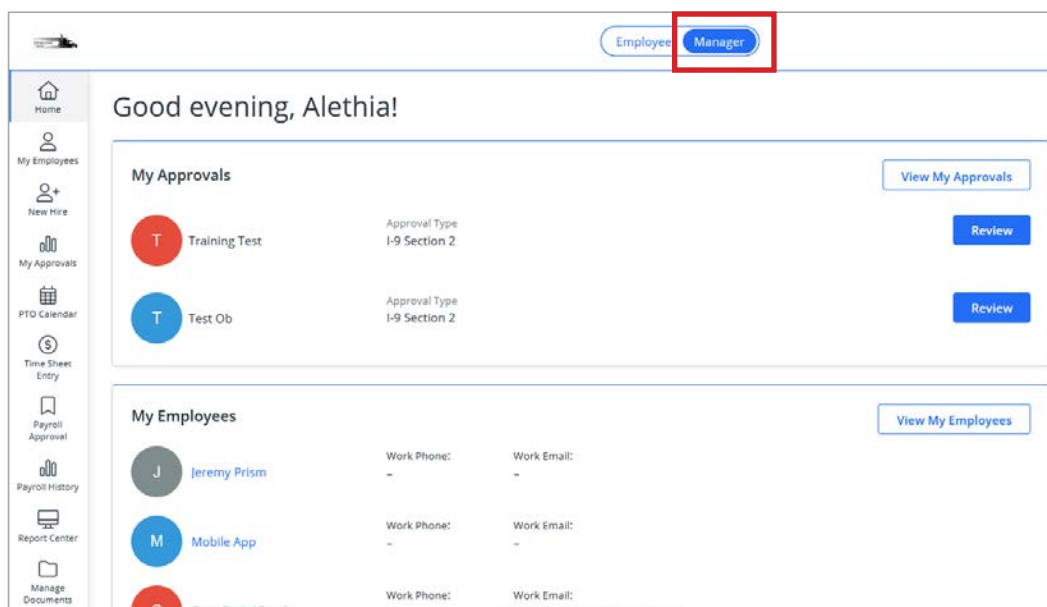


MANAGER ESSENTIALS: DAILY PEOPLE MANAGEMENT

Manager Tools

Manager Dashboard

If you have manager permissions, you will see a **Manager toggle** at the top of the portal. Switching to the Manager view provides access to tools for managing employees, approvals, and HR actions.



Managing My Employees

This section explains how worksite managers can customize the My Employees directory to display only the information and groups that are most relevant to their role. It covers searching for employees, choosing which columns appear, filtering by categories, and viewing employee details.

Customizing your directory view helps you work more efficiently by reducing clutter and making it easier to find employee information.

When Would I Use This?

Use this section when you need to:

- Quickly locate a specific employee
- Customize which employee details appear in the directory
- Filter employees by department or other categories
- View additional employee details from the directory

Getting Started

The **My Employees** screen displays a list of employees you have permission to view. From this screen, you can:

- Search across available employee information
- Customize which columns are displayed
- Filter employees by category
- Open an employee's record to view additional details

Steps:

1. Select **My Employees**.

The screenshot shows the 'My Employees' screen. The left sidebar has a red box around the 'My Employees' link. The main content area displays a table of employees. The table has the following columns: Name, Employee ID, PTO Approver, Department, Position, Type, Last Hire Date, and Status. The table lists 10 employees, including Cigna Test, Devon Mirage, Elizabeth Prism, Jeremy Prism, Kathy Prism, Krista McVie, Mac Fleeton, Mary Poppins, Mick Fleetcaster, and Mobile App. The status for all is 'ACTIVE'.

2. Enter search criteria in the search bar and review the filtered results in the employee list.

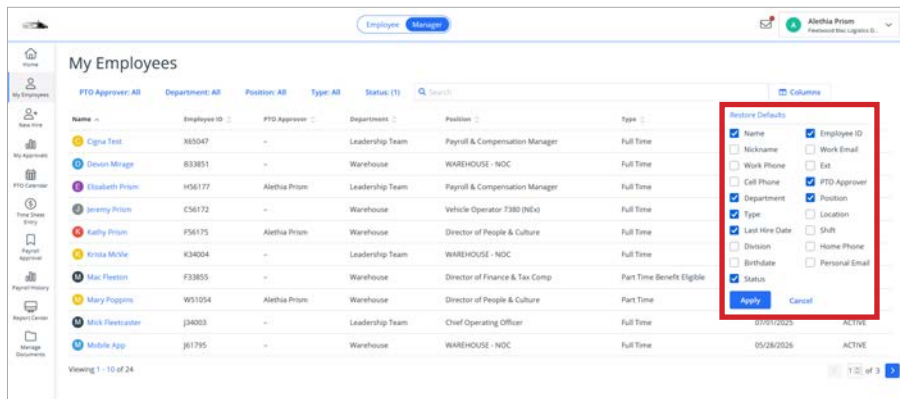
The screenshot shows the 'My Employees' screen with the search bar highlighted. The search bar is located at the top right of the employee list. The table of employees is visible below, showing the same 10 employees as the previous screenshot.

Customizing Column Display Options

Use column display settings to choose which employee details appear in your directory view

Steps:

1. Select **Columns**.
2. Click the columns you want to include or exclude.
3. Select **Apply**.
4. Click a column header to sort employees by that field.

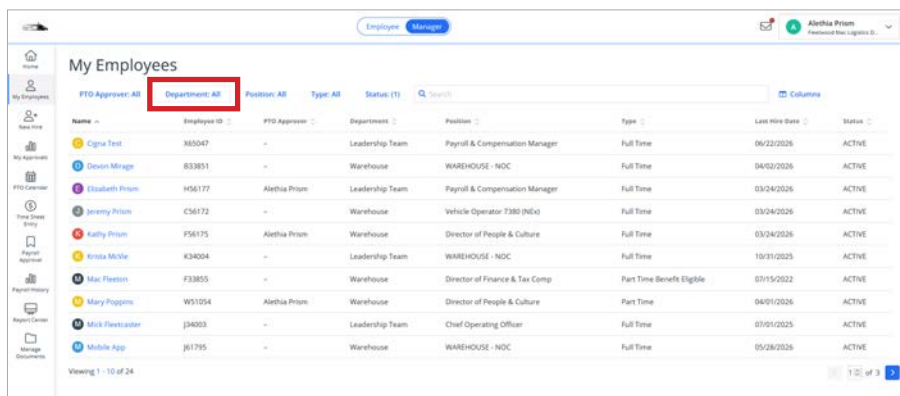


Filtering Employees by Category

Use filters to narrow the employee list to specific categories, such as department.

Steps:

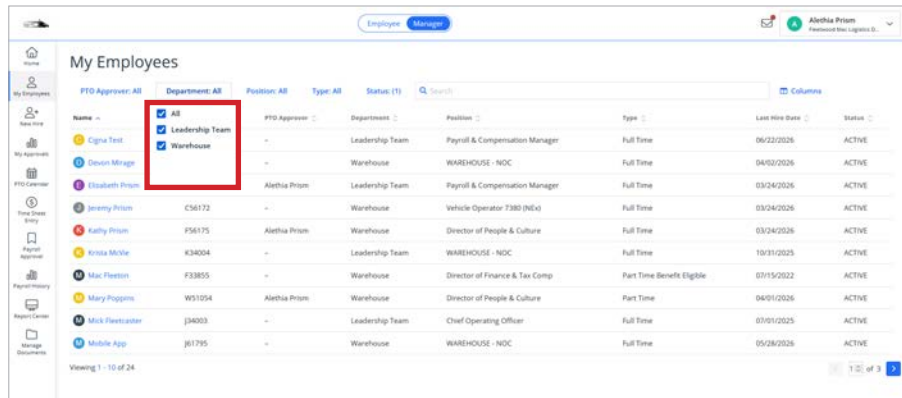
1. Select the category filter (for example, **Department: All**).
2. Check or uncheck categories to include or exclude employees.
3. Review the updated employee list.



Filtering Example

- Uncheck a department to remove those employees from the list.
- When only one department is checked, only employees in that department appear in the directory.

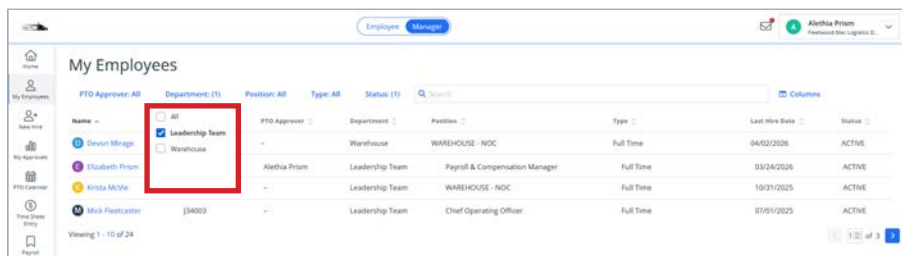
For example: Uncheck the Warehouse option



The screenshot shows the 'My Employees' page with a filter dropdown for 'Department' open. Both 'Leadership Team' and 'Warehouse' are checked. The table below lists all employees, including those from both departments.

Name	PTO Approver	Department	Position	Type	Last Hire Date	Status
Cigna Test	+	Leadership Team	Payroll & Compensation Manager	Full Time	06/22/2026	ACTIVE
Devon Mirage	+	Warehouse	WAREHOUSE - NDC	Full Time	04/02/2026	ACTIVE
Elizabeth Priem	Alethia Priem	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Jeremy Priem	C56172	Warehouse	Vehicle Operator 7380 (NEW)	Full Time	03/24/2026	ACTIVE
Kathy Priem	F56175	Alethia Priem	Director of People & Culture	Full Time	03/24/2026	ACTIVE
Krista McVie	K34004	Leadership Team	WAREHOUSE - NDC	Full Time	10/31/2025	ACTIVE
Mac Fleeter	F33855	Warehouse	Director of Finance & Tax Comp	Part Time Benefits Eligible	07/15/2022	ACTIVE
Mary Poppins	W51054	Alethia Priem	Director of People & Culture	Part Time	04/01/2026	ACTIVE
Mike Fleeter	J34003	Leadership Team	Chief Operating Officer	Full Time	07/01/2025	ACTIVE
Mobile App	J61795	Warehouse	WAREHOUSE - NDC	Full Time	05/28/2026	ACTIVE

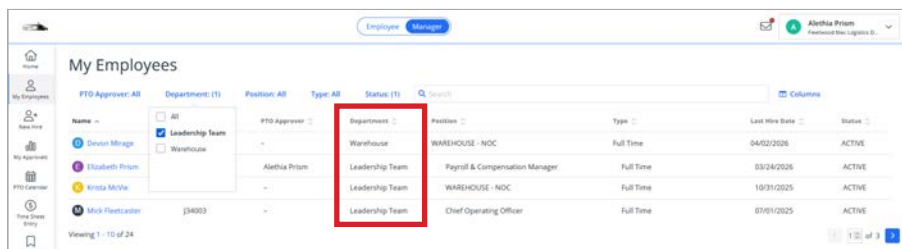
Only the Leadership Team department is checked.



The screenshot shows the 'My Employees' page with the 'Department' filter dropdown open. Only 'Leadership Team' is checked, and 'Warehouse' is unchecked. The table below shows only employees from the Leadership Team.

Name	PTO Approver	Department	Position	Type	Last Hire Date	Status
Devon Mirage	+	Warehouse	WAREHOUSE - NDC	Full Time	04/02/2026	ACTIVE
Elizabeth Priem	Alethia Priem	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Krista McVie	+	Leadership Team	WAREHOUSE - NDC	Full Time	10/31/2025	ACTIVE
Mike Fleeter	J34003	Leadership Team	Chief Operating Officer	Full Time	07/01/2025	ACTIVE

Only the Leadership Team employees are visible in this view.



The screenshot shows the 'My Employees' page with the 'Department' filter dropdown closed. Only the Leadership Team employees are visible in the table.

Name	PTO Approver	Department	Position	Type	Last Hire Date	Status
Devon Mirage	+	Warehouse	WAREHOUSE - NDC	Full Time	04/02/2026	ACTIVE
Elizabeth Priem	Alethia Priem	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Krista McVie	+	Leadership Team	WAREHOUSE - NDC	Full Time	10/31/2025	ACTIVE
Mike Fleeter	J34003	Leadership Team	Chief Operating Officer	Full Time	07/01/2025	ACTIVE

Viewing and Changing Employee Details

This section helps worksite managers view and maintain employee information in the system. Keeping employee records accurate supports correct communication, payroll processing, time-off tracking, and reporting.

Note: *What you can see, or update depends on your assigned permissions. Some options described in this guide may not be available to all managers.*

When Would I Use This?

As a worksite manager, you may use the Employee Details screen to:

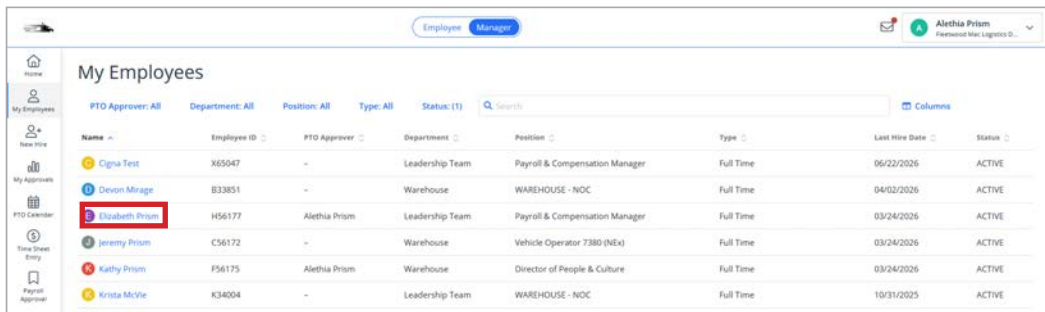
- Look up employee contact information
- Review job and employment details
- Update addresses or emergency contacts (if permitted)
- Check PTO and sick time balances
- Initiate certain employment-related actions (based on permissions)

Important Notes

- Customizing columns and filters only changes your view of the directory.
- Access to employee information is permission-based.
- Some employee details may be view-only.
- Certain updates may require HR review or approval.
- Contact HR or your system administrator if you have questions about access or data visibility.

Viewing Employee Details

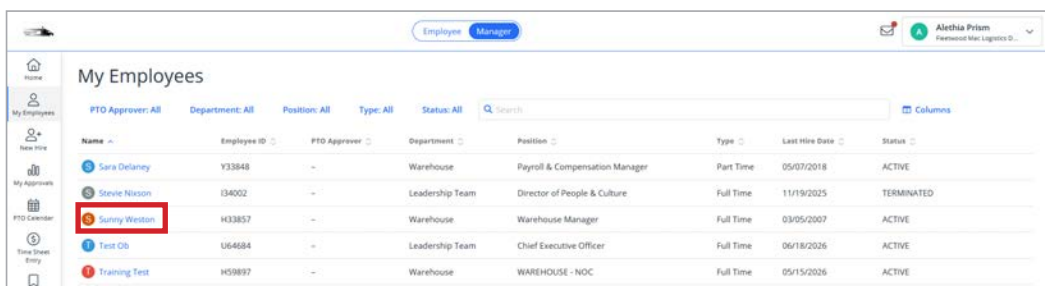
From the **My Employees** dashboard, locate the employee you want to review. Select the **employee's name** to open their **Employee Details** record.



Name	Employee ID	PTD Approver	Department	Position	Type	Last Hire Date	Status
Cigna Test	X65047	-	Leadership Team	Payroll & Compensation Manager	Full Time	06/22/2026	ACTIVE
Devon Mirage	B33851	-	Warehouse	WAREHOUSE - NOC	Full Time	04/02/2026	ACTIVE
Alethia Prism	H56177	Alethia Prism	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Jeremy Prism	C56172	-	Warehouse	Vehicle Operator 7380 (NEX)	Full Time	03/24/2026	ACTIVE
Kathy Prism	F56175	Alethia Prism	Warehouse	Director of People & Culture	Full Time	03/24/2026	ACTIVE
Krista McVie	H34004	-	Leadership Team	WAREHOUSE - NOC	Full Time	10/31/2025	ACTIVE

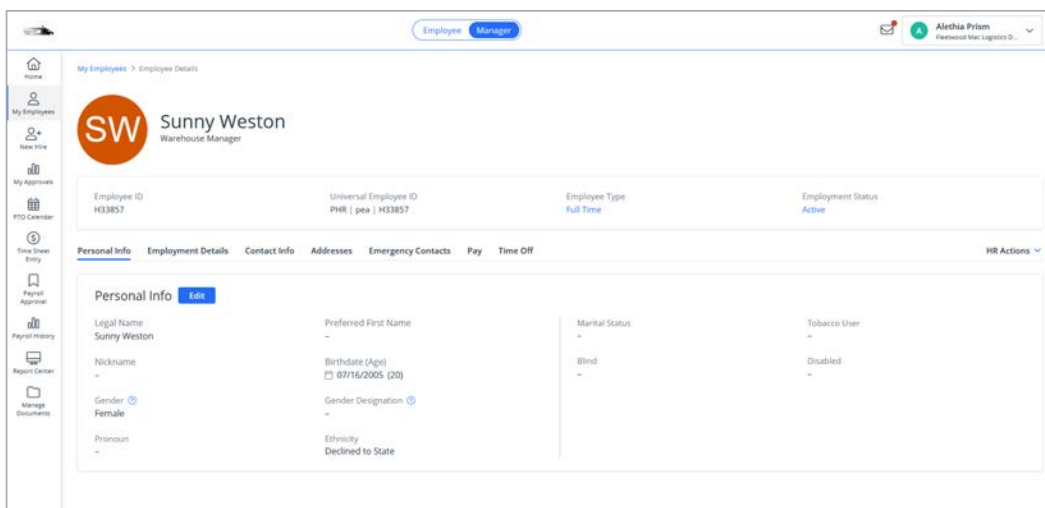
The **Employee Details** screen contains multiple tabs. Each tab organizes different types of employee information.

Use the employee list to open and review additional information for a specific employee. To view additional details about an employee, select their name to display the **Employee Details** tab.



Name	Employee ID	PTD Approver	Department	Position	Type	Last Hire Date	Status
Sara Delaney	Y33848	-	Warehouse	Payroll & Compensation Manager	Part Time	05/07/2018	ACTIVE
Kristie Nicolson	I34002	-	Leadership Team	Director of People & Culture	Full Time	11/19/2025	TERMINATED
Sunny Weston	H33857	-	Warehouse	Warehouse Manager	Full Time	03/05/2007	ACTIVE
Test Ob	U64684	-	Leadership Team	Chief Executive Officer	Full Time	06/18/2026	ACTIVE
Training Test	H39897	-	Warehouse	WAREHOUSE - NOC	Full Time	05/15/2026	ACTIVE

The employee details appear for viewing and editing.



SW Sunny Weston
Warehouse Manager

Employee ID H33857 **Universal Employee ID** PHR | pea | H33857 **Employee Type** Full Time **Employment Status** Active

Personal Info Employment Details Contact Info Addresses Emergency Contacts Pay Time Off **HR Actions**

Personal Info [Edit](#)

Legal Name
Sunny Weston

Preferred First Name
-

Marital Status
-

Tobacco User
-

Nickname
-

Birthdate (Age)
07/16/2005 (20)

Blind
-

Disabled
-

Gender
Female

Gender Designation
-

Ethnicity
Declined to State

Pronoun
-

Employee Information Tabs

The **Employee Information** tabs organize key details about each employee into clear, easy-to-navigate sections. As a worksite manager, you can use these tabs to **review employee records and make updates where permitted**.

Each tab focuses on a specific type of information, such as personal details, job information, pay, or time off. Some tabs allow edits, while others are view-only based on your role and company permissions.

The screenshot shows the 'Employee Information' page for Elizabeth Prism, a Payroll & Compensation Manager. The page has a sidebar with navigation icons and a top bar with the user's name 'Alethia Prism'. The main content area displays employee details for Elizabeth Prism, including Employee ID H56177, Universal Employee ID PHR | pea | H56177, Employee Type Full Time, and Employment Status Active. Below this, a row of tabs is visible: Personal Info, Employment Details, Contact Info, Addresses, Emergency Contacts, Pay, and Time Off. The 'Personal Info' tab is highlighted with a red box. The 'Personal Info' section includes fields for Legal Name (Elizabeth Prism), Preferred First Name (Elizabeth), Marital Status (Married), Tobacco User (No), Nickname, Birthdate (Age) (12/16/1974 (51)), Blind (No), Disabled (No), Gender (Female), and Gender Designation.

Personal Info

Use this tab to review or update basic personal information, such as:

- Legal name and preferred name (nickname)
- Date of birth
- Marital status
- Gender designation
- Tobacco user status
- Blind or Disabled designation

The screenshot shows the 'Employee Information' page for Sunny Weston, a Warehouse Manager. The page has a sidebar with navigation icons and a top bar with the user's name 'Alethia Prism'. The main content area displays employee details for Sunny Weston, including Employee ID H33857, Universal Employee ID PHR | pea | H33857, Employee Type Full Time, and Employment Status Active. Below this, a row of tabs is visible: Personal Info, Employment Details, Contact Info, Addresses, Emergency Contacts, Pay, and Time Off. The 'Personal Info' tab is highlighted with a red box. The 'Personal Info' section includes fields for Legal Name (Sunny Weston), Preferred First Name, Marital Status, Tobacco User, Nickname, Birthdate (Age) (07/16/2005 (20)), Blind, Disabled, Gender (Female), Gender Designation, Pronoun, and Ethnicity (Declined to State).

Employment Details

Use this tab to review employment details, including:

- Job position
- Pay information
- Hire date

You may also update the following employment details:

- PTO Approver
 - Manager
 - Worksite Location
 - Department
 - Benefit Group
 - Performance Review Dates
- **Important:** Changes to job, pay, or employment status require HR involvement or approval.

The screenshot shows the 'Employee Details' page for Elizabeth Prism, a Payroll & Compensation Manager. The page is divided into several sections. At the top, there's a header with the user's name 'Elizabeth Prism' and a 'Payroll & Compensation Manager' role. Below this, there's a section for 'Employee ID' (H56177) and 'Universal Employee ID' (PHR | pea | H56177). The 'Employee Type' is 'Full Time' and the 'Employment Status' is 'Active'. A navigation bar includes tabs for 'Personal Info', 'Employment Details' (which is highlighted with a red box), 'Contact Info', 'Addresses', 'Emergency Contacts', 'Pay', and 'Time Off'. The 'Employment Details' section is further divided into three columns. The first column contains 'Position' (Payroll & Compensation Manager), 'Pay Rate' (\$ 52.00 per hour), 'Annual Salary' (\$ 108,160.00 per year), 'Last Hire Date' (03/24/2026), and 'Original Hire Date' (03/24/2026). The second column contains 'PTO Approver' (Alethia Prism), 'Manager' (Alethia Prism), 'Last Review Date' (03/24/2026), 'Next Review Date' (-), and 'Benefit Group' (Manager). The third column contains 'Location' (NY Operations), 'Department' (Leadership Team), 'Division' (-), 'Shift' (-), 'Project' (-), and 'Work Group' (-). There is an 'Edit' button next to the 'Employment Details' title.

Contact Info

Use this tab to review or update:

- Phone numbers
- Email addresses

Keeping contact information current ensures employees receive important system and company communications.

The screenshot shows the 'Contact Info' tab for an employee named Elizabeth Prism. The tab is highlighted with a red box. The page displays fields for Email (Personal Email: elizabeth.h@na.com, Work Email: --) and Phone (Home Phone: --, Cell Phone: --). The 'Edit' button is visible next to the 'Contact Info' header.

Address

Use this tab to **review or update employee address information**, such as:

- Residential address
- Mailing address
- W-2 address

When would I use this?

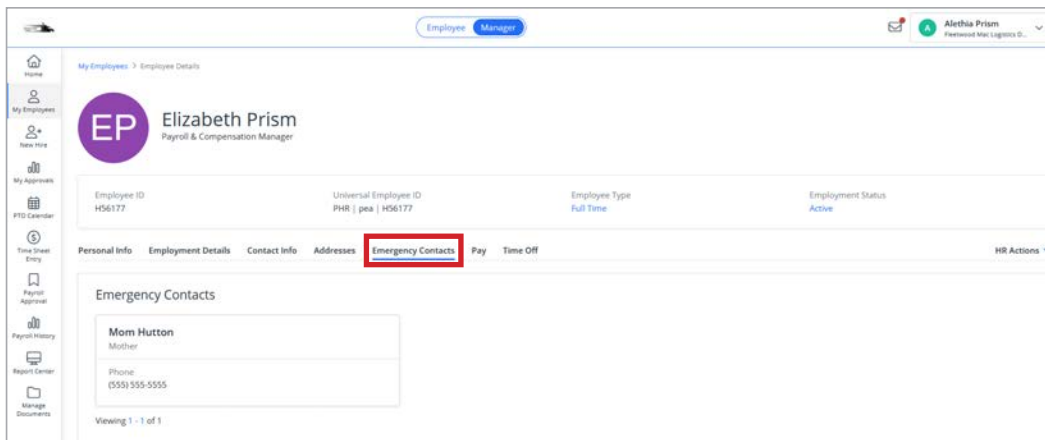
- An employee reports a change of address
- You are verifying address information for records or payroll coordination

The screenshot shows the 'Addresses' tab for an employee named Elizabeth Prism. The tab is highlighted with a red box. The page displays three address sections: Resident (Address Line 1: 1500 Park Place Blvd, Address Line 2: --, City: CLEARWATER, State: FL), Mailing (Address Line 1: --, Address Line 2: --, City: --, State: --), and W-2 (Address Line 1: --, Address Line 2: --, City: --, State: --). Each section has an 'Edit' button.

Emergency Contacts

Use this tab to review **emergency contact information** on file for the employee.

Note: Depending on configuration, employees may also be able to manage their own emergency contacts.



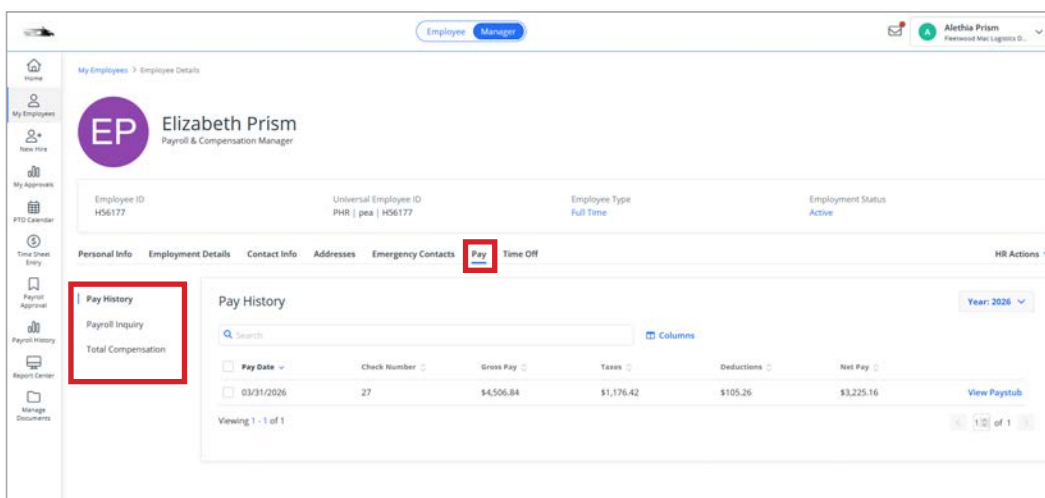
Pay Information

Use this tab to view **employee compensation details**, such as:

- Current pay rate or salary
- Pay frequency (hourly or salaried)
- Standard hours, if applicable

When would I use this?

- To confirm an employee's current pay information
- To answer basic employee questions
- To verify details before initiating a pay change request



Time Off

Use this tab to **review employee time-off information**, including:

- Available PTO and sick time balances
- Planned future time off
- Historical time-off usage

The screenshot shows the 'Time Off' tab for an employee named Elizabeth Prism. The interface includes a sidebar with navigation options like Home, My Employees, My Approvals, PTO Calendar, Time Sheet Entry, Payroll Approval, Payroll History, Report Center, and Manage Documents. The main content area displays the 'Time Off Overview' with two tables: 'PTO FT EEs' and 'SICK - All EEs'. Both tables show 'Available' balances of 2.17 and 18.00 respectively. The 'Planned' tab is selected at the bottom.

Employee Details:

- Employee ID: H56177
- Universal Employee ID: PHR | pea | H56177
- Employee Type: Full Time
- Employment Status: Active

Time Off Overview:

Category	Available
PTO FT EEs	2.17 Available
SICK - All EEs	18.00 Available

Category	Value
Carry Over	0.00
Accrued	42.17
Subtotal	42.17
Taken	0.00
Planned	40.00
Available	2.17

Category	Value
Carry Over	0.00
Accrued	18.00
Subtotal	18.00
Taken	0.00
Planned	0.00
Available	18.00

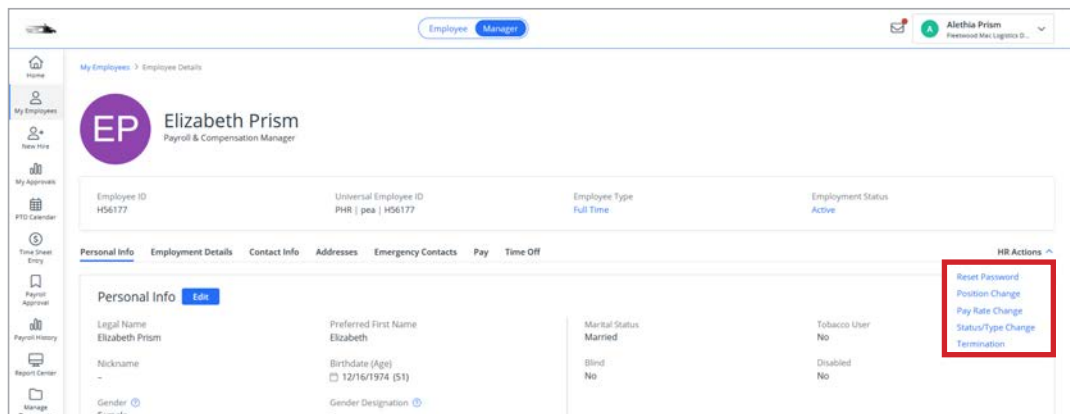
Planned History

MANAGER TRANSACTIONS & HR ACTIONS

HR Actions (Permission-Based)

Some worksite managers may see an **HR Actions** menu on the Employee Details screen. Available options depend on your role and permissions and may include:

- **Reset Password** – Sends a password recovery link to the employee
- **Position Change** – Initiates a job or position update
- **Pay Rate Change** – Submits a pay or hours change
- **Status/Type Change** – Updates employment status or classification



Changing an Employee's Status or Type

This section explains how worksite managers can propose a change to an employee's employment status or type using the Status/Type Change action, when permitted. This process is used to update an employee's employment classification and, if applicable, adjust standard hours.

Status and type changes are sensitive actions and typically require HR or administrative approval before taking effect.

When would I use this?

- An employee's employment status needs to change (for example, active, leave, or other status)
- An employee's employment type needs to be updated
- A future-dated status or type change has been approved
- Standard hours need to be adjusted as part of the change
- You need to review the history of prior status or type changes

Entering a Status or Type Change

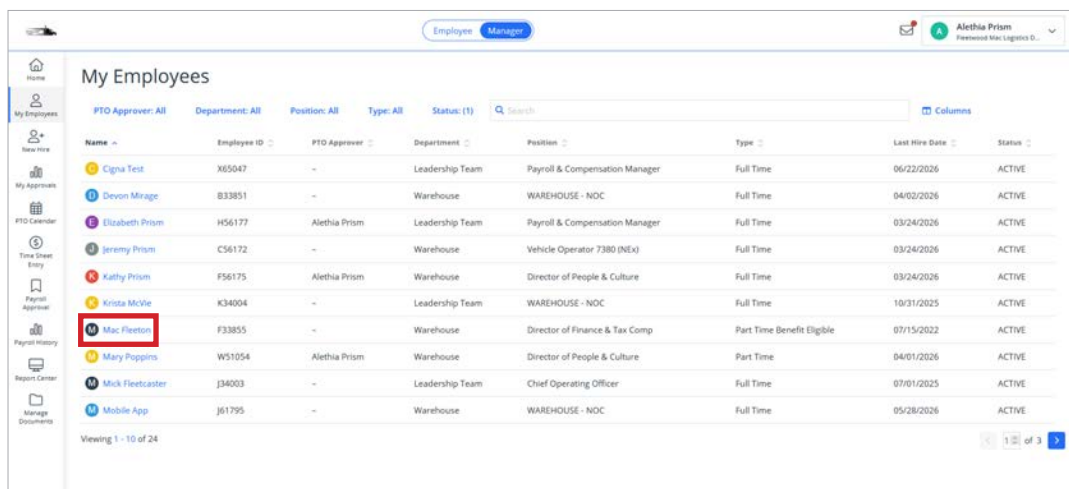
The **Status/Type Change** action is used to **propose updates** to an employee's employment status or type. The action includes two tabs:

- **Detail** – Used to enter and submit a proposed change
- **History** – Used to review previously submitted changes

All submitted changes are logged and may require approval before becoming effective.

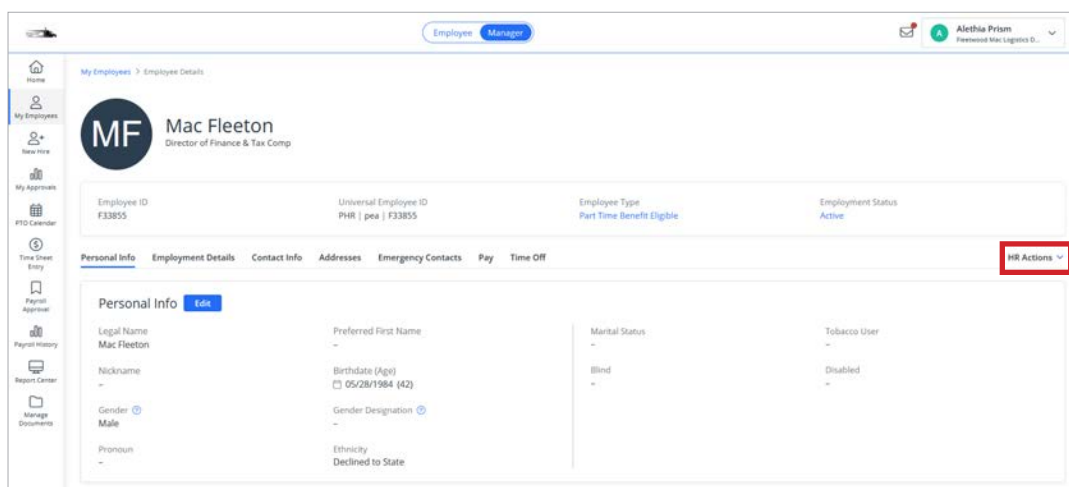
All proposed changes are logged and may require approval before becoming effective.

- From the Manager Dashboard, locate and select the employee.



Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Cigna Test	X65047	-	Leadership Team	Payroll & Compensation Manager	Full Time	06/22/2026	ACTIVE
Devon Mirage	B33851	-	Warehouse	WAREHOUSE - NDC	Full Time	04/02/2026	ACTIVE
Elizabeth Prism	H56177	Alethia Prism	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Jeremy Prism	C56172	-	Warehouse	Vehicle Operator 7380 (NEX)	Full Time	03/24/2026	ACTIVE
Kathy Prism	F56175	Alethia Prism	Warehouse	Director of People & Culture	Full Time	03/24/2026	ACTIVE
Krista McVie	K34004	-	Leadership Team	WAREHOUSE - NDC	Full Time	10/31/2025	ACTIVE
Mac Fleeton	F33855	-	Warehouse	Director of Finance & Tax Comp	Part Time Benefit Eligible	07/15/2022	ACTIVE
Mary Poppo	W51054	Alethia Prism	Warehouse	Director of People & Culture	Part Time	04/01/2026	ACTIVE
Mick Fleetcaster	J34003	-	Leadership Team	Chief Operating Officer	Full Time	07/01/2025	ACTIVE
Mobile App	J61795	-	Warehouse	WAREHOUSE - NDC	Full Time	05/28/2026	ACTIVE

- From the employee record, select HR Actions.



Mac Fleeton
Director of Finance & Tax Comp

Employee ID: F33855 | Universal Employee ID: PHR | pea | F33855 | Employee Type: Part Time Benefit Eligible | Employment Status: Active

HR Actions

Personal Info (Edit)

Legal Name: Mac Fleeton	Preferred First Name: -	Marital Status: -	Tobacco User: -
Nickname: -	Birthdate (Age): 05/28/1984 (42)	Blind: -	Disabled: -
Gender: Male	Gender Designation: -		
Pronoun: -	Ethnicity: Declined to State		

Select **Status/Type Change** from the list.

The screenshot shows the 'Employee Details' page for Mac Fleeton. The 'HR Actions' dropdown menu is open, showing options: 'Reset Password', 'Position Change', 'Pay Rate Change', 'Status/Type Change' (highlighted with a red box), and 'Termination'.

Select **Add New** on the **Status/Type Change** tab.

The screenshot shows the 'Status/Type Change' page. The 'Add New' button is highlighted with a red box. The page displays 'Current Information' and a 'History' section.

In the Proposed changed action, update the following fields:

- New employment status
- New employment type
- Reason for the change
- Effective date of the change

The screenshot shows the 'Status/Type Change' modal form. The 'Proposed Change' section is highlighted with a red box, containing the following fields:

- * New Employment Status (dropdown menu)
- * New Employment Type (dropdown menu)
- * Reason (dropdown menu)
- * Status/Type Date (calendar icon and text input)

There is also an unchecked checkbox for 'Update Employee's Hours' and 'Cancel' and 'Submit Changes' buttons at the bottom.

(Optional) To update hours, select **Update Employee's Hours**.

- Enter the **New Standard Hours**.
- Enter **New Default Time Sheet Hours**, if applicable.

The screenshot shows the 'Status/Type Change' form. The 'Proposed Change' section includes dropdowns for 'New Employment Status' (ACTIVE) and 'New Employment Type' (Full Time). A yellow warning box states: 'For this type, benefits will NOT be terminated if no longer eligible. This type code will be auto-enrolled in any benefit plans.' Below this, there are dropdowns for 'Reason' (Other) and a date field for 'Status/Type Date' (06/25/2026). The 'Update Employee's Hours' checkbox is checked and highlighted with a red box. Below it, a blue information box says: 'Only enter new hours if applicable. Changes to the standard hours field will create a Pay History record for the employee.' At the bottom of the red box, there are two input fields: 'New Standard Hours' and 'New Default Time Sheet Hours'.

Select **Submit Changes**.

This screenshot shows the same 'Status/Type Change' form as the previous one, but with the 'New Standard Hours' field set to '40' and the 'New Default Time Sheet Hours' field set to '40'. The 'Update Employee's Hours' checkbox remains checked. At the bottom right, the 'Submit Changes' button is highlighted with a red box, next to a 'Cancel' button.

Before applying the changes to the employee record, the system displays a warning message to review the details to ensure accuracy. If everything is correct, select **Yes, Change**.

The screenshot shows the 'Status/Type Change' dialog box. A confirmation overlay is displayed in the center with a red warning icon and the text: 'Change Status/Type? Are you sure you want to change Mac Fleeton status from ACTIVE to ACTIVE and type from Part Time Benefit Eligible to Full Time effective on 06/25/2026?'. The overlay has 'Cancel' and 'Yes, Change' buttons. The background dialog box shows 'Proposed Change' with 'New Employment Status' set to 'ACTIVE' and 'New Employment Type' set to 'Full Time'. Other fields include 'Reason' (set to 'Other'), 'Update' (checked), 'Only en record f', 'New Standard Hours' (40), and 'New Default Time Sheet Hours' (40). At the bottom are 'Cancel' and 'Submit Changes' buttons.

After submission, a confirmation message displays indicating the employee's **status/type change has been submitted for approval**.

The screenshot shows the 'Status/Type Change' dialog box with a success message at the top: 'Mac Fleeton Status/Type has been submitted for approval.' with a green checkmark icon. The dialog box shows 'Proposed Change' with 'New Employment Status' and 'New Employment Type' fields. 'Reason' is set to 'Other'. 'Status/Type Date' is set to 'mm/dd/yyyy'. 'Update Employee's Hours' is unchecked. At the bottom are 'Cancel' and 'Submit Changes' buttons.

Reviewing Status or Type Change History

Use the **History** tab to review previously submitted status or type changes.

What the manager can view

- Prior status and type changes
- Effective dates of changes
- Reasons provided
- Approval timing

Permission notes

- History is view-only.
- Historical records cannot be edited.

Important Notes

- Status and type changes affect employment classification and payroll.
- Always confirm required approvals before submitting a change.
- Changes may be future-dated.
- Standard hours updates may impact time sheets and payroll.
- Historical records are view-only.
- If an option is not visible, it is due to permission settings.
- Contact HR or your system administrator with questions.

Once approved, the updated pay rate is reflected in the employee's **Status/Type Change > History** details as of the effective date.

The screenshot displays the 'Status/Type Change' history for an employee named Mac Fleeton. The interface includes a sidebar with navigation options like Home, My Employees, New Hire, My Approvals, PTO Calendar, Time Sheet Entry, Payroll Approval, Payroll History, Report Center, and Manage Documents. The main content area shows the employee's details and a table of status/type changes.

Employee Details:

- Employee ID: F33855
- Universal Employee ID: PHR | pea | F33855
- Employee Type: Full Time
- Employment Status: Active

Status/Type Change History:

Status	Type	Reason	Effective Date	Date Updated
ACTIVE	Full Time	Other	06/25/2026	06/25/2026
ACTIVE	Part Time Benefit Eligible	Other	04/01/2026	04/02/2026
ACTIVE	Part Time	-	07/15/2022	07/22/2025

Changing an Employee's Pay Rate

This section explains how worksite managers can submit a pay rate change request for an employee when permitted. It covers how to enter a new pay rate and standard hours, select effective dates and reasons, and review pay rate history.

Pay rate changes are sensitive actions and may require HR or administrative review before taking effect.

When Would I Use This?

Use this section when:

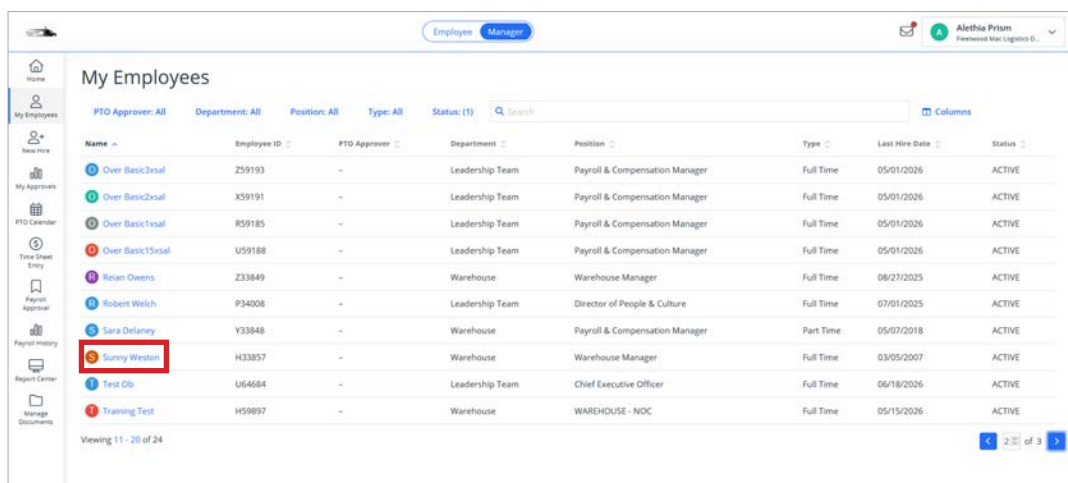
- An employee's pay rate needs to be updated
- An employee's standard hours need to be adjusted
- A future-dated pay change has been approved
- You need to review an employee's pay rate or hours history

Accessing the Pay Rate Change Action

The **Pay Rate Change** action allows permitted managers to **propose updates** to an employee's pay rate and standard hours. Submitted changes are logged and may require approval before becoming effective.

Managers submit pay rate change requests; payroll processing occurs after approval.

1. Sign in to the Portal and from the Manager Dashboard locate and select the employee whose pay rate needs to be updated.



Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Over Basic3xsal	Z59193	-	Leadership Team	Payroll & Compensation Manager	Full Time	05/01/2026	ACTIVE
Over Basic2xsal	X59191	-	Leadership Team	Payroll & Compensation Manager	Full Time	05/01/2026	ACTIVE
Over Basic1xsal	R59185	-	Leadership Team	Payroll & Compensation Manager	Full Time	05/01/2026	ACTIVE
Over Basic1xsal	U59188	-	Leadership Team	Payroll & Compensation Manager	Full Time	05/01/2026	ACTIVE
Reian Owens	Z33849	-	Warehouse	Warehouse Manager	Full Time	08/27/2025	ACTIVE
Robert Welch	P34008	-	Leadership Team	Director of People & Culture	Full Time	07/01/2025	ACTIVE
Sara Delaney	Y33848	-	Warehouse	Payroll & Compensation Manager	Part Time	05/07/2018	ACTIVE
Sunny Weston	H33857	-	Warehouse	Warehouse Manager	Full Time	03/05/2007	ACTIVE
Test 06	U64684	-	Leadership Team	Chief Executive Officer	Full Time	06/18/2026	ACTIVE
Training Test	H59997	-	Warehouse	WAREHOUSE - NDC	Full Time	05/15/2026	ACTIVE

From the employee record, select **HR Actions**.

The screenshot shows the employee record for Sunny Weston, Warehouse Manager. The HR Actions dropdown menu is highlighted with a green box. The menu options are: Reset Password, Position Change, Pay Rate Change, Status Type Change, and Termination.

Employee ID	Universal Employee ID	Employee Type	Employment Status
H33857	PHR pea H33857	Full Time	Active

Legal Name	Preferred First Name	Marital Status	Tobacco User
Sunny Weston	-	-	-

Nickname	Birthdate (Age)	Blind	Disabled
-	07/16/2006 (20)	-	-

Gender	Gender Designation
Female	-

Select **Pay Rate Change**.

The screenshot shows the employee record for Sunny Weston, Warehouse Manager. The Pay Rate Change option is highlighted in the HR Actions dropdown menu with a red box.

Employee ID	Universal Employee ID	Employee Type	Employment Status
H33857	PHR pea H33857	Full Time	Active

Legal Name	Preferred First Name	Marital Status	Tobacco User
Sunny Weston	-	-	-

Nickname	Birthdate (Age)	Blind	Disabled
-	07/16/2006 (20)	-	-

Gender	Gender Designation
Female	-

Select **Add New**.

The screenshot shows the Pay Rate Change page. The Add New button is highlighted with a red box. The page displays current information and a history table.

Effective Date	Pay Rate	Per	Annual Pay	Standard Hours	Change Percent	Change Amount	Reason
04/01/2026	\$6,750.00	Monthly	\$81,000.00	40.00	3.85%	\$3,000.00	Promotion

Entering Pay Rate and Hours Details

The **Pay Rate Change** action appears for entry.

Update the following information:

- **Pay rate** – The amount the employee is paid.
- **Pay period** – The time period used to calculate the employee's pay.
- **Standard hours** – The employee's regularly scheduled work hours.
- **Hours period** – The time period the standard hours apply to.
- **Effective date** – The date the pay rate or hours change takes effect.
- **Reason for the change** – The explanation for why the pay rate or hours update is being made.

Pay Rate Change

Proposed Change

* New Pay Rate

per

▼

* New Standard Hours

per

▼

New Annualized Pay
-

Auto Pay Time Card

?

☐

* Effective Date

mm/dd/yyyy

* Reason

▼

Cancel

Submit Changes

In the **New Pay Rate** field, enter the employee's new pay rate.

In the corresponding **Select Period** field, select the pay period.

The screenshot shows the 'Pay Rate Change' form. The 'Proposed Change' section has two main fields: '* New Pay Rate' and '* New Standard Hours'. The '* New Pay Rate' field is highlighted with a red rectangle and contains the value '\$6,800'. Next to it is a 'per' label and a dropdown menu showing 'Monthly'. The '* New Standard Hours' field is empty. Below these fields, the 'New Annualized Pay' is calculated as '\$81,600.00'. There is a checkbox for 'Auto Pay Time Card' which is unchecked. Below that is an 'Effective Date' field with a calendar icon and a text input showing 'mm/dd/yyyy'. At the bottom is a 'Reason' dropdown menu. The form has 'Cancel' and 'Submit Changes' buttons at the bottom right.

In the **New Standard Hours** field, enter the employee's new hours.

In the corresponding **Select Period** field, select the period for the employee's new hours.

The screenshot shows the 'Pay Rate Change' form. The 'Proposed Change' section has two main fields: '* New Pay Rate' and '* New Standard Hours'. The '* New Standard Hours' field is highlighted with a red rectangle and is empty. Next to it is a 'per' label and a dropdown menu. The '* New Pay Rate' field is also empty. Below these fields, the 'New Annualized Pay' is calculated as '-'. There is a checkbox for 'Auto Pay Time Card' which is unchecked. Below that is an 'Effective Date' field with a calendar icon and a text input showing 'mm/dd/yyyy'. At the bottom is a 'Reason' dropdown menu. The form has 'Cancel' and 'Submit Changes' buttons at the bottom right.

After the new standard hours is entered, the system will display the annualized pay amount.

Pay Rate Change

Proposed Change

* New Pay Rate

\$6,800

per

Monthly

▼

* New Standard Hours

40

per

Weekly

▼

New Annualized Pay

\$81,600.00

Auto Pay Time Card

?

☐

* Effective Date

mm/dd/yyyy

* Reason

▼

Cancel

Submit Changes

In the **Effective Date** field, select the effective date for the pay rate change.

Pay Rate Change

Proposed Change

* New Pay Rate

\$6,800

per

Monthly

▼

* New Standard Hours

40

per

Weekly

▼

New Annualized Pay

\$81,600.00

Auto Pay Time Card

?

☐

* Effective Date

mm/dd/yyyy

* Reason

▼

Cancel

Submit Changes

In the Reason field, select a reason for the pay rate change.

Pay Rate Change

Proposed Change

* New Pay Rate

\$6,800

per

Monthly

▼

* New Standard Hours

40

per

Weekly

▼

New Annualized Pay

\$81,600.00

Auto Pay Time Card

?

☐

* Effective Date

06/25/2026

* Reason

▼

Cancel

Submit Changes

Click **Submit Changes** to save the record.

Pay Rate Change

Proposed Change

* New Pay Rate

\$6,800

per

Monthly

▼

* New Standard Hours

40

per

Weekly

▼

New Annualized Pay

\$81,600.00

Auto Pay Time Card

?

☐

* Effective Date

06/25/2026

* Reason

Merit Increase

▼

Cancel

Submit Changes

Before applying the changes to the employee record, the system displays a warning message to review the details to ensure accuracy. If everything is correct, select **Yes, Change**.

Pay Rate Change

Proposed Change

* New Pay Rate: \$6,800

* New Standard Hours: 40.00

New Annual Pay: \$81,600.00

Auto Pay Time: ☐

* Effective Date: 06/25/2026

* Reason: Merit Increase

Are you sure you want to change **Sunny Weston** pay rate from **\$ 6,750 per month** to **\$ 6,800 per monthly** effective on **06/25/2026**?

Buttons: Cancel, Yes, Change

Bottom Buttons: Cancel, Submit Changes

Submission Confirmation

After submission, a confirmation message displays indicating the **pay rate change has been submitted for approval**.

Employee Details

Sunny Weston
Warehouse Manager

Employee ID: H33857 | Universal Employee ID: PHR | pea | H33857 | Employee Type: Full Time | Employment Status: Active

Pay Rate Change (Add New)

Current Information

Effective Date	Pay Rate	Pay Period	Annualized Pay	Standard Hours	Change Percent	Change Amount	Reason
04/01/2026	\$6,750.00	Monthly	\$81,000.00	40.00	3.85%	\$3,000.00	Promotion
03/05/2007	\$1,500.00	Weekly	\$78,000.00	40.00	-	-	-

Viewing 1 - 2 of 2

Reviewing Pay Rate and Hours History

Use this section to review new and previous pay rate and standard hours changes for the employee.

What the manager can view

- Previous pay rates
- Previous standard hours
- Effective dates of changes

Once approved, the updated pay rate is reflected in the employee's **Pay History**.

Navigate to **Pay > Payroll Inquiry > Pay History** to review the change as of the effective date.

The screenshot shows the PrestigePRO Manager interface for an employee named Sunny Weston, Warehouse Manager. The interface includes a sidebar with navigation options like Home, My Employees, New Hire, My Appointments, PTO Calendar, Time Sheet Entry, Payroll Approval, Payroll History, Report Center, Manage Documents, and Performance Manager. The main content area displays the employee's details and a tabbed interface with options: Personal Info, Employment Details, Contact Info, Addresses, Emergency Contacts, **Pay**, and Time Off. The **Pay** tab is selected, leading to the Payroll Inquiry section. Within Payroll Inquiry, the **Pay History** sub-tab is active, showing a table of pay rate changes. The table has columns for Effective Date, Pay Rate, \$ Change, % Change, and Reason. Three rows of data are visible, with the first row (06/25/2026) highlighted by a red box. The bottom of the table indicates 'Viewing 1 - 3 of 3'.

Effective Date	Pay Rate	\$ Change	% Change	Reason
06/25/2026	\$6,800.00/month	\$600.00/year	0.74/year	Merk Increase
04/01/2026	\$6,750.00/month	\$1,000.00/year	3.85/year	Promotion
03/05/2007	\$1,500.00/week	-	-	-

When Would I Use This?

Use this section when:

- Pay rate changes are sensitive and closely controlled.
- Always confirm required approvals before submitting a change.
- Changes may be future-dated using the effective date.
- Updating standard hours may impact time sheets and payroll calculations.
- Annualized pay updates automatically based on entered values.
- Pay rate and hours history is **view-only** once submitted.
- If an option is not visible, it is due to permission settings.
- Contact HR or your system administrator with questions.

Processing an Employee Position Change

This section explains how worksite managers can submit a position change for an employee when permitted. Use this process for promotions, transfers, demotions, or other role changes to ensure employee records remain accurate.

Position changes are sensitive actions and may require HR or administrative review before taking effect.

Use this when:

- An employee's job role or title is changing
- An employee is transferring to a different position or department
- A position change has been approved and needs to be scheduled
- The employee is not being terminated or rehired

The Position Change action allows permitted managers to submit a proposed update to an employee's position. Changes are effective on the selected start date and are tracked in position history.

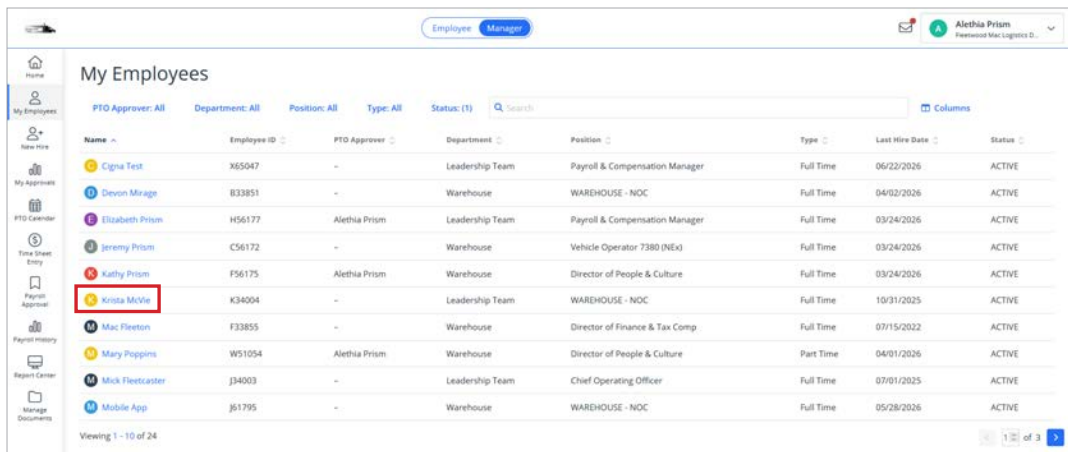
Managers submit position change requests; final updates may require HR review.

Important Notes

- Position changes are sensitive and closely controlled.
- Always confirm approvals before submitting a change.
- Changes may be future-dated.
- Historical position records are view-only.
- If an option is not visible, it is due to permission settings.
- Contact HR or your system administrator with questions.

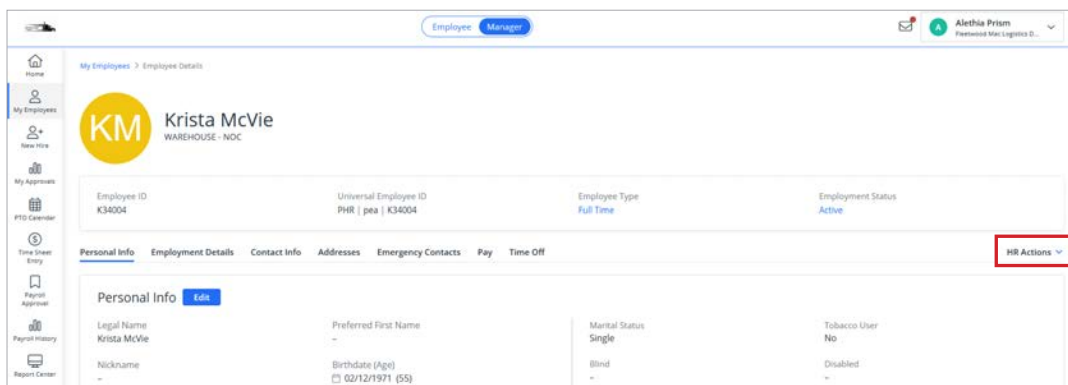
Accessing the Position Change Action

1. From the Manager Dashboard, navigate to My Employees and select the employee whose position is changing.



Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Cigna Test	X65047	-	Leadership Team	Payroll & Compensation Manager	Full Time	06/22/2026	ACTIVE
Devon Mirage	B33851	-	Warehouse	WAREHOUSE - NOC	Full Time	04/02/2026	ACTIVE
Elizabeth Prism	H56177	Alethia Prism	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Jeremy Prism	C56172	-	Warehouse	Vehicle Operator 7380 (NEX)	Full Time	03/24/2026	ACTIVE
Kathy Prism	F56175	Alethia Prism	Warehouse	Director of People & Culture	Full Time	03/24/2026	ACTIVE
Krista McVie	K34004	-	Leadership Team	WAREHOUSE - NOC	Full Time	10/31/2025	ACTIVE
Mac Fleeton	F33855	-	Warehouse	Director of Finance & Tax Comp.	Full Time	07/15/2022	ACTIVE
Mary Poppins	W51054	Alethia Prism	Warehouse	Director of People & Culture	Part Time	04/01/2026	ACTIVE
Mick Fleetcaster	J34003	-	Leadership Team	Chief Operating Officer	Full Time	07/01/2025	ACTIVE
Mobile App	J61795	-	Warehouse	WAREHOUSE - NOC	Full Time	05/28/2026	ACTIVE

2. From the employee record, select HR Actions.



My Employees > Employee Details

KM Krista McVie
WAREHOUSE - NOC

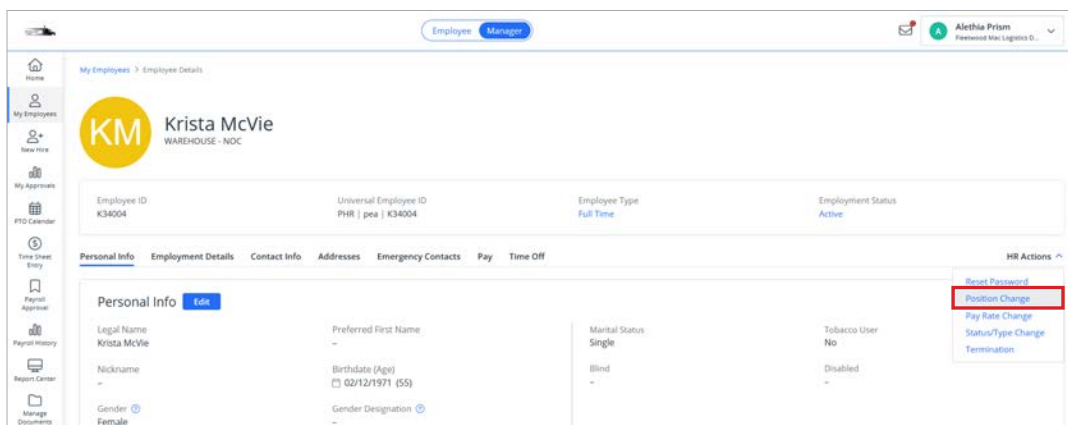
Employee ID: K34004 | Universal Employee ID: PHR | pea | K34004 | Employee Type: Full Time | Employment Status: Active

Personal Info | Employment Details | Contact Info | Addresses | Emergency Contacts | Pay | Time Off | **HR Actions**

Personal Info [Edit](#)

Legal Name: Krista McVie | Preferred First Name: - | Marital Status: Single | Tobacco User: No
Nickname: - | Birthdate (Age): 02/12/1971 (55) | Blind: - | Disabled: -

3. Select **Position Change**.



My Employees > Employee Details

KM Krista McVie
WAREHOUSE - NOC

Employee ID: K34004 | Universal Employee ID: PHR | pea | K34004 | Employee Type: Full Time | Employment Status: Active

Personal Info | Employment Details | Contact Info | Addresses | Emergency Contacts | Pay | Time Off | **HR Actions**

Personal Info [Edit](#)

Legal Name: Krista McVie | Preferred First Name: - | Marital Status: Single | Tobacco User: No
Nickname: - | Birthdate (Age): 02/12/1971 (55) | Blind: - | Disabled: -
Gender: Female | Gender Designation: -

HR Actions dropdown menu:
Reset Password
Position Change
Pay Rate Change
Status/Type Change
Termination

4. Select **Add New** to create a new position change.

The screenshot shows the 'Employee Details' page for Krista McVie. The 'Position Change' tab is active, and the 'Add New' button is highlighted with a red box. The page displays employee information such as Employee ID (K34004), Universal Employee ID (PHR | pea | K34004), Employee Type (Full Time), and Employment Status (Active). The 'Position Change' section shows 'Current Information' with Position (WAREHOUSE - NOC) and Position Start Date (10/31/2025). The 'History' section is also visible.

Complete all required fields in the Change Position window:

- Required fields are marked with an asterisk (*).

The 'Change Position' dialog box is shown. The 'Proposed Change' section contains the following fields:

- * Position (highlighted with a red box)
- * Position Start Date (highlighted with a red box)
- * Reason
- Based on Recent Review (Date)

At the bottom, there are 'Cancel' and 'Submit Changes' buttons.

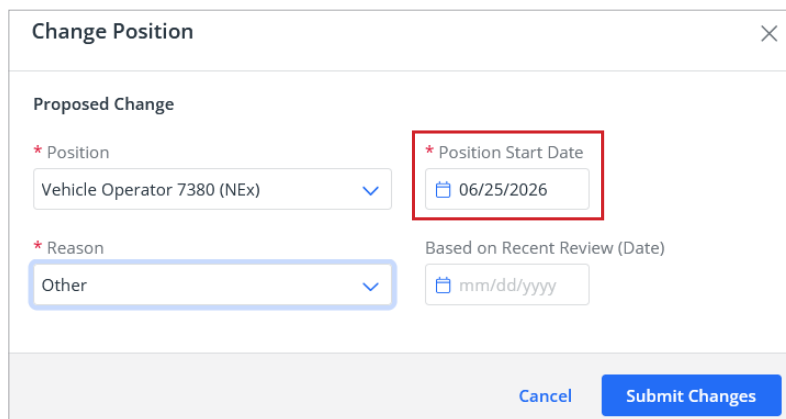
5. In **Position**, enter the employee's new position.

The 'Change Position' dialog box is shown. The 'Proposed Change' section contains the following fields:

- * Position (highlighted with a red box, value: Vehicle Operator 7380 (NEx))
- * Position Start Date (highlighted with a red box)
- * Reason
- Based on Recent Review (Date)

At the bottom, there are 'Cancel' and 'Submit Changes' buttons.

6. In **Position Start Date**, enter the date the new position becomes effective.

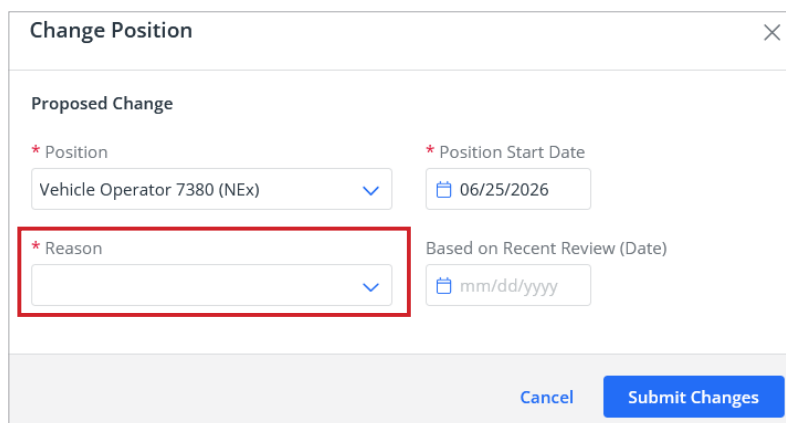


The screenshot shows the 'Change Position' form with the following fields:

- Proposed Change**
 - * Position: Vehicle Operator 7380 (NEx) (dropdown menu)
 - * Position Start Date: 06/25/2026 (calendar icon, highlighted with a red box)
 - * Reason: Other (dropdown menu)
 - Based on Recent Review (Date): mm/dd/yyyy (calendar icon)

Buttons: Cancel, Submit Changes

7. In **Reason Code**, enter the reason for the position change (for example, promotion or transfer).

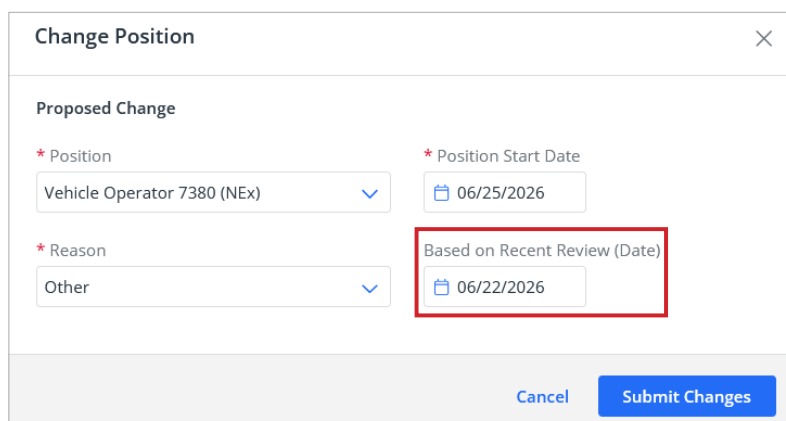


The screenshot shows the 'Change Position' form with the following fields:

- Proposed Change**
 - * Position: Vehicle Operator 7380 (NEx) (dropdown menu)
 - * Position Start Date: 06/25/2026 (calendar icon)
 - * Reason: (empty dropdown menu, highlighted with a red box)
 - Based on Recent Review (Date): mm/dd/yyyy (calendar icon)

Buttons: Cancel, Submit Changes

8. (Optional) In **Based on Recent Review Date Of**, enter the date of the employee's most recent performance review.



The screenshot shows the 'Change Position' form with the following fields:

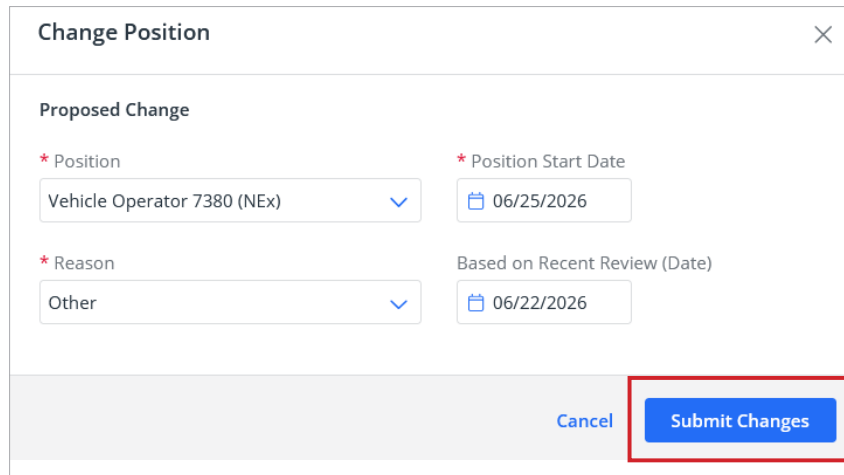
- Proposed Change**
 - * Position: Vehicle Operator 7380 (NEx) (dropdown menu)
 - * Position Start Date: 06/25/2026 (calendar icon)
 - * Reason: Other (dropdown menu)
 - Based on Recent Review (Date): 06/22/2026 (calendar icon, highlighted with a red box)

Buttons: Cancel, Submit Changes

Submitting the Position Change

Final review and submission

1. Review all entered information.
2. Select **Submit Changes**. needs to be reset.



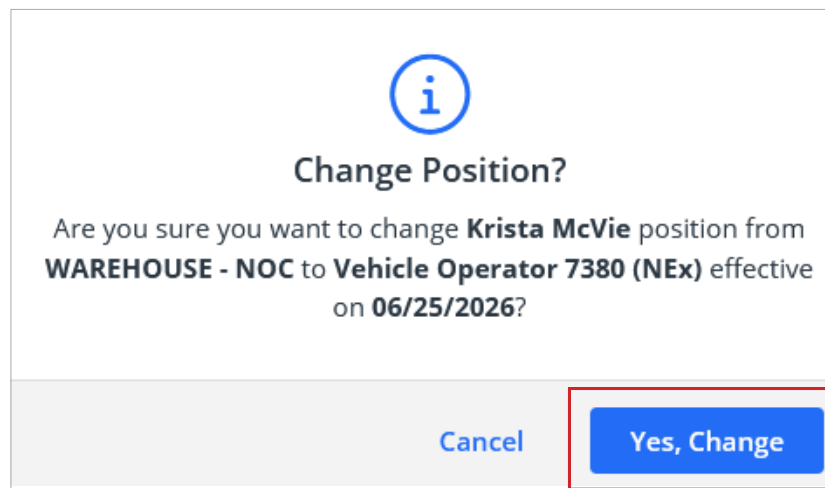
The 'Change Position' dialog box contains the following fields:

- Proposed Change**
 - * Position**: Vehicle Operator 7380 (NEx)
 - * Position Start Date**: 06/25/2026
 - * Reason**: Other
 - Based on Recent Review (Date)**: 06/22/2026

At the bottom, there are two buttons: 'Cancel' and 'Submit Changes'. The 'Submit Changes' button is highlighted with a red border.

3. When prompted, confirm by selecting **Yes, Change**.

Once confirmed, the system will update the employee's position on the selected start date.



The confirmation dialog box displays an information icon and the following text:

Change Position?
Are you sure you want to change **Krista McVie** position from **WAREHOUSE - NOC** to **Vehicle Operator 7380 (NEx)** effective on **06/25/2026**?

At the bottom, there are two buttons: 'Cancel' and 'Yes, Change'. The 'Yes, Change' button is highlighted with a red border.

After You Submit

The updated position will appear in the employee's **Position Change History**.

The screenshot shows the 'Position Change' section for Krista McVie. A green notification at the top states 'Employee Position successfully updated.' The 'History' table lists previous positions, with the current one highlighted in red.

Effective Date	Position
06/23/2025	Vehicle Operator 7380 (NEX)
02/09/2024	WAREHOUSE - NDC - WH
02/04/2024	Chief Operating Officer - COO
01/14/2024	Chief Executive Officer - CEO
12/22/2023	Warehouse Manager - WH_MGR

The employee's Employment Details update on the effective date.

The change may be reviewed or approved by HR, depending on your organization's process.

The screenshot shows the 'Employment Details' section for Krista McVie. The 'Position' field is highlighted in red, showing 'Vehicle Operator 7380 (NEX)'.

Position	PTD Approver	Location
Vehicle Operator 7380 (NEX)	Manager Sara Delaney	CA Operations

Pay Rate	Last Review Date	Department
\$ 32.50 per hour	06/22/2024	Leadership Team

Annual Salary	Next Review Date	Division
\$ 67,600.00 per year	-	-

Last Hire Date	Benefit Group	Shift
10/31/2025	PRIMARY	-

Original Hire Date	Project	Work Group
07/01/2025	-	-

Resetting an Employee's Portal Password

This section explains how worksite managers can initiate a portal password reset for an employee when permitted. It outlines how to access the employee record, send a password recovery link, and confirm the request was successfully submitted.

Password resets are typically used when an employee is unable to access their portal and cannot complete the self-service recovery process.

When Would I Use This?

Use this section when:

- An employee reports they cannot log in to the employee portal
- The employee is unable to reset their password using self-service options
- You are authorized to initiate a password reset on the employee's behalf

Initiating a Password Reset

Password resets are initiated from the employee's record. When you submit a reset request, the system sends the employee a secure recovery link. The employee must complete the reset using that link.

Managers do **not** set or view employee passwords.

1. From the Manager Dashboard and locate and select the employee whose password needs to be reset.

The screenshot shows the 'My Employees' table with the following data:

Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Cigna Test	X65047	-	Leadership Team	Payroll & Compensation Manager	Full Time	06/22/2026	ACTIVE
Devon Mirago	B33851	-	Warehouse	WAREHOUSE - NOC	Full Time	04/02/2026	ACTIVE
Elizabeth Prism	H56177	Alethia Prism	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Jeremy Prism	C56172	-	Warehouse	Vehicle Operator 7380 (NEI)	Full Time	03/24/2026	ACTIVE
Kathy Prism	F56175	Alethia Prism	Warehouse	Director of People & Culture	Full Time	03/24/2026	ACTIVE
Krista McVie	K34004	-	Leadership Team	Vehicle Operator 7380 (NEI)	Full Time	10/31/2025	ACTIVE
Mac Pleeton	F33855	-	Warehouse	Director of Finance & Tax Comp	Full Time	07/15/2022	ACTIVE
Mary Poppins	W51054	Alethia Prism	Warehouse	Director of People & Culture	Part Time	04/01/2026	ACTIVE
Mick Fleetcaster	J34003	-	Leadership Team	Chief Operating Officer	Full Time	03/01/2025	ACTIVE
Mobile App	J61795	-	Warehouse	WAREHOUSE - NOC	Full Time	05/28/2026	ACTIVE

2. Open the **HR Actions** menu and select **Reset Password** to send a recovery link.

This screenshot shows the 'HR Actions' dropdown menu for the employee 'Devon Mirage'. The menu is open, displaying several options: 'Reset Password', 'Position Change', 'Pay Rate Change', 'Status/Type Change', and 'Termination'. The 'Reset Password' option is highlighted with a red rectangular box.

To reset an employee's password, select **Password Reset** and choose the email address or mobile phone number to receive the recovery link.

This screenshot shows the 'Password Reset' form. The form has a section titled 'Reset Password' with a sub-header 'Please choose where the recovery link will be sent to:'. There are two radio button options: 'Devon@foodmaclogistics.com' (which is selected) and '741-727-8525'. Below these options is a blue button labeled 'Send Password Reset'.

Select **Send Password Reset** to send the recovery link to the employee.

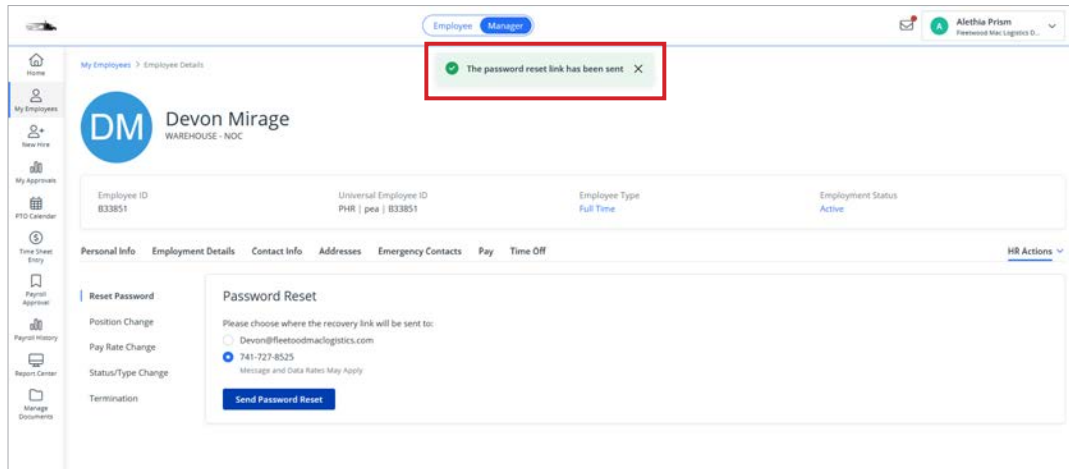
This screenshot is identical to the previous one, showing the 'Password Reset' form. In this version, the 'Send Password Reset' button is highlighted with a red rectangular box.

Confirmation and Employee Next Steps

After the reset is sent, the system displays confirmation that the password reset link was sent.

The employee receives the recovery link by the selected delivery method and then the employee follows the instructions in the link to create a new password.

- Managers cannot see or reset the employee's actual password.
- The recovery link is secure and time-limited.
- If the employee does not receive the link, verify their contact information.



Reviewing, Approving, or Denying Employee Time-Off Requests

This section explains how worksite managers can review and respond to employee time-off requests using the My Approvals area. It covers how to access pending requests, review request details and balances, and either approve or deny time-off requests when permitted.

Use this guide to ensure time-off decisions are made with full visibility into available balances, accruals, and submitted comments, while staying within your assigned permissions.

When Would I Use This?

Use this section when:

- Review pending employee time-off requests
- View available and pending time-off balances
- Approve a single time-off request
- Approve multiple time-off requests at once
- Deny a time-off request and provide a reason

Important Notes

- Always review available and pending balances before approving or denying time-off.
- Denying a request requires a reason.
- Denied requests can be resubmitted by the employee.
- Approval and denial actions are permission-based.
- Approving or denying a request does not change company time-off policies.
- If an option is not visible, it is due to permission settings.
- Contact HR or your system administrator with questions about time-off policies or access.

My Approvals

The **My Approvals** screen displays time-off requests with a status of pending review.

From this screen, you can:

- Review high-level request information
- Open request details
- Approve or deny requests (if permitted)

From the Manager Dashboard, access **My Approvals** using one of the following methods:

- From the **My Approvals** widget on the Manager Dashboard
- From the toolbar, select **My Approvals**

Good evening, Alethia!

My Approvals [View My Approvals](#)

T	Training Test	Approval Type: I-9 Section 2	Review
T	Test Ob	Approval Type: I-9 Section 2	Review
K	Kathy Prism	Approval Type: Leave Request	Review

My Employees [View My Employees](#)

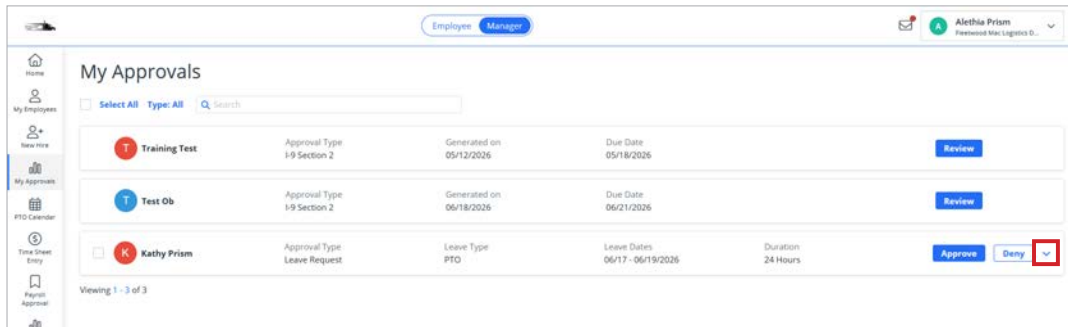
K	Kathy Prism	Work Phone: -	Work Email: -
D	Devon Mirage	Work Phone: 727-741-2563	Work Email: Devon@fleetoodmaclogistics.com
K	Krista McVie	Work Phone: 728-541-2354	Work Email: krista@fleetoodmaclogistics.com
S	Sunny Weston	Work Phone: 727-741-1556	Work Email: sunny@fleetoodmaclogistics.com
M	Mac Fleeton	Work Phone: 452-782-1453	Work Email: jokersmommy7495@gmail.com

Reviewing Time-Off Request Details

Use this section to review all relevant information before approving a request.

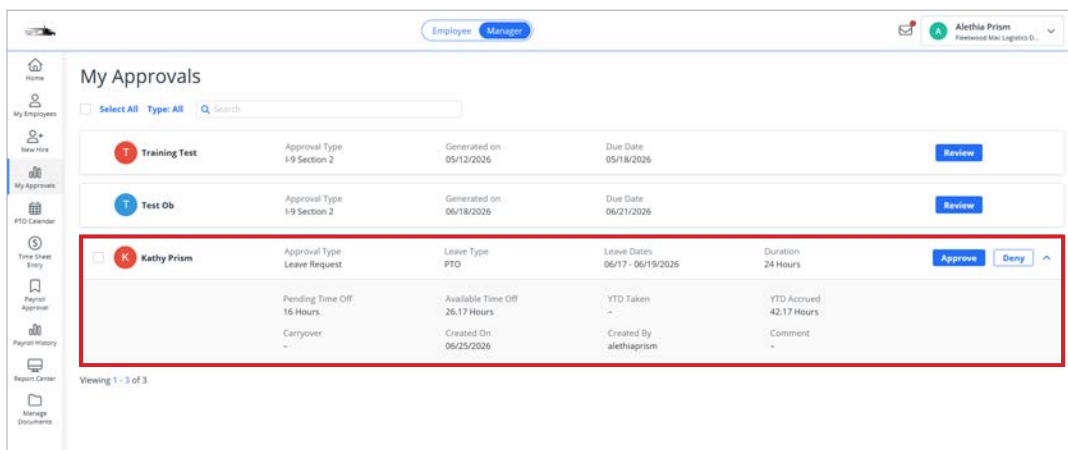
- Reviewing the details of a submitted time-off request
- Viewing balances and accrual information to support approval decisions

Select the **More Details** drop-down arrow to display additional information for the time-off request.



The **More Details** drop-down arrow displays:

- **Pending time-off balance** – Projected balance including pending requests
- **Available time-off balance** – Current balance available for use
- **Year-to-date accruals and usage** – Hours earned and used so far this year
- **Applicable carryover hours** – Hours carried over from a prior period, if applicable
- **Submission date** – Date the request was submitted
- **Submitting employee** – Employee who submitted the request
- **Comments included with the request** – Notes provided with the request



Approving / Denying Time-Off Requests

Use this section to respond to time-off requests by approving or denying them, depending on the situation and your permissions.

What the manager can view or update (if permitted)

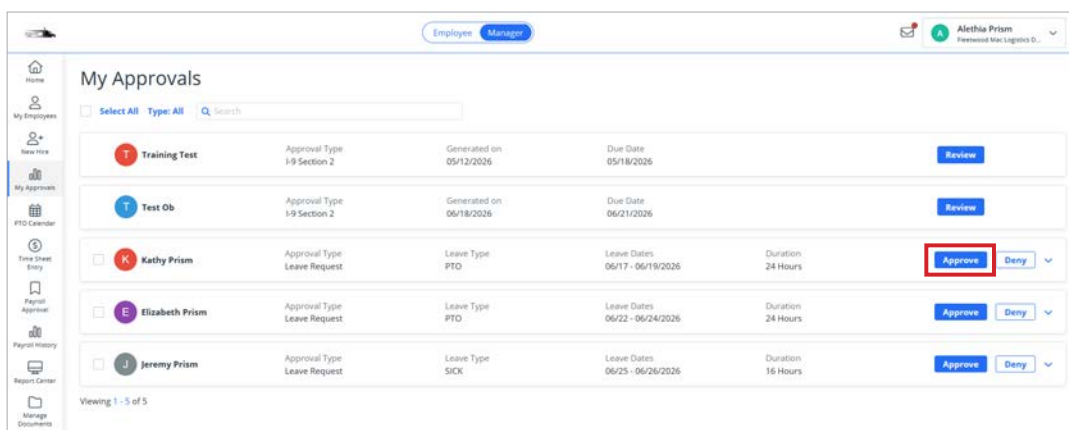
- Approve individual time-off requests
- Approve multiple time-off requests at once
- Deny individual time-off requests with a required reason

Approving an Individual Request

Use this option when reviewing and responding to one request at a time.

Steps:

1. Locate the time-off request in **My Approvals**.
2. Review the request details.
3. Select **Approve** on the corresponding request.

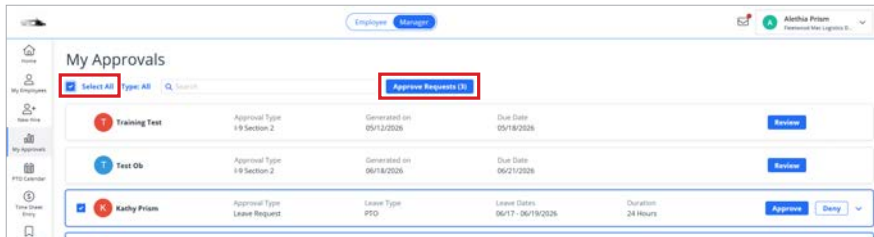


Approving Multiple Requests at Once

Use this option to quickly approve several requests when appropriate.

Steps:

1. Select **Select All** to choose multiple pending requests.
2. Select **Approve Requests**.



Denying a Time-Off Request

Use this option when a time-off request cannot be approved and needs to be returned to the employee.

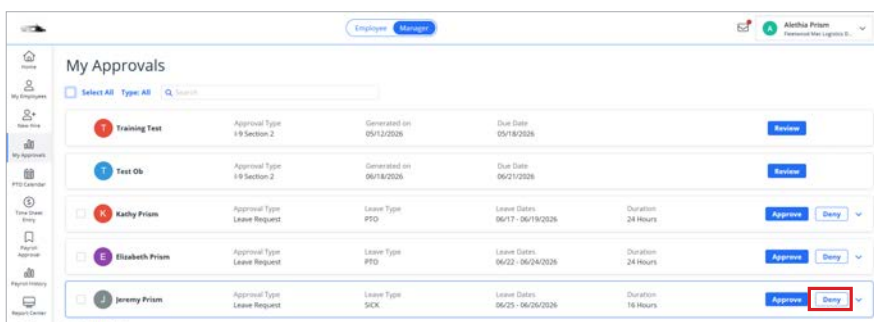
Important Notes

- Denying a request does not delete it.
- A denial reason is required.
- Denied requests may be updated and resubmitted by the employee.
- Managers do not adjust time-off balances when denying requests.

Steps:

1. Locate the time-off request in My Approvals.
2. Review the request details.
3. Select Deny on the corresponding request.
4. Enter the required denial reason.
5. Select Deny Request to confirm.

Once the request is denied, its status updates and the employee is notified of the reason for the denial.



Team PTO Calendar

This section explains how worksite managers can use the Team PTO Calendar to view employee paid time off (PTO). It covers how to review pending and approved PTO, filter and search requests, switch between calendar and list views, and view request details.

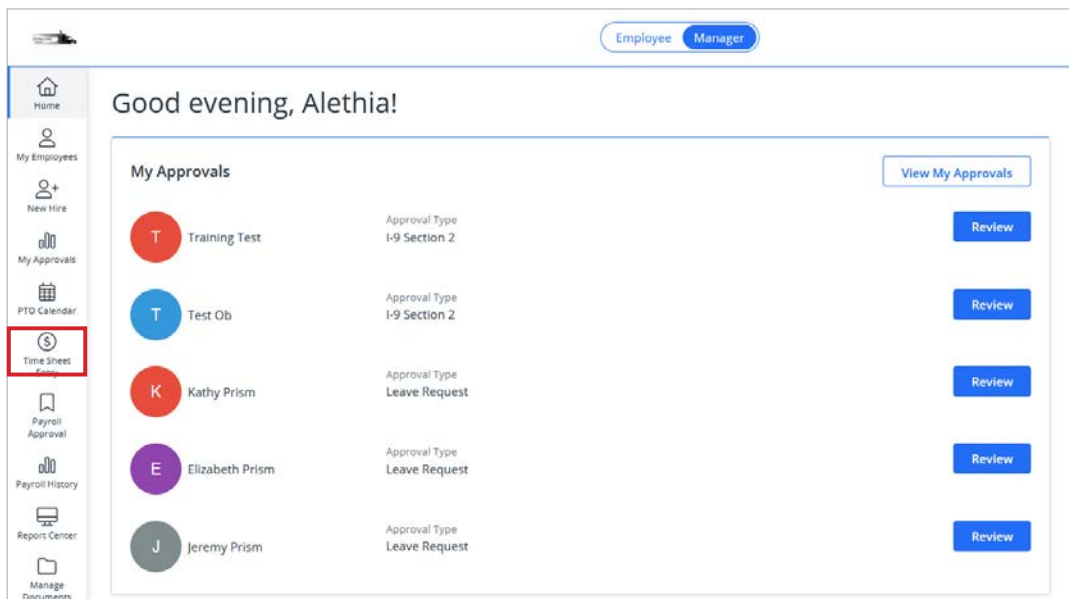
The Team PTO Calendar is a viewing and planning tool and does not replace the PTO approval process.

When Would I Use This?

- View upcoming employee PTO
- Plan coverage for your team
- Review pending or approved PTO requests
- Quickly see who is out on specific dates
- View details and notes for a PTO request

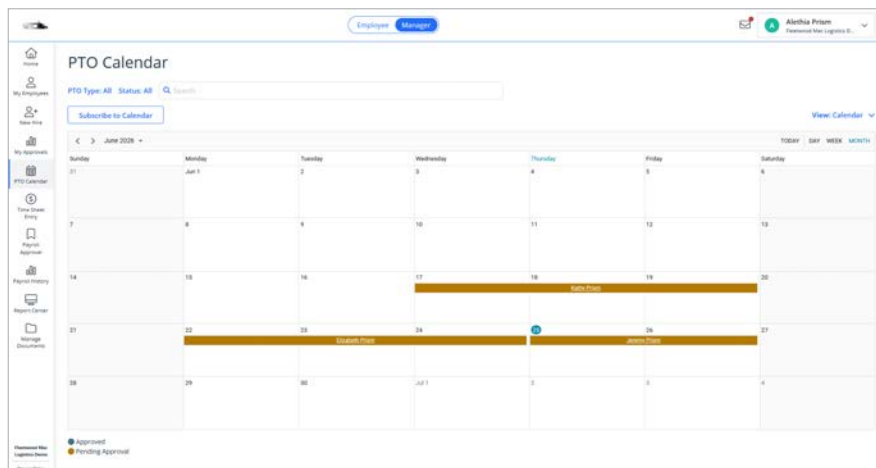
Viewing PTO on the Calendar

Sign in to the Portal and from the Manager Dashboard, navigate to **PTO Calendar or Team PTO Calendar**.



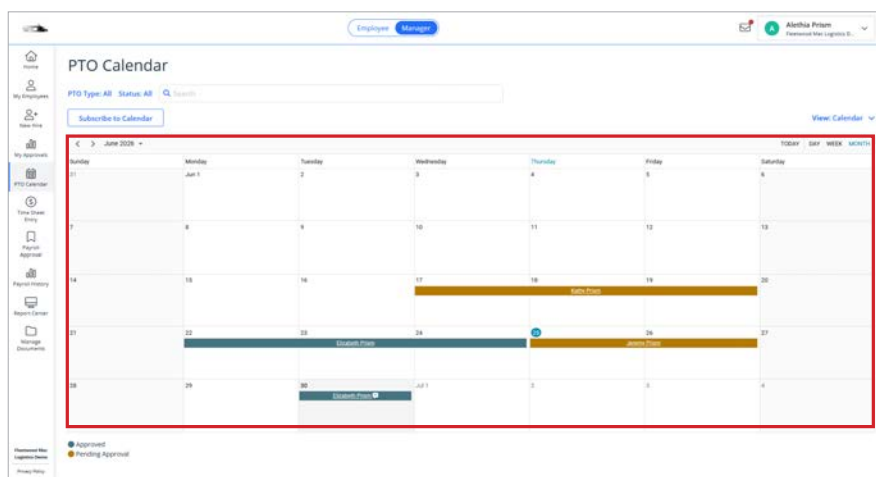
The **Team PTO Calendar** displays employee PTO in either a **monthly calendar view** or a **list view**. You can filter and search the calendar to focus on specific PTO types, request statuses, or employees.

Only PTO requests you are permitted to view appear on the calendar.



Review PTO directly on the monthly calendar.

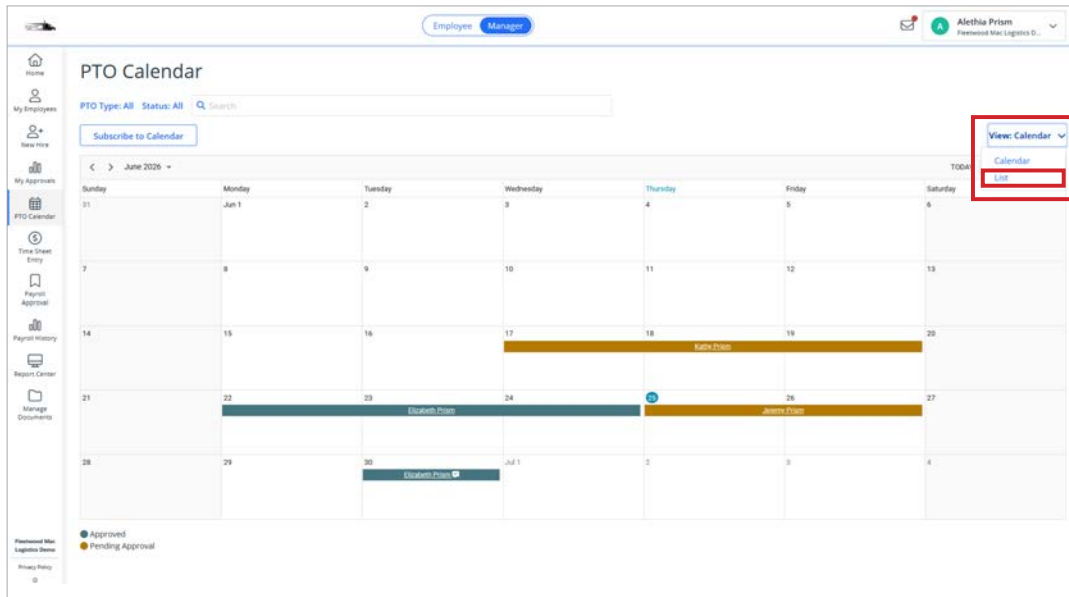
Select a PTO entry to view the associated time and notes.



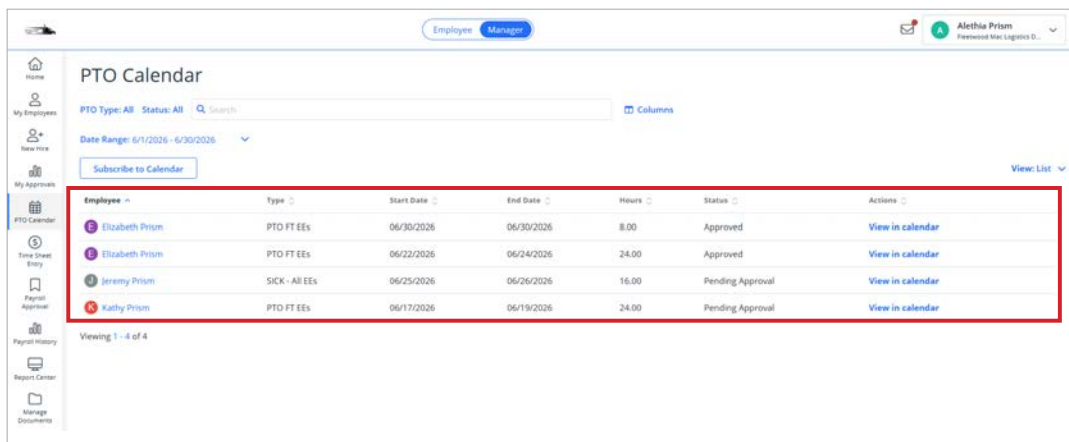
Viewing PTO in List View

Use the list view to review PTO requests in a table format.

1. Select **View**.
2. Switch from **Calendar** to **List**.



PTO requests are displayed in a list view instead of the calendar view.



Subscribing to the Team PTO Calendar

Use this option to subscribe to the Team PTO Calendar in an external calendar application (such as Outlook or Google Calendar). This allows you to view employee PTO events alongside your own calendar.

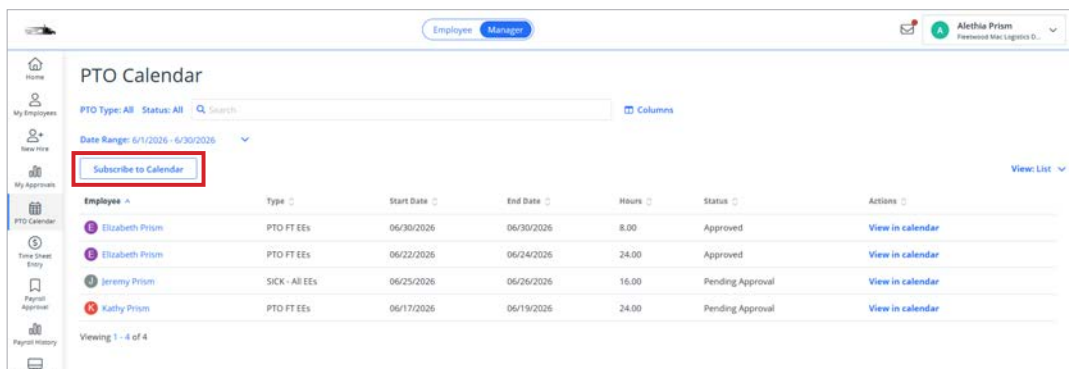
1. Subscribing provides view-only access and does not allow you to edit PTO requests.
2. The subscribed calendar is read-only.
3. Subscription access is permission-based.
4. If you no longer want the calendar, you can remove the subscription from your calendar application.

Important Notes

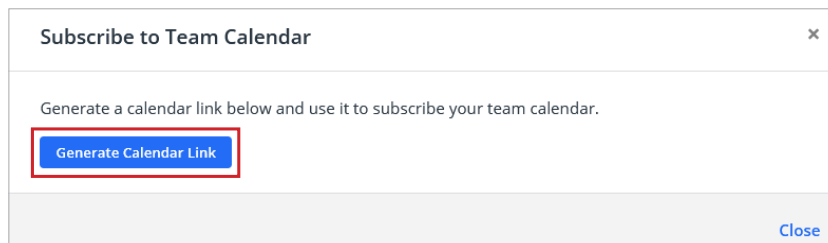
1. Subscribing helps with planning and visibility but does not replace approvals.
2. Use My Approvals to take action on PTO requests.
3. If the subscription option is not visible, it is due to permission settings.

Steps:

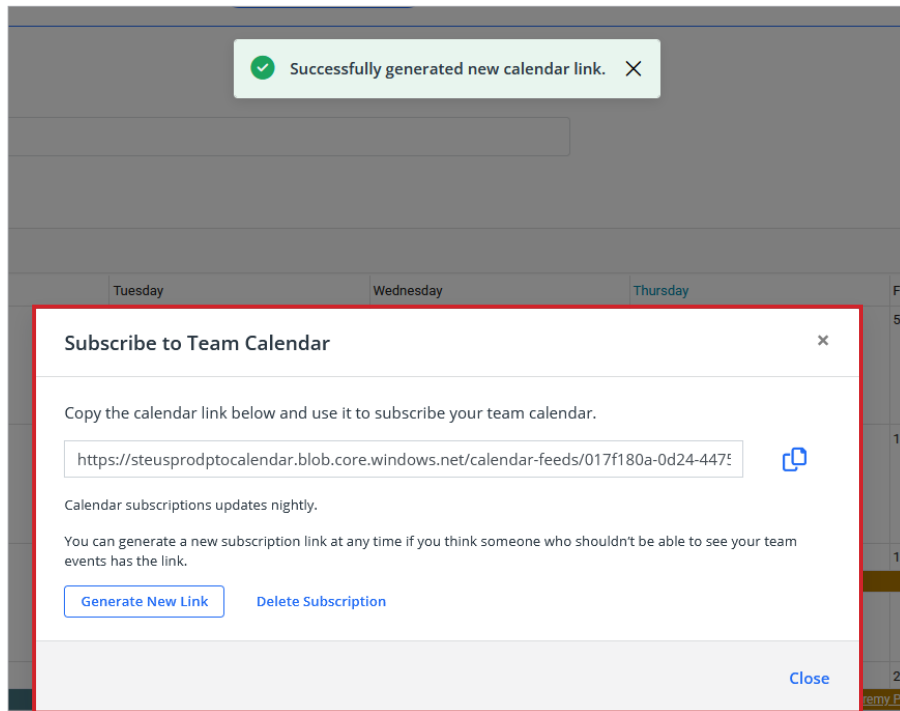
1. From the Team PTO Calendar, select **Subscribe to Calendar**.



2. Select **Generate Calendar Link**.



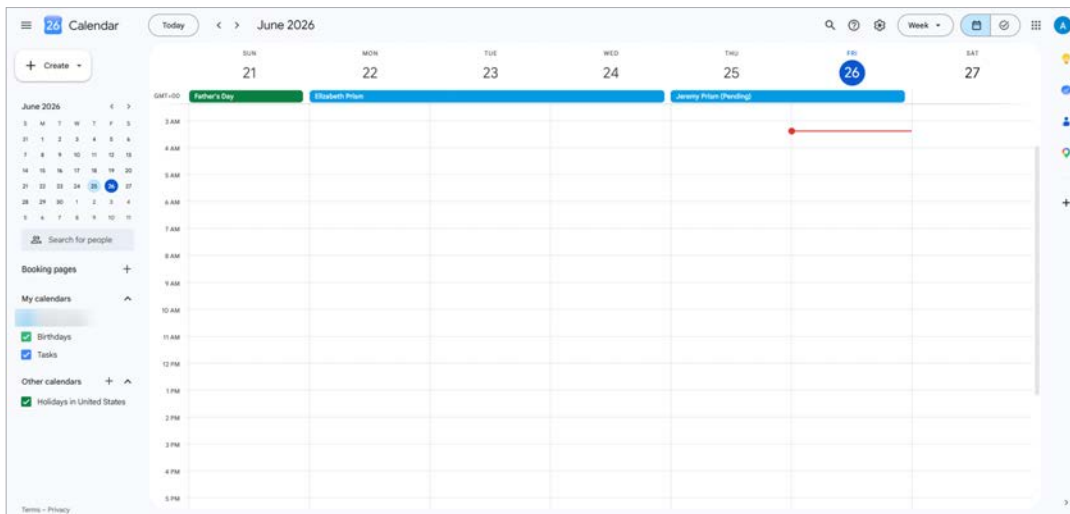
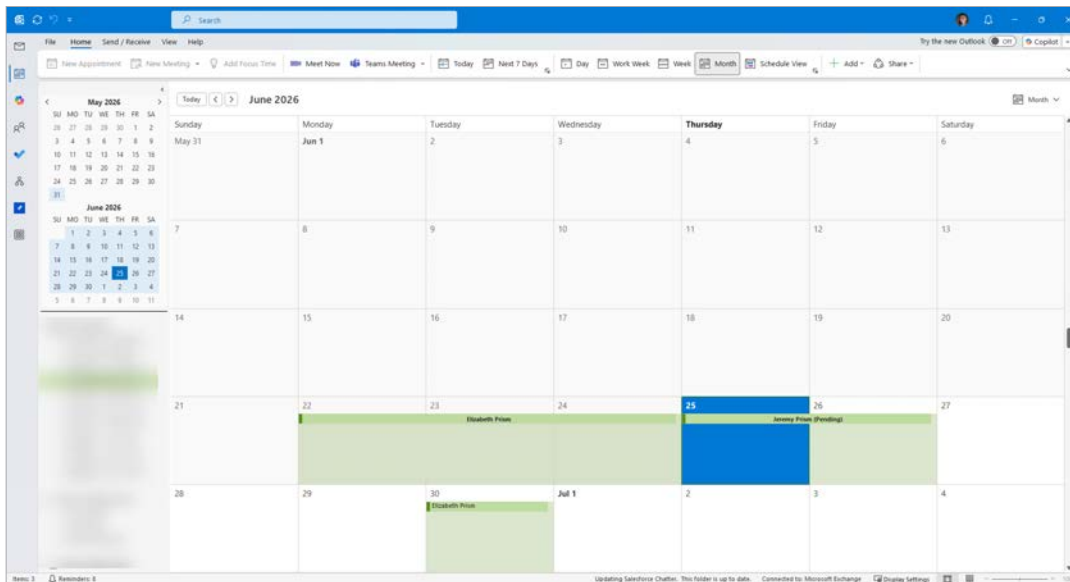
3. Copy the generated calendar link.
4. Paste the link into your internet browser to generate the calendar import file.
5. Import the file into your preferred calendar application to complete the subscription.



How the subscription works

After importing the calendar into Outlook, employee PTO events appear alongside your existing calendar events or as a separate calendar and update automatically.

1. The subscribed calendar updates automatically when PTO requests are added, approved, or changed.
2. Only PTO events you are permitted to view appear on the subscribed calendar.
3. Changes to PTO requests must still be completed in the portal.



New Hire Dashboard

This section explains how worksite managers use the New Hire Dashboard to initiate the hiring process for a new employee. It covers entering required employee information, sending a Welcome Message, and managing new hire records before onboarding is completed.

The New Hire Dashboard supports data entry and coordination; final onboarding steps may require employee action or HR review.

When Would I Use This?

- Add a new employee to the system
- Enter personal, employment, and pay information
- Send or resend a Welcome Message
- Review or update a pending new hire record
- Remove a new hire record that was entered in error

Beginning the Hiring Process

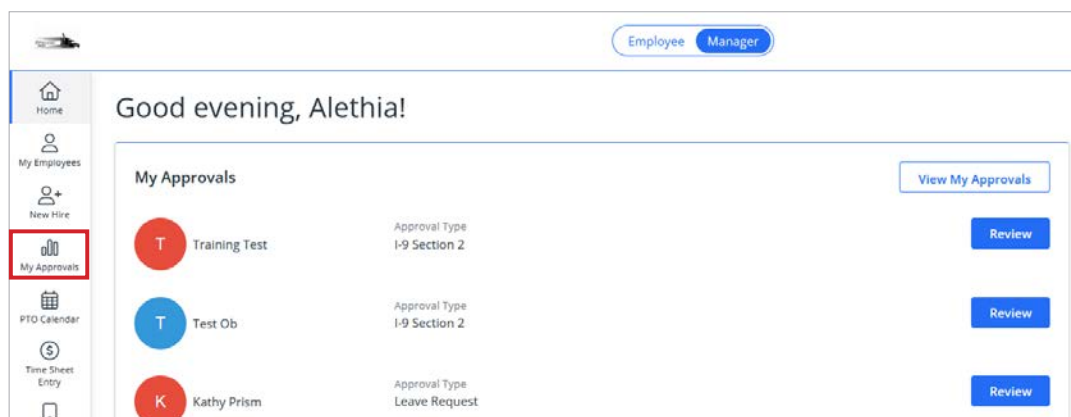
The **New Hire Dashboard** displays new employee records that are in progress. From this screen, you can:

- Start a new hire
- Filter and search existing new hire records
- Send or resend Welcome Messages
- View, edit, or delete new hire entries

Only records you are permitted to view or manage appear on the dashboard.

Steps:

1. From the Manager Dashboard, navigate to New Hire or New Hire Dashboard.



2. To add a new employee to the system, select **Hire New Employee**.

The screenshot shows the 'New Hire' page with a sidebar on the left containing navigation links like Home, My Employees, My Approvals, PTO Calendar, Time Sheet Entry, Request Approval, Payroll History, Request Center, and Manage Documents. The main content area has tabs for 'Candidates', 'New Hires', and 'Completed'. Below the tabs is a search bar and a table of new hires. A red box highlights the 'Hire New Employee' button in the top right corner.

Name	Hire Status	Employee ID	Hire Date	Start Date	Hired By
Colin Eagle	Not Started	-	04/02/2026	04/06/2026	Alethia Joney - Prism
Frank Jones	In Progress	N59999	05/13/2026	05/13/2026	Jennifer Jackson - Kerry Demo

3. The **New Hire Action** displays.

Note: Required fields are indicated by an asterisk*.

The screenshot shows the 'New Hire Form' with a sidebar on the left containing navigation links like Home, My Employees, My Approvals, PTO Calendar, Time Sheet Entry, Request Approval, Payroll History, Request Center, and Manage Documents. The main content area has a 'New Hire Form' section with two sub-sections: 'Employee Personal Info' and 'Employment Details'. The 'Employee Personal Info' section includes fields for First Name, Last Name, Personal Email Address, and Mobile Phone. The 'Employment Details' section includes fields for Work Location, Position, Employment Type, Department Code, Employer ID, Employment Status, and Start Date. A red box highlights the 'Employee Personal Info' section.

4. Enter required information in the Employee Personal Info section.

The screenshot shows the 'New Hire Form' with a sidebar on the left containing navigation links like Home, My Employees, My Approvals, PTO Calendar, Time Sheet Entry, Request Approval, Payroll History, Request Center, and Manage Documents. The main content area has a 'New Hire Form' section with two sub-sections: 'Employee Personal Info' and 'Employment Details'. The 'Employee Personal Info' section is highlighted with a red box and contains the following information: First Name (Toni), Last Name (Silveira), Personal Email Address (noemail@na.com), and Mobile Phone (4405) 777-7777. The 'Employment Details' section includes fields for Work Location, Position, Employment Type, Department Code, Employer ID, Employment Status, and Start Date.

5. Enter work details in the **Employment Details** section.

The screenshot shows the 'New Hire Form' interface. The 'Employment Details' section is highlighted with a red box. It contains the following fields:

- Work Location: NY Operations
- Employer ID: Demo Company
- Position: Director of People & Culture
- Employment Status: ACTIVE
- Employment Type: FT
- Start Date: 06/29/2026
- Department Code: Leadership Team

Buttons for 'Show Additional Fields (0)' are present at the bottom of the section.

6. Enter benefit group information in the **Benefit Details** section.

The screenshot shows the 'New Hire Form' interface. The 'Benefit Details' section is highlighted with a red box. It contains the following fields:

- Benefit Group: Manager

Buttons for 'Show Additional Fields (1)' are present at the bottom of the section.

7. Enter pay information in the **Employee Pay Details** section.

The screenshot shows the 'New Hire Form' interface. The 'Employee Pay Details' section is highlighted with a red box. It contains the following fields:

- Pay Group: Semi-Monthly
- Standard Hours: 88.67
- Pay Method: Salary
- Pay Rate Basis/Period: Semi-Monthly
- Pay Rate: \$4,500

Buttons for 'Show Additional Fields (1)' are present at the bottom of the section.

8. Respond to any applicable required state questions in the **State New Hire Questions** section.

The screenshot shows the 'Employee Pay Details' form in the PrestigePRO Manager system. The form is divided into two main sections: 'Employee Pay Details' and 'New Hire Questions for NY'. The 'Employee Pay Details' section includes fields for 'Pay Group' (Semi-Monthly), 'Pay Method' (Salary), 'Pay Rate' (\$4,500), 'Standard Hours' (86.67), and 'Pay Rate Basis/Period' (Semi-Monthly). The 'New Hire Questions for NY' section is highlighted with a red box and contains several questions about allowances and overtime exemptions. The questions are: 'Are any allowances taken?', 'Are any tip allowances taken?', 'Are meal allowances taken?', 'Are lodging allowances taken?', 'Are there other allowances taken?', and 'This employee is exempt from overtime under the following exemption(s)'. Each question has a dropdown menu for the answer. The 'New Hire' section on the right side of the form includes a 'Jump to section' link and a list of sections: 'Employee Personal Info', 'Employee Details', 'Employee Pay Details', and 'New Hire Questions for NY'.

9. Select **Save** to record the employee's information in the system.

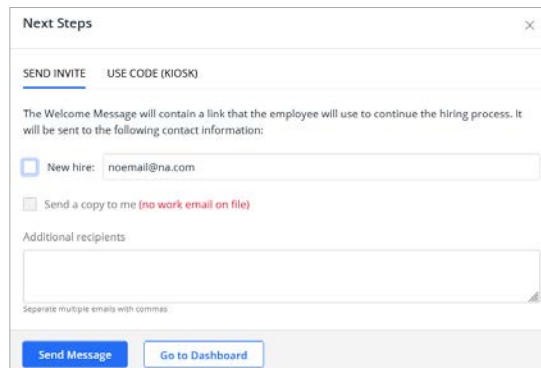
This screenshot is identical to the one above, showing the 'Employee Pay Details' form. The 'New Hire Questions for NY' section is still highlighted with a red box. In this version, the 'Save' button at the bottom left of the form is also highlighted with a red box, indicating the next step in the process.

Sending the Welcome Message

Use the Welcome Message to allow the employee to complete their portal setup

Steps:

1. On the **Next Steps** action, select **Personal Email**.
2. Enter the employee's email address.
3. Select **Send Message**.



The 'Next Steps' dialog box has a close button (X) in the top right corner. It features two tabs: 'SEND INVITE' (selected) and 'USE CODE (KIOSK)'. Below the tabs, a message states: 'The Welcome Message will contain a link that the employee will use to continue the hiring process. It will be sent to the following contact information:'. There is a checkbox for 'New hire:' with the email 'noemail@na.com' entered in the adjacent field. Below this is another checkbox for 'Send a copy to me (no work email on file)'. A text area for 'Additional recipients' is present, with a note 'Separate multiple emails with commas'. At the bottom are two buttons: 'Send Message' and 'Go to Dashboard'.

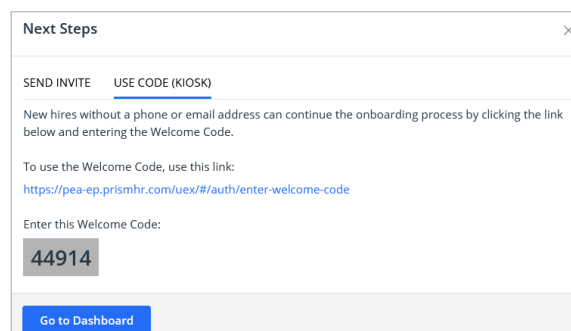
Providing Kiosk Access

Use kiosk access to send the welcome message when:

- The employee does not have an email address
- The employee does not have a mobile phone
- The employee will complete onboarding on-site
- A shared computer or kiosk is available

How kiosk access works

1. The employee is provided a **Welcome Code** instead of a welcome email.
2. The employee uses the Welcome Code at a kiosk or shared computer.
3. The employee enters their own login and personal information securely.
4. Provide the Welcome Code and Employee Portal link to the employee.
5. Direct the employee to the kiosk or shared workstation to complete setup.



The 'Next Steps' dialog box has a close button (X) in the top right corner. It features two tabs: 'SEND INVITE' and 'USE CODE (KIOSK)' (selected). Below the tabs, a message states: 'New hires without a phone or email address can continue the onboarding process by clicking the link below and entering the Welcome Code.' It then provides a link: 'To use the Welcome Code, use this link: <https://pea-ep.prismhr.com/uex/#/auth/enter-welcome-code>'. Below this, it says 'Enter this Welcome Code:' followed by a text box containing the code '44914'. At the bottom is a button labeled 'Go to Dashboard'.

Once the welcome information is shared with the employee, select **Go to Dashboard** to return to the New Hire Dashboard.

Next Steps

SEND INVITE

USE CODE (KIOSK)

New hires without a phone or email address can continue the onboarding process by clicking the link below and entering the Welcome Code.

To use the Welcome Code, use this link:
<https://pea-ep.prismhr.com/ux/#/auth/enter-welcome-code>

Enter this Welcome Code:

44914

Go to Dashboard

A confirmation notification appears indicating the employee has been successfully entered into the system.

Employee

Manager

Toni Silveira has successfully been entered.

New Hire

Candidates

New Hires

Completed

Hire Status: All

Hired By: All

Search

Columns

Start Date: All

Hire Date: All

	Name	Hire Status	Employee ID	Hire Date	Start Date	Hired By	
☐	Colin Eagle	Not Started	-	04/02/2026	04/06/2026	Alethia Josey - Prism	123
☐	Frank Jones	In Progress	N59999	05/13/2026	05/13/2026	Jennifer Jackson - Kerry Demo	
☐	Toni Silveira	Not Started	-	06/26/2026	06/29/2026	Alethia Josey - Prism	123

What Happens Next for the Employee

After the manager enters the employee's information:

1. The employee receives a Welcome Message email.
2. The email contains a secure link.
 - The employee uses the link to:
 - Set up their Employee Portal login
 - Provide Social Security information through a secure site

Filtering and Managing New Hire Records

Use filters and icons to locate and manage new hire records.

Available options

- **Hiring Status** – Filters new hire records by status.
- **Search** – Enter criteria to locate a specific new hire.

Action icons

- **Send Welcome Message (Paper Airplane)** – Resends the Welcome Message email.
- **View Welcome Code (123)** – Displays the employee's Welcome Code.
- **Edit (Pencil)** – Opens the new hire record for editing.
- **Delete (Trash Can)** – Deletes the new hire record.
 - **Note:** Deleting an employee from the dashboard removes them from the Portal view only.
 - If the employee has already been created in Onboarding or has an employee record, you must also run the **Delete Unused Employee** utility in Core to fully remove all associated data.
 - If the employee was only entered in the Portal and has not logged in, deleting them from the dashboard is sufficient.
 - **Important:** If the employee has already been paid, they cannot be deleted and must be terminated instead.

	Name	Hire Status	Employee ID	Hire Date	Start Date	Hired By	
☐	Colin Eagle	Not Started	-	04/02/2026	04/06/2026	Alethia Josey - Prism	123
☐	Frank Jones	In Progress	NS9999	05/13/2026	05/13/2026	Jennifer Jackson - Kerry Demo	
☐	Toni Silveira	Not Started	-	06/26/2026	06/29/2026	Alethia Josey - Prism	123

Reviewing Completed New Hires

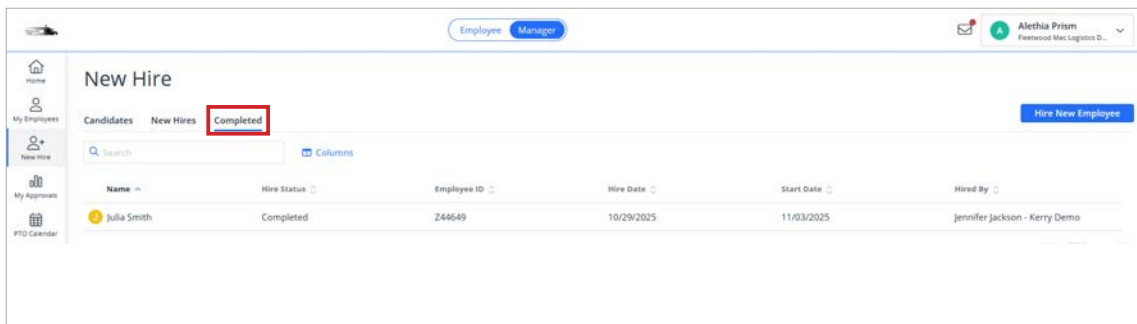
Use the Completed tab to review employees who have successfully completed the new hire process and finished required onboarding steps.

What the manager can view

- Completed new hire records
- Confirmation that onboarding steps were completed
- Basic hire details for reference

Important notes

- The **Completed** tab is **view-only**.
- No edits or onboarding actions are available from this tab.
- Employees listed here are now active and managed through standard employee records. from the dashboard is sufficient.



The screenshot shows the 'New Hire' section of the PrestigePRO Manager interface. The 'Completed' tab is selected and highlighted with a red box. The table displays the following data:

Name	Hire Status	Employee ID	Hire Date	Start Date	Hired By
Julia Smith	Completed	244649	10/29/2025	11/03/2025	Jennifer Jackson - Kerry Demo

Processing an Employee Termination

This section explains how worksite managers can submit a proposed employee termination when permitted. It walks through how to access the termination action, complete required termination details, review unpaid PTO information, and submit the termination request for processing.

Employee terminations are sensitive actions and require HR or administrative review before being finalized.

When Would I Use This?

- An employee's employment needs to be ended
- A future-dated termination has been approved
- You are authorized to submit termination requests
- You need to document termination details and reasons

The **Termination** process allows permitted managers to submit a proposed termination. The request includes required employment details, rehire eligibility, direct deposit handling, approval reassignment, and unpaid PTO review.

Managers submit the request; termination processing and finalization occur after review.

Important Notes

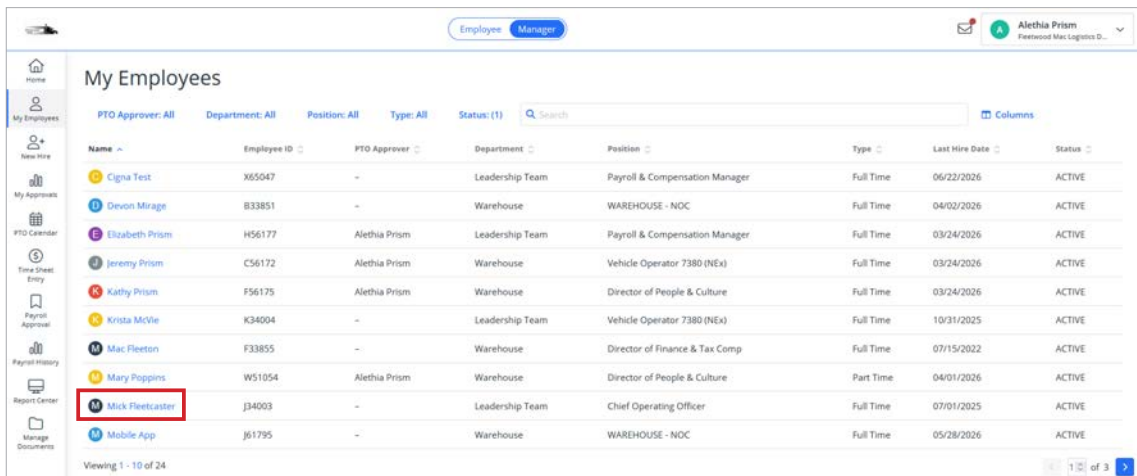
- Employee terminations are sensitive and closely controlled.
- Always confirm internal approvals before submitting a termination.
- Terminations may be future-dated.
- PTO handling is governed by state regulations.
- Reassigning approvals ensures workflow continuity.
- If an option is not visible, it is due to permission settings.
- Contact HR or your system administrator with questions.

Entering Termination Details

Use the Completed tab to review employees who have successfully completed the new hire process and finished required onboarding steps.

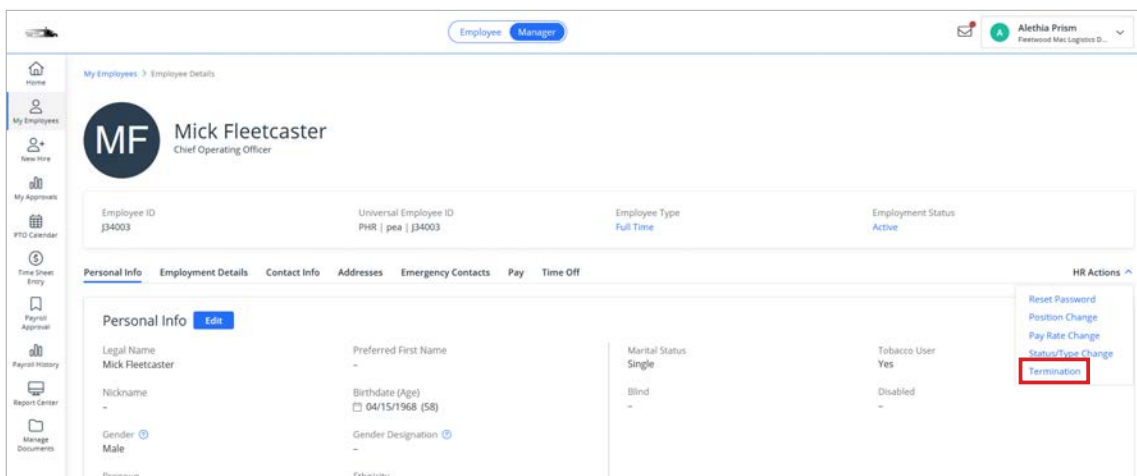
Steps:

1. From the Manager Dashboard, locate and select the employee.



Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Cigna Test	X65047	-	Leadership Team	Payroll & Compensation Manager	Full Time	06/22/2026	ACTIVE
Devon Mirage	B33851	-	Warehouse	WAREHOUSE - NOC	Full Time	04/02/2026	ACTIVE
Elizabeth Prism	H56177	Alethia Prism	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Jeremy Prism	C56172	Alethia Prism	Warehouse	Vehicle Operator 7380 (NEx)	Full Time	03/24/2026	ACTIVE
Kathy Prism	F56175	Alethia Prism	Warehouse	Director of People & Culture	Full Time	03/24/2026	ACTIVE
Krista McVie	K34004	-	Leadership Team	Vehicle Operator 7380 (NEx)	Full Time	10/31/2025	ACTIVE
Mac Fleeton	F33855	-	Warehouse	Director of Finance & Tax Comp	Full Time	07/15/2022	ACTIVE
Mary Poppins	W51054	Alethia Prism	Warehouse	Director of People & Culture	Part Time	04/01/2026	ACTIVE
Mick Fleetcaster	J34003	-	Leadership Team	Chief Operating Officer	Full Time	07/01/2025	ACTIVE
Mobile App	J61795	-	Warehouse	WAREHOUSE - NOC	Full Time	05/28/2026	ACTIVE

2. From the employee record, navigate to **HR Actions > Termination**.



My Employees > Employee Details

MF Mick Fleetcaster
Chief Operating Officer

Employee ID: J34003 | Universal Employee ID: PHR | pea | J34003 | Employee Type: Full Time | Employment Status: Active

Personal Info | Employment Details | Contact Info | Addresses | Emergency Contacts | Pay | Time Off

Personal Info Edit

Legal Name: Mick Fleetcaster	Preferred First Name: -	Marital Status: Single	Tobacco User: Yes
Nickname: -	Birthdate (Age): 04/15/1968 (58)	Blind: -	Disabled: -
Gender: Male	Gender Designation: -		
Pronoun: -	Ethnicity: -		

HR Actions

- Reset Password
- Position Change
- Pay Rate Change
- Status/Type Change
- Termination**

3. Select **Start Termination** to begin the process.

The screenshot shows the 'Employee Details' page for Mick Fleetcaster, Chief Operating Officer. The 'Termination' tab is active, and the 'Start Termination' button is highlighted with a red box. The page displays various employee information fields and a sidebar with navigation options.

4. The **Terminate Employee** action displays for entry.

- In the **Termination Status** field, select the appropriate status.
- Enter the **Termination Date**.
- Enter the **Last Day Worked**.
- Select the **Termination Reason**.

The 'Terminate Employee' form is shown. The 'Proposed Change' section is highlighted with a red box. It contains the following fields:

- * Termination Status (dropdown menu)
- * Termination Date (calendar icon, format mm/dd/yyyy)
- * Termination Reason (dropdown menu)
- Last Day Worked (calendar icon, format mm/dd/yyyy)

Below the highlighted section, there are additional fields:

- Okay to Rehire? (dropdown menu)
- * Turn Off Direct Deposit (if Active) (radio buttons for Yes and No)
- Reassign Pending Approvals (dropdown menu with search icon)
- Termination Explanation (text area)

Rehire and Payroll-Related Options

- In the **Okay to Rehire?** field, indicate whether the employee is eligible for rehire.
- In **Turn Off Direct Deposit (if Active)**, select whether direct deposits should be deactivated.

Terminate Employee

Proposed Change

* Termination Status

* Termination Date

mm/dd/yyyy

* Termination Reason

Last Day Worked

mm/dd/yyyy

Okay to Rehire?

* Turn Off Direct Deposit (if Active)

Yes

No

Reassign Pending Approvals

In **Reassign Pending Approvals**, select another employee to receive any pending approval items from the terminated employee.

Terminate Employee

Proposed Change

* Termination Status

TERMINATED

* Termination Date

06/25/2026

* Termination Reason

Position Eliminated

Last Day Worked

06/25/2026

Okay to Rehire?

Yes

* Turn Off Direct Deposit (if Active)

Yes

No

Reassign Pending Approvals ⓘ

Search

Termination Explanation

0/200 Characters

Termination Explanation

In the **Termination Explanation** field, enter details regarding the termination.

This explanation is added to the employee's record.

Terminate Employee

✕

Okay to Rehire?
Yes

* Turn Off Direct Deposit (if Active)
☒ Yes
☐ No

Reassign Pending Approvals ⓘ
Emily Jones

Termination Explanation

0/200 Characters

Reviewing Unpaid PTO

Review the **Unpaid PTO** section. This section displays any unpaid PTO for the employee, which is handled by state regulations.

Terminate Employee

✕

Okay to Rehire?
Yes

* Turn Off Direct Deposit (if Active)
☒ Yes
☐ No

Reassign Pending Approvals ⓘ
Emily Jones

Termination Explanation

0/200 Characters

Unpaid PTO

⚠ To pay out unpaid PTO, add the time to the employee's pay details in the next payroll.

PTO Register Type	Description	Available Hours
PTO	PTO FT EEs	71.59
SICK	SICK - All EEs	8

Cancel

Submit Termination

COBRA Qualifying Information

Use this section to indicate whether the employee's termination is a **COBRA-qualifying event**.

This information helps ensure required benefits notifications are initiated when applicable.

Terminate Employee

Unpaid PTO

To pay out unpaid PTO, add the time to the employee's pay details in the next payroll.

PTO Register Type	Description	Available Hours
PTO	PTO FT EEs	71.59
SICK	SICK - All EEs	8

COBRA Qualifying Information

COBRA Qualifying Event

COBRA Qualifying Event Date

mm/dd/yyyy

Cancel

Submit Termination

Submitting the Termination

Review all entered information carefully.

Select **Submit Termination** to save the record.

Terminate Employee

No

Reassign Pending Approvals

Emily Jones

Termination Explanation

0/200 Characters

Unpaid PTO

To pay out unpaid PTO, add the time to the employee's pay details in the next payroll.

PTO Register Type	Description	Available Hours
PTO	PTO FT EEs	71.59
SICK	SICK - All EEs	8

COBRA Qualifying Information

COBRA Qualifying Event

COBRA Qualifying Event Date

mm/dd/yyyy

Cancel

Submit Termination

If the information is correct, when prompted, confirm the action by selecting Yes, Continue.



Please Review the Following

Leave Balance
WARNING: J34003 Has A PTO Balance Of 79.59

Another prompt appears, to confirm the termination. If correct, continue by selecting **Yes, terminate**.



Terminate Mick Fleetcaster?

Are you sure you want to terminate Mick Fleetcaster on
06/25/2026?

After submission, a confirmation message displays indicating the **termination has been submitted for processing**.

The screenshot displays the 'Employee Details' page for Mick Fleetcaster. A red box highlights a green confirmation message at the top: 'Termination for Mick Fleetcaster has been submitted.' Below this, the employee's profile is shown with fields for Employee ID (J34003), Universal Employee ID (PHR | pea | J34003), Employee Type (Full Time), and Employment Status (Active). The 'Employment Details' tab is selected, showing fields for Position (Chief Operating Officer), Pay Rate (\$ 700.00 per week), Annual Salary (\$ 36,400.00 per year), Last Hire Date (07/01/2025), Original Hire Date (07/01/2025), PTO Approver (Sara Delaney), Last Review Date (07/01/2025), Next Review Date, Benefits Group (PRIMARY), Location (NY Operations), Department (Leadership Team), Division, Shift, Project, and Work Group.

After Submission

The updated **Employment Status** will appear in the **Employee Details** action.

The screenshot displays the 'Employee Details' page for Mick Fleetcaster. A red box highlights the 'Employment Status' field, which now shows 'Terminated'. The 'Personal Info' tab is selected, showing fields for Legal Name (Mick Fleetcaster), Preferred First Name, Birthdate (Age) (04/15/1968 (58)), Gender (Male), Ethnicity (White / Caucasian), Marital Status (Single), Tobacco User (Yes), Blind, and Disabled.

Rehiring an Employee

This section explains how worksite managers can rehire a previously terminated employee. It walks through how to locate a terminated employee, start the rehire process, enter required employment, payroll, and benefits information, and submit the rehire request for processing.

Rehire actions are sensitive and may require HR or administrative review before becoming effective.

When Would I Use This?

- A former employee is returning to work
- An approved rehire has been authorized
- You need to restore an employee to active status
- Payroll, benefits, or onboarding options need to be reviewed during rehire

Important Notes

- Rehires are sensitive employment actions.
- Always confirm internal approvals before submitting a rehire.
- Terminated employees must be filtered and selected first.
- Prior payroll and benefits selections should be reviewed carefully.
- Onboarding and benefits enrollment may need to be relaunched.
- If an option is not visible, it may be due to permission settings.
- Contact HR or your system administrator with questions.

Getting Started

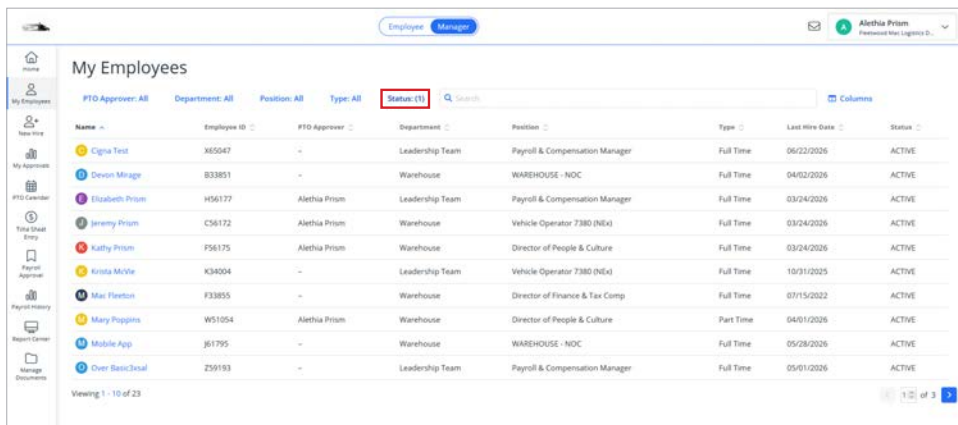
The **Rehire** action allows permitted managers to submit a proposed rehire request. During this process, you can:

- Set the employee's new status and type
- Select a rehire date
- Review or apply prior payroll, deductions, and benefits
- Assign work location, position, and pay details
- Launch onboarding or benefits enrollment if required
- Managers submit the request; final processing may require HR review.

Before you can rehire an employee, you must first locate them in the employee list.

Steps:

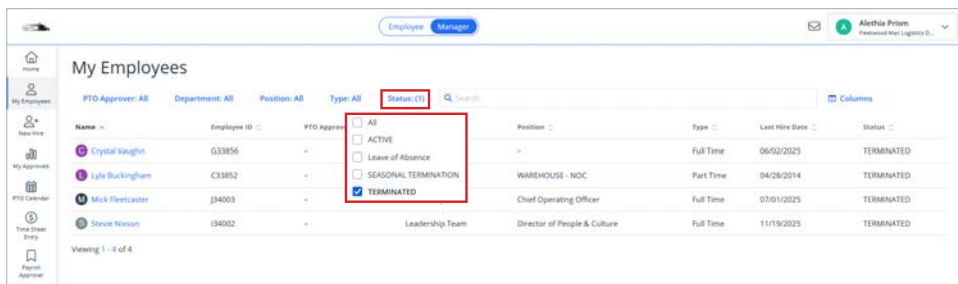
1. From the employee summary or My Employees list, locate the Status filter.



The screenshot shows the 'My Employees' page with a table of employee records. The 'Status' filter is highlighted with a red box, showing 'Status: (1)'. The table lists employees with columns for Name, Employee ID, PTO Approver, Department, Position, Type, Last Hire Date, and Status.

Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Cigna Test	X65047	-	Leadership Team	Payroll & Compensation Manager	Full Time	06/23/2026	ACTIVE
Devon Mirage	B33851	-	Warehouse	WAREHOUSE - NOC	Full Time	04/02/2026	ACTIVE
Elizabeth Prim	H56177	Alethia Prim	Leadership Team	Payroll & Compensation Manager	Full Time	03/24/2026	ACTIVE
Jeremy Prim	C56172	Alethia Prim	Warehouse	Vehicle Operator 7380 (NEX)	Full Time	03/24/2026	ACTIVE
Kathy Prim	P56175	Alethia Prim	Warehouse	Director of People & Culture	Full Time	03/24/2026	ACTIVE
Krista McVie	K34004	-	Leadership Team	Vehicle Operator 7380 (NEX)	Full Time	10/31/2025	ACTIVE
Mae Plenton	F33055	-	Warehouse	Director of Finance & Tax Comp	Full Time	07/15/2022	ACTIVE
Mary Puggins	W51054	Alethia Prim	Warehouse	Director of People & Culture	Part Time	04/01/2026	ACTIVE
Mobile App	J61795	-	Warehouse	WAREHOUSE - NOC	Full Time	05/28/2026	ACTIVE
Over Basic/Anal	Z59193	-	Leadership Team	Payroll & Compensation Manager	Full Time	05/01/2026	ACTIVE

2. Change the status filter from Active to Terminated.

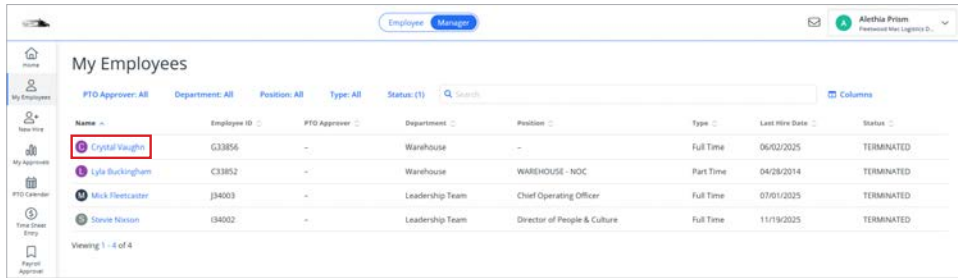


The screenshot shows the 'My Employees' page with a table of employee records. The 'Status' filter is highlighted with a red box, showing a dropdown menu with options: All, ACTIVE, Leave of Absence, SEASONAL TERMINATION, and TERMINATED. The 'TERMINATED' option is selected. The table lists employees with columns for Name, Employee ID, PTO Approver, Department, Position, Type, Last Hire Date, and Status.

Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Crystal Vaughn	G33856	-	-	-	Full Time	06/02/2025	TERMINATED
Lyla Buckingham	C33852	-	WAREHOUSE - NOC	WAREHOUSE - NOC	Part Time	04/28/2014	TERMINATED
Mick Fleetcaster	J34003	-	Leadership Team	Chief Operating Officer	Full Time	07/01/2025	TERMINATED
Stevie Nixon	I34002	-	Leadership Team	Director of People & Culture	Full Time	11/19/2025	TERMINATED

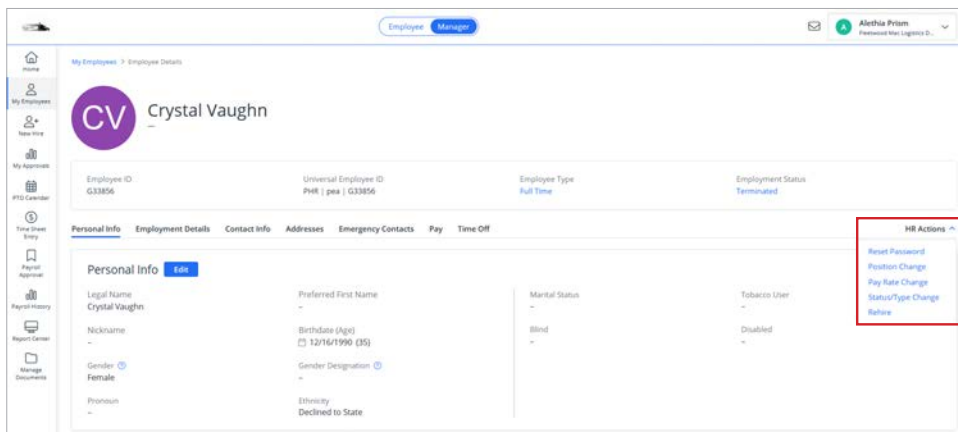
Accessing the Rehire Action

1. Open the employee's record.



Name	Employee ID	PTO Approver	Department	Position	Type	Last Hire Date	Status
Crystal Vaughn	G33856	-	Warehouse	-	Full Time	06/02/2025	TERMINATED
Lyla Buckingham	C33852	-	Warehouse	WAREHOUSE - NOC	Part Time	04/28/2014	TERMINATED
Mick Fleetster	J34003	-	Leadership Team	Chief Operating Officer	Full Time	07/01/2025	TERMINATED
Storie Nelson	G34002	-	Leadership Team	Director of People & Culture	Full Time	11/19/2025	TERMINATED

2. Navigate to the **HR Actions** menu.



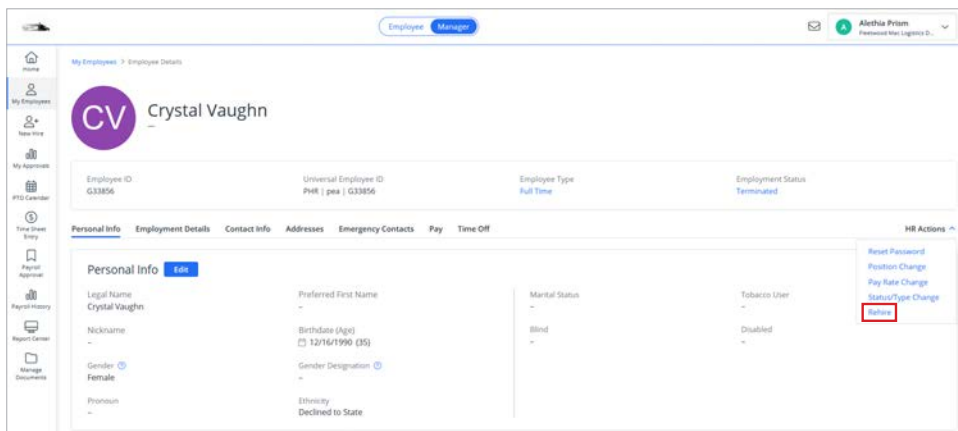
Employee ID: G33856 | Universal Employee ID: PHR | pea | G33856 | Employee Type: Full Time | Employment Status: Terminated

Personal Info | Employment Details | Contact Info | Addresses | Emergency Contacts | Pay | Time Off

HR Actions

- Reset Password
- Position Change
- Pay Rate Change
- Status/Type Change
- Rehire

3. Select **Rehire** to open the action.



Employee ID: G33856 | Universal Employee ID: PHR | pea | G33856 | Employee Type: Full Time | Employment Status: Terminated

Personal Info | Employment Details | Contact Info | Addresses | Emergency Contacts | Pay | Time Off

HR Actions

- Reset Password
- Position Change
- Pay Rate Change
- Status/Type Change
- Rehire

Starting the Rehire Process

1. On the **Rehire** action, select **Start Rehire Process**.

The screenshot shows the 'Employee Details' page for Crystal Vaughn. The 'Rehire' section is highlighted, and the 'Start Rehire Process' button is visible. The page includes a sidebar with navigation options like 'My Employees', 'My Approvals', 'PTO Calendar', 'Time Sheet Entry', 'Payroll Approval', 'Payroll History', 'Report Center', and 'Manage Documents'. The main content area shows 'Current Information' and a 'History' table.

Status	Type	Reason	Effective Date	Date Updated
TERMINATED	Full Time	Retired	05/13/2026	05/13/2026
ACTIVE	Full Time	-	06/02/2025	07/22/2025
ACTIVE	Part Time	Correction	07/31/2025	08/01/2025
ACTIVE	Full Time	Return to Work	01/29/2026	01/29/2026

2. The **Proposed Change** section displays.

The 'Rehire' dialog box is shown with the 'Proposed Change' section. It includes the following fields and options:

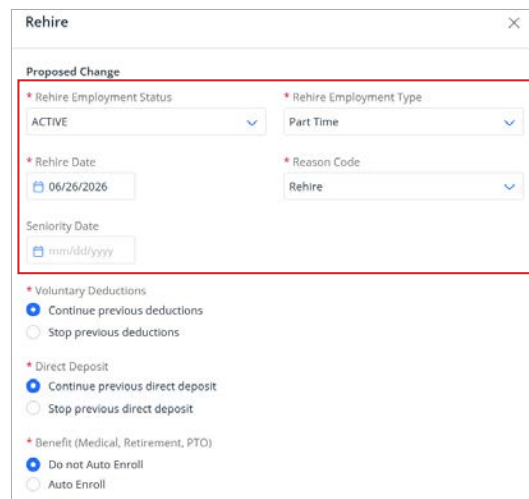
- Rehire Employment Status**: Dropdown menu.
- Rehire Employment Type**: Dropdown menu.
- Rehire Date**: Date picker (mm/dd/yyyy).
- Reason Code**: Dropdown menu.
- Seniority Date**: Date picker (mm/dd/yyyy).
- Voluntary Deductions**: Radio buttons for 'Continue previous deductions' (selected) and 'Stop previous deductions'.
- Direct Deposit**: Radio buttons for 'Continue previous direct deposit' (selected) and 'Stop previous direct deposit'.
- Benefit (Medical, Retirement, PTO)**: Radio buttons for 'Do not Auto Enroll' (selected) and 'Auto Enroll'.
- Employment Details**:
 - Work Location**: Dropdown menu (NY Operations).
 - Position**: Search dropdown menu.

Buttons at the bottom: Cancel, Submit Rehire.

Entering Rehire Employment Details

Enter the following information:

- **Rehire Employment Status** – The employee's employment status after rehire.
- **Rehire Employment Type** – The employee's employment type after rehire.
- **Rehire Date** – The date the employee returns to work.
- **Reason Code** – The reason for the employee's rehire.
- **Seniority Date** – The employee's seniority date, if different from the rehire date.



The screenshot shows the 'Rehire' form with the 'Proposed Change' section highlighted by a red box. This section includes the following fields:

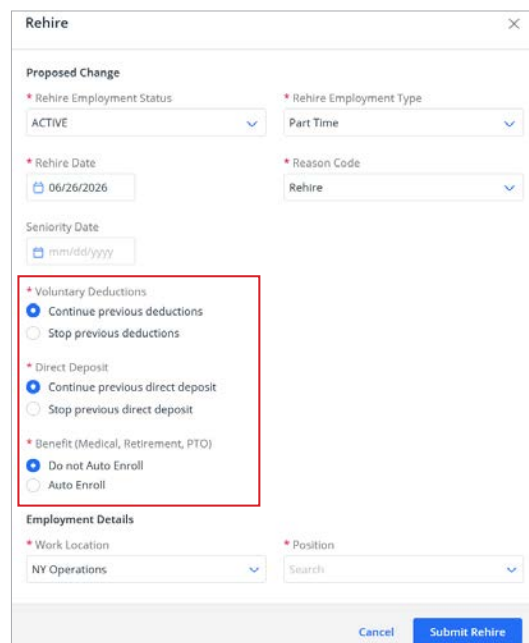
- * Rehire Employment Status**: A dropdown menu with 'ACTIVE' selected.
- * Rehire Employment Type**: A dropdown menu with 'Part Time' selected.
- * Rehire Date**: A date picker showing '06/26/2026'.
- * Reason Code**: A dropdown menu with 'Rehire' selected.
- Seniority Date**: A date picker showing 'mm/dd/yyyy'.

Below the 'Proposed Change' section, there are three groups of radio buttons:

- * Voluntary Deductions**:
 - ☒ Continue previous deductions
 - ☐ Stop previous deductions
- * Direct Deposit**:
 - ☒ Continue previous direct deposit
 - ☐ Stop previous direct deposit
- * Benefit (Medical, Retirement, PTO)**:
 - ☒ Do not Auto Enroll
 - ☐ Auto Enroll

Reviewing Deductions, Direct Deposit, and Benefits

In the Voluntary Deductions, Direct Deposit, and Benefits sections, select whether the employee's previous information should be applied.



The screenshot shows the 'Rehire' form with the 'Voluntary Deductions', 'Direct Deposit', and 'Benefits' sections highlighted by a red box. This section includes the following radio button groups:

- * Voluntary Deductions**:
 - ☒ Continue previous deductions
 - ☐ Stop previous deductions
- * Direct Deposit**:
 - ☒ Continue previous direct deposit
 - ☐ Stop previous direct deposit
- * Benefit (Medical, Retirement, PTO)**:
 - ☒ Do not Auto Enroll
 - ☐ Auto Enroll

Below the highlighted section, there is an 'Employment Details' section with the following fields:

- * Work Location**: A dropdown menu with 'NY Operations' selected.
- * Position**: A dropdown menu with 'Search' selected.

At the bottom of the form, there are two buttons: 'Cancel' and 'Submit Rehire'.

Work Assignment and Pay Setup

In the **Employment Details** section, view and update the following:

- **Work Location** – Where the employee is assigned to work.
- **Position** – The employee's job role.
- **Benefit Group** – Determines which benefit plans apply.
- **Retirement Benefit Group** – Determines retirement plan eligibility.
- **Department** – The business unit the employee belongs to.
- **PTO Approver** – The person who approves the employee's time-off requests.
- **Other Client-Configured Fields** – Additional fields set up to support client-specific tracking or workflows.
-

Rehire

☐ Stop previous direct deposit

* Benefit (Medical, Retirement, PTO)

☒ Do not Auto Enroll

☐ Auto Enroll

Employment Details

* Work Location

NY Operations

* Position

WAREHOUSE - NOC

* Benefit Group

PRIMARY

Retirement Benefit Group

PRIMARY

Division

Search

* Department

Warehouse

Shift

Project

Search

Work Group

Search

Union Code

PTO Approver

Search

Pay Details

Cancel

Submit Rehire

In the **Pay Details** section, review and update the following:

- **Pay Group** – Determines the payroll schedule and processing rules.
- **Pay Method** – How the employee is paid (for example, direct deposit or check).
- **Pay Rate** – The amount the employee is paid.
- **Pay Rate Basis** – How the pay rate is calculated (for example, hourly or salary).
- **Standard Hours** – The employee's regularly scheduled work hours.

The screenshot shows a 'Rehire' form with a close button (X) in the top right. The 'PTO Approver' dropdown is set to 'Alethia Prism'. The 'Pay Details' section is highlighted with a red box and contains the following fields: 'Pay Group' (WEEKLY), 'Pay Method' (Hourly), 'Pay Rate' (\$30), 'Pay Rate Basis' (Hourly), and 'Standard Hours' (40.00). Below this is the 'Personal Information' section with 'Personal Email' (Crystal@fleetoodmaclogistics.com) and 'Work Email' (crystal@fleetoodmaclogistics.com).

Optional Employee Updates

In the **Employment Details** section, view and update the following:

This screenshot shows the same 'Rehire' form, but with the 'Personal Information' section highlighted by a red box. This section includes 'Personal Email' (Crystal@fleetoodmaclogistics.com), 'Work Email' (crystal@fleetoodmaclogistics.com), and 'Mobile Phone' ((727) 548-1234). Below the highlighted section are 'Onboarding Options' with radio buttons for 'Launch Onboarding for this rehire' (selected) and 'Do not launch Onboarding'. At the bottom right are 'Cancel' and 'Submit Rehire' buttons.

Onboarding and Benefits Enrollment Options

Under the **Onboarding Options and Benefits Enrollment Options**, select whether to relaunch onboarding or benefits enrollment for the employee.

The 'Rehire' form is divided into several sections. The 'Pay Details' section includes fields for Pay Group (WEEKLY), Pay Method (Hourly), Pay Rate (\$30), and Pay Rate Basis (Hourly). The 'Personal Information' section includes fields for Personal Email, Work Email, and Mobile Phone. The 'Onboarding Options' section has two radio buttons: 'Launch Onboarding for this rehire' (selected) and 'Do not launch Onboarding'. The 'Benefits Enrollment Options' section has two radio buttons: 'Launch Benefit Enrollment for this rehire' (selected) and 'Do not launch Benefit Enrollment'. At the bottom are 'Cancel' and 'Submit Rehire' buttons.

Pay Details	
* Pay Group	* Pay Method
WEEKLY	Hourly
Pay Rate	Pay Rate Basis
\$30	Hourly
Standard Hours	
40.00	

Personal Information	
Personal Email	Work Email
Crystal@fleetoodmaclogistics.com	crystal@fleetoodmaclogistics.com
Mobile Phone	
(727) 548-1234	

* Onboarding Options

☒ Launch Onboarding for this rehire

☐ Do not launch Onboarding

* Benefits Enrollment Options

☒ Launch Benefit Enrollment for this rehire

☐ Do not launch Benefit Enrollment

Cancel Submit Rehire

Respond to applicable new hire questions.

The 'Rehire' form is divided into several sections. The 'Onboarding Options' section has two radio buttons: 'Launch Onboarding for this rehire' (selected) and 'Do not launch Onboarding'. The 'Benefits Enrollment Options' section has two radio buttons: 'Launch Benefit Enrollment for this rehire' (selected) and 'Do not launch Benefit Enrollment'. The 'New Hire Questions for NY' section includes several questions with dropdown menus and text input fields. At the bottom are 'Cancel' and 'Submit Rehire' buttons.

☒ Launch Onboarding for this rehire

☐ Do not launch Onboarding

* Benefits Enrollment Options

☒ Launch Benefit Enrollment for this rehire

☐ Do not launch Benefit Enrollment

New Hire Questions for NY

Are any allowances taken? No

Are any tip allowances taken? No

If tip allowances were taken, enter the amount per hour

Are meal allowances taken? No

If meal allowances were taken, enter the amount per meal

Are lodging allowances taken? No

If lodging allowances were taken, enter the amount

Are there other allowances taken? No

If other allowances were taken, enter the amount

This employee is exempt from overtime under the following exemption:

Cancel Submit Rehire

Submitting the Rehire

Review all entered information carefully.

Select **Submit Rehire** to save the rehire request.

Rehire

☒ Launch Onboarding for this rehire
☐ Do not launch Onboarding

* Benefits Enrollment Options
☒ Launch Benefit Enrollment for this rehire
☐ Do not launch Benefit Enrollment

New Hire Questions for NY

Are any allowances taken?

Are any tip allowances taken?

If tip allowances were taken, enter the amount per hour:

Are meal allowances taken?

If meal allowances were taken, enter the amount per meal:

Are lodging allowances taken?

If lodging allowances were taken, enter the amount:

Are there other allowances taken?

If other allowances were taken, enter the amount:

This employee is exempt from overtime under the following exemption:

[Cancel](#) [Submit Rehire](#)

A warning message will display asking you to confirm the rehire request.

Confirm by selecting the **Rehire** button.

Rehire Employee?

Are you sure you want to rehire **Crystal Vaughn** on **06/26/2026**?

[Cancel](#) [Rehire](#)

Submission Confirmation

After submission, a confirmation message displays indicating the **rehire information has been saved**.

The screenshot shows the 'Employee Details' page for Lyla Buckingham. A red box highlights a green confirmation message at the top: 'The rehire information has been saved.' Below this, the employee's information is displayed, including Employee ID C3852, Universal Employee ID PHR | pex | C3852, and Employment Status **Terminated**. The 'Employment Details' tab is active, showing fields for Position (WAREHOUSE - NOC), Pay Rate (\$ 4,333.33 per month), Annual Salary (\$ 52,000.00 per year), Last Hire Date (04/28/2014), Original Hire Date (04/28/2014), PTO Approver (Manager), Last Review Date (04/28/2014), Next Review Date, and Benefits Group (1). The Location is NY Operations, Department is Warehouse, and Shift is --.

The **Employee Detail** record now reflects the **Employment Status** as Active.

The screenshot shows the 'Employee Details' page for Lyla Buckingham. The 'Employment Status' is now **Active**, highlighted by a red box. The 'Personal Info' tab is active, showing fields for Legal Name (Lyla Buckingham), Preferred First Name, Marital Status, Tobacco User, Nickname, Birthdate (06/19/2002 (24)), Blind, Disabled, Gender (Female), Gender Designation, Pronoun, and Ethnicity (Declined to State).

Reviewing and Editing Time Sheets

This section explains how worksite managers can review, update, and submit employee time sheets when permitted. It covers editing time entries, applying approved leave, reviewing pay-rate-related indicators, and submitting completed time sheets for payroll calculation.

Managers review and correct time sheet information but do not process payroll.

When Would I Use This?

- Review employee time sheets for accuracy
- Edit time entries before payroll calculation
- Apply approved PTO to a time sheet
- Review pay-rate-related indicators on a time sheet
- Submit time sheets for payroll calculation

Important Notes

- Review time sheets carefully before submitting.
- Apply approved leave as needed.
- Pay-rate-related indicators require review but may not require action.
- Submitting sends the time sheet for calculation.
- If an option is not visible, it may be due to permission settings.
- Contact HR or payroll support with questions.

Getting Started

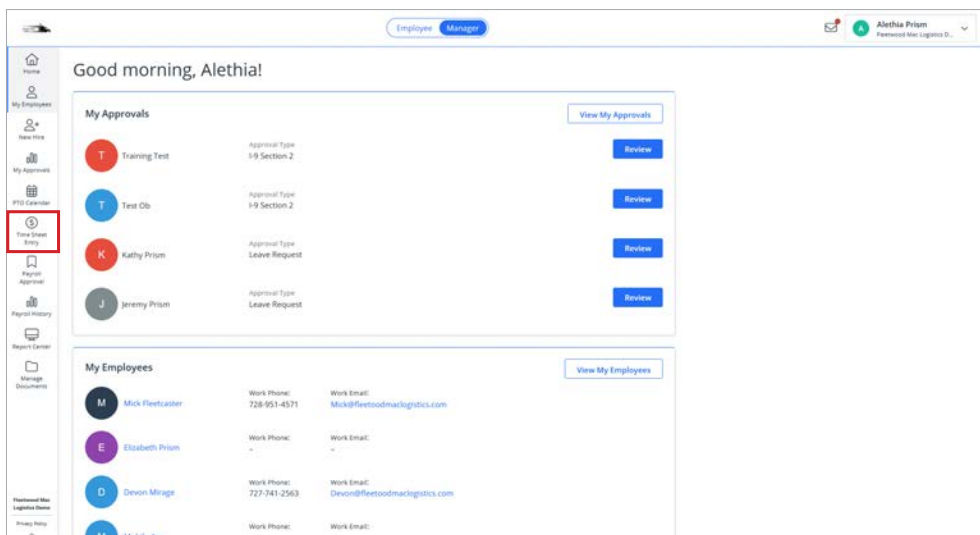
The **Time Sheet Entry** area allows permitted managers to review and update employee time sheets before they are submitted for calculation.

From this area, you can:

- Review employee hours
- Edit time entries
- Apply approved leave
- Review summary and detail information
- Submit time sheets for processing

Steps

From the Manager Dashboard, navigate to the **Time Sheet Entry** action.



Accessing Time Sheets

Use this process to open employee time sheets for review or editing.

- Select Start or Edit to open the Time Sheet Summary action.
- Select View to review time sheets that have already been submitted for calculation

Pay Date	Pay Group	Payroll Type	Payroll Number	Description	Cutoff Date	Payroll Status	Action
05/15/2026	Semi-Monthly	Regularly Scheduled	202620	05-15-26 SM	06/27/2026 05:00 PM EDT	Ready for Time Entry	Start
04/30/2026	Monthly	Regularly Scheduled	202613	04-30-26 M	06/27/2026 05:00 PM EDT	Ready for Calculation	View
04/25/2026	WEEKLY	Special/Unscheduled	202604	Test Payroll	06/27/2026 05:00 PM EDT	Time Entry in Progress	Edit

Editing Time Entries

Use the Time Entry tab to manually update employee time sheet entries.

What the manager can view or update (if permitted)

- Individual time entry cells
- Daily or weekly hours

Steps:

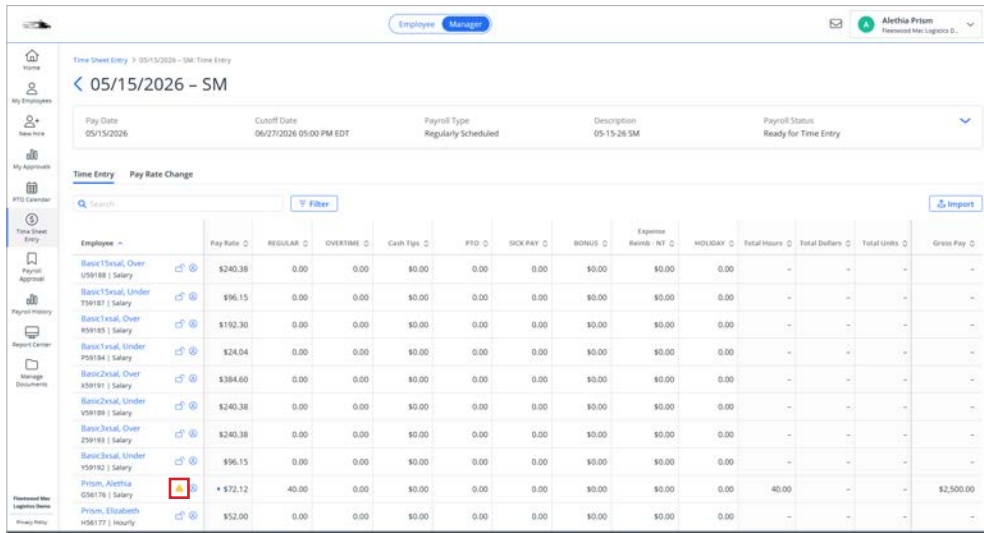
1. Open the **Time Entry** tab and select a cell on the time sheet to edit the entry.

Employee	Pay Rate	REGULAR	OVERTIME	Cash Tips	PTD	SICK PAY	BONUS	Expense	HOURLY	Total Hours	Total Dollars	Total Units	Gross Pay
BasicTotal, Over	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--
BasicTotal, Under	\$96.15	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--
BasicTotal, Over	\$192.30	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--
BasicTotal, Under	\$24.04	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--
BasicTotal, Over	\$384.80	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--
BasicTotal, Under	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--
BasicTotal, Over	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--
BasicTotal, Under	\$96.15	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--
Prism, Aletha	\$72.12	40.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	40.00	--	--	\$2,500.00
Prism, Elizabeth	\$52.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	--	--	--	--

Time Sheet Indicators

A **yellow triangle** ⚠ next to an employee's name indicates required review, such as:

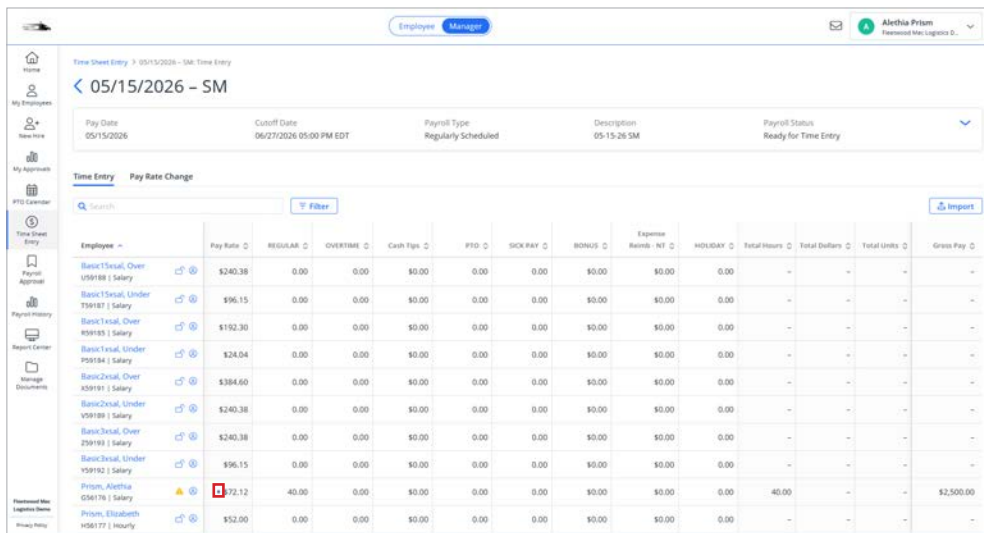
- A pay rate change
- An available leave request that must be applied



The screenshot shows the 'Time Sheet Entry' interface for the date 05/15/2026. The 'Pay Rate Change' tab is active. A yellow triangle icon is visible next to the employee name 'Prim, Alethia' in the list, indicating a required review.

Employee	Pay Rate	REGULAR	OVERTIME	Cash Tgn	PTD	SICK PAY	BONUS	Expense Reimb. NT	HOLIDAY	Total Hours	Total Dollars	Total Units	Gross Pay
Basic1(Ssal, Over V59188 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic1(Ssal, Under T59187 Salary	\$96.15	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic1(Ssal, Over K59185 Salary	\$192.30	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic1(Ssal, Under P59184 Salary	\$24.04	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic2(Ssal, Over K59191 Salary	\$384.60	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic2(Ssal, Under V59189 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic3(Ssal, Over Z59193 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic3(Ssal, Under V59192 Salary	\$96.15	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Prim, Alethia V59176 Salary	\$72.12	40.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	40.00	-	-	\$2,500.00
Prim, Elizabeth V59177 Hourly	\$52.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-

A **blue dot** ● next to an employee's name indicates additional entries are available for review on the **Pay Rate Change** tab.



The screenshot shows the 'Time Sheet Entry' interface for the date 05/15/2026. The 'Pay Rate Change' tab is active. A blue dot icon is visible next to the employee name 'Prim, Alethia' in the list, indicating additional entries are available for review.

Employee	Pay Rate	REGULAR	OVERTIME	Cash Tgn	PTD	SICK PAY	BONUS	Expense Reimb. NT	HOLIDAY	Total Hours	Total Dollars	Total Units	Gross Pay
Basic1(Ssal, Over V59188 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic1(Ssal, Under T59187 Salary	\$96.15	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic1(Ssal, Over K59185 Salary	\$192.30	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic1(Ssal, Under P59184 Salary	\$24.04	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic2(Ssal, Over K59191 Salary	\$384.60	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic2(Ssal, Under V59189 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic3(Ssal, Over Z59193 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic3(Ssal, Under V59192 Salary	\$96.15	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Prim, Alethia V59176 Salary	\$72.12	40.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	40.00	-	-	\$2,500.00
Prim, Elizabeth V59177 Hourly	\$52.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-

Reviewing Pay Rate Changes

Use the **Pay Rate Change** tab to review pay-rate-related entries associated with the time sheet.

What the manager can view or update (if permitted)

- Pay rate change records tied to the time sheet
- Allocation of hours related to the change

Steps:

1. Open the Pay Rate Change tab.

The screenshot shows the 'Pay Rate Change' tab selected in the 'Time Entry' section. The interface displays a table with columns for Employee, Pay Rate, REGULAR, OVERTIME, Cash Tips, PTO, SICK PAY, BONUS, Expense Reimb. Net, HOLIDAY, Total Hours, Total Dollars, Total Units, and Gross Pay. The table lists various pay rate changes for employees like Basic15sal, Over, Under, and Prizm, Alethia. The 'Prizm, Alethia' entry is highlighted, showing a pay rate change from \$72.12 to \$72.12 for 40.00 hours, resulting in a gross pay of \$2,500.00.

Employee	Pay Rate	REGULAR	OVERTIME	Cash Tips	PTO	SICK PAY	BONUS	Expense Reimb. Net	HOLIDAY	Total Hours	Total Dollars	Total Units	Gross Pay
Basic15sal, Over V59188 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic15sal, Under T59187 Salary	\$96.15	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic15sal, Over K59185 Salary	\$192.30	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic15sal, Under T59184 Salary	\$24.04	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic20sal, Over K59191 Salary	\$384.60	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic20sal, Under V59189 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic20sal, Over Z59193 Salary	\$240.38	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Basic20sal, Under V59192 Salary	\$96.15	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-
Prizm, Alethia C56176 Salary	\$72.12	40.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	40.00	-	-	\$2,500.00
Prizm, Elizabeth W58177 Hourly	\$52.00	0.00	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	-	-	-	-

2. Select **Allocate Hours**, if applicable.

The screenshot shows the 'Pay Rate Change' tab with a table listing pay rate changes. The 'Prizm, Alethia' entry is highlighted, showing a pay rate change from \$62.50 to \$72.12. The 'Allocate Hours' button is visible next to the 'New Pay Rate' column.

Employee	Pay Group	Effective Date	Old Pay Rate	New Pay Rate
Prizm, Alethia C56176 Salary	SM	05/02/2026	\$62.50	\$72.12

3. Select **Apply Change** to save the update.

Allocate Hours for Prism, Alethia

Pay Group	Effective Date	Old Pay Rate	New Pay Rate
SM	05/02/2026 (Sat)	\$62.50	\$72.12

Pay Code	Pay Rate	Hours	Charge Date
REGULAR		Total	40.00
WAGES			
OLD	\$62.50	0.00	05/14/2026 (Thu)
NEW	\$72.12	40.00	05/02/2026 (Sat)

Cancel

Apply Change

4. A confirmation message and green checkmark display when changes are applied.

Employee Manager

Alethia Prism

Time Sheet Entry

Pay rate change successfully applied.

< 05/15/2026 - SM

Pay Date	Cutoff Date	Payroll Type	Description	Payroll Status
05/15/2026	06/27/2026 05:00 PM EDT	Regularly Scheduled	05-15-26 SM	Ready for Time Entry

Time Entry

Pay Rate Change

Employee	Pay Group	Effective Date	Old Pay Rate	New Pay Rate	
Prism, Alethia	SM	05/02/2026	\$62.50	\$72.12	Change Applied!

Viewing 1 - 1 of 1

Applying Leave Requests

Use the **Leave Requests** tab to apply approved PTO to an employee's time sheet.

What the manager can view or update (if permitted)

- Approved leave requests
- Leave hours applied to the time sheet

Steps:

1. Open the **Leave Requests** tab.

Employee	Pay Rate	REGULAR	OVERTIME	Cash Type	PTO	SICK PAY	BONUS	Expense	Holiday	Total Hours	Total Dollars	Total Units	Gross Pay
Prion, Aletha C06178 Salary	\$72.12	86.67	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	86.67	--	--	\$6,250.25
Prion, Elizabeth H06177 Hourly	\$52.00	54.67	0.00	\$0.00	32.00	0.00	\$0.00	\$0.00	0.00	86.67	--	--	\$4,506.84
Prion, Jeremy C06172 Salary	\$37.50	70.67	0.00	\$0.00	0.00	16.00	\$0.00	\$0.00	0.00	86.67	--	--	\$3,250.13
Prion, Kathy F06175 Hourly	\$42.50	62.67	0.00	\$0.00	24.00	0.00	\$0.00	\$0.00	0.00	86.67	--	--	\$3,683.48
Totals		274.68	0.00	\$0.00	56.00	16.00	\$0.00	\$0.00	0.00	346.68	\$0.00	0.00	\$17,696.70

2. Select **Apply Leave** to apply approved leave or select **Details** to review leave information before applying.

Employee	Leave Type	Dates	Approved	Available	Status	Buttons
Prion, Elizabeth H06177 Hourly	PTO - PTO FT EEs	06/22/2026 - 06/24/2026	32.00	6.51	Leave Applied	Details
Prion, Jeremy C06172 Salary	SICK - SICK - All EEs	06/25/2026 - 06/26/2026	16.00	0.00	Leave Applied	Details
Prion, Jeremy C06172 Salary	PTO - PTO FT EEs	06/17/2026 - 06/18/2026	16.00	46.51	Apply Leave	Details
Prion, Kathy F06175 Hourly	PTO - PTO FT EEs	06/17/2026 - 06/19/2026	28.00	30.51	Apply Leave	Details

3. When viewing Leave Details, you can review:

- **Leave type** – The category of time off requested (for example, vacation or sick).
- **Approved hours** – The number of leave hours that were approved.
- **Starting leave balance** – The employee's available leave balance before the request is applied.
- **Requested leave date** – The date or dates the employee requested off.
- **Adjusted hours (if applicable)** – Any changes made to the approved leave hours before applying them.
- **Comments** – Notes associated with the leave request.
- **Remaining leave balance** – The employee's leave balance after the leave is applied.
- **Current and updated time sheet hours** – The employee's recorded hours before and after the leave is applied.

Select **Apply Leave** to apply the leave to the time sheet.

Leave Details for Prism, Kathy

Leave Type: PTO - PTO FT EEs | Leave Approved: 28.00 | Starting Leave Balance: 30.51

Dates	Approved	Adjusted Hours	Comment	Leave Balance
✓ 06/17/2026	8.00	8.00	Auto-accepted by system	22.51
✓ 06/18/2026	8.00	8.00	Auto-accepted by system	14.51
✓ 06/19/2026	8.00	8.00	Auto-accepted by system	6.51
06/19/2026	4.00	4.00		2.51
28.00 28.00				Remaining Leave 2.51

Time Sheet Hours: REG - Regular Wages: PTO - Personal Time Off
 Current Hours: 62.67 | Updated Hours: 58.67 | 24.00 | 28.00

Cancel Apply Leave

4. A confirmation message and green checkmark display when changes are applied.

Time Sheet Entry - 06/30/2026 - SMP Apply/Leave Request

06/30/2026 - SMP

Pay Date: 06/30/2026 | Cutoff Date: 06/29/2026 05:00 PM EDT | Payroll Type: Regularly Scheduled | Description: 06-30-26 SMP | Payroll Status: Time Entry in Progress

Employee	Leave Type	Dates	Approved	Available	Status
Prism, Elizabeth (58112) hourly	PTO - PTO FT EEs	06/23/2026 - 06/24/2026	32.00	6.51	Leave Applied
Prism, Jeremy (58112) hourly	SICK - SICK - All EEs	06/25/2026 - 06/26/2026	16.00	0.00	Leave Applied
Prism, Jeremy (58112) hourly	PTO - PTO FT EEs	06/17/2026 - 06/18/2026	16.00	46.51	Apply Leave
Prism, Kathy (58112) hourly	PTO - PTO FT EEs	06/17/2026 - 06/19/2026	28.00	30.51	Leave Applied

Viewing 1 - 4 of 4

Reviewing and Submitting the Time Sheet

Use this step to review final time sheet details and submit the time sheet for calculation.

Steps:

1. When time sheet edits are complete, select **Review** to access the **Review** tab.

Time Sheet Entry > 06/30/2026 - SMP: Time Entry

< 06/30/2026 - SMP

Pay Date: 06/30/2026 Cutoff Date: 06/26/2026 05:00 PM EDT Payroll Type: Regularly Scheduled Description: 06-30-26 SMP Payroll Status: Time Entry in Progress

Time Entry Leave Requests Pay Rate Change

Search Filter Import

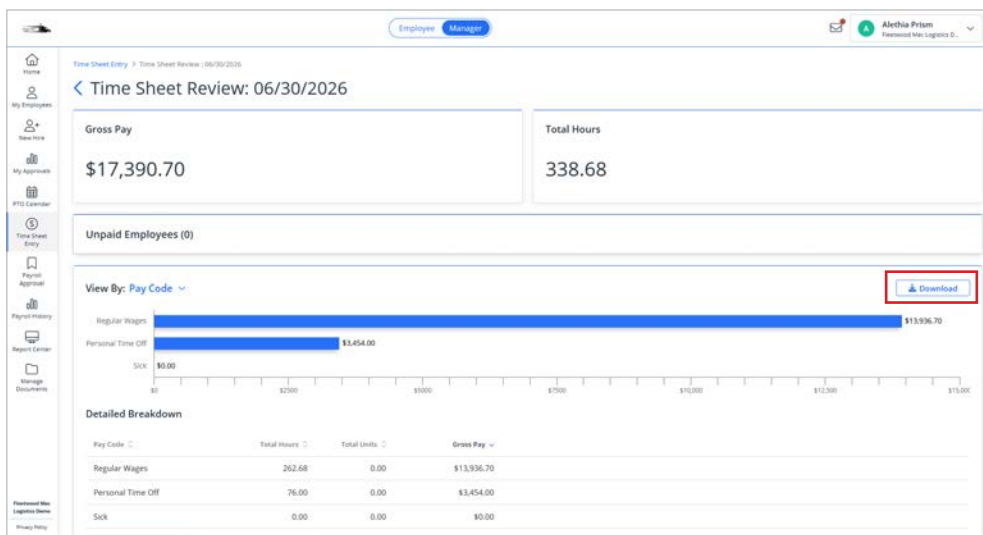
Employee	Pay Rate	REGULAR	OVERTIME	Cash Hrs	PTO	SICK PAY	BONUS	Expense	HOLIDAY	Total Hours	Total Dollars	Total Units	Gross Pay
Prizm, Aletha (59176) Salary	\$72.12	86.67	0.00	\$0.00	0.00	0.00	\$0.00	\$0.00	0.00	86.67	-	-	\$6,250.25
Prizm, Elizabeth (59177) Hourly	\$52.00	54.67	0.00	\$0.00	32.00	0.00	\$0.00	\$0.00	0.00	86.67	-	-	\$4,506.84
Prizm, Jeremy (59172) Salary	\$37.50	0.00	0.00	\$0.00	16.00	0.00	\$0.00	\$0.00	0.00	78.67	-	-	\$2,950.13
Prizm, Kathy (59175) Hourly	\$42.50	58.67	0.00	\$0.00	28.00	0.00	\$0.00	\$0.00	0.00	86.67	-	-	\$3,683.48
Totals		200.01	0.00	\$0.00	76.00	0.00	\$0.00	\$0.00	0.00	338.68	\$0.00	0.00	\$17,390.70

Viewing 1 - 4 of 4

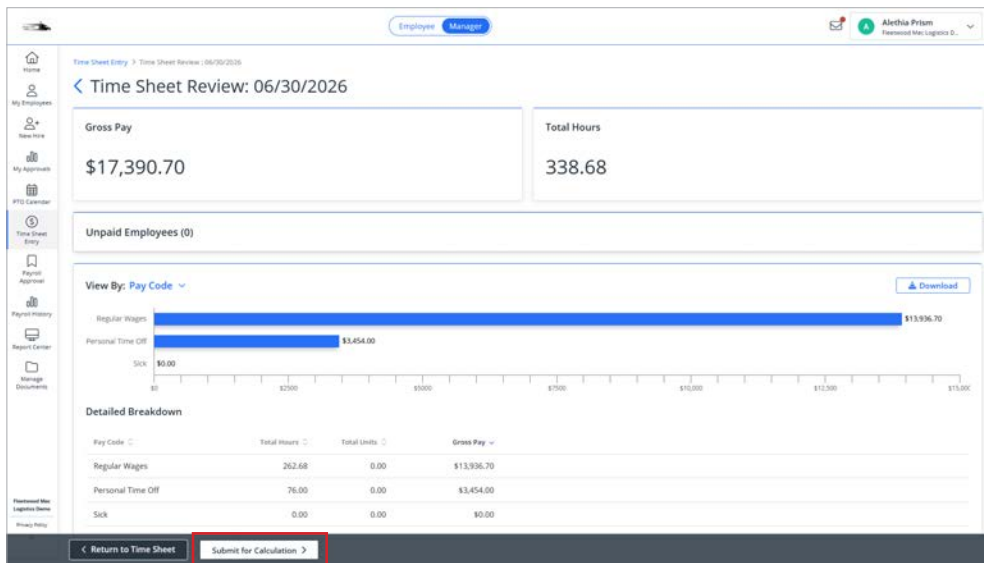
Review

2. Review summary details.

(Optional) Download the time sheet information as a CSV file.



- When the time sheet review is complete, select **Submit for Calculation** to send it for processing.



- After submission, the **Time Sheet Entry** dashboard updates the **Payroll Status** to **Ready for Calculation**.

Pay Date	Pay Group	Payroll Type	Payroll Number	Description	Cutoff Date	Payroll Status	Action
06/30/2026	SM PRISMHR	Regularly Scheduled	202622	06-30-26 SMP	06/26/2026 05:00 PM EDT	Ready for Calculation	View
05/15/2026	Semi-Monthly	Regularly Scheduled	202620	05-15-26 SM	06/27/2026 05:00 PM EDT	Ready for Time Entry	Start
04/30/2026	Monthly	Regularly Scheduled	202613	04-30-26 M	06/27/2026 05:00 PM EDT	Ready for Calculation	View
04/25/2026	WEEKLY	Special/Unscheduled	20264	Test Payroll	06/27/2026 05:00 PM EDT	Ready for Calculation	View

Viewing 1 - 4 of 4

Reviewing and Approving Payrolls

This section explains how worksite managers review payroll batches that are submitted for client approval. It covers how to access pending payrolls, review employee payment and unpaid details, view invoices and reports, and either approve or deny a payroll so processing can continue.

Managers review payrolls for accuracy but do not process payroll or make corrections directly.

When Would I Use This?

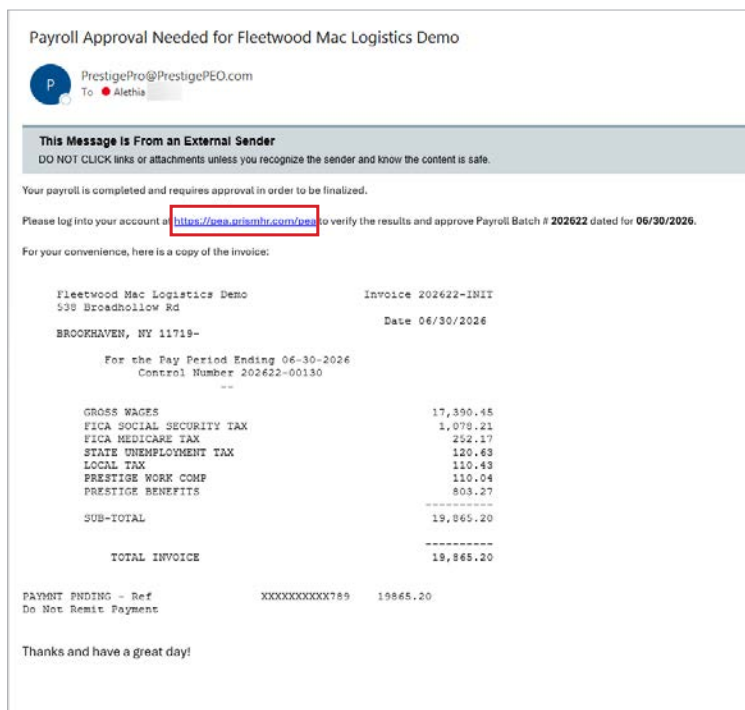
- A payroll has been submitted for your review and approval
- You receive an email notification that a payroll is ready
- You need to review employee payment details, invoices, or reports
- You need to approve or deny a payroll batch

Getting Started

When a payroll is sent for worksite approval, the system sends an email notification with the payroll invoice.

Steps

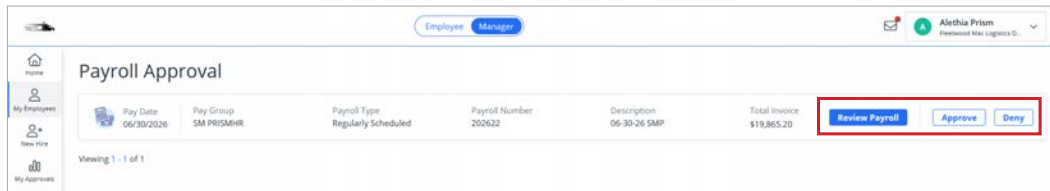
1. Select the link in the email or sign in to the Employee Portal.
2. Navigate to **Payroll Approvals**.



The **Payroll Approvals** screen displays payrolls with a status of **Pending Client Approval** that are ready for review.

From this screen, you can:

- Open payrolls for review
- View or download payroll information
- Approve or deny payrolls

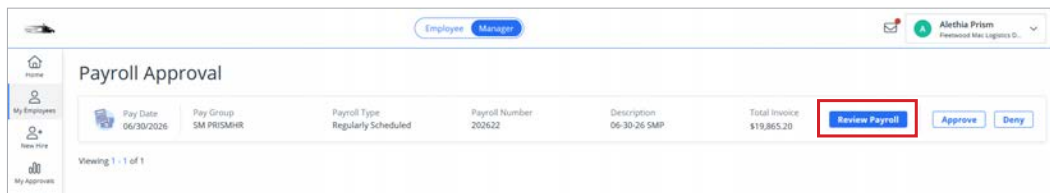


Reviewing the Payroll

Use this process to review payroll details before making an approval decision.

Steps

1. Select **Review Payroll** to open the payroll for review.



2. After selecting **Review Payroll**, the **Payroll Summary** action appears.

Within the payroll, you can review the following tabs:

- Payroll Details
- Unpaid Employee Detail
- Invoice
- Reports & Files

The screenshot shows the 'Payroll Summary' screen for '06/30/2026 - SM PRISMHR'. The 'Payroll Details' tab is selected and highlighted with a red box. The screen displays a table of payroll details for four employees: Alethia, Elizabeth, Jeremy, and Kathy. The table includes columns for Name, Voucher, Hours, Gross Pay, Gross Earnings, Taxes, Deductions, Net Pay, Check Amount, Deposit Amount, and Pay Stub Type. A 'Download' button is visible in the top right corner of the table area.

Name	Voucher	Hours	Gross Pay	Gross Earnings	Taxes	Deductions	Net Pay	Check Amount	Deposit Amount	Pay Stub Type
Prism, Alethia	000131	86.67	\$6,250.00	\$6,250.00	\$1,892.74	\$0.00	\$4,357.26	\$4,357.26	\$0.00	Paper
Prism, Elizabeth	000132	86.67	\$4,506.84	\$4,506.84	\$1,038.33	\$491.81	\$2,976.70	\$0.00	\$2,976.70	Electronic
Prism, Jeremy	000129	78.67	\$2,950.13	\$2,950.13	\$656.63	\$0.00	\$2,293.50	\$2,293.50	\$0.00	Paper
Prism, Kathy	000130	86.67	\$3,683.48	\$3,683.48	\$916.89	\$0.00	\$2,766.59	\$2,766.59	\$0.00	Paper

Payroll Detail Tab

Displays payment records for individual employees included in the payroll.

Allows download of employee payment records as a CSV file.

The screenshot shows the 'Payroll Detail' tab selected in the '06/30/2026 - SM PRISMHR' payroll. The interface includes a sidebar with navigation options like Home, My Employees, My Approvals, PTO Calendar, Time Sheet Entry, Payroll Approval, Payroll History, Report Center, and Manage Documents. The main content area displays a summary of payroll details and a table of employee payment records. The summary includes Pay Date (06/30/2026), Description (06-30-26 SMP), Payroll Type (Regularly Scheduled), Payroll Status (Client Approval Pending), Total Invoice (\$19,865.20), and Payroll Number (202622). The table lists four employees: Alethia, Elizabeth, Jeremy, and Kathy, with columns for Name, Voucher, Hours, Gross Pay, Gross Earnings, Taxes, Deductions, Net Pay, Check Amount, Deposit Amount, and Pay Stub Type. A 'Download' button is located at the top right of the table.

Name	Voucher	Hours	Gross Pay	Gross Earnings	Taxes	Deductions	Net Pay	Check Amount	Deposit Amount	Pay Stub Type
Prism, Alethia	000131	86.67	\$6,250.00	\$6,250.00	\$1,892.74	\$0.00	\$4,357.26	\$4,357.26	\$0.00	Paper
Prism, Elizabeth	000132	86.67	\$4,506.84	\$4,506.84	\$1,038.33	\$491.81	\$2,976.70	\$0.00	\$2,976.70	Electronic
Prism, Jeremy	000129	78.67	\$2,950.13	\$2,950.13	\$656.63	\$0.00	\$2,293.50	\$2,293.50	\$0.00	Paper
Prism, Kathy	000130	86.67	\$3,683.48	\$3,683.48	\$916.89	\$0.00	\$2,766.59	\$2,766.59	\$0.00	Paper
Totals		338.68	\$17,390.45	\$17,390.45	\$4,504.59	\$491.81	\$12,394.05	\$9,417.35	\$2,976.70	

Unpaid Employee Detail Tab

Displays employees marked as unpaid on the payroll.

Allows download of unpaid employee details as a CSV file.

The screenshot shows the 'Unpaid Employee Detail' tab selected in the '06/30/2026 - SM PRISMHR' payroll. The interface is similar to the previous screenshot, but the table displays details for unpaid employees. The summary section shows Pay Date (06/30/2026), Description (06-30-26 SMP), Payroll Type (Regularly Scheduled), Payroll Status (Client Approval Pending), Total Invoice (\$19,865.20), and Payroll Number (202622). The table lists one unpaid employee: Basic15xsl, Over, with Employee ID U59188, Gross Pay \$0.00, Deductions \$0.00, Net Pay \$0.00, Voucher 000138, and Employee Status Active. A 'Download' button is located at the top right of the table.

Name	Employee ID	Gross Pay	Deductions	Net Pay	Voucher	Employee Status
Basic15xsl, Over	U59188	\$0.00	\$0.00	\$0.00	000138	Active

Invoice Tab

Displays a breakdown of payment amounts, taxes, and fees.

Allows download of invoice details as a CSV file.

The screenshot shows the 'Invoice' tab selected in the 'Reports & Files' section. The interface includes a sidebar with navigation options like Home, My Employees, My Approvals, PTO Calendar, Time Sheet Entry, Payroll Approval, Payroll History, Report Center, and Manage Documents. The main content area displays payroll details for 06/30/2026 - SM PRISMHR. A summary table at the top shows Pay Date (06/30/2026), Description (06-30-26 SMP), Payroll Type (Regularly Scheduled), Payroll Status (Client Approval Pending), Total Invoice (\$19,865.20), and Payroll Number (202622). Below this, a section for 'Payroll Detail' includes tabs for Unpaid Employee Detail, Invoice, and Reports & Files. The 'Invoice' tab is active, showing client information (Fleetwood Mac Logistics Demo, 538 Broadhollow Rd, BROOKHAVEN, NY 11719) and a table of invoice items. A 'Download' button is visible in the top right of the invoice section.

Pay Date	Description	Payroll Type	Payroll Status	Total Invoice	Payroll Number
06/30/2026	06-30-26 SMP	Regularly Scheduled	Client Approval Pending	\$19,865.20	202622

Client	Address	Date
Fleetwood Mac Logistics Demo	538 Broadhollow Rd BROOKHAVEN, NY 11719	06/30/2026

Pay Period Ending	Control Number	Total Invoice
06/30/2026	00130-202622	\$ 19,865.2

Invoice Name	Amount
GROSS WAGES	\$17,432.95
FICA SOCIAL SECURITY TAX	\$1,080.84
FICA MEDICARE TAX	\$252.79

Reports & Files Tab

Displays payroll reports associated with the payroll batch.

Reports are available for viewing and download.

The screenshot shows the 'Reports & Files' tab selected in the 'Reports & Files' section. The interface is similar to the previous screenshot, but the 'Reports & Files' tab is active. It displays a list of payroll reports for 06/26/2026. The table includes columns for Title, File Type, Status, and Action. Each report has a 'Download' and 'View' link. The 'Reports & Files' tab is highlighted in the top navigation bar.

Title	File Type	Status	Action
Client Allocation Report	PDF	06/26/2026 01:26 AM EDT	Download View
Consolidated PDF Reports	PDF	06/26/2026 01:26 AM EDT	Download View
Deduction Register	PDF	06/26/2026 01:26 AM EDT	Download View
Gross-To-Net Report	PDF	06/26/2026 01:26 AM EDT	Download View
Payroll Allocation Report	PDF	06/26/2026 01:26 AM EDT	Download View
Payroll Check Journal	PDF	06/26/2026 01:26 AM EDT	Download View
Payroll Register	PDF	06/26/2026 01:26 AM EDT	Download View

Denying a Payroll

Use this action when a payroll cannot be approved and requires correction by the payroll processor.

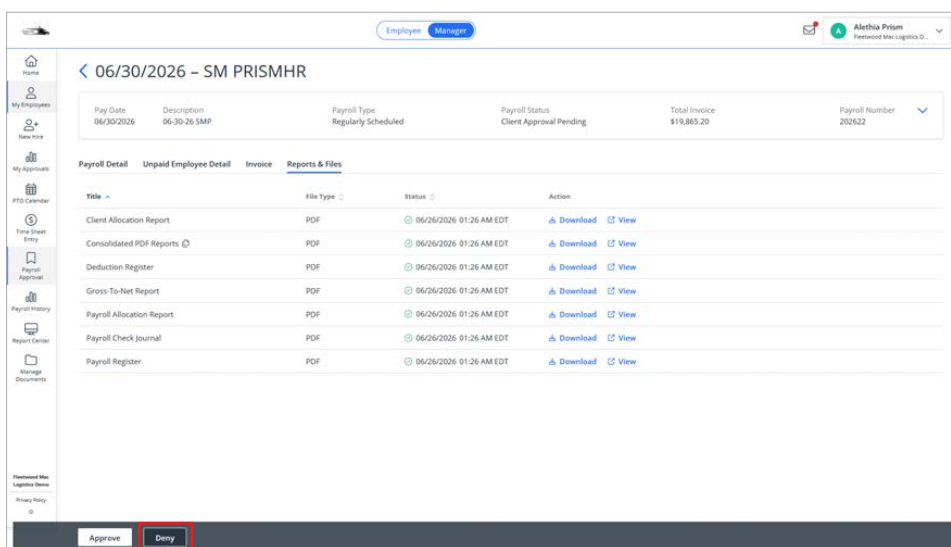
Important Notes

- A denial reason is required.
- Managers do not correct payroll data themselves.
- Denying a payroll sends it back into the workflow for review.

Steps:

To deny a payroll:

1. Select **Deny** to open the **Deny Payroll** action.



2. Before you can deny a payroll, you need to enter a reason.

Type the reason in the action, then select **Deny Payroll**.

The payroll will be sent back to the payroll processing team to review and fix any issues.

A screenshot of a modal dialog box titled 'Deny Payroll #202622'. The dialog has a close button (X) in the top right corner. Below the title, there is a red asterisk followed by the text '* Please provide a reason for denying the payroll'. Underneath this text is a large, empty text input field. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Deny Payroll'. The 'Deny Payroll' button is highlighted with a red rectangle.

Approving a Payroll

Use this action when a payroll cannot be approved and requires correction by the
Use this action when the payroll has been reviewed and is ready to move forward.

Important Notes

- Approval confirms review, not payroll processing.
- Once approved, the payroll continues through processing.
- Approved payrolls cannot be edited by managers.

To approve a payroll:

Select **Approve**.

The system records the approval and submits the payroll to the payroll processing team for further processing.

The screenshot displays the PrestigePRO Manager interface for a manager. The top navigation bar includes 'Employee' and 'Manager' tabs, and a user profile for 'Alethia Prism'. The main content area is titled '06/30/2026 - SM PRISMHR' and shows payroll details: Pay Date (06/30/2026), Description (06-30-26 SMP), Payroll Type (Regularly Scheduled), Payroll Status (Client Approval Pending), Total Invoice (\$19,865.20), and Payroll Number (202622). Below this, there are tabs for 'Payroll Detail', 'Unpaid Employee Detail', 'Invoice', and 'Reports & Files'. The 'Reports & Files' tab is active, showing a table of reports with columns for Title, File Type, Status, and Action. The table lists several reports, including 'Client Allocation Report', 'Consolidated PDF Reports', 'Deduction Register', 'Gross-To-Net Report', 'Payroll Allocation Report', 'Payroll Check Journal', and 'Payroll Register'. At the bottom of the interface, there are two buttons: 'Approve' and 'Deny'. The 'Approve' button is highlighted with a red rectangle.

Title	File Type	Status	Action
Client Allocation Report	PDF	06/26/2026 01:26 AM EDT	Download View
Consolidated PDF Reports	PDF	06/26/2026 01:26 AM EDT	Download View
Deduction Register	PDF	06/26/2026 01:26 AM EDT	Download View
Gross-To-Net Report	PDF	06/26/2026 01:26 AM EDT	Download View
Payroll Allocation Report	PDF	06/26/2026 01:26 AM EDT	Download View
Payroll Check Journal	PDF	06/26/2026 01:26 AM EDT	Download View
Payroll Register	PDF	06/26/2026 01:26 AM EDT	Download View

Managing Reports in Report Center

This section explains how worksite managers can use the Report Center to review employee and organizational data in a consolidated view or through personalized report views. It also covers how to save and manage custom report views for ongoing use.

The Report Center provides access to configurable, view-only reports and dashboards.

When Would I Use This?

- Review employee or workforce information
- Monitor key performance indicators (KPIs)
- View hiring or workforce trends
- Customize reports to highlight information most relevant to you
- Save personal report views for future access

Important Notes

- Report views control **how data is displayed**, not the data itself.
- Saved views are **personal** and visible only to you.
- Applying or saving a view does not change employee records.
- If a View option is not visible, it is due to permission settings.
- Contact HR or your system administrator if access appears incorrect.

Getting Started

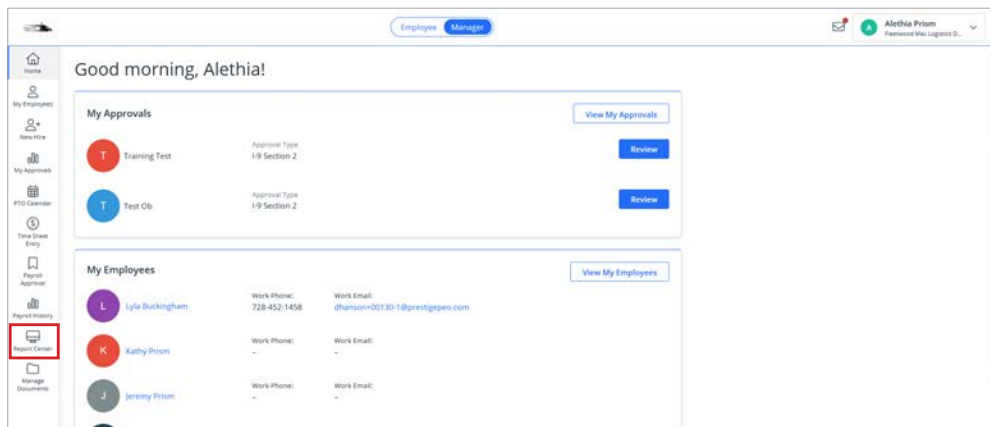
The **Report Center** provides access to **30+ configurable reports and dashboards**, depending on your organization's setup. Managers can review data:

- In a consolidated view for their team or organization
- Through personalized views tailored to their needs

Reports are view-only and designed for insight and analysis.

Steps

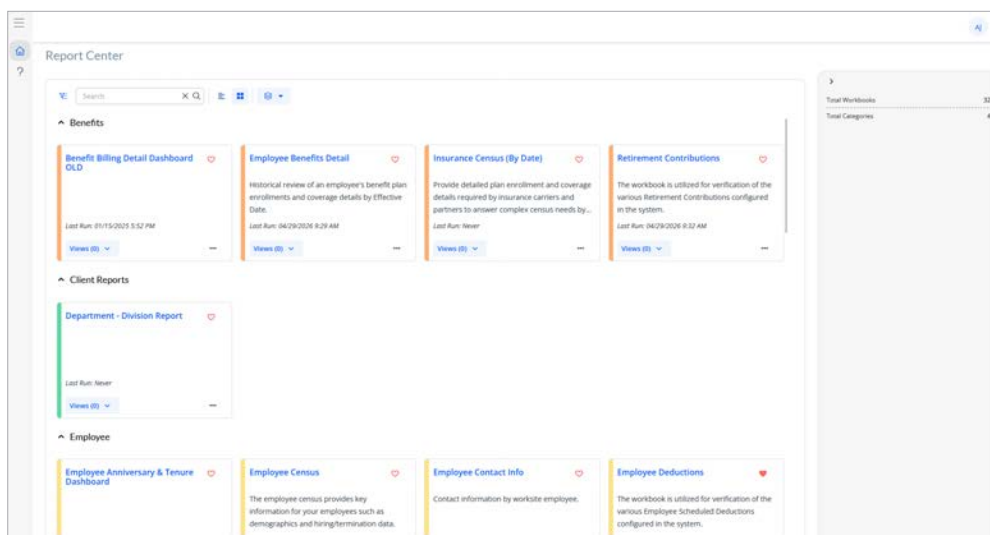
1. From the Manager Dashboard, navigate to **Report Center**.



2. Report Center will open in a new window. Use this section to open available reports and dashboards.

What you can view:

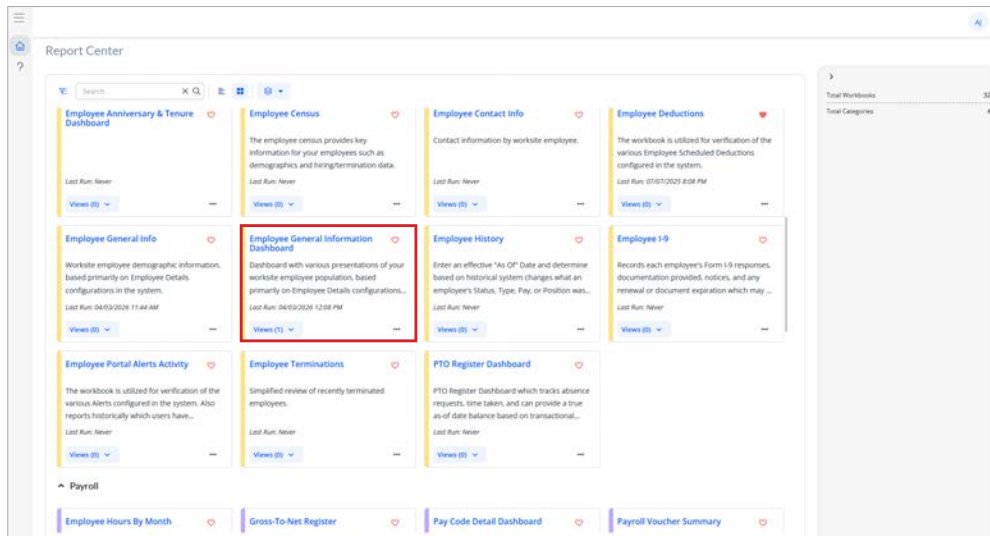
- Standard dashboards and reports
- Hiring and workforce trend reports
- Key metrics and summary information



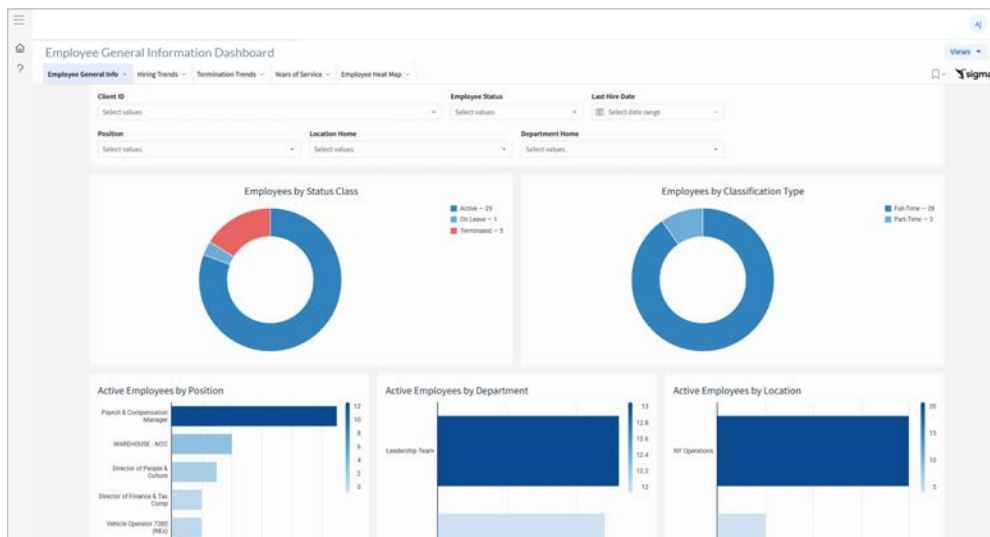
Accessing Reports and Dashboards

From the **Report Center**, select a report or dashboard.

- Example: “Employee General Information Dashboard”



- Review the displayed KPIs and summary data.



Customizing Report Views

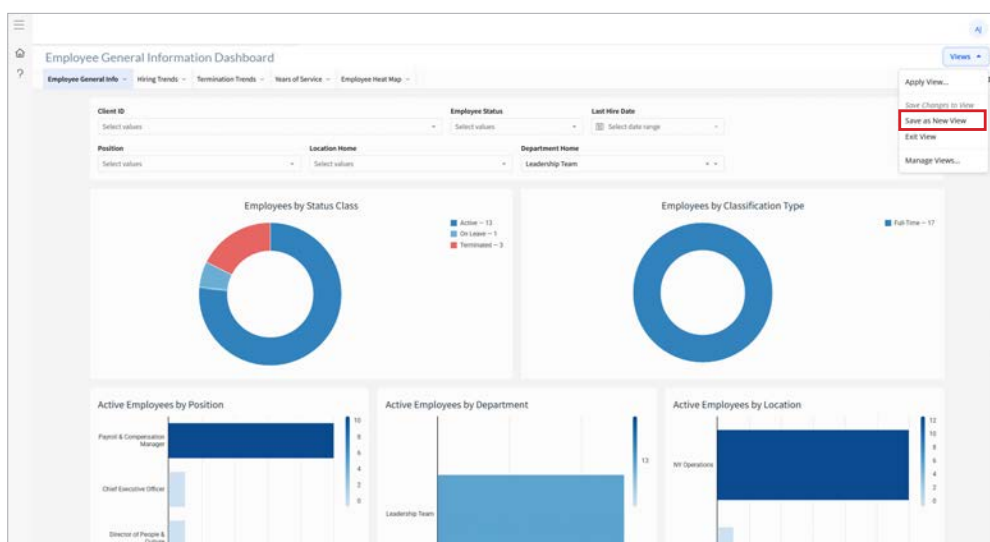
Use this option to customize how report data is displayed for your personal use.

What the manager can view or update

- Filters and displayed values
- Layout and organization of report data
- Saved personal views

Steps

1. Adjust filters or displayed values as needed.
2. Select the Bookmark and Select **Save as New View**.



3. Enter a name for the view.

The screenshot shows the 'Save New View' dialog box. A red box highlights the 'Name' field containing 'New Saved View'.

Save New View

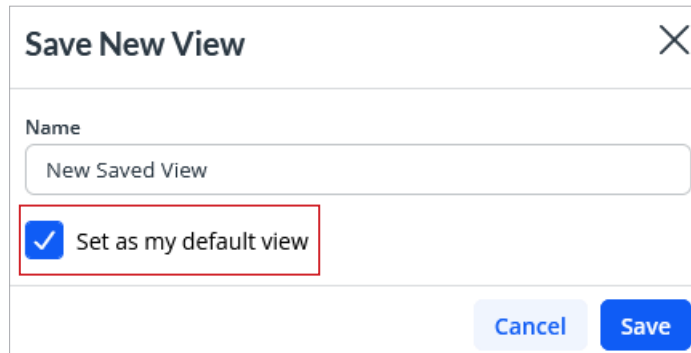
Name

New Saved View

☐ Set as my default view

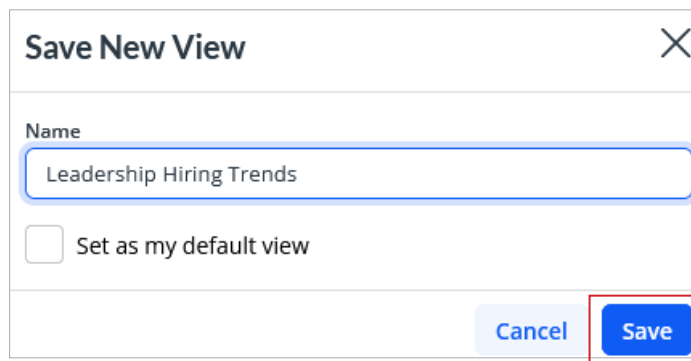
Cancel Save

4. (Optional) If you want this view to be your default, select this checkbox.



The dialog box is titled "Save New View" with a close button (X) in the top right corner. Below the title is a "Name" label and a text input field containing "New Saved View". Below the input field is a checkbox labeled "Set as my default view", which is checked. At the bottom right are "Cancel" and "Save" buttons. A red rectangle highlights the "Set as my default view" checkbox.

5. Select Save to bookmark this new view.



The dialog box is titled "Save New View" with a close button (X) in the top right corner. Below the title is a "Name" label and a text input field containing "Leadership Hiring Trends". Below the input field is an unchecked checkbox labeled "Set as my default view". At the bottom right are "Cancel" and "Save" buttons. A red rectangle highlights the "Save" button.

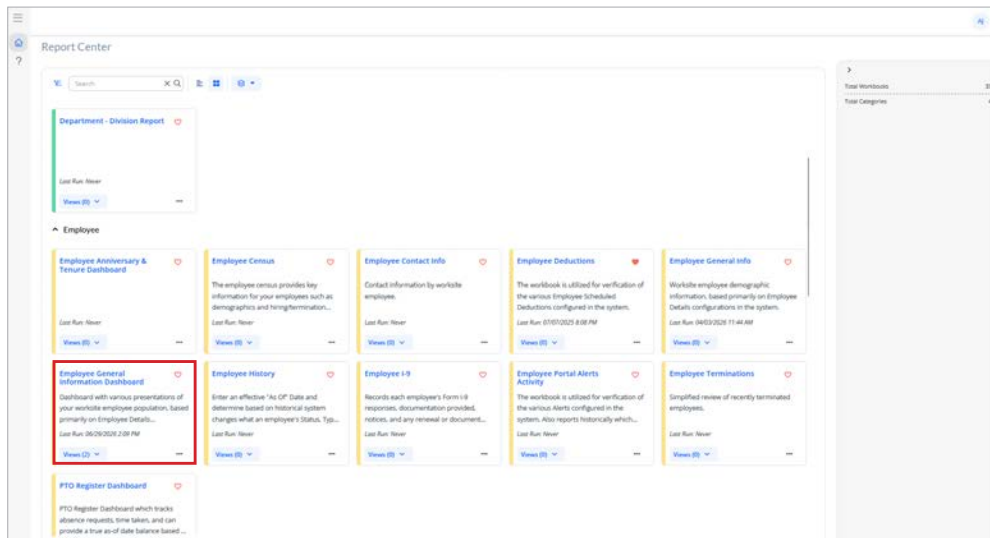
Managing Saved Views

Use the **View options** to apply, save, or manage report views. Views control how report data is displayed for you and do not change underlying data.

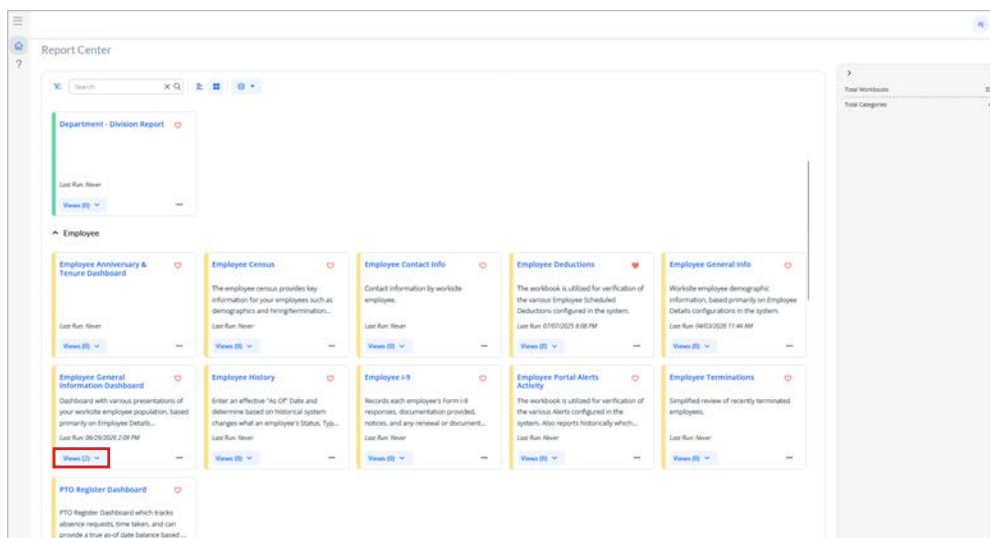
Saved views are personal and do not affect other users.

Steps

1. From **Report Center**, select a report or dashboard.
 - Example: “Employee General Information Dashboard”



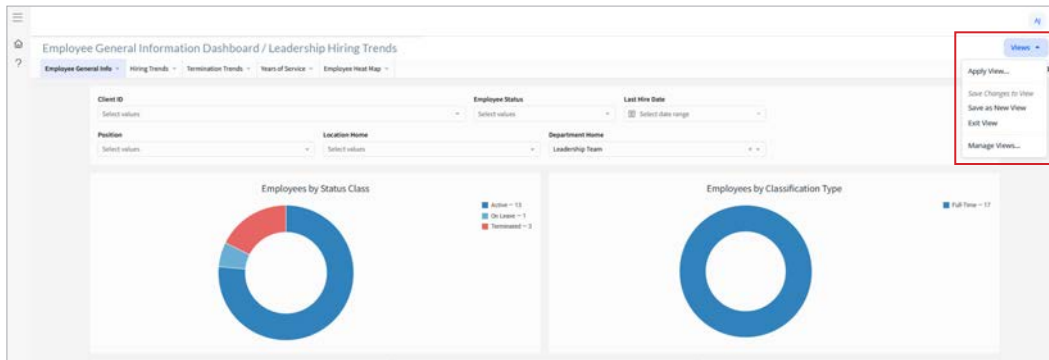
2. The saved views appear under **Views**, along with the total number of available views.



View Options

Use the **View** options to apply, save, or manage report views. Views control how report data is displayed for you and do not change underlying data.

Saved views are personal and do not affect other users.



Apply View

Apply View displays a previously saved view for the selected report.

- Use this option to quickly switch between saved report layouts.
- Applying a view updates filters and displayed values based on that view.

Save Changes to View

Save Changes to View updates the currently selected view with any changes you have made.

- Use this option when you want to keep modifications to an existing view.
- Changes apply only to your saved view.

Note: This updates the selected view, not the original report.

Save as New View

Save as New View creates a new, separate view using your current settings.

- Use this option to preserve a customized layout without changing an existing view.
- Enter a name for the new view when prompted.

Exit View

Exit View closes the current view and returns you to the default report display.

- Use this option to leave a saved view without applying additional changes.
- Unsaved changes are not retained.

Manage Views

Manage Views allows you to organize your saved views.

Depending on your permissions, you may be able to:

- View saved report views
- Apply a different view
- Update view settings
- Remove views you no longer need

Note: Managing views does not affect report data or other users.

Managing Documents

This section explains how worksite managers can view, upload, and manage documents within the Manage Documents area. It covers how to locate documents, download files, and upload new documents to the appropriate folders.

Access to document actions is permission-based and may vary by folder and document type.

When Would I Use This?

- View or download company or employee documents
- Upload documents to the portal
- Manage document versions or details (if permitted)

Important Notes

- Always upload documents to the correct folder.
- Do not upload sensitive documents unless permitted.
- Use document versions instead of deleting files when updates are needed.
- Certain folder permissions and access may be restricted.
- Contact HR or your system administrator if you have access questions.

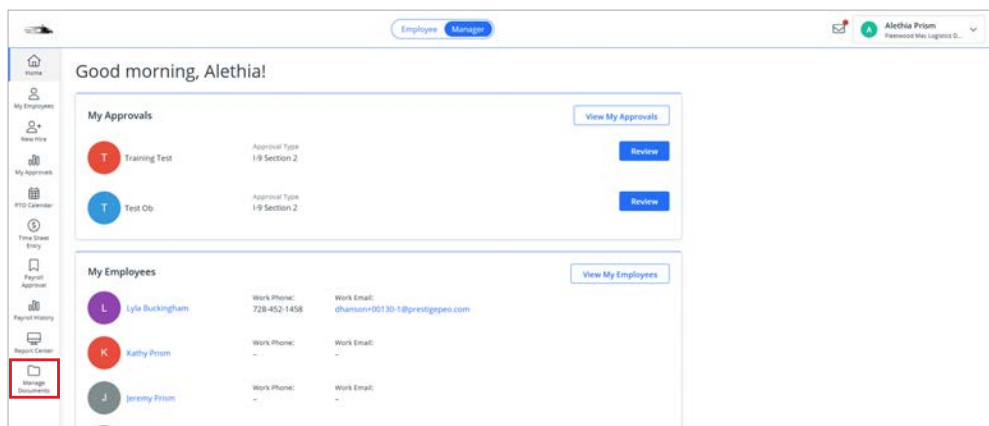
Getting Started

The Manage Documents screen is organized into folders that determine document visibility and access.

Use this process to locate and view existing documents.

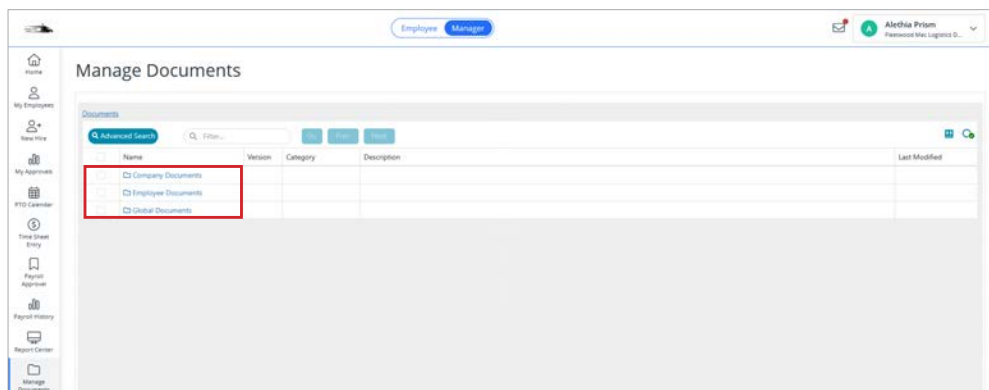
Steps

1. From the Manager Dashboard, navigate to Manage Documents.



2. Available folders may include:

- **Company Documents** – Documents shared at the company level
- **Employee Documents** – Documents associated with individual employees
- **Global Documents** – Documents available across multiple areas

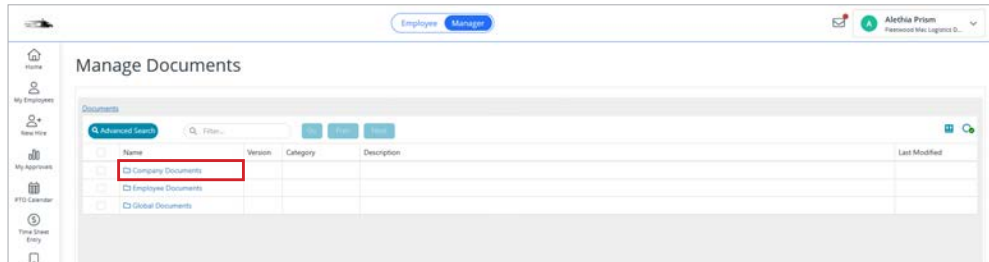


Uploading Documents

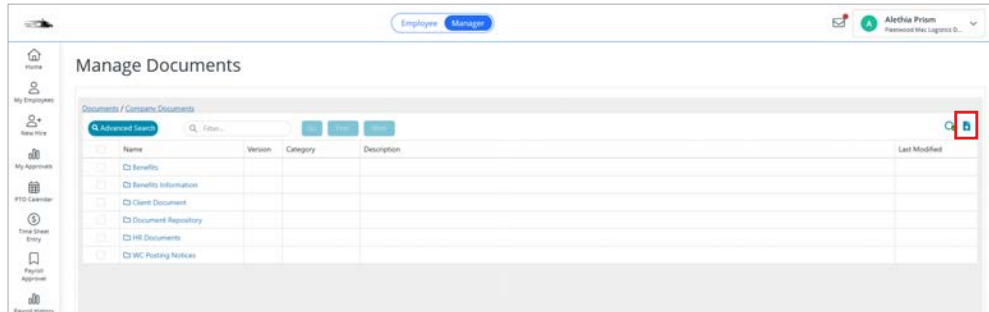
Use this process to upload documents to the appropriate folder.

Steps

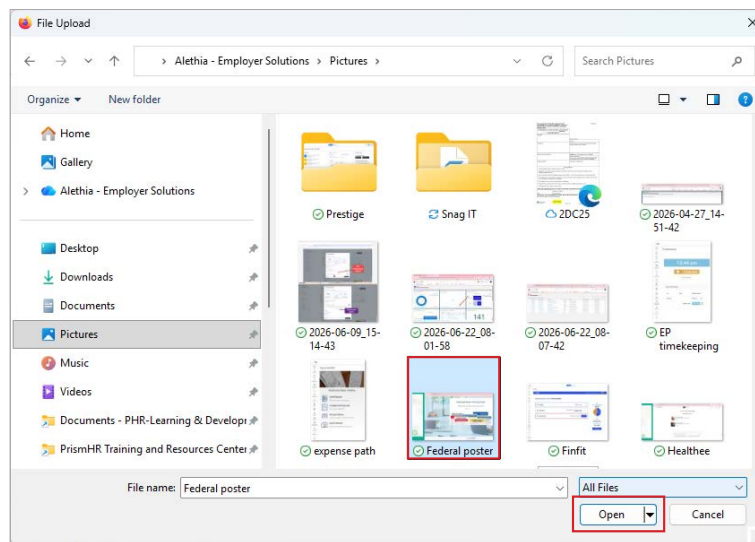
1. Navigate to the destination folder.



2. Select the **Upload** icon.



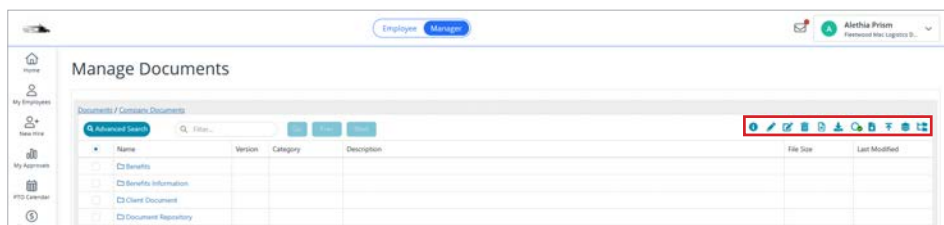
3. Choose a document from your computer and select Open to upload the file.



Document Action Options

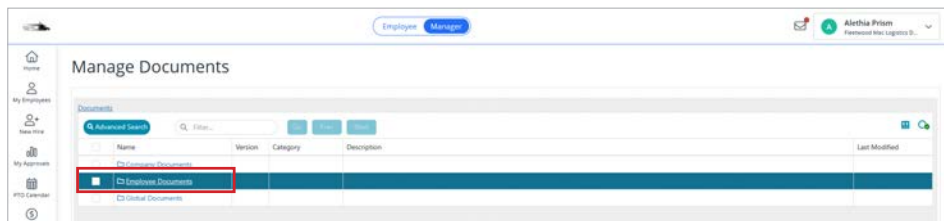
Depending on your permissions, the following document actions may be available:

- **Document Details** – View basic information about the document.
- **Rename** – Change the document name.
- **Edit Description** – Update the document description.
- **Delete** – Remove the document from the system.
- **Report Download** – Download document metadata in report format.
- **Bulk Download** – Download multiple documents at once.
- **Upload** – Add a new document to the selected folder.
- **Upload Version** – Add a new version of an existing document.
- **Manage Versions** – View and manage previous document versions.



Employee Documents Folder

Use this folder to view or manage documents related to individual employees.



- Each employee has a dedicated folder.
- Folders are labeled with the employee name and employee ID.

