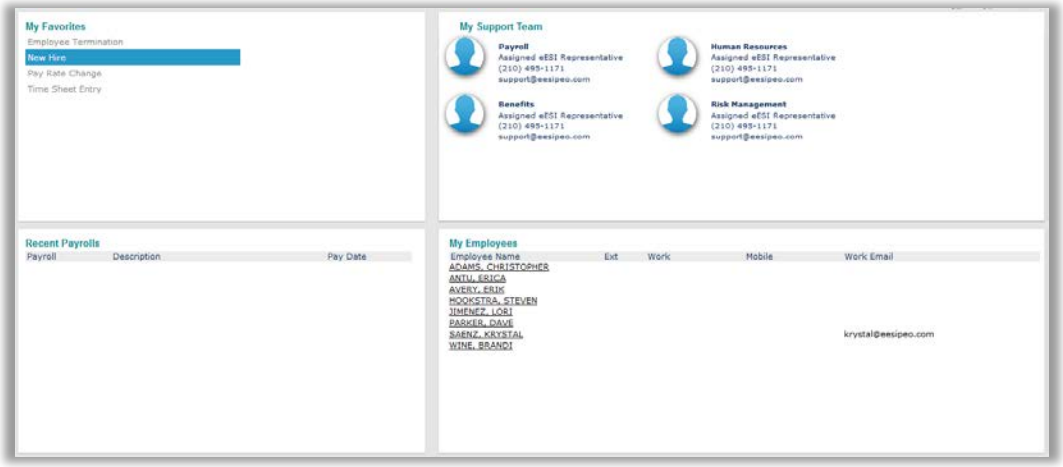
Getting Started in Your Manager Portal

Dashboard

As soon as you log in to your Manager Portal you are immediately taken to your Dashboard. Your Dashboard consists of four parts:

- Use ***My Favorites*** to access items frequently used.
- Your dedicated Payroll, HR, Benefits and Risk team's contact information is displayed in ***My Support Team***.
- Your ***Recent Payrolls*** processed will be displayed here.
- ***My Employees*** will list all of your active employees. Select a name to go to Employee Details.

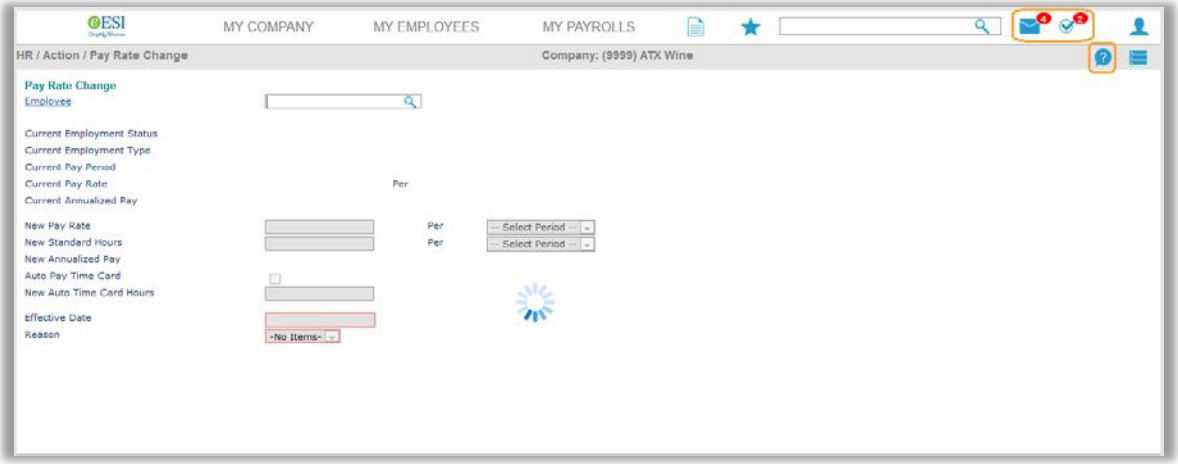


Navigation

Use your navigation bar to access additional items related to your company, employees and payroll. Use the search field to enter information to search by for an employee or form instead of navigating to the form or employee using the menu paths.

Pending approvals and message for items such as payroll will be notated by the red tick mark on the envelope and check mark icons. Select the appropriate icon to access your pending message and approvals.

Select the question mark to access the help section and user guides.



New Hire Entry - Electronic On-boarding Users

Entering a New Hire

Log in to your Manager Portal and go to **My Employees** / **HR** / **Action** / **New Hire**.

"Hiring" users start here - all other users begin with step one below

You can access job candidate information by selecting ***Candidates*** from the ***Action bar***. Use the search dialog to select the job candidate you want; the candidate's information populates the new hire form. Once you save the form, you can select ***Employee Details*** from the ***Action bar***.

Submit an inquiry to your HR Business Partner if you are interested in learning more about our Hiring services.

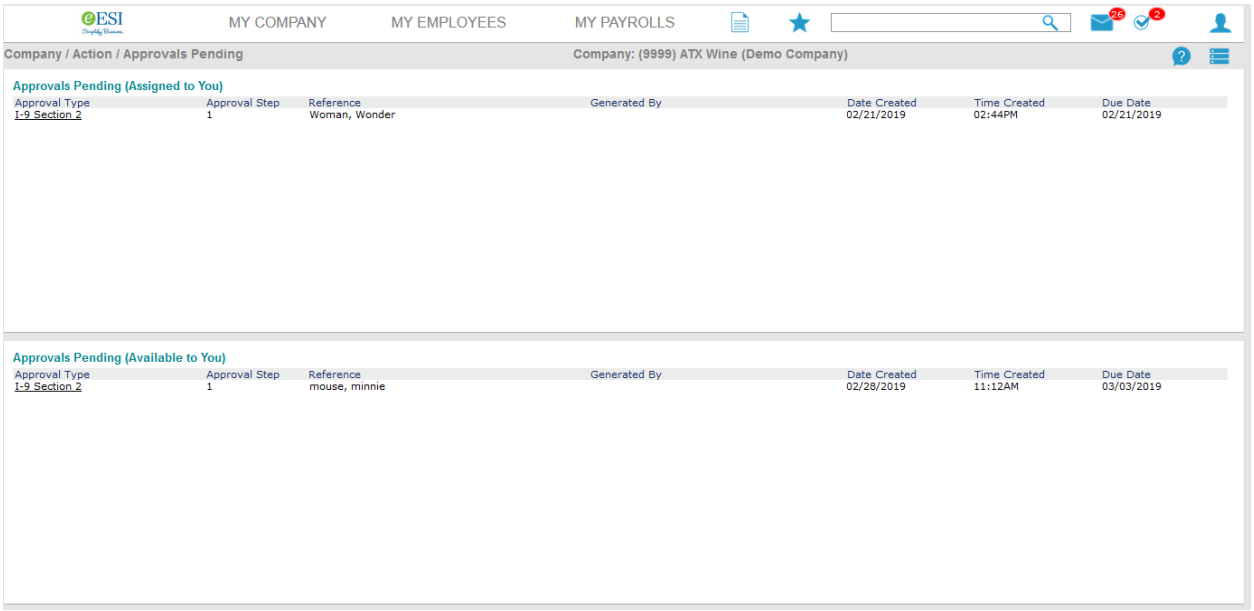
All of the fields in red are required and outlined below:

1. Enter the primary ***Work Location ID*** where the employee works.
2. Enter the employees ***Social Security Number***.
3. Enter the employee's ***First Name***.
4. Enter the employee's ***Last Name***.
5. Enter the employee's ***Middle Name***.
6. Enter the employee's ***Nickname***.
7. Enter the employee's ***Birth Date***.
8. Enter the employee's ***Company Start Date***.
9. Select the employee's ***Position*** from the available list. If a position is not listed, please contact your Payroll Specialist or HR Business Partner to have it added.
10. Select ***Employment Type*** "***Active***".
11. Select the employee's ***Benefit Group***. This determines the plans offered to the employee.
12. Enter employee's ***Division***, ***Department***, ***Shift*** and ***Project*** if applicable.
13. Enter the employee's supervisor in ***Reports To***. This will show on the company ***Organization Chart*** found under ***HR / View***.
14. Select the ***Pay Group*** the employee belongs to.
15. Select the ***Pay Method*** by which the employee will be paid.
16. Enter the ***Pay Rate*** that corresponds with the selected ***Pay Rate Basis***.
17. Select the ***Pay Rate Basis***.
18. Enter the employee's ***Standard Hours*** during a pay period. The system uses this to calculate the employee's annualized pay.
19. Select ***Auto Time Sheet*** if this is the salaried employee and the system should automatically create and accept time sheets for the employee.
20. Enter the ***Default Time Sheet Hours*** to use in conjunction with the ***Auto Time Sheet*** option. The employee's timesheet defaults to this number of hours.
21. Skip ***Benefits Calculation Salary***. This is used to override benefits calculations that use employee's salary in the calculation.
22. Enter the employee's address information.
23. Enter the employee's phone numbers.
24. Enter the employee's Personal and Work ***Email Address***. If both are provided, the Personal email address will be used for on-boarding purposes.
25. **Save**.

You're newly hired employee is now in the system and ready for on-boarding. They will receive an email notifying them to log in to their employee portal to complete their on-boarding.

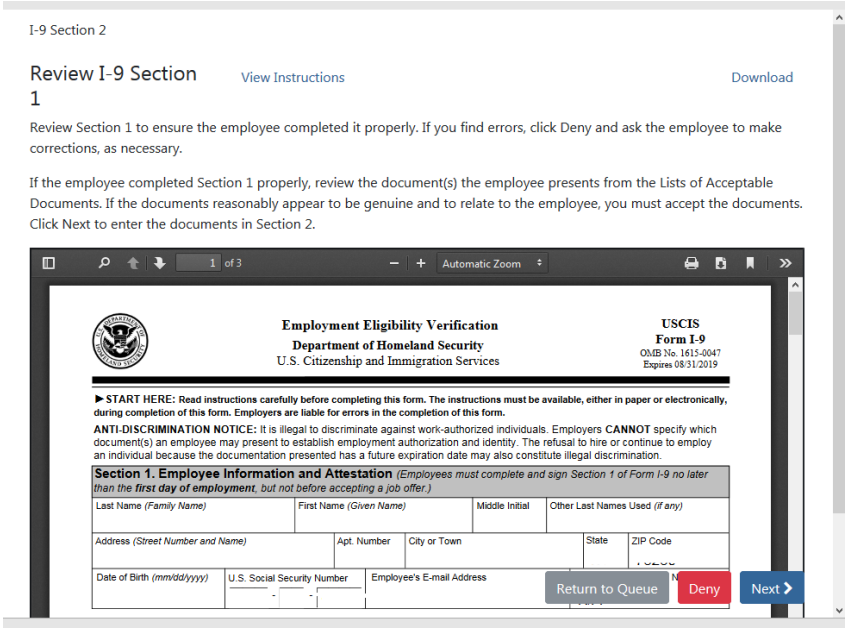
Form I9 Section 2 Verifications

You will receive an email from no-reply@prismhr.com when an employee has submitted their I9 for verification. Log in to your Manager Portal to take action. You will see that you have messages and/or approvals requiring attention, as indicated by the red tick mark on your message and approval icons in your upper right corner. Click on the approval icon (blue check mark) to be directed to the approvals section. The approvals section is broken out in to 2 sections, approvals *assigned* to you and approvals *available* to you.



1. Select the I9 for an employee you wish to approve from the bottom section 'Approvals Pending (Available to You)' and click 'grab' to proceed with the approval. Once an approval is 'grabbed' other manager will no longer see or have access to that approval. It is now assigned to you. We recommend you do not grab an item unless you are prepared to take action.
2. You will notice this item has now moved from the bottom section to the top. Select the item and follow the on-screen instructions to complete section 2 of the I9.

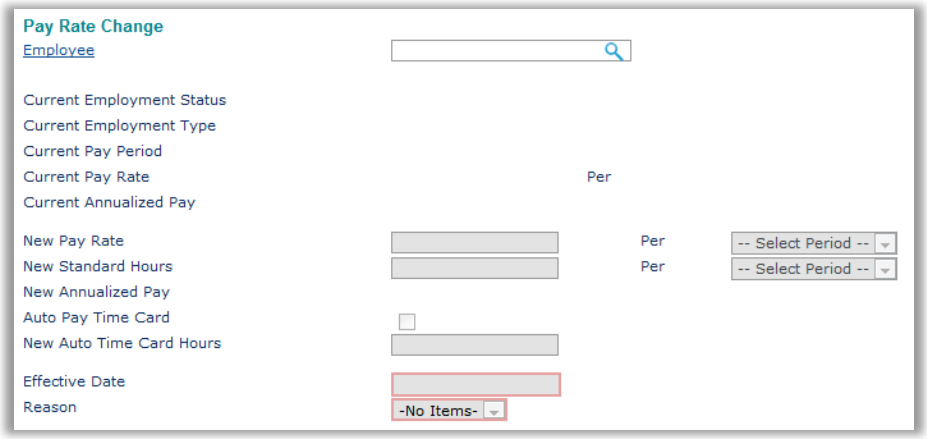
If you need further instructions on completing the I9 click on the 'View Instructions' link at the top or click on next to proceed.



Employee Maintenance

Pay Rate Change

Log in to your Manager Portal and go to **My Employees** / **HR** / **Action** / **Pay Rate Change**.



1. Enter the ***Employee*** by either typing the name or ID to display a pop-up list of matching employee records, or by clicking the field label to open the search window. The *Current Employment Information* displays.
2. Enter the ***New Pay Rate***, then select the ***period*** the rate applies to.

The New Pay Rate and Per basis define the new employee's pay. For example, $250 Weekly or $3500 Monthly.

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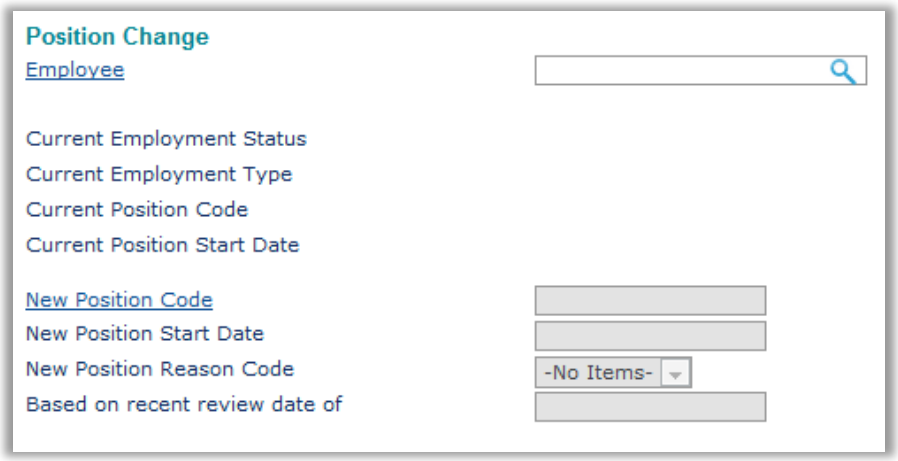
3. Enter the ***New Standard Hours***, then select the ***period***. The system calculates and displays the *New Annualized Pay.*
4. Select ***Auto Pay Time Card*** to auto populate the employee's time sheet with hours.
5. If the employee's time sheet populates with time, enter the default number of hours per pay period in the ***New Auto Time Card Hours*** field.
6. Enter the Effective Date the new rate goes into effect.
   a) In cases where the date of the pay rate change falls during a payroll where hours have already been entered for the employee, the system allows you to enter the number of hours to pay the employee at the new rate. If you enter any hours, including 0, the option *'If you don't know what hours to assign to the new pay rate'* is deselected and the payroll processor does not see a notification of the pay rate change in the timesheet.
   b) If you do not know the number of hours to assign, leave the ***Hours Paid*** field blank. The payroll processor will be prompted to assign hours for the employee the next time they edit the payroll.
7. Select the ***Reason*** that best describes the pay rate change.
8. ***Save***.

Employee Maintenance

Position Change

Log in to your Manager Portal and go to **My Employees** / **HR** / **Action** / **Position Change**.



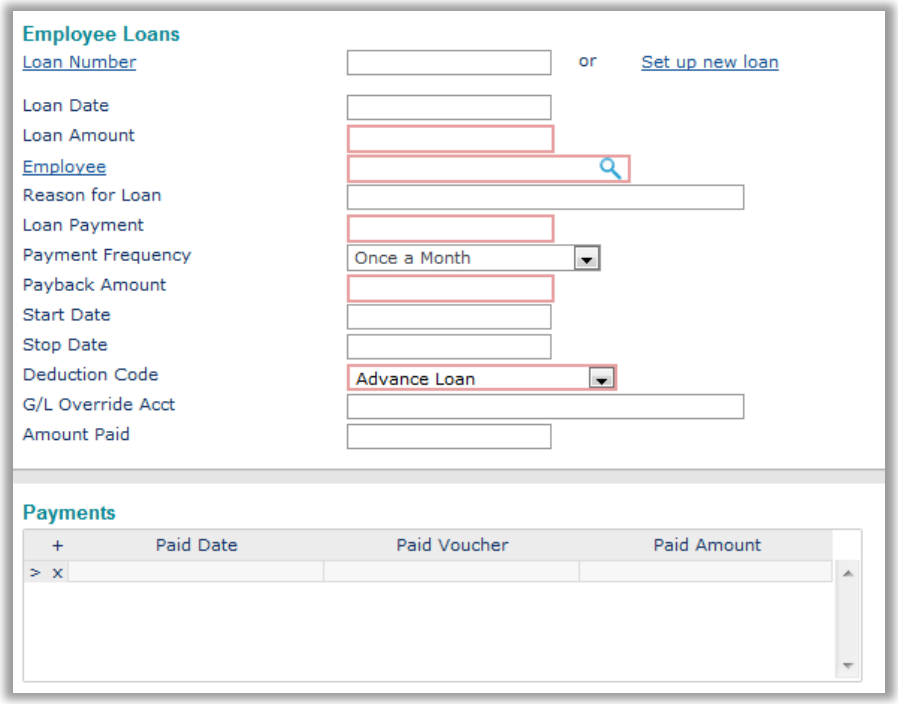
1. Enter the ***Employee*** by either typing the name or ID to display a pop-up list of matching employee records, or by clicking the field label to open the search window. The *Current Employment Information* displays.
2. Enter the ***New Position Code*** for the employee. Contact your Payroll Specialist to add new codes.
3. Enter the ***New Position Start Date*** the new position goes into effect.
4. Select the ***New Position Reason Code*** that best describes the reason for the position change.
5. Enter the Based on Recent Review Date that caused this position change to occur, if applicable.
6. Save.

Payroll Maintenance

Employee Loans

Use the Employee Loans form to establish employee loan information, track the payment of the loan, and view loan payments that were deducted from employee paychecks.

Log in to your Manager Portal and go to **My Payroll** / **Payroll** / **Change** / **Employee Loans**.



1. Select an existing ***Loan Number*** or click Set up new loan. The system will automatically generate a unique loan number if you set up a new loan.
2. Select the ***Employee*** by either typing the name or ID to display a pop-up list of matching employee records, or by clicking the field label to open the search window.
3. Enter the ***Loan Amount*** granted to the employee.
4. Enter the ***Loan Date*** on which the loan was granted.
5. Enter the ***Reason for Loan***.
6. Enter the ***Loan Payment*** amount to automatically deduct from each paycheck to repay the loan.
7. Select the ***Payment Frequency*** for the payroll deduction.
8. Enter the ***Payback Amount*** required to consider the loan paid in full, which is the loan amount.
9. Enter the ***Start Date*** on which payroll deductions will begin.
10. Enter the ***Stop Date*** on which payroll deductions will cease.
11. Enter the ***Deduction Code*** used for the loan.
12. G/L Override Acct is not an applicable field.
13. Use the ***Amount Paid*** field to enter the amount the employee has paid to date prior to entering the loan.
14. Save.