HR CLOUD ONBOARDING GUIDE

Step by Step Manager's Guide to Navigating the PEOPL*EASE* HR Cloud

CORPORATE HEADQUARTERS
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V 2019.08

CONTENTS

GETTING STARTED

WELCOME TO PEOP*LEASE*! THIS WORKBOOK IS MEANT TO BE A GUIDE TO THE NEW PEOP*LEASE* PLATFORM. THE INSTRUCTIONS COUPLED WITH SCREEN-SHOTS WILL HELP YOU TO GET COMFORTABLE IN THE PEOPL*EASE* SYSTEM, BUT IT IS NOT COMPREHENSIVE. SHOULD YOU HAVE ANY QUESTIONS OR NEED ASSISTANCE, YOU ARE ALWAYS WELCOME TO REACH OUT TO YOUR PAYROLL SPECIALIST.

GETTING STARTED

Navigate to https://ppl.prismhr.com/ppl and enter your credentials:

NAVIGATION

HOW TO USE YOUR NAVIGATION TOOLBAR

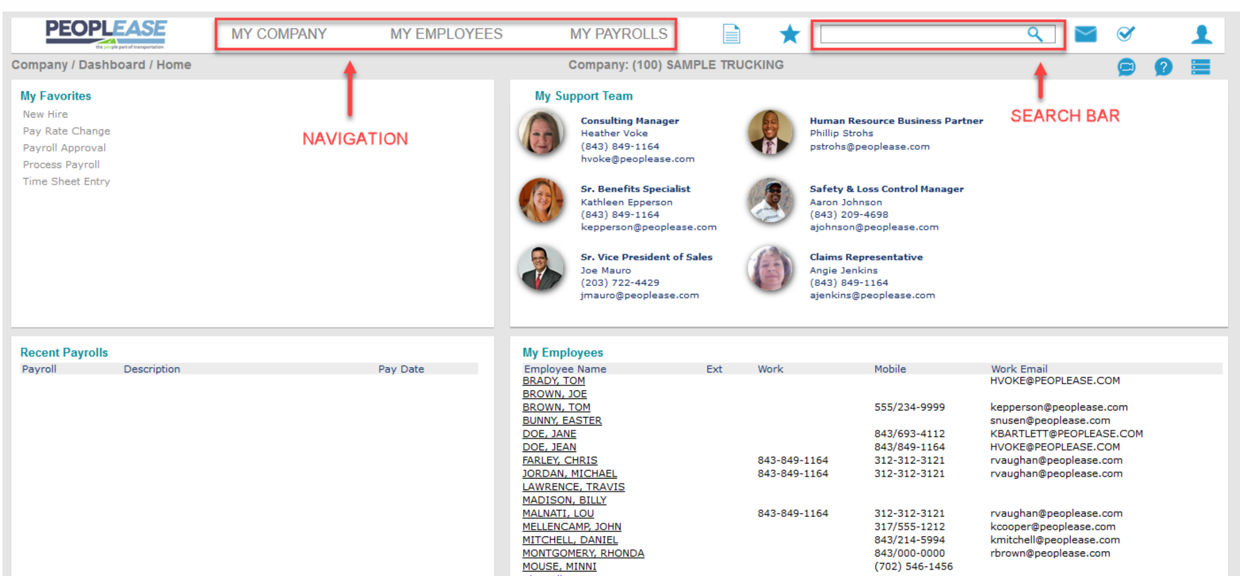
Upon logging in, you'll find the navigation toolbar across the top of the home screen.

My Company: This is where you will find all the information that pertains to your organization and allows you to manage your company's basic structure.

My Employees: Allows you to maintain your employees' HR records.

My Payrolls: Allows you to enter payroll, view employee payroll history and invoices as well as manage voluntary deductions for your employees.

Search Bar: Allows you to search for employees, reports, or other items. This gives you quick access to features without needing to know where to find them in the menus.



NAVIGATION

HOW TO USE YOUR NAVIGATION TOOLBAR

Reporting: The paper icon gives you access to various reports,

Favorites: You can add Favorites at any time by navigating to the screen you would like to add/remove from favorites, clicking on the "Action Menu," and selecting "add to favorites" or "remove from favorites." These Favorites will be listed on the Dashboard when you first login to the system. You can also access them access them from the Favorites menu

Messages: The Messages icon indicates whether you have any messages. Click it to access the messages

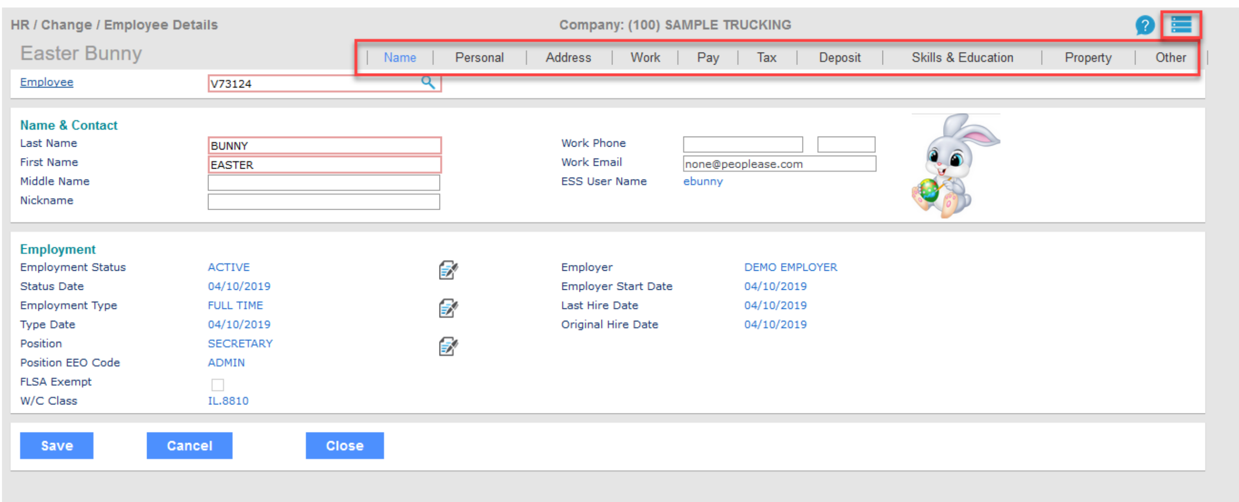
Approvals: Approvals icon indicates whether you have any pending approvals. Click it to access the approvals

Help: Utilizing the icon will display a user guide for the page in the system that you are on. Video help is available on many of these features. Click the video help icon at the top right of the form to watch the video.

EMPLOYEE DETAILS

PAY RATE CHANGES

You can click on an employee's name on the Dashboard to access the **Employee Details** screen:



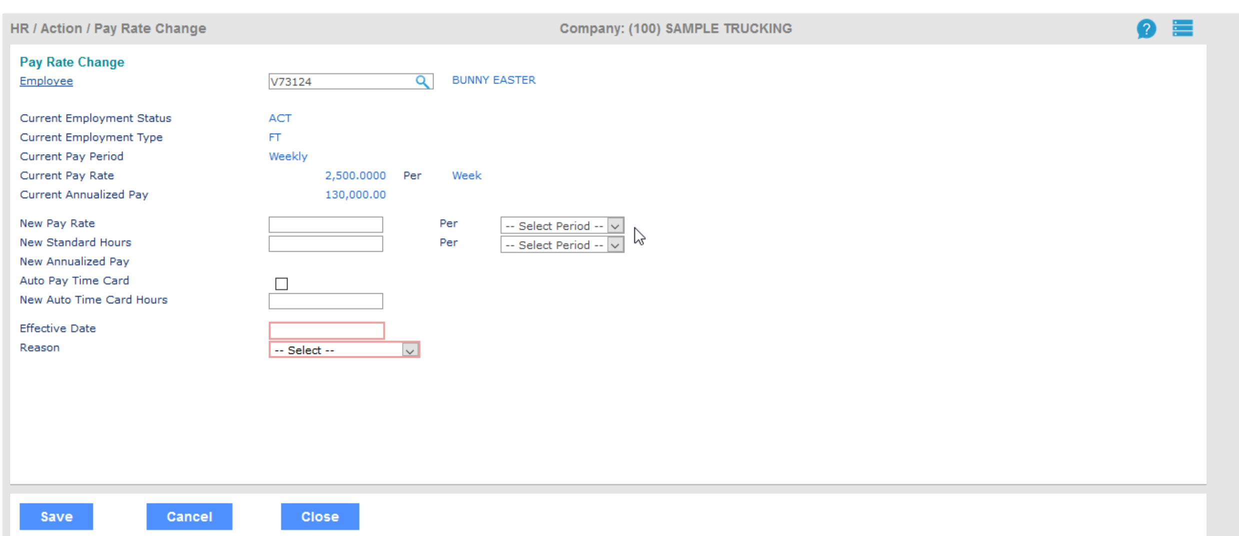
The Employee Details screen allows you to view and update employees' personal data, including taxes, direct deposit, etc.

EMPLOYEE DETAILS

PAY RATE CHANGES

Pay Rate Changes can be accessed by clicking on the icon on the Pay tab. This will open the Pay Rate Change in a pop-up window.

Enter new pay information for employee and click Save.



EMPLOYEE DETAILS

DIRECT DEPOSIT

Direct Deposit information can be added or changed from the Deposit tab.

Deposit Status:

Active if setting up new Direct Deposit
Inactive if inactivating existing Direct Deposit

Pay Types to Deposit:

Select All if all pay types (Regular earnings, Vacation earnings, etc.) should be paid via Direct Deposit

Type-Checking or Savings:

Pay Type – only needs to be selected if this specific account should receive only certain types of pay (Supplemental earnings, Vacation earnings, etc.)

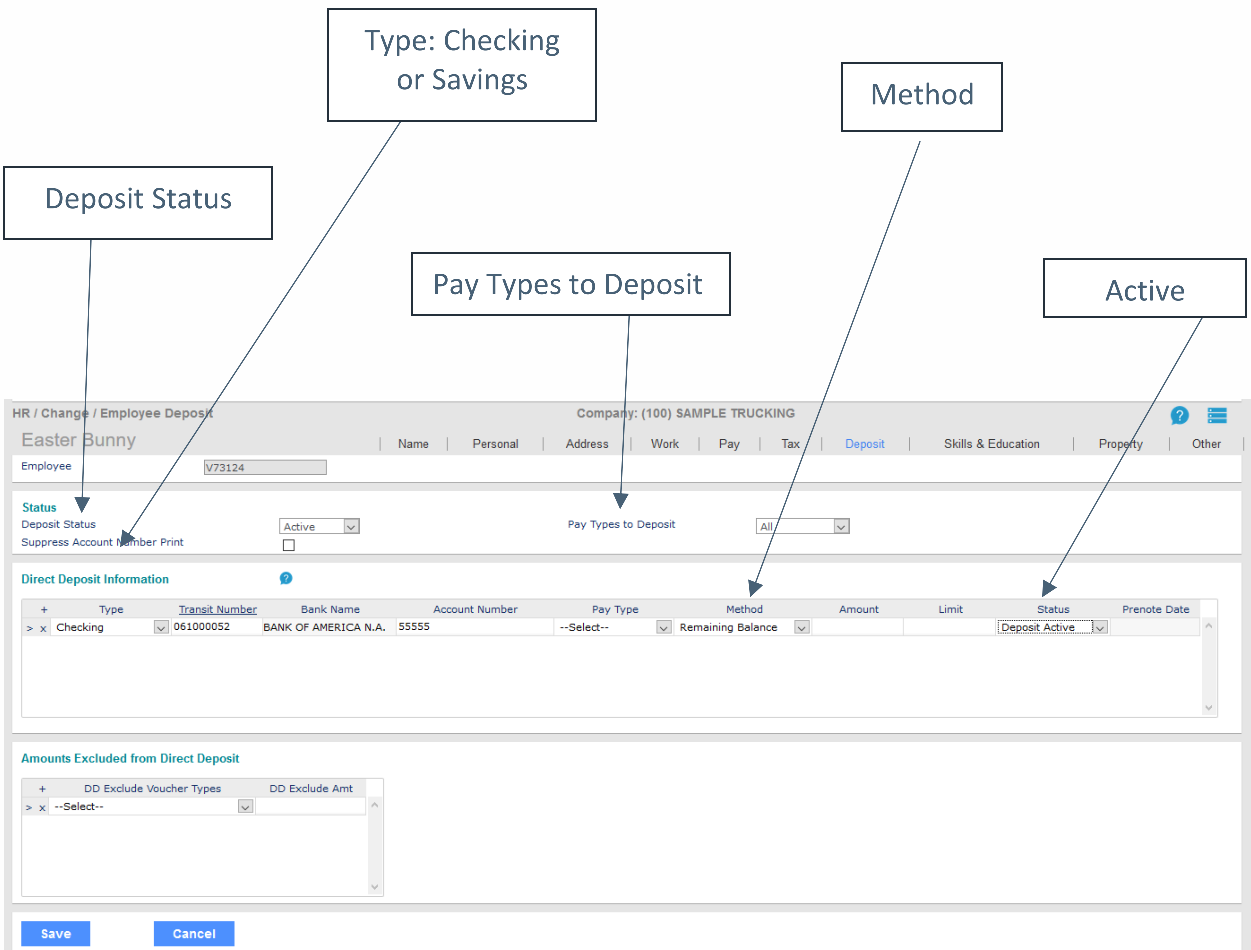
Method:

Fixed: Fixed $ amount to this specific account
Percentage: % of net goes to this specific account
Remaining Balance: **used if all net earnings go to this account**

Status – set as Active

EMPLOYEE DETAILS

DIRECT DEPOSIT



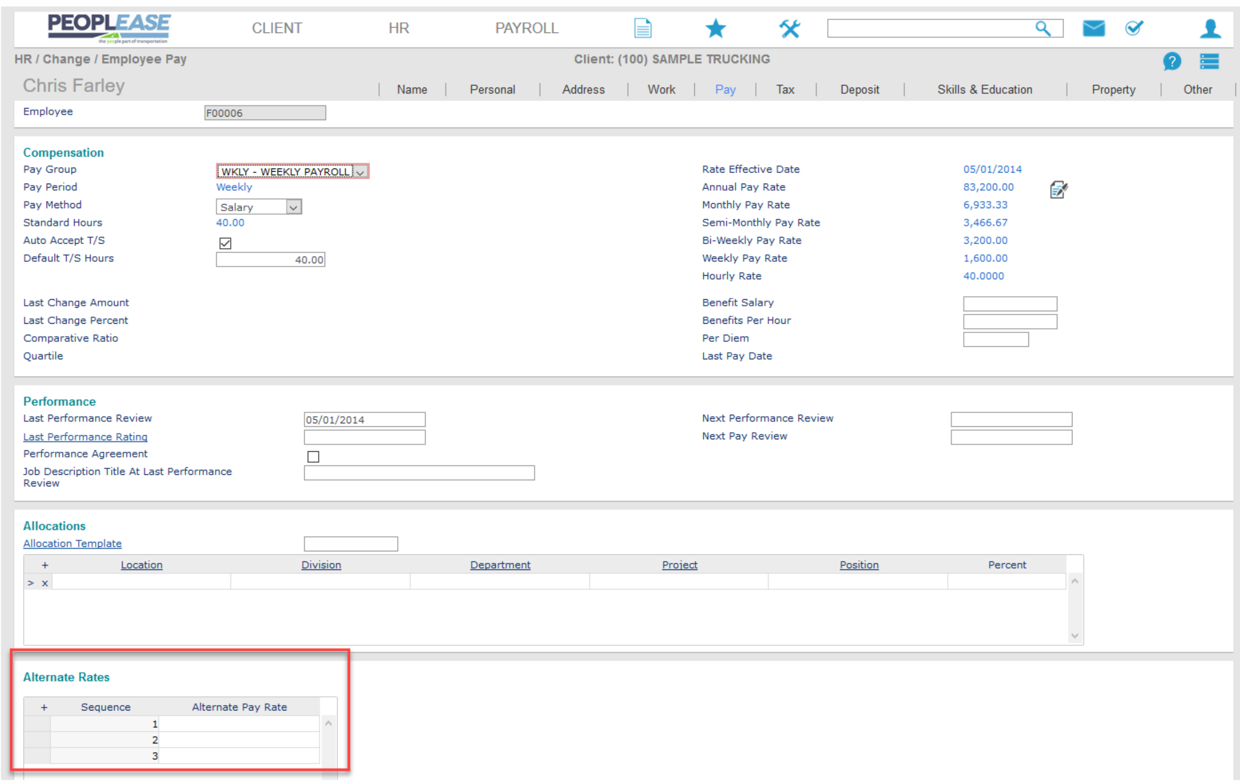
EMPLOYEE DETAILS

ALTERNATE PAY RATES

If your employees are paid mileage, or any other type of pay that requires a non-hourly rate, these will need to be entered as Alternate Rates. **Your Implementation or Payroll Specialist will let you know which Alternate Rate Sequence number applies to each type of pay.**

Employee Details > Pay Tab > Alternate Rates.

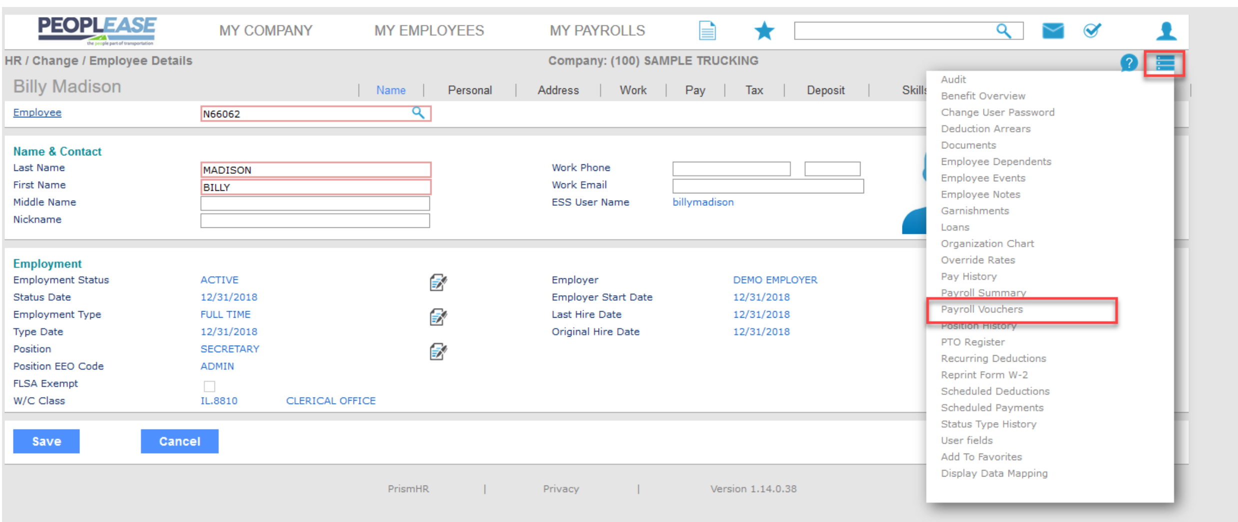
For example, if your employees are paid .35/mile, this would be entered as an Alternate Rate.

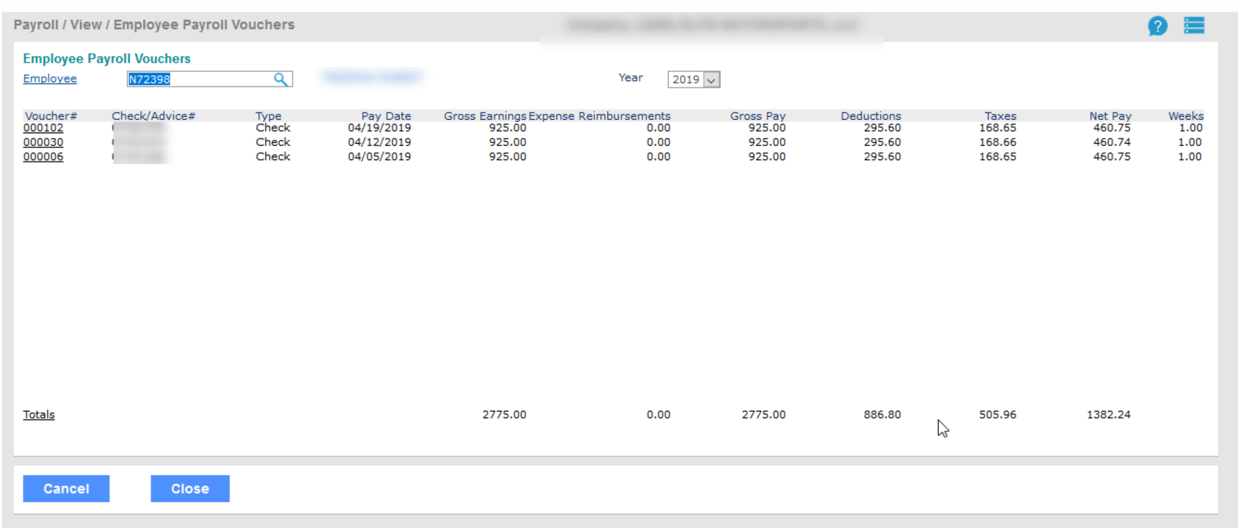


EMPLOYEE DETAILS

REPRINTING PAYROLL VOUCHERS

From the Employee Details, click on the Action Bar and select Payroll Vouchers

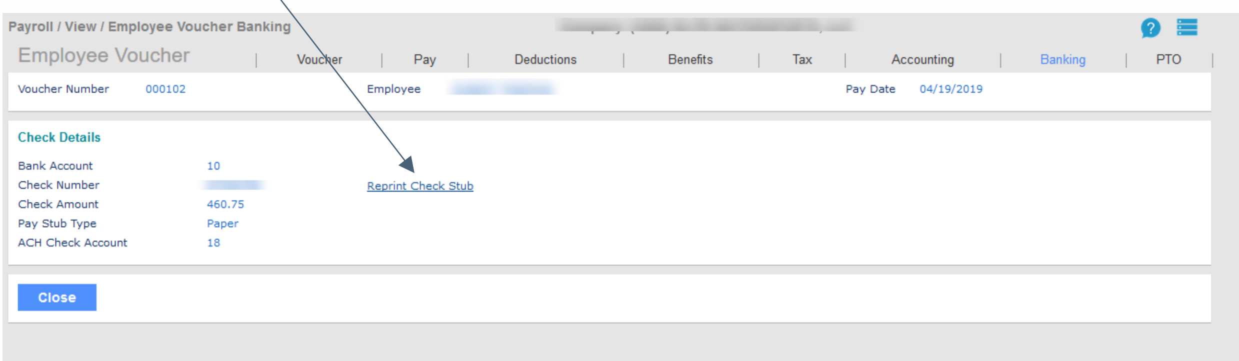




EMPLOYEE DETAILS

REPRINTING PAYROLL VOUCHERS

Select the Voucher # you would like to reprint and navigate to the Banking Tab, where you'll see a link to **Reprint Check Stub**



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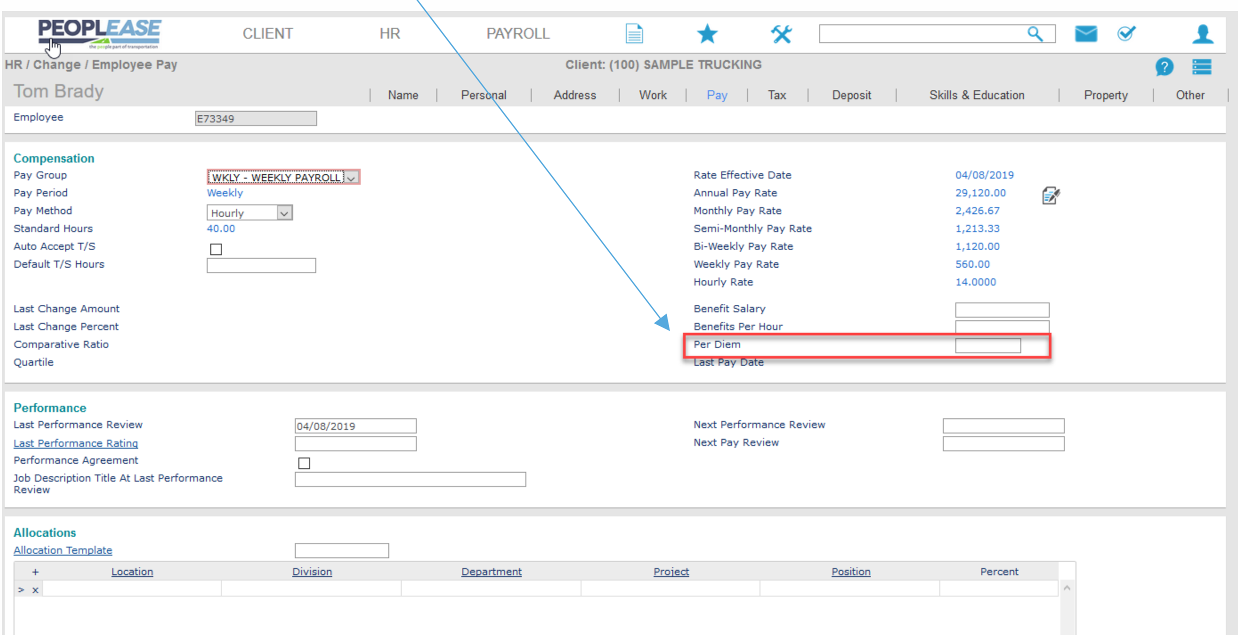
EMPLOYEE DETAILS

PER DIEM

If your employees are paid per diem, these rates will need to be entered as the following way:

Path: Employee Details -> Pay Tab -> Per Diem Field



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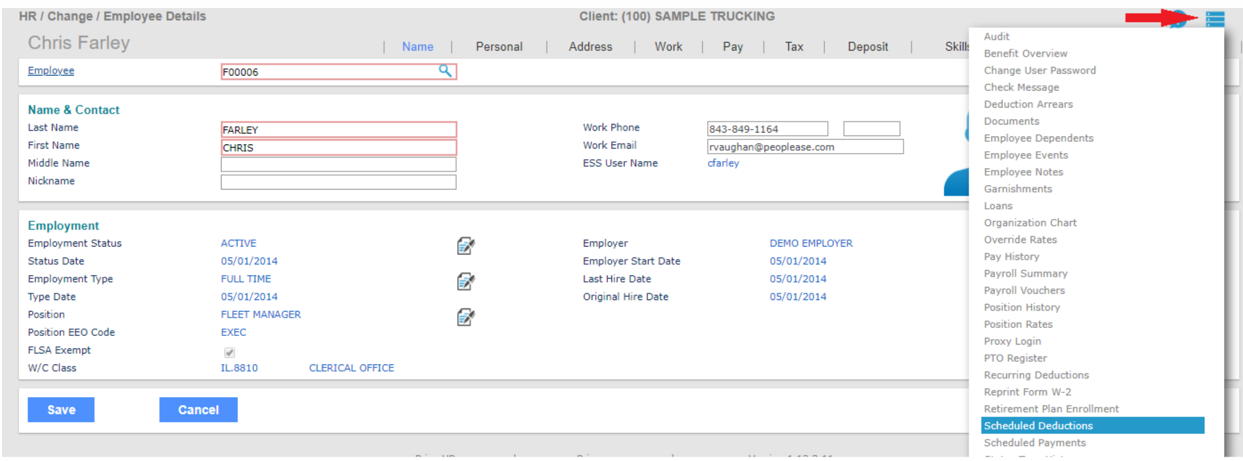
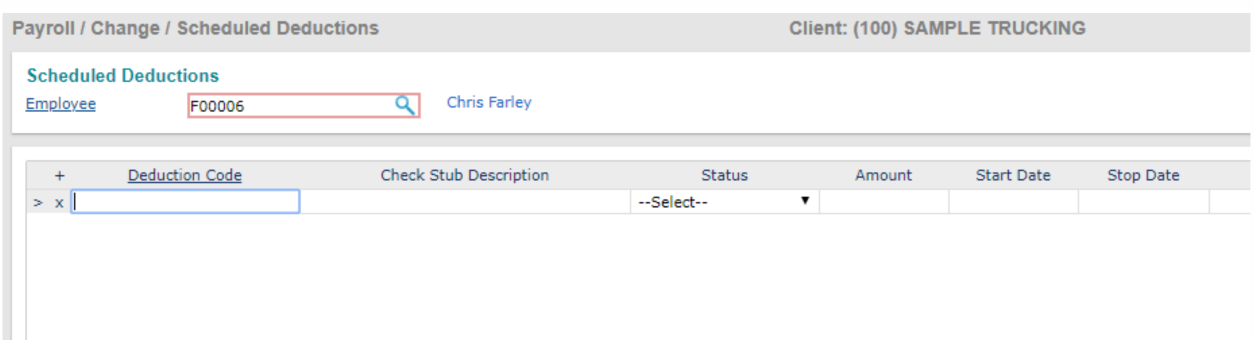
SCHEDULED DEDUCTIONS

DEDUCTIONS ONE TIME, OR DATE RANGE

A Scheduled Deduction establishes either a one-time deduction for an employee, or a deduction for a date range.





SCHEDULED DEDUCTIONS

SCHEDULED DEDUCTIONS (CONT.)

1. Enter the *Deduction Code*.

2. Select the deduction *Status* to specify when the deduction occurs:

   - **One Time**: The system takes the deduction once during the specified pay range and then sets it to **Inactive**.
   - **Active**: The system takes the deduction each pay period during the date range.
   - **Inactive**: The system has stopped taking the deduction.

3. Enter the *Amount* to deduct from the employee's net earnings (after taxes).

4. Enter the *Start Date*; the system begins processing the deduction on or after this date.

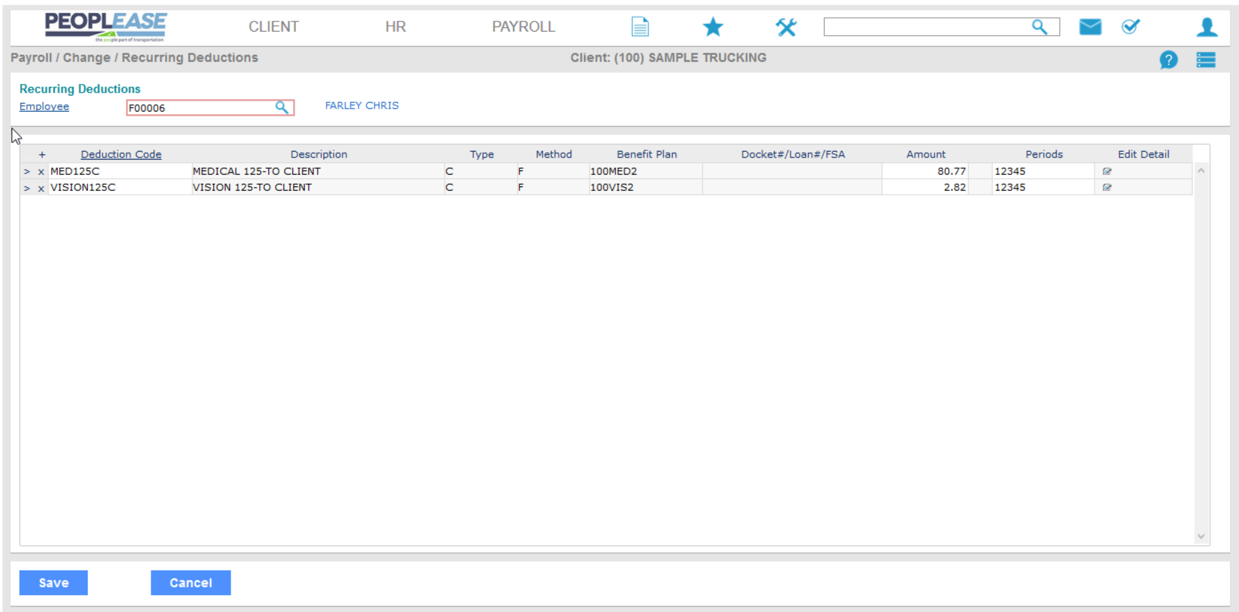
5. Enter the *Stop Date*; the system stops processing this deduction on or after this date.

6. Click **Save**.

RECURRING DEDUCTIONS

RECURRING DEDUCTIONS ON REGULAR BASIS

A recurring Deduction can be setup for deductions to come out on a regular basis.



1. Enter the *Deduction Code*.

2. Enter the amount of the deduction to be withheld

3. **Periods (Pay Dates)** – this will identify when you want the deduction to be withheld. Enter ALL that apply.

    - "1" for First pay date of the month
    - "2" for 2nd pay date of the month
    - "3" for 3rd pay date of the month
    - "4" for 4th pay date of the month
    - "5" for 5th pay date of the month

4. Click **Save**

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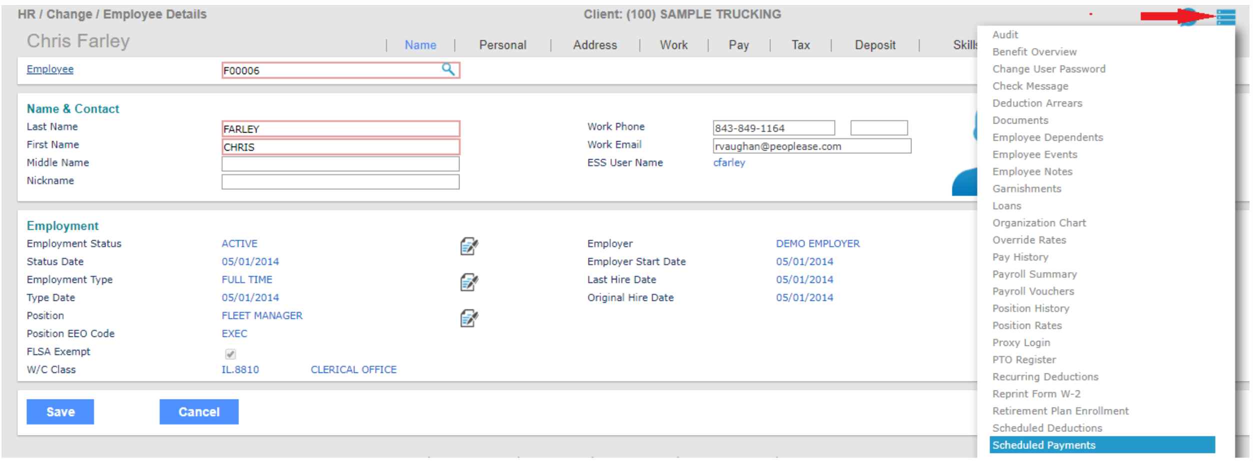
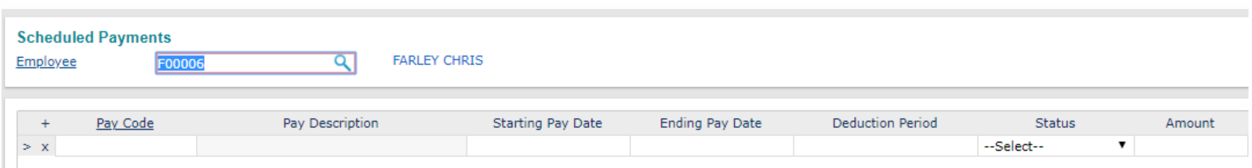
SCHEDULED PAYMENTS

PAYMENTS FOR SPECIFIC FUTURE DATE

A Scheduled Payment establishes payments for a specific date in the future, or a repeated payment each pay date during a specified time period.





1. Enter the *Pay Code* for this payment. The *Pay Description* displays.

2. Enter the *Starting Pay Date* and *Ending Pay Date* when the payment is in effect.

3. Enter the *Deduction Period* to make this payment on certain periods within the date range. For example, if you enter 2, *PEOPLEASE* makes the payment in the second pay period of the month.

SCHEDULED PAYMENTS

PAYMENTS FOR SPECIFIC FUTURE DATE, CONT.

4. Select the *Status* to specify when the scheduled payment occurs:

    - **One Time**: The payment is made once during the specified pay range and then set to **Inactive**.
    - **Active**: The payment is made each pay period during the date range.
    - **Inactive**: No payment will be made.

5. Enter the *Amount* to pay the employee.

6. Click **Save**.

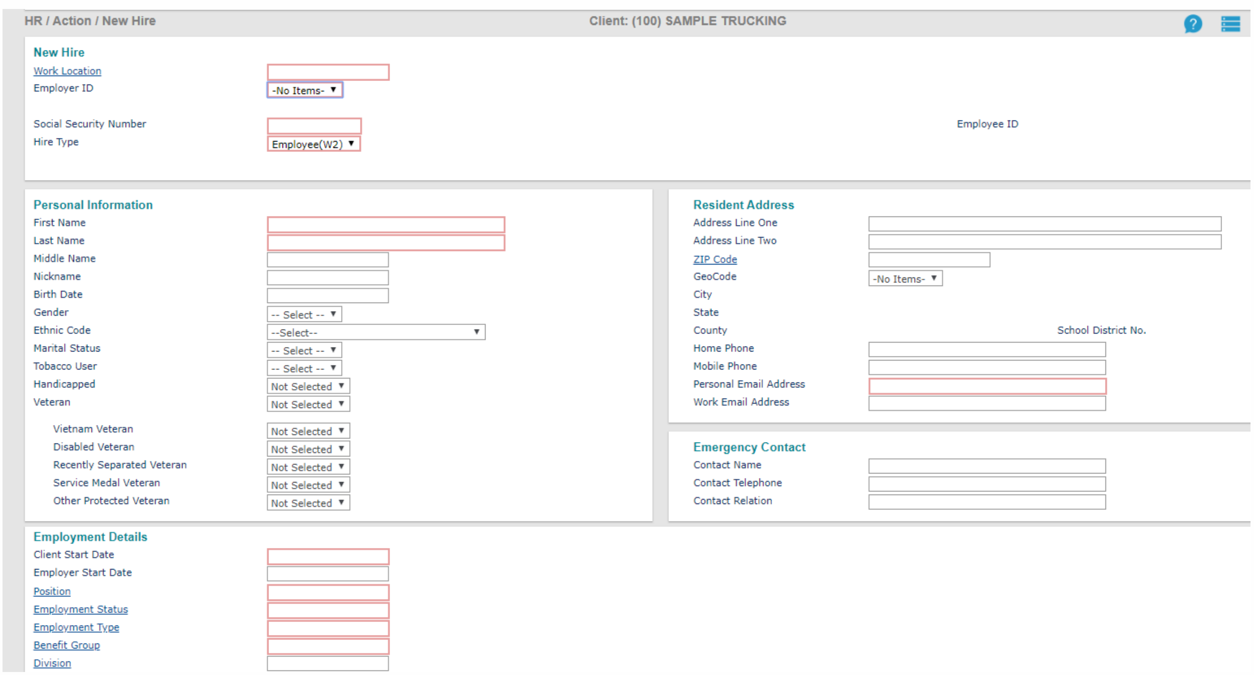
NEW HIRE

MANDATORY FIELDS

Navigate to My Employees/Action/New Hire and enter the appropriate fields. Required fields are in **RED**.

Fields that are **underlined** require specific information. Click on the link to select appropriate data.

Once the required information is entered and the record is saved, the employee will receive an email to start the registration process (this is for Electronic Onboarding Process only).



NEW HIRE

I-9 SECTION 2 APPROVAL

As a Manager involved in the I-9 process you will be required to review, input and approve the Section II of the I-9 form. When an employee has completed their I-9 form you will receive a message that the employee has completed Section I of the form and that it is now ready for you to complete Section II. A sample of the message is below.

Reply Reply All Forward

PB Thu 7/11/2019 9:12 AM

benefits@peoplease.com

ACTION REQUIRED: I-9 Needs Verification

To Robert Vaughan

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

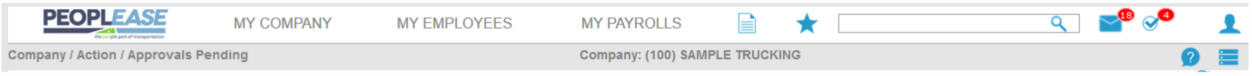
Action required! In order to complete onboarding for your new hire, additional action is required. Please complete Section II of Form I-9 for Joe Morgan at Sample Trucking. The I-9 form is extremely time sensitive, as there are specific regulations regarding the timing of when information must be completed. As such, please complete the verification of this form immediately.

Follow these steps to complete I-9 Section II:
Log into the PrismHR website
Go to Client > Action > Approvals Pending

We are here to help! You can contact us at onboardingsupport@peoplease.com.

Sincerely,
PEOPLEASE and PLC Services

Sign on to your account in PrismHR, In the upper righthand screen you will see a check mark with a red number next to it. Click on the check mark.

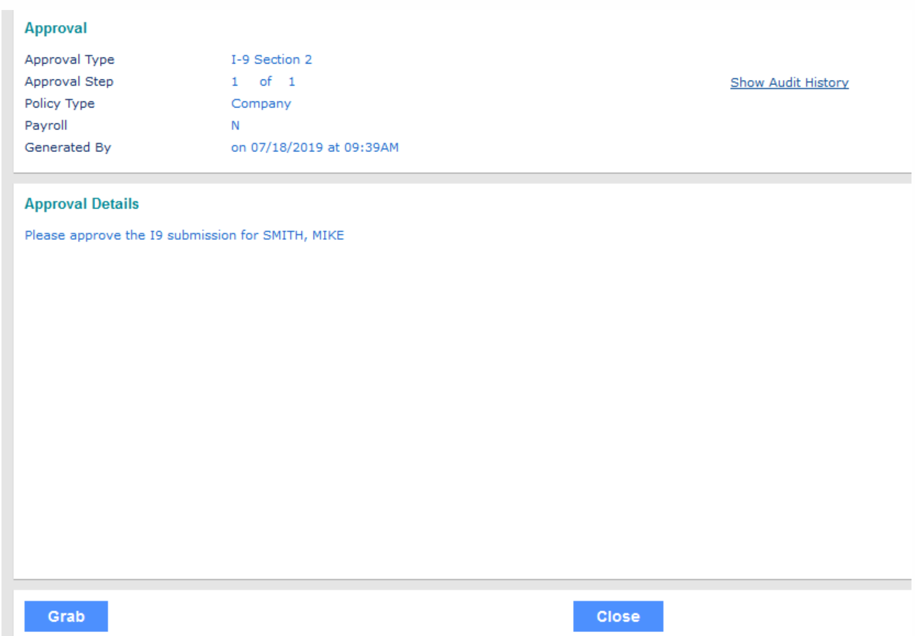


This will bring up the Approvals Pending screen with all approvals that currently need to be processed. You will see Approvals Pending (Assigned to You) and Approvals Pending (Available to You). In order to approve an I9, you must first assign it to yourself.

NEW HIRE

I-9 SECTION 2 APPROVAL

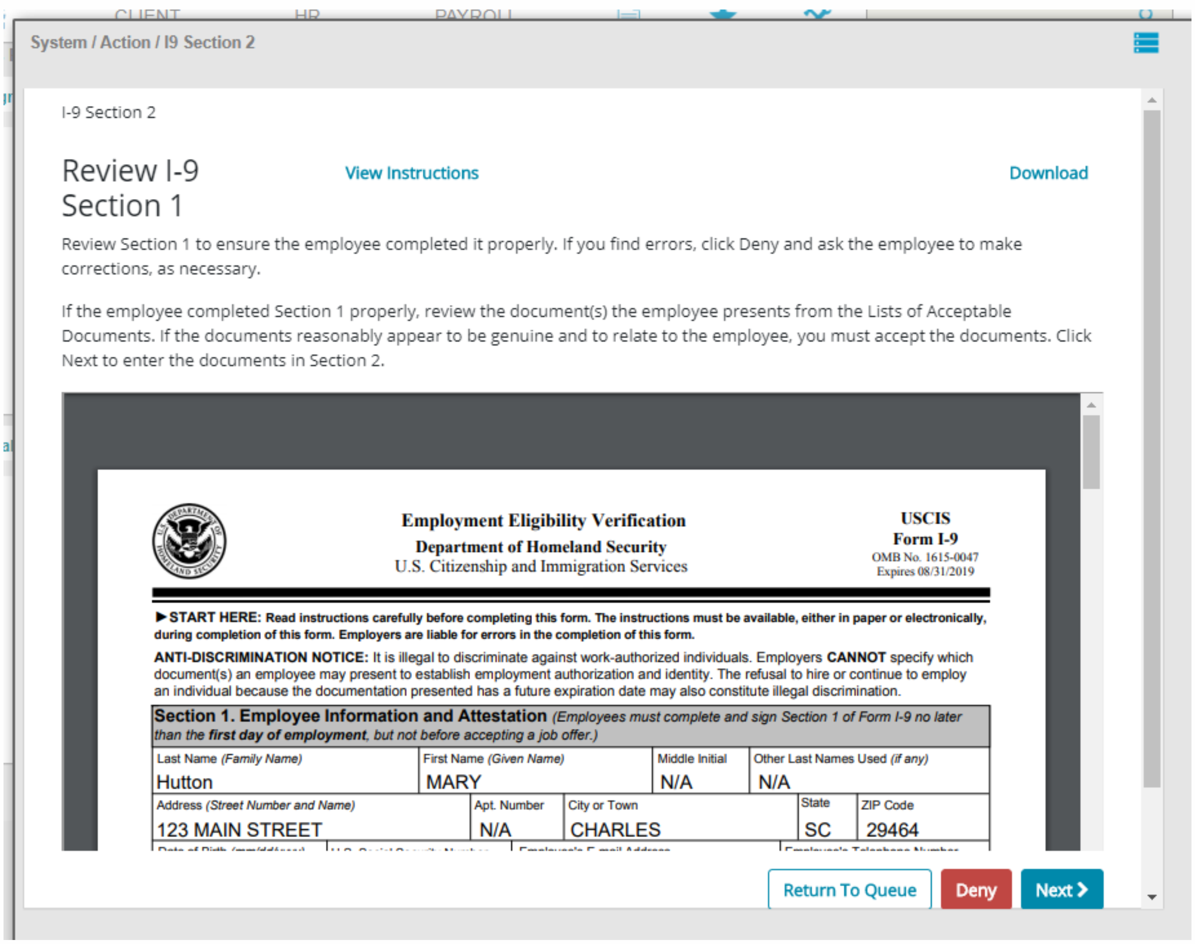
Select the I-9 you would like to approve and click Grab.



To process an approval, click on the Approval Type link now listed under Approvals Pending (Assigned to You). This will open the I-9 for identification information and approval.

NEW HIRE

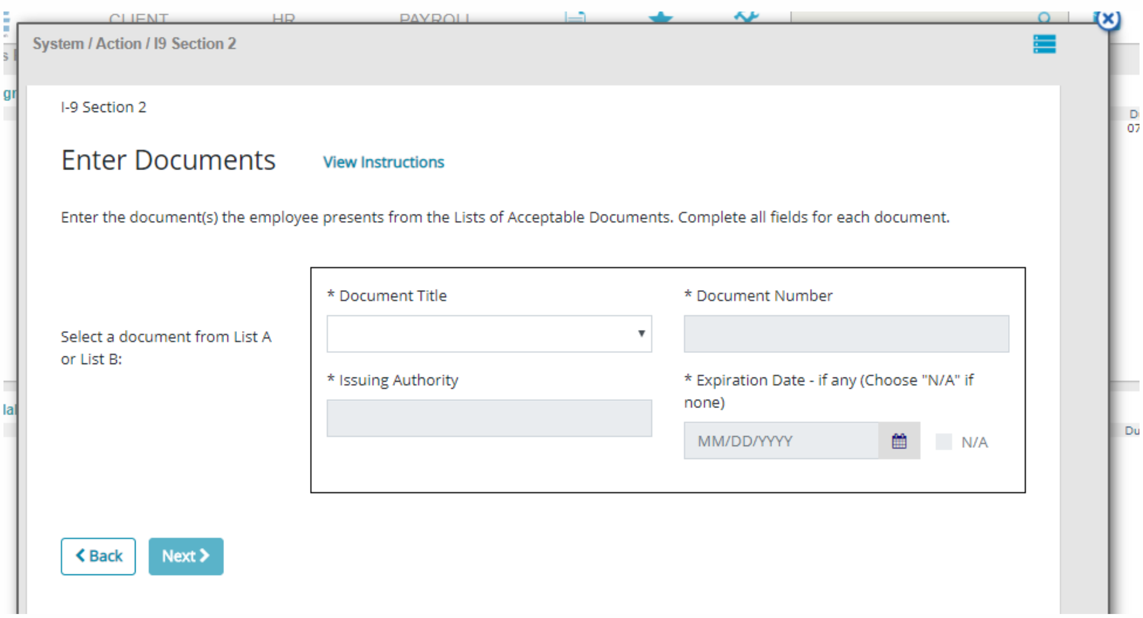
I-9 SECTION 2 APPROVAL



NEW HIRE

I-9 SECTION 2 APPROVAL

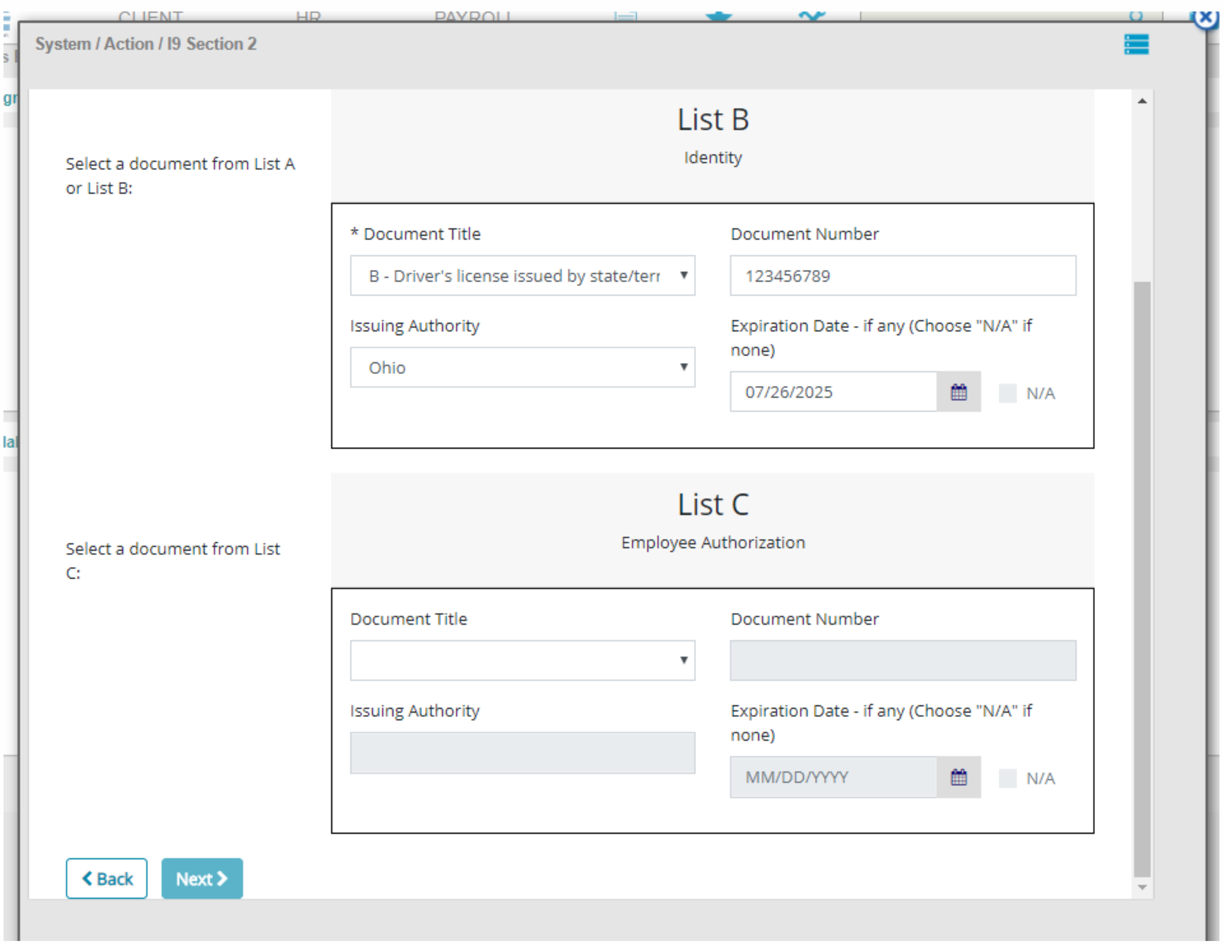
Click NEXT to enter identification information



NEW HIRE

I-9 SECTION 2 APPROVAL

Select the dropdown to select the document title from list A or list B. Enter the document number and the Issuing Authority. If there is an expiration date enter the date or if not select the box next to N/A. If you chose an item from list A then click NEXT, if from List B the screen adds another section for an item from list C.

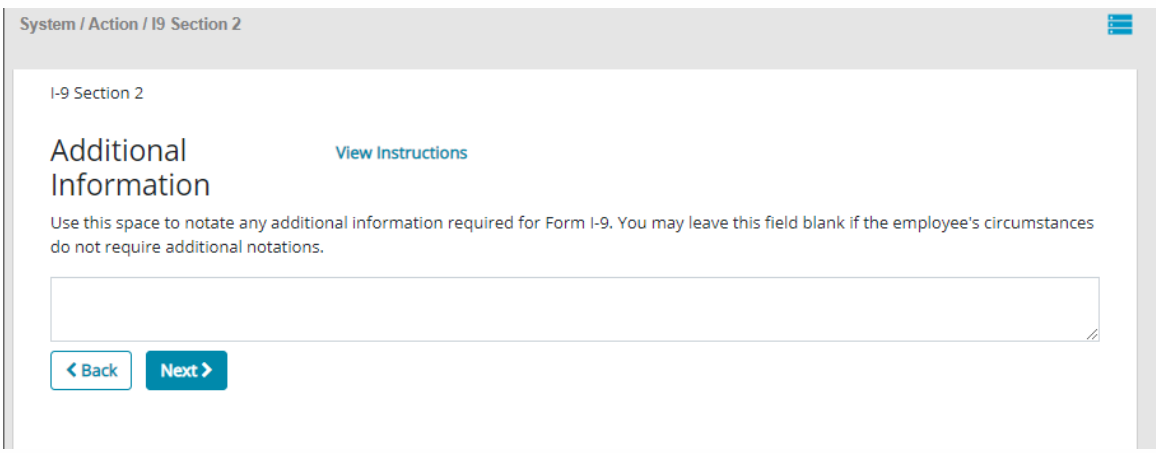


NEW HIRE

I-9 SECTION 2 APPROVAL

Complete the List C section and click on NEXT.

If you have any additional information to record on the I-9 form enter it here. Click NEXT to continue.



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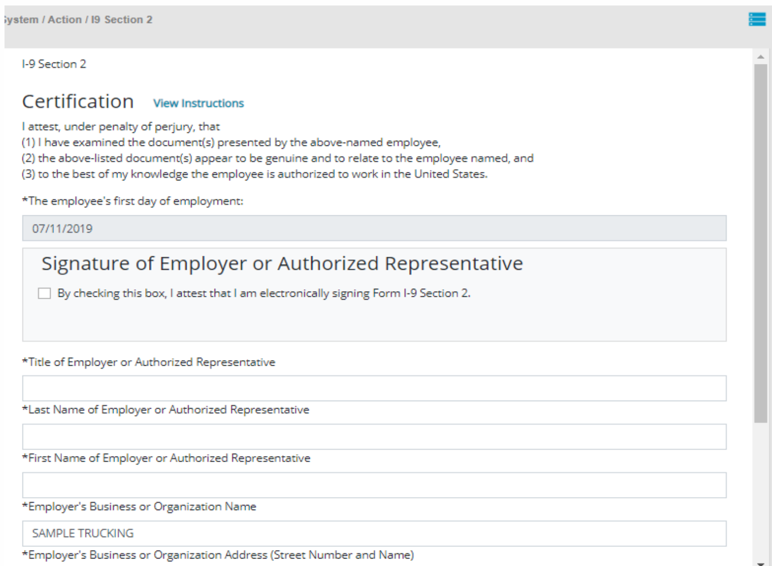
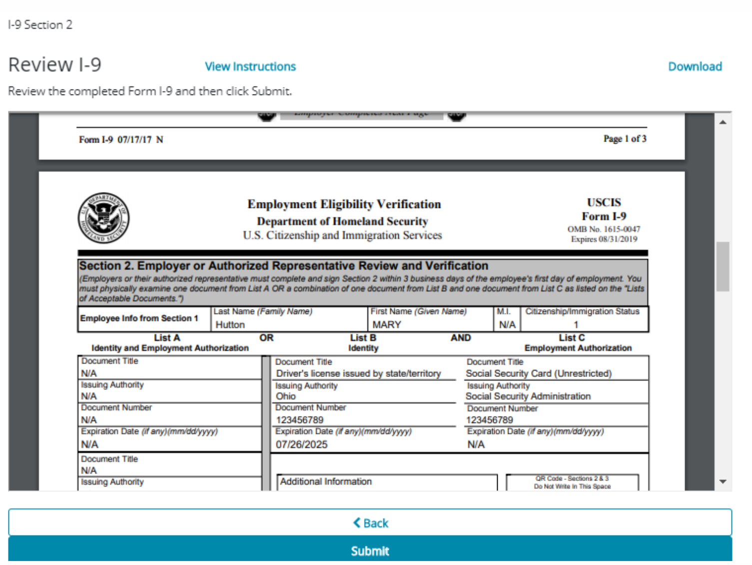
NEW HIRE

I-9 SECTION 2 APPROVAL



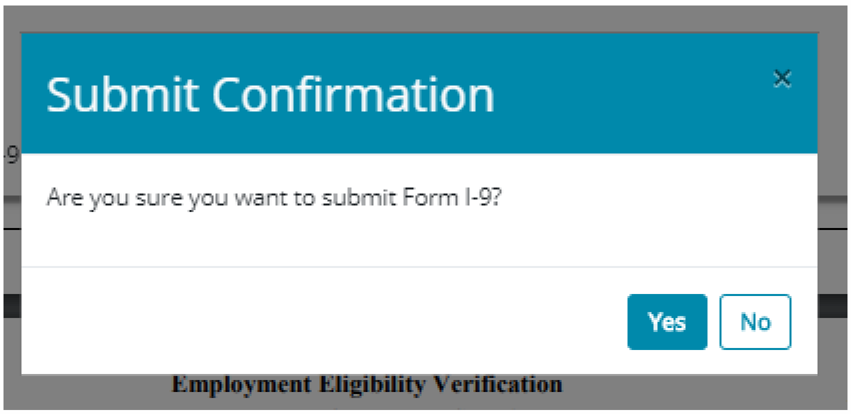
Complete the Certification information and click NEXT.



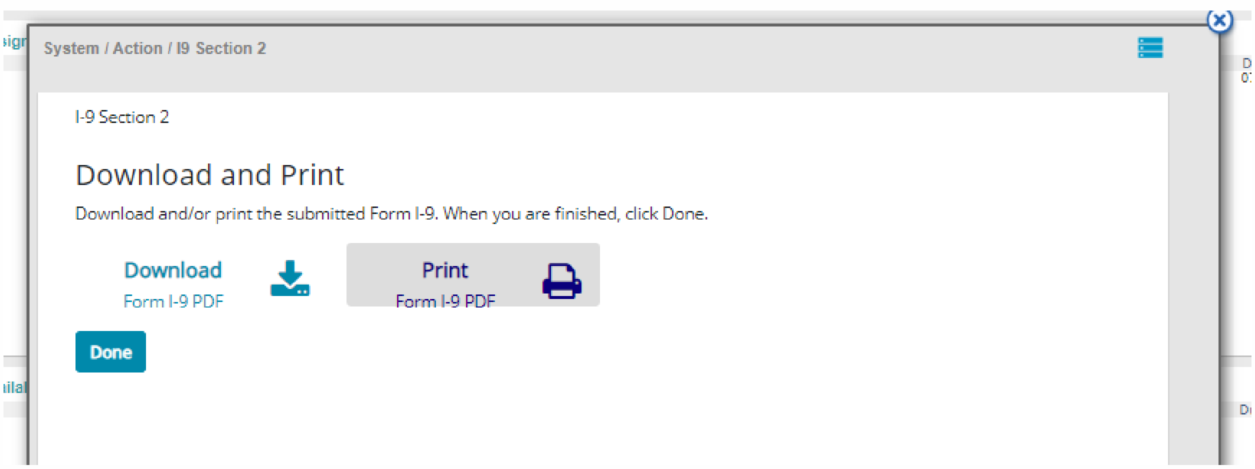
NEW HIRE

I-9 SECTION 2 APPROVAL

Review the I-9 and click SUBMIT to continue



Click YES to confirm that you are submitting the I-9

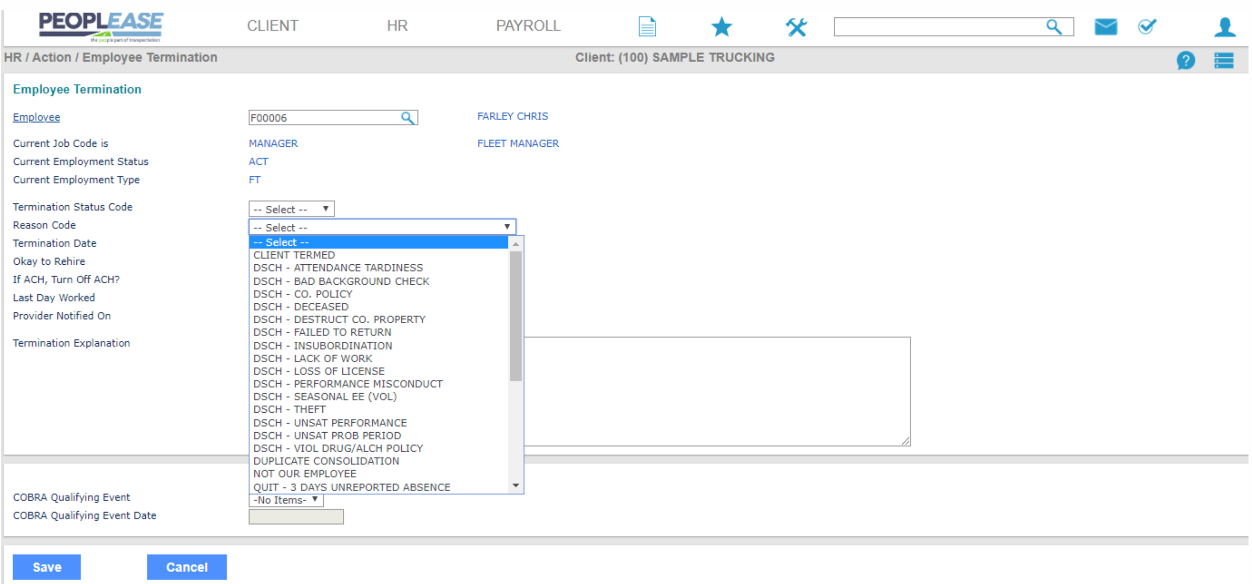


You can Download, Print and then click DONE to complete the process.

TERMINATION

HOW TO UPDATE APPROPRIATE FIELDS

Navigate to HR/Action/Employee Termination and enter the appropriate fields. Please enter termination date, if employee is eligible for rehire, and the reason for termination from the drops provided.



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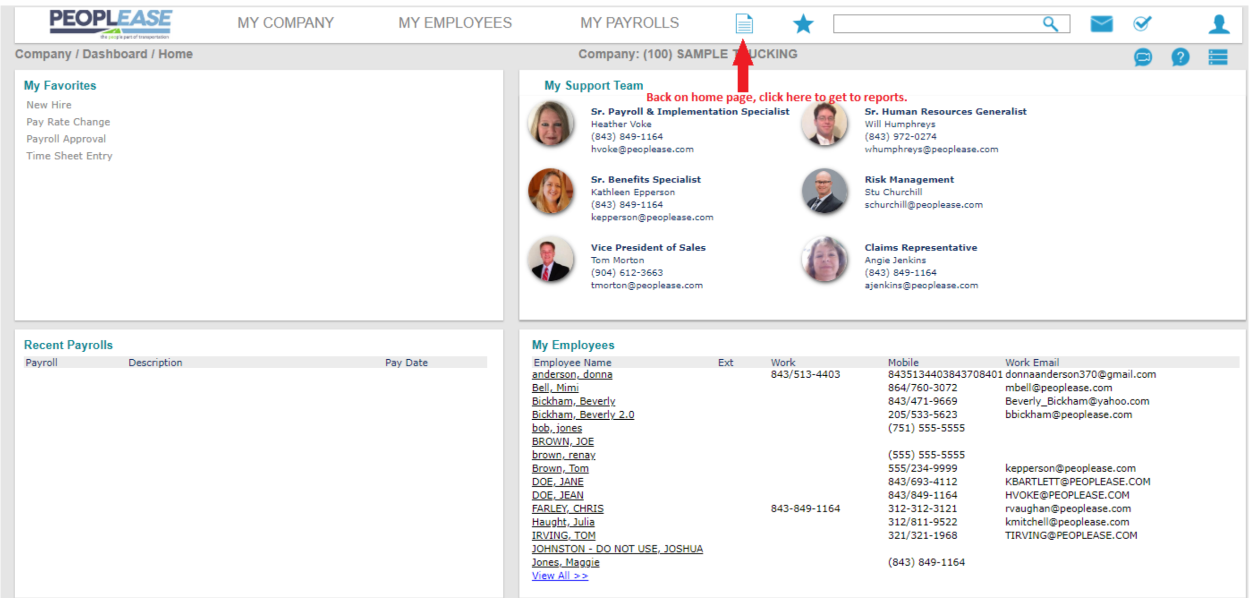
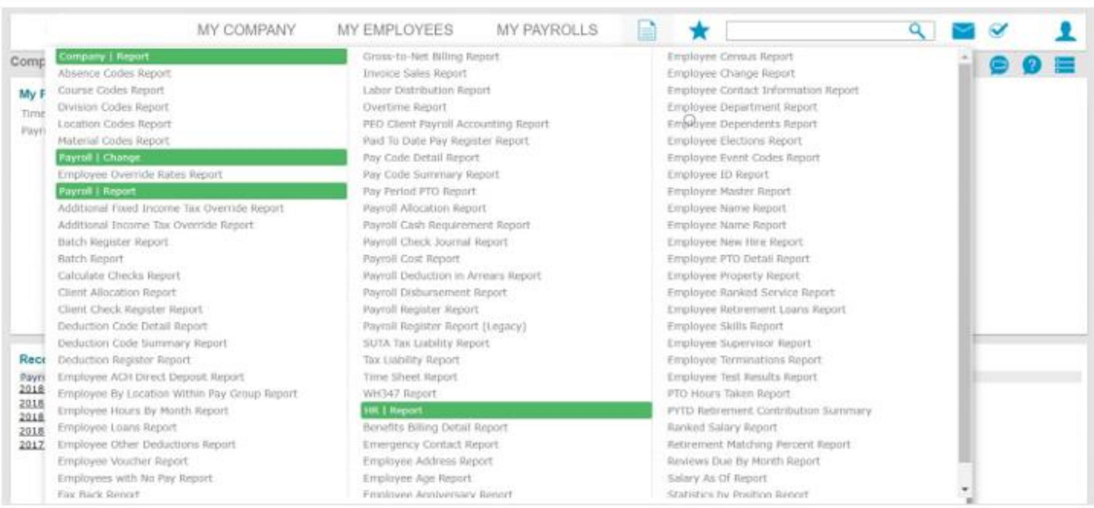
REPORTS

SYSTEM REPORTING AVAILABLE

Click the "reports" button on the Navigation Toolbar to access the various reports available in *PEOPLEASE*. These can all be generated and exported to excel, pdf, or csv. format. You can drill down by location, department, position type, etc. to get a clear picture of your employee data with the exact information you are looking for.

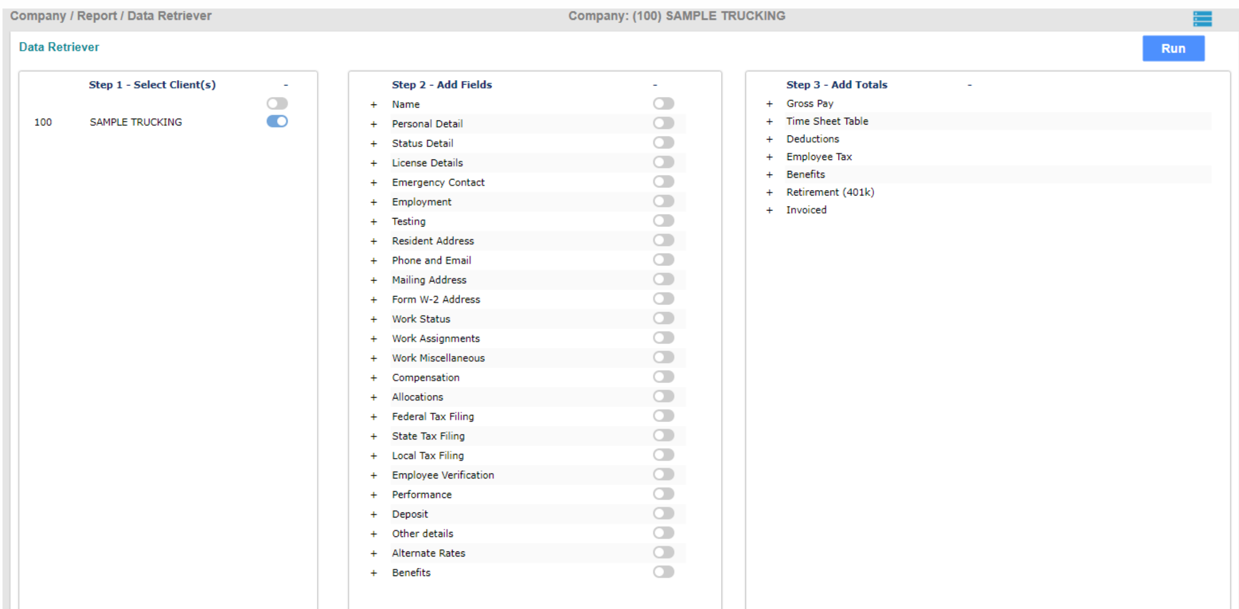




REPORTS

DATA RETRIEVER FOR CUSTOM REPORTING

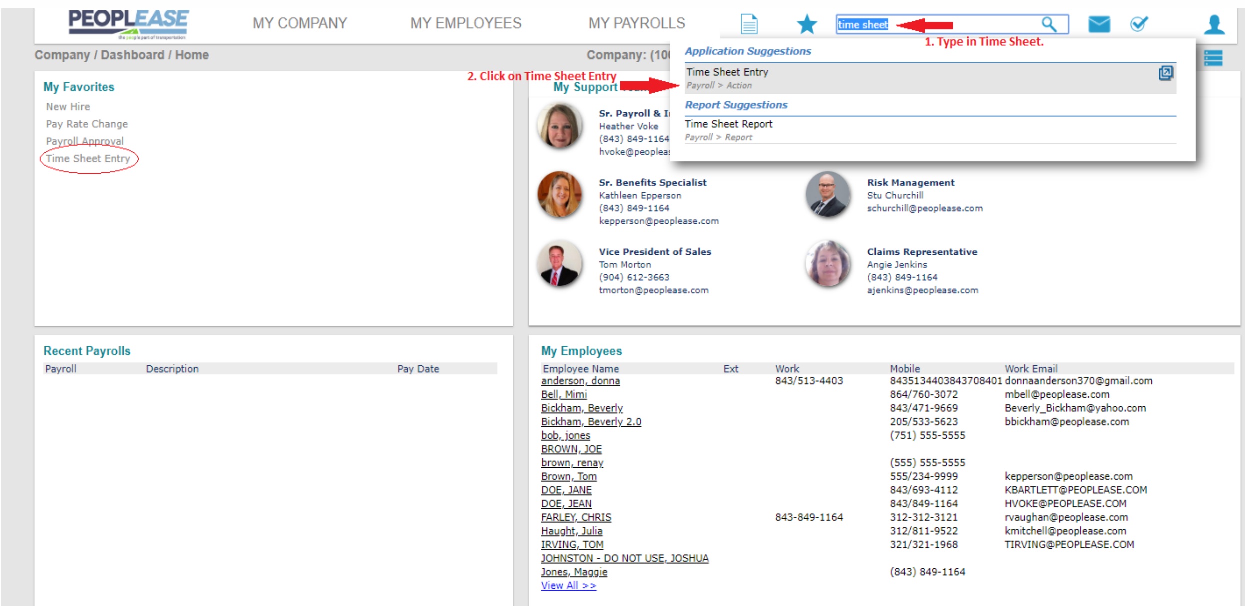
Search for “Data Retriever” in the search menu. You can select any parameters you would like to build your own custom reports! The following screen displays:



PAYROLL

FREQUENT PAGE FAVORITES

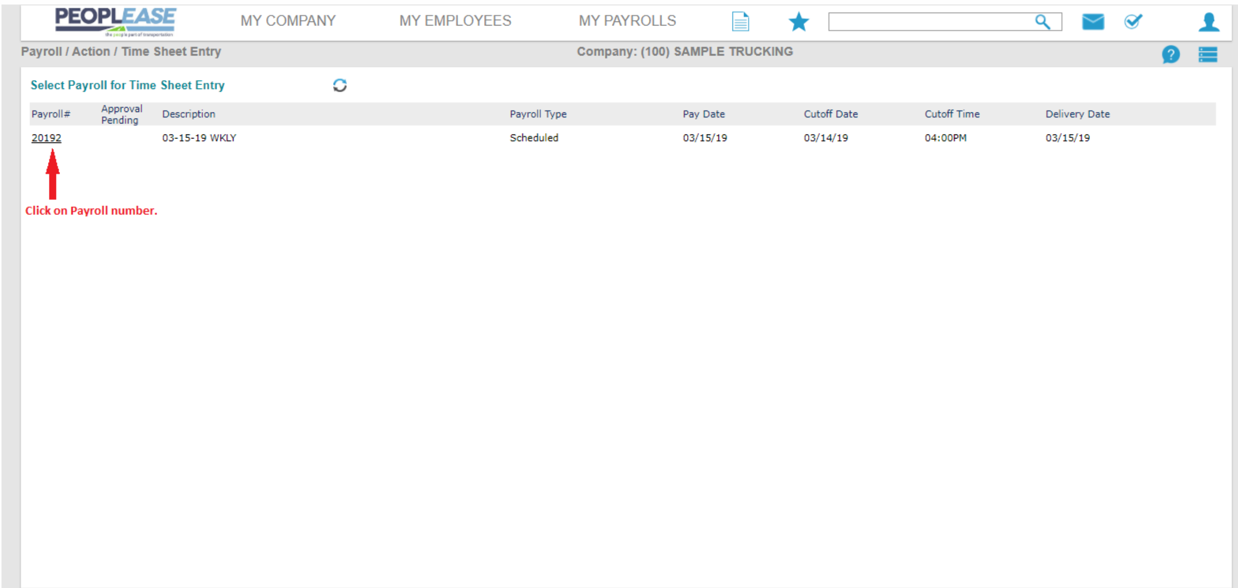
You can utilize the search bar to navigate to Time Sheet Entry, or you may select it in your "Favorites."



PAYROLL

FREQUENT PAGE FAVORITES

Select the payroll you would like to edit:



PAYROLL

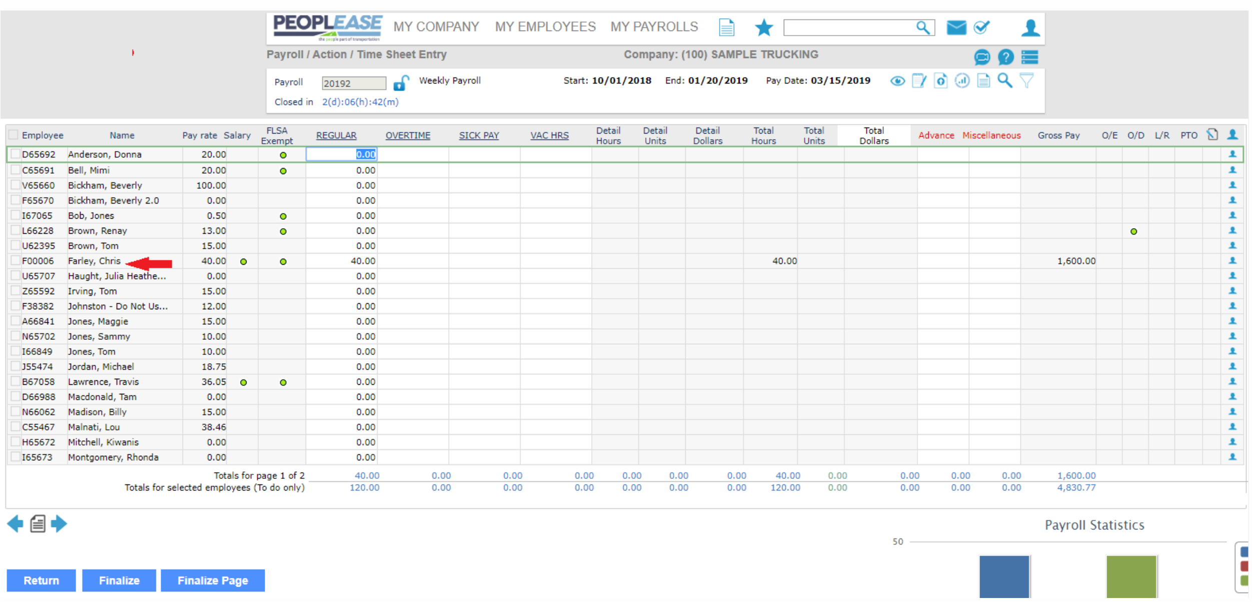
TIME SHEET

You can to the following key to assist you in navigating your timesheet:

Icon Key:

- Import pay data from a file
- Statistics – Compares the current payroll to prior payrolls
- Timesheet entry detail report
- Search for a specific employee name or ID number
- Filter the timesheet to display by department, location, etc.
- Use this function to hide columns

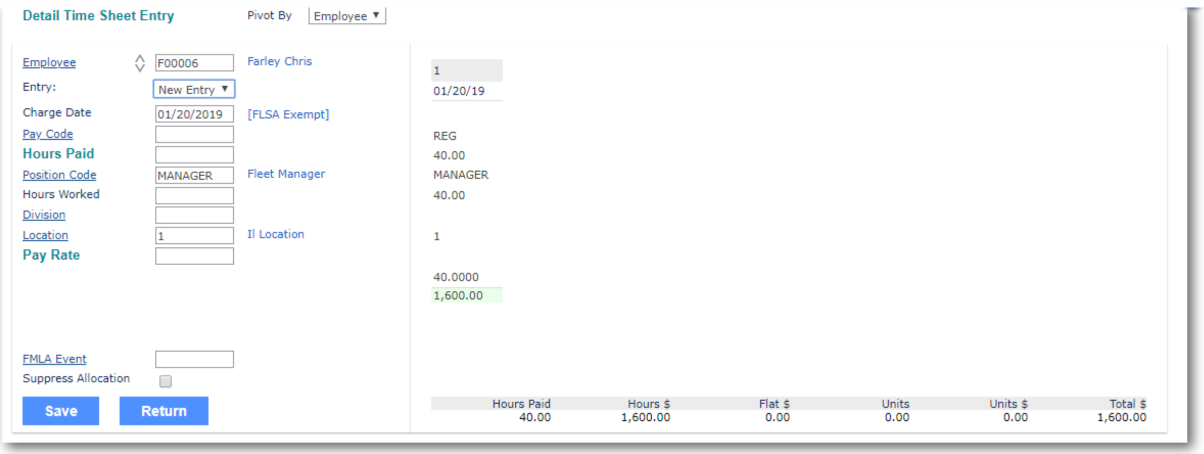
Inside your timesheet, salaried employees' data has been prepopulated for you. You may make edits to each column the same way you did before. If you need a pay code not listed, you may click on the Employee's name to pull up detailed time entry.



PAYROLL

TIME SHEET

Columns may be selected and edited, and new ones can be added on this screen. You may also allocate hours by project, location, etc. on this screen. Totals are then displayed at the bottom:



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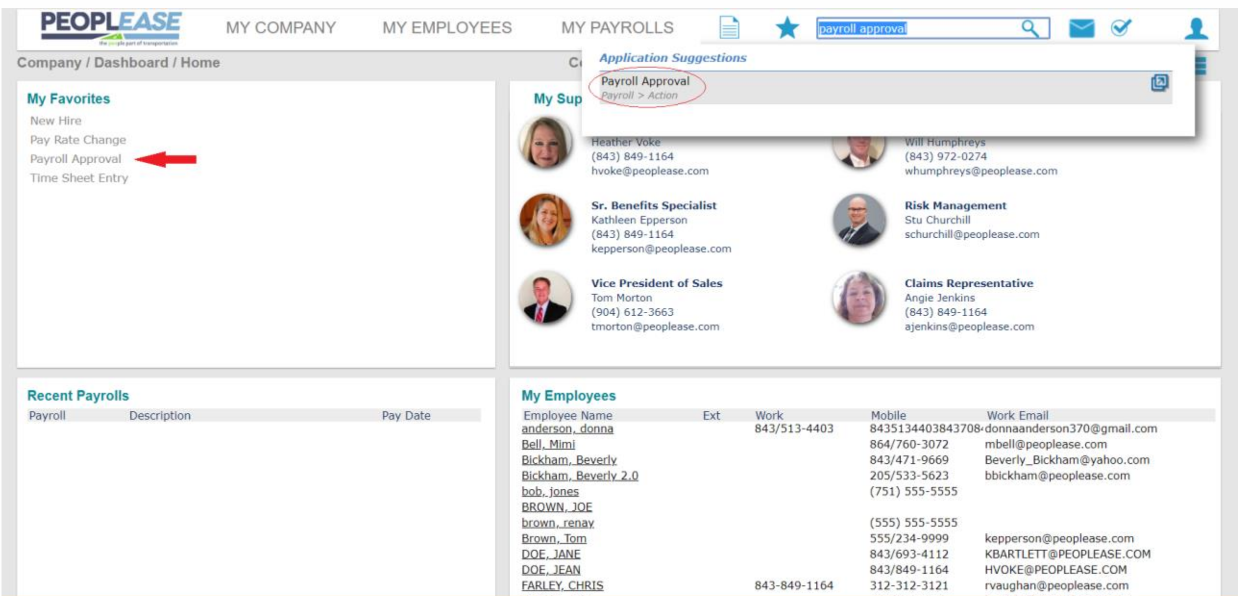
PAYROLL

APPROVING PAYROLL

When you're happy with the way the time sheet looks, you will hit "finalize" and the batch will be sent to *PEOPLEASE* for processing. When your preview is available, you will receive an email notification.

Navigate to "Payroll Approval" under "My Payrolls" or on your "Favorites" menu or by using the search bar:

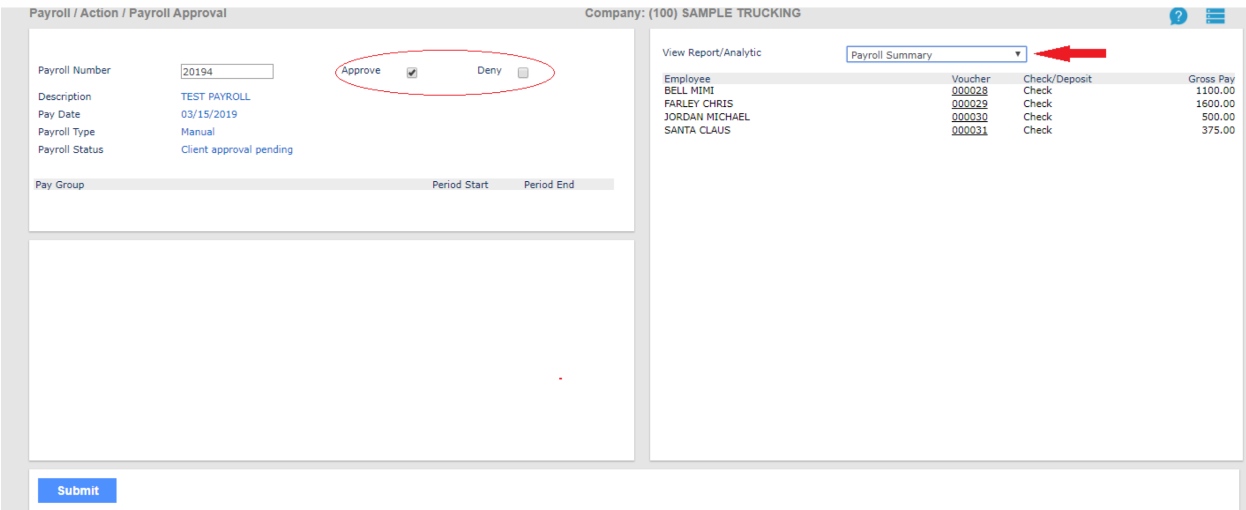


PAYROLL

APPROVING PAYROLL

On the “**Payroll Approval**” screen, you may review all your reports by using the drop-down menu.

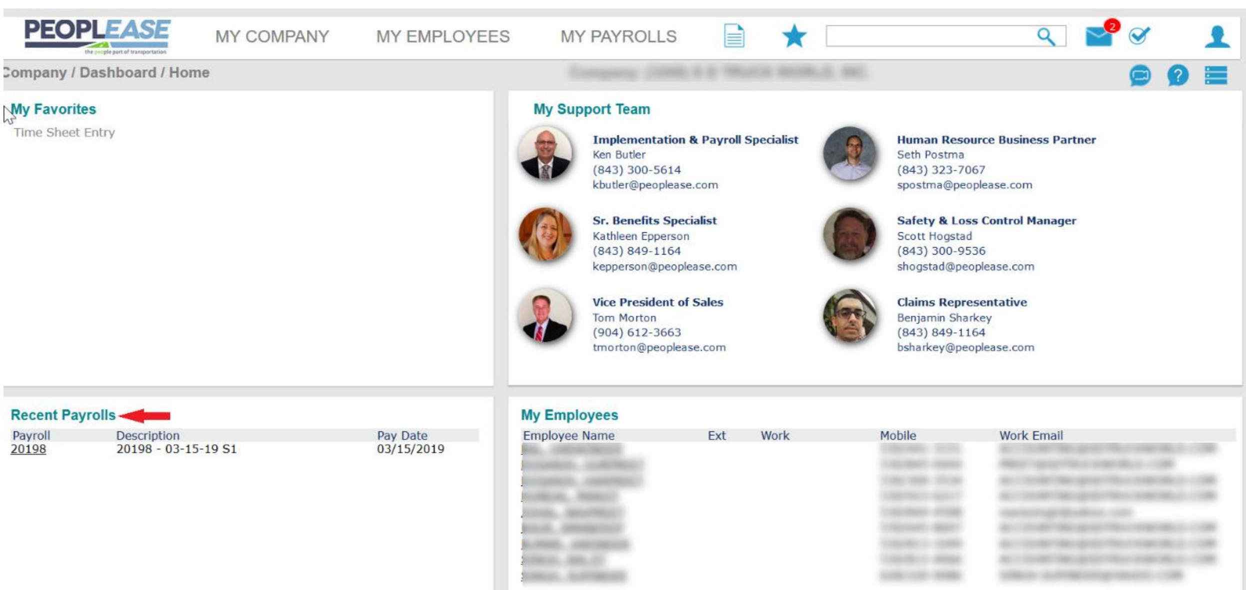
You may then deny the batch if you need to make changes or approve it. Click “**Submit**” when you’re done, and we will finalize your payroll.



PAYROLL

APPROVING PAYROLL

Once the payroll has been completed, your final reports are available under "**Recent Payrolls**"



PAYROLL

CREATING UNSCHEDULED PAYROLL

IF YOU NEED TO PROCESS A PAYROLL OUTSIDE OF YOUR NORMAL PAYROLL SCHEDULE, YOU WILL NEED TO CREATE AN UNSCHEDULED PAYROLL.

1. Navigate to My Payrolls -> Payroll Control
2. Select New payroll
3. Payroll Type -> Manual Payroll
4. Enter a Description for the unscheduled Payroll
5. Enter the Pay Date (all other dates will auto populate)
6. Enter Period Start, Period End, Weeks Worked, and Deduction Period. This will be the pay period of the month. ‘1’ for first, ‘2’ for second, etc., and Deduction Period. (The system uses this during payroll processing to take the appropriate standard payroll deductions for the employees).

PAYROLL

CREATING UNSCHEDULED PAYROLL

Once the unscheduled payroll is saved, it will be available for entry in Timesheet Entry.