



HR CLOUD ONBOARDING GUIDE

Step by Step Manager's Guide to Navigating
the PEOPLELEASE HR Cloud



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GETTING STARTED

WELCOME TO PEOPLELEASE! THIS WORKBOOK IS MEANT TO BE A GUIDE TO THE NEW PEOPLELEASE PLATFORM. THE INSTRUCTIONS COUPLED WITH SCREEN-SHOTS WILL HELP YOU TO GET COMFORTABLE IN THE PEOPLELEASE 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.

Company / Dashboard / Home

Company: (100) SAMPLE TRUCKING

My Favorites

- New Hire
- Pay Rate Change
- Payroll Approval
- Process Payroll
- Time Sheet Entry

My Support Team

- Consulting Manager**
Heather Voke
(843) 849-1164
hvoke@peoplelease.com
- Human Resource Business Partner**
Phillip Strohs
pstrohs@peoplelease.com
- Sr. Benefits Specialist**
Kathleen Epperson
(843) 849-1164
kepperson@peoplelease.com
- Safety & Loss Control Manager**
Aaron Johnson
(843) 209-4698
ajohnson@peoplelease.com
- Sr. Vice President of Sales**
Joe Mauro
(203) 723-4429
jmauro@peoplelease.com
- Claims Representative**
Angie Jenkins
(843) 849-1164
ajenkins@peoplelease.com

Recent Payrolls

Payroll	Description	Pay Date
---------	-------------	----------


My Employees

Employee Name	Ext	Work	Mobile	Work Email
BRADY, TOM				HVOKE@PEOPLELEASE.COM
BROWN, JOE				snusen@peoplelease.com
BROWN, TOM			555/234-9999	KBARTLETT@PEOPLELEASE.COM
BUNNY, EASTER				HVOKE@PEOPLELEASE.COM
DOE, JANE			843/693-4112	rvaughan@peoplelease.com
DOE, JEAN			843/849-1164	
FARLEY, CHRIS	843-849-1164		312-312-3121	
JORDAN, MICHAEL	843-849-1164		312-312-3121	
LAWRENCE, TRAVIS				
MADISON, BILLY				
MALNATI, LOU	843-849-1164		312-312-3121	rvaughan@peoplelease.com
MELLENBAMP, JOHN			317/555-1212	kcooper@peoplelease.com
MITCHELL, DANIEL			843/214-5994	kmitchell@peoplelease.com
MONTGOMERY, RHONDA			843/000-0000	rbrown@peoplelease.com
MOUSE, MINNI			(702) 546-1456	


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 screenshot shows the 'Employee Details' screen for 'Easter Bunny' in the 'SAMPLE TRUCKING' company. The interface includes a top navigation bar with tabs: Name, Personal, Address, Work, Pay, Tax, Deposit, Skills & Education, Property, and Other. The 'Name' tab is selected. Below the tabs, there is a search bar with the employee ID 'V73124'. The main content area is divided into sections: 'Name & Contact' with fields for Last Name (BUNNY), First Name (EASTER), Middle Name, and Nickname; 'Work Phone', 'Work Email' (none@peoplelease.com), and 'ESS User Name' (ebunny); and 'Employment' with fields for Employment Status (ACTIVE), Status Date (04/10/2019), Employment Type (FULL TIME), Type Date (04/10/2019), Position (SECRETARY), Position EEO Code (ADMIN), FLSA Exempt (checkbox), and W/C Class (IL8810). There are also fields for Employer (DEMO EMPLOYER), Employer Start Date (04/10/2019), Last Hire Date (04/10/2019), and Original Hire Date (04/10/2019). A cartoon bunny icon is visible on the right. At the bottom, there are 'Save', 'Cancel', and 'Close' buttons.

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.

HR / Change / Employee Pay Company: (100) SAMPLE TRUCKING

Easter Bunny

Employee V73124

Compensation

Pay Group WKLY - WEEKLY PAYROLL

Pay Period Weekly

Pay Method Salary

Standard Hours 40.00

Auto Accept T/S

Default T/S Hours

First Pay Period Hours

Last Change Amount

Last Change Percent

Comparative Ratio

Quartile

Rate Effective Date 04/10/2019

Annual Pay Rate 130,000.00

Monthly Pay Rate 10,833.33

Semi-Monthly Pay Rate 5,416.67

Bi-Weekly Pay Rate 5,000.00

Weekly Pay Rate 2,500.00

Hourly Rate 62.5000

Benefit Salary

Benefits Per Hour

Per Diem

Last Pay Date

Enter new pay information for employee and click Save.

HR / Action / Pay Rate Change Company: (100) SAMPLE TRUCKING

Pay Rate Change

Employee V73124 BUNNY EASTER

Current Employment Status ACT

Current Employment Type FT

Current Pay Period Weekly

Current Pay Rate 2,500.0000 Per Week

Current Annualized Pay 130,000.00

New Pay Rate

New Standard Hours

New Annualized Pay

Auto Pay Time Card

New Auto Time Card Hours

Effective Date

Reason

Save Cancel Close



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

Diagram illustrating the Direct Deposit setup interface with callouts for key fields:

- Deposit Status
- Type: Checking or Savings
- Pay Types to Deposit
- Method
- Active

The interface shows the following details:

HR / Change / Employee Deposit
Company: (100) SAMPLE TRUCKING
Employee: Easter Bunny
Employee ID: V73124

Fields and Callouts:

- Deposit Status:** Deposit Status (Active), Suppress Account Number Print (checkbox).
- Type: Checking or Savings:** Type (Checking).
- Pay Types to Deposit:** Pay Types to Deposit (All).
- Method:** Method (Remaining Balance).
- Active:** Status (Deposit Active).

Direct Deposit Information Table:

Type	Transit Number	Bank Name	Account Number	Pay Type	Method	Amount	Limit	Status	Prenote Date
x	061000052	BANK OF AMERICA N.A.	55555	--Select--	Remaining Balance			Deposit Active	

Amounts Excluded from Direct Deposit Table:

DD Exclude Voucher Types	DD Exclude Amt
x	--Select--

Buttons: Save, Cancel



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.

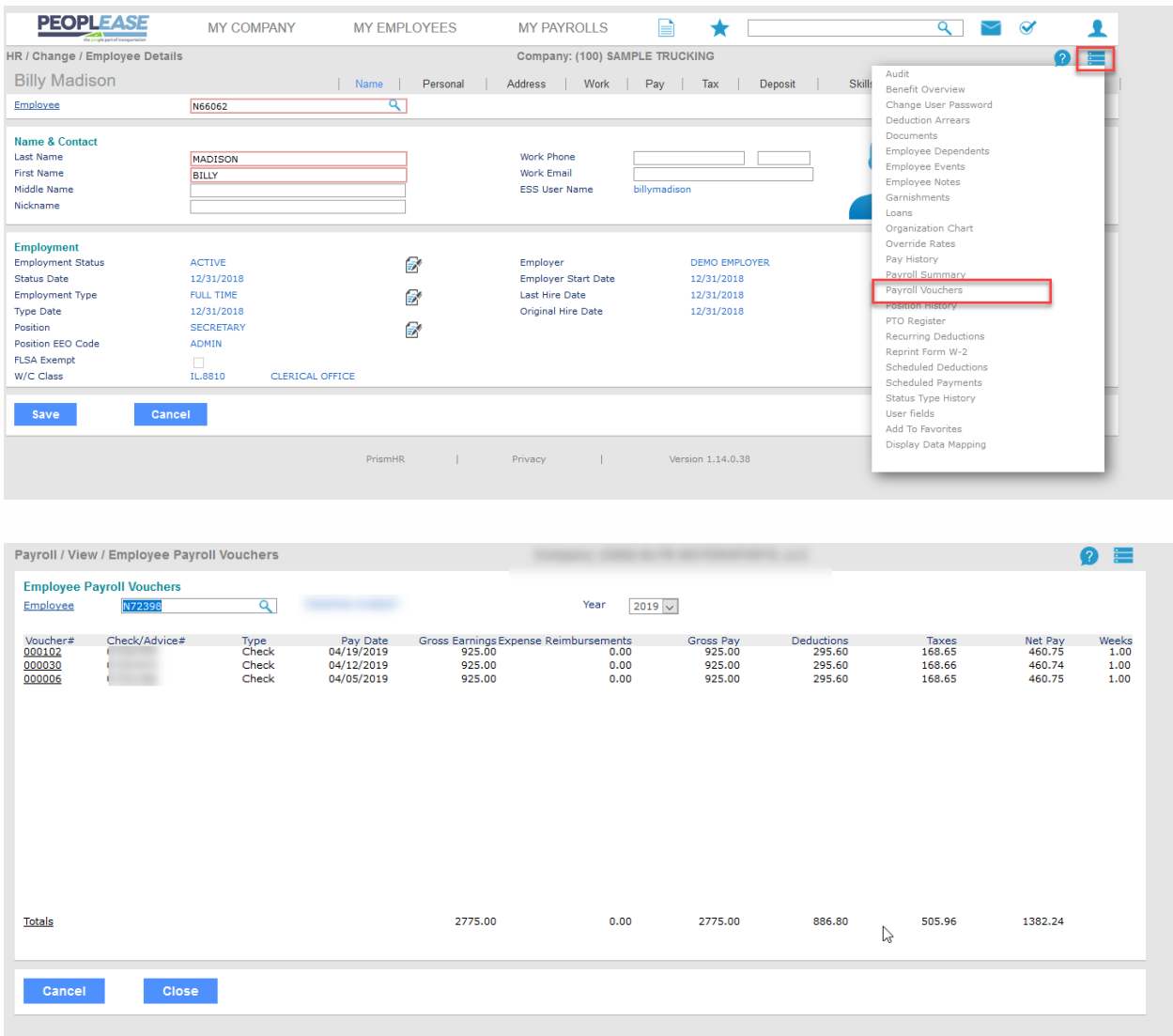
The screenshot displays the PEOPLELEASE HR system interface. The top navigation bar includes 'CLIENT', 'HR', and 'PAYROLL' tabs. The main header shows 'HR / Change / Employee Pay' for 'Chris Farley' (Employee ID: F00006). The 'Pay' tab is selected, showing various compensation details. The 'Alternate Rates' section is highlighted with a red box, showing a table with three rows for sequence numbers 1, 2, and 3, each with an 'Alternate Pay Rate' field.

Sequence	Alternate Pay Rate
1	
2	
3	

EMPLOYEE DETAILS

REPRINTING PAYROLL VOUCHERS

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



The screenshot shows the PEOPLELEASE Employee Details page for Billy Madison. The Action Bar is open, and the 'Payroll Vouchers' option is highlighted. Below the screenshot, the 'Employee Payroll Vouchers' table is displayed for the year 2019.

Voucher#	Check/Advice#	Type	Pay Date	Gross Earnings	Expense Reimbursements	Gross Pay	Deductions	Taxes	Net Pay	Weeks
000102		Check	04/19/2019	925.00	0.00	925.00	295.60	168.65	460.75	1.00
000030		Check	04/12/2019	925.00	0.00	925.00	295.60	168.66	460.74	1.00
000006		Check	04/05/2019	925.00	0.00	925.00	295.60	168.65	460.75	1.00
Totals				2775.00	0.00	2775.00	886.80	505.96	1382.24	

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**

The screenshot displays the 'Employee Voucher' interface. At the top, there's a navigation bar with tabs: 'Voucher', 'Pay', 'Deductions', 'Benefits', 'Tax', 'Accounting', 'Banking' (highlighted in blue), and 'PTO'. Below the navigation bar, the 'Banking' tab is active, showing a 'Voucher Number' of 000102, an 'Employee' field, and a 'Pay Date' of 04/19/2019. A section titled 'Check Details' lists the following information: Bank Account (10), Check Number (460.75), Check Amount (460.75), Pay Stub Type (Paper), and ACH Check Account (18). A blue link labeled 'Reprint Check Stub' is visible next to the Check Number. A 'Close' button is located at the bottom left of the interface.

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

The screenshot shows the PEOPLELEASE software interface for the 'Pay' tab of employee Tom Brady (Employee ID: E73349). The interface includes a navigation bar with tabs for CLIENT, HR, and PAYROLL. The 'Pay' tab is selected, and the 'Per Diem' field is highlighted with a red box. A blue arrow points from the text 'Path: Employee Details -> Pay Tab -> Per Diem Field' to this field.

Compensation

Pay Group	WEEKLY - WEEKLY PAYROLL	Rate Effective Date	04/08/2019
Pay Period	Weekly	Annual Pay Rate	29,120.00
Pay Method	Hourly	Monthly Pay Rate	2,426.67
Standard Hours	40.00	Semi-Monthly Pay Rate	1,213.33
Auto Accept T/S	<input type="checkbox"/>	Bi-Weekly Pay Rate	1,120.00
Default T/S Hours		Weekly Pay Rate	560.00
		Hourly Rate	14.0000
Last Change Amount		Benefit Salary	
Last Change Percent		Benefits Per Hour	
Comparative Ratio		Per Diem	
Quartile		Last Pay Date	

Performance

Last Performance Review	04/08/2019	Next Performance Review	
Last Performance Rating		Next Pay Review	
Performance Agreement	<input type="checkbox"/>		
Job Description Title At Last Performance Review			

Allocations

Allocation Template	Location	Division	Department	Project	Position	Percent
+ > x						



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.

HR / Change / Employee Details Client: (100) SAMPLE TRUCKING

Chris Farley

Employee: F00006

Name & Contact

Last Name: FARLEY
First Name: CHRIS
Middle Name:
Nickname:

Work Phone: (843) 849-1164
Work Email: rvaughan@peoplelease.com
ESS User Name: cfarley

Employment

Employment Status: ACTIVE
Status Date: 05/01/2014
Employment Type: FULL TIME
Type Date: 05/01/2014
Position: FLEET MANAGER
Position EEO Code: EXEC
FLSA Exempt: ☒
W/C Class: IL8810 CLERICAL OFFICE

Employer: DEMO EMPLOYER
Employer Start Date: 05/01/2014
Last Hire Date: 05/01/2014
Original Hire Date: 05/01/2014

Save Cancel

Right-hand menu:

- Audit
- Benefit Overview
- Change User Password
- Check Message
- Deduction Arrears
- Documents
- Employee Dependents
- Employee Events
- Employee Notes
- Garnishments
- Loans
- Organization Chart
- Override Rates
- Pay History
- Payroll Summary
- Payroll Vouchers
- Position History
- Position Rates
- Proxy Login
- PTO Register
- Recurring Deductions
- Reprint Form W-2
- Retirement Plan Enrollment
- Scheduled Deductions**
- Scheduled Payments

Payroll / Change / Scheduled Deductions Client: (100) SAMPLE TRUCKING

Scheduled Deductions

Employee: F00006 Chris Farley

	Deduction Code	Check Stub Description	Status	Amount	Start Date	Stop Date
> x			--Select--			



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.

Deduction Code	Description	Type	Method	Benefit Plan	Docket#/Loan#/FSA	Amount	Periods	Edit Detail
> x MED125C	MEDICAL 125-TO CLIENT	C	F	100MED2		80.77	12345	
> x VISION125C	VISION 125-TO CLIENT	C	F	100VIS2		2.82	12345	

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**

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.

HR / Change / Employee Details Client: (100) SAMPLE TRUCKING

Chris Farley

Employee F00006

Name & Contact

Last Name FARLEY Work Phone 843-849-1164

First Name CHRIS Work Email rvvaughan@peoplelease.com

Middle Name

Nickname

ESS User Name cfarley

Employment

Employment Status ACTIVE

Status Date 05/01/2014

Employment Type FULL TIME

Type Date 05/01/2014

Position FLEET MANAGER

Position EEO Code EXEC

FLSA Exempt

W/C Class IL8810 CLERICAL OFFICE

Employer DEMO EMPLOYER

Employer Start Date 05/01/2014

Last Hire Date 05/01/2014

Original Hire Date 05/01/2014

Save Cancel

Scheduled Payments

Employee F00006 FARLEY CHRIS

	Pay Code	Pay Description	Starting Pay Date	Ending Pay Date	Deduction Period	Status	Amount
> X						--Select--	

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, *PEOPLELEASE* 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).

HR / Action / New Hire Client: (100) SAMPLE TRUCKING

New Hire

Work Location

Employer ID -No Items-

Social Security Number

Hire Type Employee(W2) Employee ID

Personal Information

First Name

Last Name

Middle Name

Nickname

Birth Date

Gender -- Select --

Ethnic Code -- Select --

Marital Status -- Select --

Tobacco User -- Select --

Handicapped Not Selected

Veteran Not Selected

Vietnam Veteran Not Selected

Disabled Veteran Not Selected

Recently Separated Veteran Not Selected

Service Medal Veteran Not Selected

Other Protected Veteran Not Selected

Resident Address

Address Line One

Address Line Two

ZIP Code

GeoCode -No Items-

City

State

County

School District No.

Home Phone

Mobile Phone

Personal Email Address

Work Email Address

Emergency Contact

Contact Name

Contact Telephone

Contact Relation

Employment Details

Client Start Date

Employer Start Date

Position

Employment Status

Employment Type

Benefit Group

Division



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



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

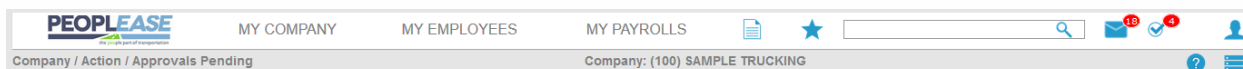
Go to Client > Action > Approvals Pending

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

Sincerely,

PEOPLELEASE 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.

Approval
Approval Type: I-9 Section 2
Approval Step: 1 of 1
Policy Type: Company
Payroll: N
Generated By: on 07/18/2019 at 09:39AM
[Show Audit History](#)

Approval Details
Please approve the I9 submission for SMITH, MIKE

[Grab](#) [Close](#)

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

CLIENT HR PAYROLL


System / Action / I9 Section 2

I-9 Section 2

Review I-9 Section 1 [View Instructions](#) [Download](#)

Review Section 1 to ensure the employee completed it properly. If you find errors, click Deny and ask the employee to make corrections, as necessary.

If the employee completed Section 1 properly, review the document(s) the employee presents from the Lists of Acceptable Documents. If the documents reasonably appear to be genuine and to relate to the employee, you must accept the documents. Click Next to enter the documents in Section 2.



Employment Eligibility Verification
Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS Form I-9
OMB No. 1615-0047
Expires 08/31/2019

► **START HERE:** Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of Form I-9 no later than the **first day of employment**, but not before accepting a job offer.)

Last Name (Family Name)	First Name (Given Name)	Middle Initial	Other Last Names Used (if any)
Hutton	MARY	N/A	N/A
Address (Street Number and Name)		Apt. Number	City or Town
123 MAIN STREET		N/A	CHARLES
		State	ZIP Code
		SC	29464

Date of Birth (mm/dd/yyyy) U.S. Citizenship Status Employee's Email Address Employee Telephone Number

[Return To Queue](#) [Deny](#) [Next >](#)

NEW HIRE

I-9 SECTION 2 APPROVAL

Click NEXT to enter identification information

The screenshot shows a web application window titled "System / Action / I9 Section 2". The main heading is "Enter Documents" with a link to "View Instructions". Below this, a instruction reads: "Enter the document(s) the employee presents from the Lists of Acceptable Documents. Complete all fields for each document." The form contains a dropdown menu labeled "Select a document from List A or List B:". To the right of the dropdown are four required fields: "* Document Title" (a dropdown), "* Document Number" (a text box), "* Issuing Authority" (a text box), and "* Expiration Date - if any (Choose 'N/A' if none)" (a date picker with a calendar icon and a checkbox for "N/A"). At the bottom left of the form are two buttons: "< Back" and "Next >".

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.

CLIENT HR PAYROLL

System / Action / I9 Section 2

Select a document from List A or List B:

List B

Identity

* Document Title: B - Driver's license issued by state/terr

Document Number: 123456789

Issuing Authority: Ohio

Expiration Date - if any (Choose "N/A" if none): 07/26/2025 ☐ N/A

Select a document from List C:

List C

Employee Authorization

Document Title:

Document Number:

Issuing Authority:

Expiration Date - if any (Choose "N/A" if none): MM/DD/YYYY ☐ N/A

[< Back](#) [Next >](#)



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.

A screenshot of a web-based form titled "I-9 Section 2". The breadcrumb trail at the top reads "System / Action / I9 Section 2". The main heading is "Additional Information" with a link "View Instructions" to its right. Below the heading is a text box with the instruction: "Use this space to notate any additional information required for Form I-9. You may leave this field blank if the employee's circumstances do not require additional notations." Below the text box is a large, empty rectangular input area. At the bottom left of the form are two buttons: "< Back" and "Next >".

System / Action / I9 Section 2

I-9 Section 2

Additional Information [View Instructions](#)

Use this space to notate any additional information required for Form I-9. You may leave this field blank if the employee's circumstances do not require additional notations.

< Back Next >



NEW HIRE

I-9 SECTION 2 APPROVAL

System / Action / I-9 Section 2

I-9 Section 2

Certification [View Instructions](#)

I attest, under penalty of perjury, that

(1) I have examined the document(s) presented by the above-named employee,

(2) the above-listed document(s) appear to be genuine and to relate to the employee named, and

(3) to the best of my knowledge the employee is authorized to work in the United States.

*The employee's first day of employment:

07/11/2019

Signature of Employer or Authorized Representative

☐ By checking this box, I attest that I am electronically signing Form I-9 Section 2.

*Title of Employer or Authorized Representative

*Last Name of Employer or Authorized Representative

*First Name of Employer or Authorized Representative

*Employer's Business or Organization Name

SAMPLE TRUCKING

*Employer's Business or Organization Address (Street Number and Name)

Complete the Certification information and click NEXT.

I-9 Section 2

Review I-9 [View Instructions](#) [Download](#)

Review the completed Form I-9 and then click Submit.

Form I-9 07/17/17 N Page 1 of 3

Employment Eligibility Verification
Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS Form I-9
OMB No. 1615-0047
Expires 08/31/2019

Section 2. Employer or Authorized Representative Review and Verification
(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")

Employee Info from Section 1		Last Name (Family Name)		First Name (Given Name)		M.I.	Citizenship/Immigration Status
		Hutton		MARY		N/A	1

List A Identify and Employment Authorization		List B Identify		List C Employment Authorization	
Document Title	N/A	Document Title	Driver's license issued by state/territory	Document Title	Social Security Card (Unrestricted)
Issuing Authority	N/A	Issuing Authority	Ohio	Issuing Authority	Social Security Administration
Document Number	N/A	Document Number	123456789	Document Number	123456789
Expiration Date (if any)(mm/dd/yyyy)	N/A	Expiration Date (if any)(mm/dd/yyyy)	07/26/2025	Expiration Date (if any)(mm/dd/yyyy)	N/A
Document Title	N/A	Additional Information		QR Code - Sections 2 & 3 Do Not Write in This Space	
Issuing Authority					

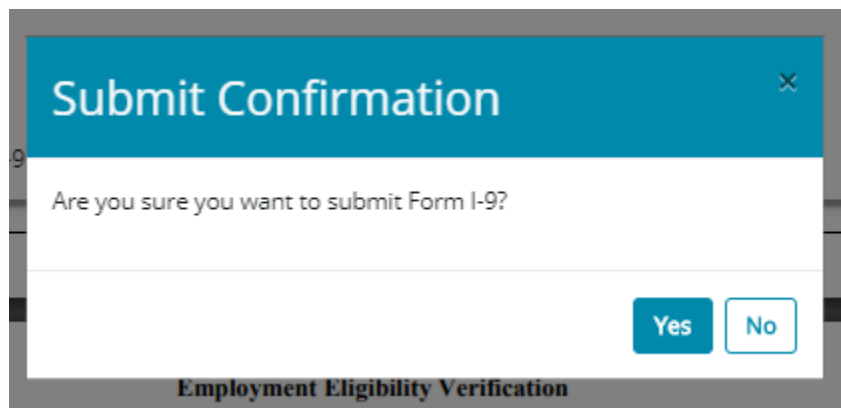
[< Back](#)

[Submit](#)

NEW HIRE

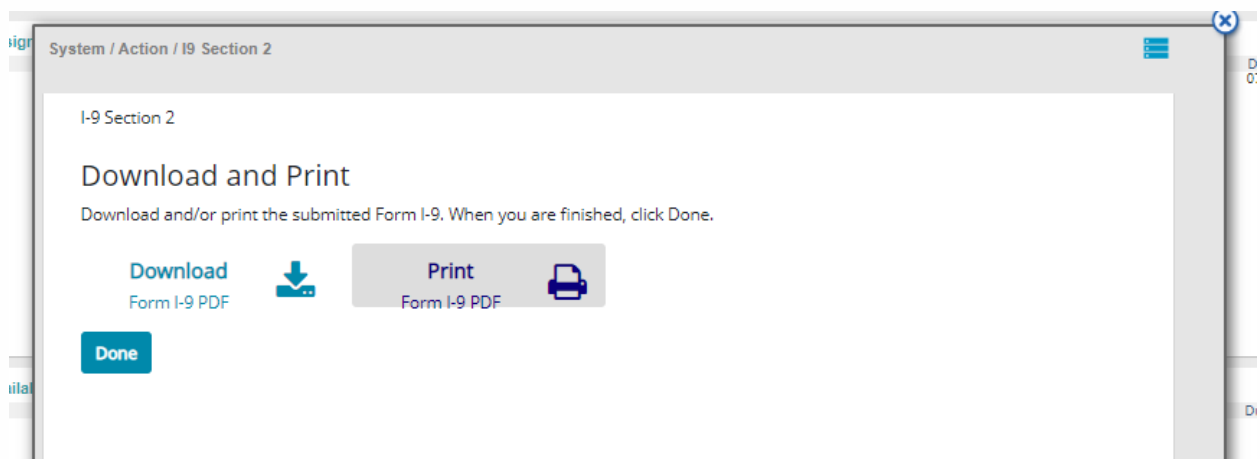
I-9 SECTION 2 APPROVAL

Review the I-9 and click SUBMIT to continue



A screenshot of a 'Submit Confirmation' dialog box. The title bar is blue with the text 'Submit Confirmation' and a close button (X). The main area is white and contains the question 'Are you sure you want to submit Form I-9?'. At the bottom right, there are two buttons: 'Yes' (blue) and 'No' (white with a blue border). Below the dialog box, the text 'Employment Eligibility Verification' is visible.

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



A screenshot of the 'I-9 Section 2' screen. The title bar shows 'System / Action / I9 Section 2'. The main content area has the heading 'I-9 Section 2' and 'Download and Print'. Below this, it says 'Download and/or print the submitted Form I-9. When you are finished, click Done.' There are two buttons: 'Download Form I-9 PDF' (blue) and 'Print Form I-9 PDF' (grey). Below these buttons is a 'Done' button (blue). On the right side of the screen, there is a vertical sidebar with a close button (X) at the top and some text below it.

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.

PEOPLELEASE CLIENT HR PAYROLL

HR / Action / Employee Termination Client: (100) SAMPLE TRUCKING

Employee Termination

Employee: F00006 FARLEY CHRIS
MANAGER FLEET MANAGER

Current Job Code is: MANAGER
Current Employment Status: ACT
Current Employment Type: FT

Termination Status Code: -- Select --
Reason Code: -- Select --
Termination Date: -- Select --
Okay to Rehire: -- Select --
If ACH, Turn Off ACH?: -- Select --
Last Day Worked: -- Select --
Provider Notified On: -- Select --
Termination Explanation: -- Select --

COBRA Qualifying Event: -- Select --
COBRA Qualifying Event Date: -- Select --

Save Cancel



REPORTS

SYSTEM REPORTING AVAILABLE

Click the “reports” button on the Navigation Toolbar to access the various reports available in *PEOPLELEASE*. 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.

PEOPLELEASE MY COMPANY MY EMPLOYEES MY PAYROLLS

Company / Dashboard / Home Company: (100) SAMPLE JACKING

My Favorites

- New Hire
- Pay Rate Change
- Payroll Approval
- Time Sheet Entry

My Support Team *Back on home page, click here to get to reports.*

- Sr. Payroll & Implementation Specialist**
Heather Voke
(843) 849-1164
hvoke@peoplelease.com
- Sr. Human Resources Generalist**
Will Humphreys
(843) 972-0274
whumphreys@peoplelease.com
- Sr. Benefits Specialist**
Kathleen Epperson
(843) 849-1164
kepperson@peoplelease.com
- Risk Management**
Stu Churchill
schurchill@peoplelease.com
- Vice President of Sales**
Tom Morton
(904) 612-3663
tmorton@peoplelease.com
- Claims Representative**
Angie Jenkins
(843) 849-1164
ajenkins@peoplelease.com

Recent Payrolls

Payroll	Description	Pay Date
---------	-------------	----------

My Employees

Employee Name	Ext	Work	Mobile	Work Email
anderson, donna		843/513-4403	843/513-4403	donnaanderson370@gmail.com
Bell, Jim			864/760-3072	nbell@peoplelease.com
Bickham, Beverly			843/471-9669	Beverly_Bickham@yahoo.com
Bickham, Beverly 2.0			205/533-5623	bbickham@peoplelease.com
bob.jones			(751) 555-5555	
BROWN, JOE			(555) 555-5555	
brown, renav			555/234-9999	kepperson@peoplelease.com
Brown, Tom			843/693-4112	KBARTLETT@PEOPLELEASE.COM
DOE, JANE			843/849-1164	HVOKE@PEOPLELEASE.COM
DOE, JEAN				rvvaughan@peoplelease.com
FARLEY, CHRIS		843-849-1164	312-312-3121	kmitchell@peoplelease.com
Haight, Julia			312/811-9522	TIRVING@PEOPLELEASE.COM
IRVING, TOM			321/321-1968	
JOHNSTON - DO NOT USE, JOSHUA				
Jones, Maggie			(843) 849-1164	

[View All >>](#)

PEOPLELEASE MY COMPANY MY EMPLOYEES MY PAYROLLS

Company / Dashboard / Home Company: (100) SAMPLE JACKING

My Favorites

- New Hire
- Pay Rate Change
- Payroll Approval
- Time Sheet Entry

Recent Payrolls

Payroll	Description	Pay Date
---------	-------------	----------

My Employees

Employee Name	Ext	Work	Mobile	Work Email
anderson, donna		843/513-4403	843/513-4403	donnaanderson370@gmail.com
Bell, Jim			864/760-3072	nbell@peoplelease.com
Bickham, Beverly			843/471-9669	Beverly_Bickham@yahoo.com
Bickham, Beverly 2.0			205/533-5623	bbickham@peoplelease.com
bob.jones			(751) 555-5555	
BROWN, JOE			(555) 555-5555	
brown, renav			555/234-9999	kepperson@peoplelease.com
Brown, Tom			843/693-4112	KBARTLETT@PEOPLELEASE.COM
DOE, JANE			843/849-1164	HVOKE@PEOPLELEASE.COM
DOE, JEAN				rvvaughan@peoplelease.com
FARLEY, CHRIS		843-849-1164	312-312-3121	kmitchell@peoplelease.com
Haight, Julia			312/811-9522	TIRVING@PEOPLELEASE.COM
IRVING, TOM			321/321-1968	
JOHNSTON - DO NOT USE, JOSHUA				
Jones, Maggie			(843) 849-1164	

[View All >>](#)



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:

Company / Report / Data Retriever Company: (100) SAMPLE TRUCKING

Data Retriever Run

Step 1 - Select Client(s)

100 SAMPLE TRUCKING ☒

Step 2 - Add Fields

- + Name ☐
- + Personal Detail ☐
- + Status Detail ☐
- + License Details ☐
- + Emergency Contact ☐
- + Employment ☐
- + Testing ☐
- + Resident Address ☐
- + Phone and Email ☐
- + Mailing Address ☐
- + Form W-2 Address ☐
- + Work Status ☐
- + Work Assignments ☐
- + Work Miscellaneous ☐
- + Compensation ☐
- + Allocations ☐
- + Federal Tax Filing ☐
- + State Tax Filing ☐
- + Local Tax Filing ☐
- + Employee Verification ☐
- + Performance ☐
- + Deposit ☐
- + Other details ☐
- + Alternate Rates ☐
- + Benefits ☐

Step 3 - Add Totals

- + Gross Pay
- + Time Sheet Table
- + Deductions
- + Employee Tax
- + Benefits
- + Retirement (401k)
- + Invoiced



PAYROLL

FREQUENT PAGE FAVORITES

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

The screenshot displays the PEOPLELEASE payroll system interface. At the top, there are navigation tabs: MY COMPANY, MY EMPLOYEES, MY PAYROLLS, and a search bar. The search bar contains the text "time sheet" and a red arrow points to it with the instruction "1. Type in Time Sheet." Below the navigation tabs, there is a "My Favorites" section on the left with a list of links: New Hire, Pay Rate Change, Payroll Approval, and Time Sheet Entry (which is circled in red). A red arrow points to the "Time Sheet Entry" link with the instruction "2. Click on Time Sheet Entry." In the center, there is a "Company: (10)" section with a list of employees and their contact information. On the right, there is a "Time Sheet Entry" dropdown menu with options: Time Sheet Entry, Payroll > Action, Report Suggestions, Time Sheet Report, and Payroll > Report. Below the "My Favorites" section, there is a "Recent Payrolls" table with columns: Payroll, Description, and Pay Date. Below the "Company: (10)" section, there is a "My Employees" table with columns: Employee Name, Ext, Work, Mobile, and Work Email. The table lists several employees, including Donna Anderson, Mimi Bell, Beverly Bickham, Bob Jones, Joe Brown, Tom Brown, Jane Doe, Jean Doe, Chris Farley, Julia Haught, Tom Irving, Joshua Johnston, and Maagie Jones.

Employee Name	Ext	Work	Mobile	Work Email
anderson, donna		843/513-4403	8435134403843708401	donnaanderson370@gmail.com
Bell, Mimi			864/760-3072	mbell@peoplelease.com
Bickham, Beverly			843/471-9669	Beverly_Bickham@yahoo.com
Bickham, Beverly 2.0			205/533-5623	bbickham@peoplelease.com
bob, jones			(751) 555-5555	
BROWN, JOE				
brown, renav			(555) 555-5555	
Brown, Tom			555/234-9999	kepperson@peoplelease.com
DOE, JANE			843/693-4112	KBARTLETT@PEOPLELEASE.COM
DOE, JEAN			843/849-1164	HVOKE@PEOPLELEASE.COM
FARLEY, CHRIS	843-849-1164		312-312-3121	rvaughan@peoplelease.com
Haught, Julia			312/811-9522	kmitchell@peoplelease.com
IRVING, TOM			321/321-1968	TIRVING@PEOPLELEASE.COM
JOHNSTON - DO NOT USE, JOSHUA				
Jones, Maagie			(843) 849-1164	



PAYROLL

FREQUENT PAGE FAVORITES

Select the payroll you would like to edit:

The screenshot shows the PEOPLELEASE web application interface. At the top, there are navigation tabs: MY COMPANY, MY EMPLOYEES, and MY PAYROLLS. Below these, a breadcrumb trail reads 'Payroll / Action / Time Sheet Entry'. The main content area is titled 'Select Payroll for Time Sheet Entry' and contains a table with the following data:

Payroll#	Approval	Description	Payroll Type	Pay Date	Cutoff Date	Cutoff Time	Delivery Date
20192	Pending	03-15-19 WKLY	Scheduled	03/15/19	03/14/19	04:00PM	03/15/19

A red arrow points to the '20192' payroll number in the first row. Below the arrow, the text 'Click on Payroll number.' is displayed in red.



PAYROLL

TIME SHEET

You can use 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.

PEOPLELEASE

MY COMPANY

MY EMPLOYEES

MY PAYROLLS



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:

Detail Time Sheet Entry Pivot By: Employee ▼

Employee Farley Chris

Entry: New Entry ▼

Charge Date [FLSA Exempt]

Pay Code

Hours Paid

Position Code Fleet Manager

Hours Worked

Division

Location IL Location

Pay Rate

FMLA Event

Suppress Allocation ☐

Save Return

1
01/20/19
REG
40.00
MANAGER
40.00
1
40.0000
1,600.00

Hours Paid	Hours \$	Flat \$	Units	Units \$	Total \$
40.00	1,600.00	0.00	0.00	0.00	1,600.00



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 *PEOPLELEASE* 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:

The screenshot shows the PEOPLELEASE web application interface. The top navigation bar includes 'MY COMPANY', 'MY EMPLOYEES', 'MY PAYROLLS', and a search bar with 'payroll approval' entered. The 'My Favorites' menu on the left has a red arrow pointing to 'Payroll Approval'. The 'Application Suggestions' dropdown menu is open, showing 'Payroll Approval' with a sub-link 'Payroll > Action'. The 'Recent Payrolls' table is empty. The 'My Employees' table lists several employees with their contact information.

Employee Name	Ext	Work	Mobile	Work Email
anderson, donna		843/513-4403	8435134403843708	donnaanderson370@gmail.com
Bell, Mimi			864/760-3072	mbell@peoplelease.com
Bickham, Beverly			843/471-9669	Beverly_Bickham@yahoo.com
Bickham, Beverly 2.0			205/533-5623	bbickham@peoplelease.com
bob, Jones			(751) 555-5555	
BROWN, JOE			(555) 555-5555	
brown, renay			555/234-9999	kepperson@peoplelease.com
Brown, Tom			843/693-4112	KBARTLETT@PEOPLELEASE.COM
DOE, JANE			843/849-1164	HVOKE@PEOPLELEASE.COM
DOE, JEAN			312-312-3121	rvaughan@peoplelease.com
FARLEY, CHRIS		843-849-1164	312-312-3121	knitchell@peoplelease.com
Haught, Julia			312/811-9522	



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 / Action / Payroll Approval Company: (100) SAMPLE TRUCKING

Payroll Number: 20194

Description: TEST PAYROLL

Pay Date: 03/15/2019

Payroll Type: Manual

Payroll Status: Client approval pending

Pay Group: Period Start: Period End:

Approve ☒ Deny ☐

View Report/Analytic: Payroll Summary

Employee	Voucher	Check/Deposit	Gross Pay
BELL MIMI	000028	Check	1100.00
FARLEY CHRIS	000029	Check	1600.00
JORDAN MICHAEL	000030	Check	500.00
SANTA CLAUS	000031	Check	375.00

Submit



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).

