Human Resources User Guide

Setup and administration of Human Resources on the PrismHR platform.

PrismHR 1.17
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# Table of Contents

**Human Resources User Guide** ................................................................. 1  
Copyright notice .................................................................................... 2  
Table of Contents .................................................................................. 3  

**Introduction** ...................................................................................... 13 
Intended Audience ................................................................................ 13  
Overview ................................................................................................ 13  
Conventions ............................................................................................ 13  
"Global" and "Company" ......................................................................... 14  
Navigating PrismHR .............................................................................. 14  
Dashboard ................................................................................................ 14  
Client Search .......................................................................................... 15  
Favorites ................................................................................................ 15  
Search ..................................................................................................... 16  
Action Bar .............................................................................................. 17  
Reports ................................................................................................... 17  
Audit ........................................................................................................ 17  
Value Search .......................................................................................... 17  
Dates ....................................................................................................... 18  
Tables ..................................................................................................... 18  
Data Mapping ......................................................................................... 19  
Navigating Online Help ........................................................................ 19  

**Section 1 - Setup** .............................................................................. 21  
Chapter 1: System-Level Human Resources Codes ................................. 22  
  EEO Ethnic Codes ............................................................................... 22  
  EEO Class Codes ............................................................................... 22  
  EEO Position Groups ........................................................................ 22  

© 2019 PrismHR
<table>
<thead>
<tr>
<th>Position Classifications</th>
<th>23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Statuses</td>
<td>24</td>
</tr>
<tr>
<td>Employee Types</td>
<td>25</td>
</tr>
<tr>
<td>Employee Suffix</td>
<td>26</td>
</tr>
<tr>
<td>Reasons</td>
<td>26</td>
</tr>
<tr>
<td>Relationships</td>
<td>27</td>
</tr>
<tr>
<td>OSHA Events</td>
<td>28</td>
</tr>
<tr>
<td>New Hire Questions</td>
<td>28</td>
</tr>
<tr>
<td>Creating a New Hire Question</td>
<td>29</td>
</tr>
<tr>
<td>Editing a New Hire Question</td>
<td>29</td>
</tr>
<tr>
<td>Assigning the New Hire Questions</td>
<td>29</td>
</tr>
<tr>
<td>Chapter 2: Client-Level Human Resources Codes</td>
<td>30</td>
</tr>
<tr>
<td>Client Event Types</td>
<td>30</td>
</tr>
<tr>
<td>Client Events</td>
<td>30</td>
</tr>
<tr>
<td>Client Event</td>
<td>30</td>
</tr>
<tr>
<td>Event Documents</td>
<td>31</td>
</tr>
<tr>
<td>Employee Event Categories</td>
<td>32</td>
</tr>
<tr>
<td>Hazardous Materials</td>
<td>32</td>
</tr>
<tr>
<td>Ratings</td>
<td>33</td>
</tr>
<tr>
<td>Skills</td>
<td>34</td>
</tr>
<tr>
<td>Courses</td>
<td>34</td>
</tr>
<tr>
<td>New Hire Optional Fields</td>
<td>35</td>
</tr>
<tr>
<td>Approval Policies</td>
<td>36</td>
</tr>
<tr>
<td>Chapter 3: Position Codes</td>
<td>37</td>
</tr>
<tr>
<td>Positions</td>
<td>37</td>
</tr>
<tr>
<td>Hazardous Materials Exposure</td>
<td>40</td>
</tr>
<tr>
<td>ADA Position Description</td>
<td>40</td>
</tr>
</tbody>
</table>
Table of Contents

Position Code Cost/Bill Maintenance ............................................................................................................. 40
Required Skills .................................................................................................................................................. 41
Equivalent Hours Worked ............................................................................................................................ 41
Action Bar .................................................................................................................................................... 41

Section 2 - Administration ............................................................................................................................. 43

Chapter 4: Employee Details .......................................................................................................................... 44
Name Tab ...................................................................................................................................................... 45
Personal Tab .................................................................................................................................................. 46
Personal ......................................................................................................................................................... 46
Status ............................................................................................................................................................ 46
License .......................................................................................................................................................... 47
Emergency Contacts .................................................................................................................................... 47
Testing ........................................................................................................................................................... 47
Address Tab .................................................................................................................................................. 47
Work Tab ...................................................................................................................................................... 49
Status Dates ................................................................................................................................................ 49
Assignments ................................................................................................................................................ 50
Miscellaneous .............................................................................................................................................. 50
Pay Tab ........................................................................................................................................................ 51
Compensation ............................................................................................................................................. 51
Performance ............................................................................................................................................... 52
Allocations .................................................................................................................................................. 53
Alternate Rates .......................................................................................................................................... 53
Tax Tab ........................................................................................................................................................ 54
Federal Tax Filing ....................................................................................................................................... 54
State Tax Filings ......................................................................................................................................... 56
Local Tax Filings .......................................................................................................................................... 56
New Hire Tax Forms .................................................................................................................................. 57
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Verification</td>
<td>57</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>58</td>
</tr>
<tr>
<td>Deposit Tab</td>
<td>59</td>
</tr>
<tr>
<td>Status</td>
<td>59</td>
</tr>
<tr>
<td>Direct Deposit Information</td>
<td>59</td>
</tr>
<tr>
<td>Amounts Excluded from Direct Deposit</td>
<td>61</td>
</tr>
<tr>
<td>Skills &amp; Education Tab</td>
<td>61</td>
</tr>
<tr>
<td>Property Tab</td>
<td>62</td>
</tr>
<tr>
<td>Property</td>
<td>62</td>
</tr>
<tr>
<td>Vehicle Information</td>
<td>62</td>
</tr>
<tr>
<td>License Information</td>
<td>63</td>
</tr>
<tr>
<td>Auto Insurance Policy</td>
<td>63</td>
</tr>
<tr>
<td>Other Tab</td>
<td>64</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>64</td>
</tr>
<tr>
<td>Hawaii</td>
<td>65</td>
</tr>
<tr>
<td>Termination</td>
<td>66</td>
</tr>
<tr>
<td>Employee Details Action Menu</td>
<td>66</td>
</tr>
<tr>
<td>Change Password</td>
<td>66</td>
</tr>
<tr>
<td>Check Message</td>
<td>67</td>
</tr>
<tr>
<td>Documents</td>
<td>67</td>
</tr>
<tr>
<td>Employee Notes</td>
<td>68</td>
</tr>
<tr>
<td>Employee Events</td>
<td>68</td>
</tr>
<tr>
<td>Organization Chart</td>
<td>69</td>
</tr>
<tr>
<td>Reprint Form W-2</td>
<td>69</td>
</tr>
<tr>
<td>Chapter 5: Dependents and FMLA Events</td>
<td>70</td>
</tr>
<tr>
<td>Employee Dependents</td>
<td>70</td>
</tr>
<tr>
<td>Employee Dependent</td>
<td>70</td>
</tr>
<tr>
<td>Dependent Details</td>
<td>70</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
</tr>
<tr>
<td>---------</td>
<td>------</td>
</tr>
<tr>
<td>Student Details</td>
<td>71</td>
</tr>
<tr>
<td>Address Details</td>
<td>71</td>
</tr>
<tr>
<td>Create COBRA Participant</td>
<td>72</td>
</tr>
<tr>
<td>FMLA Events</td>
<td>72</td>
</tr>
<tr>
<td>Hours Adjustment</td>
<td>73</td>
</tr>
<tr>
<td>Event History</td>
<td>73</td>
</tr>
<tr>
<td>Chapter 6: Job Applicants and New Hires</td>
<td>74</td>
</tr>
<tr>
<td>Job Candidate Status Codes</td>
<td>74</td>
</tr>
<tr>
<td>Job Candidates</td>
<td>74</td>
</tr>
<tr>
<td>Job Candidates</td>
<td>74</td>
</tr>
<tr>
<td>Current Status</td>
<td>76</td>
</tr>
<tr>
<td>Skills</td>
<td>77</td>
</tr>
<tr>
<td>Notes</td>
<td>77</td>
</tr>
<tr>
<td>Candidate Education History</td>
<td>77</td>
</tr>
<tr>
<td>Affirmative Action</td>
<td>78</td>
</tr>
<tr>
<td>Prior Address</td>
<td>78</td>
</tr>
<tr>
<td>Prior Name</td>
<td>79</td>
</tr>
<tr>
<td>Hire</td>
<td>79</td>
</tr>
<tr>
<td>New Hire</td>
<td>79</td>
</tr>
<tr>
<td>New Hire</td>
<td>79</td>
</tr>
<tr>
<td>Personal Information</td>
<td>80</td>
</tr>
<tr>
<td>Resident Address and Emergency Contact</td>
<td>81</td>
</tr>
<tr>
<td>Employment Details</td>
<td>82</td>
</tr>
<tr>
<td>Pay Details</td>
<td>83</td>
</tr>
<tr>
<td>Form I-9 Details</td>
<td>84</td>
</tr>
<tr>
<td>I-9 Miscellaneous</td>
<td>85</td>
</tr>
<tr>
<td>Direct Deposit Information</td>
<td>86</td>
</tr>
<tr>
<td>Federal Form W-4 Details</td>
<td>86</td>
</tr>
</tbody>
</table>
Work and Resident State Form W-4 Details ................................................................. 87
Saving the New Hire ................................................................. 87
New Hire Notes ........................................................................... 87
New Hire Download Processing ....................................................... 88
New Hire Reporting ................................................................. 88
Clearing New Hire Report Dates ......................................................... 90
Setting New Hire Report Dates .......................................................... 91
Chapter 7: OSHA and Workers’ Compensation Case Files ........................................... 93
OSHA Cases ............................................................................ 93
OSHA Case ............................................................................ 93
Injury/Illness ............................................................................ 93
Claim ..................................................................................... 94
OSHA Form 101 Detail ............................................................... 94
OSHA Other Detail .................................................................... 95
Workers’ Compensation Cases .......................................................... 95
Workers’ Compensation Case ......................................................... 95
Contacts ................................................................................. 96
Reserved / Paid-to-Date Information .................................................. 97
Notes ....................................................................................... 97
Chapter 8: Other HR Actions ........................................................................... 99
Department Change ........................................................................ 99
Division Change .......................................................................... 99
Location Change .......................................................................... 100
Pay Rate Change .......................................................................... 100
Action Bar .................................................................................. 102
Position Change .......................................................................... 102
Status Type History ..................................................................... 103
PTO Register Enrollment .............................................................. 103
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>About Benefit Start Dates</td>
<td>104</td>
</tr>
<tr>
<td>Understanding the Accrued Thru Date Field</td>
<td>104</td>
</tr>
<tr>
<td>PTO Auto Register Enrollment</td>
<td>105</td>
</tr>
<tr>
<td>How PrismHR Uses the Accrued Thru Date for PTO Benefits</td>
<td>106</td>
</tr>
<tr>
<td>Planned Time Off Requests</td>
<td>106</td>
</tr>
<tr>
<td>Action Bar</td>
<td>107</td>
</tr>
<tr>
<td>Employee Absence Entry</td>
<td>108</td>
</tr>
<tr>
<td>Leave of Absence</td>
<td>108</td>
</tr>
<tr>
<td>Action Bar</td>
<td>109</td>
</tr>
<tr>
<td>Backdated Leave Request Processing</td>
<td>109</td>
</tr>
<tr>
<td>Reactivation</td>
<td>110</td>
</tr>
<tr>
<td>Status Type History</td>
<td>111</td>
</tr>
<tr>
<td>Employee Termination</td>
<td>111</td>
</tr>
<tr>
<td>Status Type History</td>
<td>112</td>
</tr>
<tr>
<td>Rehire</td>
<td>113</td>
</tr>
<tr>
<td>Status Type History</td>
<td>114</td>
</tr>
<tr>
<td>Status Type Change</td>
<td>114</td>
</tr>
<tr>
<td>Action Bar</td>
<td>115</td>
</tr>
<tr>
<td>Employer Reassignment</td>
<td>115</td>
</tr>
<tr>
<td>Approval Process</td>
<td>116</td>
</tr>
<tr>
<td>Approvals Pending</td>
<td>116</td>
</tr>
<tr>
<td>Approvals</td>
<td>117</td>
</tr>
<tr>
<td>Approvals Processed</td>
<td>118</td>
</tr>
<tr>
<td>Chapter 9: HR Adjustments</td>
<td>119</td>
</tr>
<tr>
<td>Department History Adjustment</td>
<td>119</td>
</tr>
<tr>
<td>Division History Adjustment</td>
<td>119</td>
</tr>
<tr>
<td>Location History Adjustment</td>
<td>120</td>
</tr>
<tr>
<td>Pay History Adjustment</td>
<td>121</td>
</tr>
<tr>
<td>Position History Adjustment</td>
<td>121</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----</td>
</tr>
<tr>
<td>Status Type History Adjustment</td>
<td>122</td>
</tr>
<tr>
<td>Employee PTO Register Adjustment</td>
<td>123</td>
</tr>
</tbody>
</table>

Chapter 10: Views and Inquiries ................................................................. 125

<table>
<thead>
<tr>
<th>Department History</th>
<th>125</th>
</tr>
</thead>
<tbody>
<tr>
<td>Division History</td>
<td>125</td>
</tr>
<tr>
<td>Location History</td>
<td>125</td>
</tr>
<tr>
<td>Pay History</td>
<td>126</td>
</tr>
<tr>
<td>Position History</td>
<td>126</td>
</tr>
<tr>
<td>Status Type History</td>
<td>126</td>
</tr>
<tr>
<td>Employee PTO Register</td>
<td>127</td>
</tr>
<tr>
<td>Employee PTO Registers</td>
<td>128</td>
</tr>
</tbody>
</table>

Chapter 11: Reports .................................................................................... 129

<table>
<thead>
<tr>
<th>1094-C Report Download in PrismHR</th>
<th>130</th>
</tr>
</thead>
<tbody>
<tr>
<td>1095-C Report Download in PrismHR</td>
<td>130</td>
</tr>
<tr>
<td>Benefits Billing Detail Report</td>
<td>130</td>
</tr>
<tr>
<td>Electronic 1095-C Report</td>
<td>132</td>
</tr>
<tr>
<td>Columns in the Electronic 1095-C Report</td>
<td>132</td>
</tr>
<tr>
<td>Employee Reports</td>
<td>132</td>
</tr>
<tr>
<td>Emergency Contact Report</td>
<td>132</td>
</tr>
<tr>
<td>Employee Address Report</td>
<td>133</td>
</tr>
<tr>
<td>Employee Age Report</td>
<td>134</td>
</tr>
<tr>
<td>Employee Birthday Report</td>
<td>136</td>
</tr>
<tr>
<td>Employee Census Report</td>
<td>137</td>
</tr>
<tr>
<td>Employee Contact Information Report</td>
<td>138</td>
</tr>
<tr>
<td>Employee Department Report</td>
<td>139</td>
</tr>
<tr>
<td>Employee Dependents Report</td>
<td>140</td>
</tr>
<tr>
<td>Employee ID Report</td>
<td>141</td>
</tr>
<tr>
<td>Report Name</td>
<td>Page</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Employee Name Report</td>
<td>142</td>
</tr>
<tr>
<td>Employee Property Report</td>
<td>143</td>
</tr>
<tr>
<td>Employee Supervisor Report</td>
<td>144</td>
</tr>
<tr>
<td>Employee Anniversary Report</td>
<td>146</td>
</tr>
<tr>
<td>Employee Change Report</td>
<td>147</td>
</tr>
<tr>
<td>Employee Elections Report</td>
<td>149</td>
</tr>
<tr>
<td>Employee Event Codes Report</td>
<td>150</td>
</tr>
<tr>
<td>Employee Hours by Active Weeks Report</td>
<td>151</td>
</tr>
<tr>
<td>Viewing the Report</td>
<td>151</td>
</tr>
<tr>
<td>Employee Master Report</td>
<td>152</td>
</tr>
<tr>
<td>Employee New Hire Report</td>
<td>155</td>
</tr>
<tr>
<td>Employee Pay Rate Report</td>
<td>156</td>
</tr>
<tr>
<td>Employee PTO Detail Report</td>
<td>158</td>
</tr>
<tr>
<td>Employee Ranked Service Report</td>
<td>160</td>
</tr>
<tr>
<td>Employee Retirement Loans Report</td>
<td>161</td>
</tr>
<tr>
<td>Employee Skills Report</td>
<td>161</td>
</tr>
<tr>
<td>Employee Terminations Report</td>
<td>163</td>
</tr>
<tr>
<td>Employee Test Results Report</td>
<td>164</td>
</tr>
<tr>
<td>Employee with Status as of Date Report</td>
<td>165</td>
</tr>
<tr>
<td>OSHA Report (300 or 300A)</td>
<td>165</td>
</tr>
<tr>
<td>OSHA 300A File Download</td>
<td>167</td>
</tr>
<tr>
<td>PTO Approval Report</td>
<td>168</td>
</tr>
<tr>
<td>PTO Hours Taken Report</td>
<td>170</td>
</tr>
<tr>
<td>PYTD Retirement Contribution Summary</td>
<td>171</td>
</tr>
<tr>
<td>Ranked Salary Report</td>
<td>172</td>
</tr>
<tr>
<td>Retirement Matching Percent Report</td>
<td>173</td>
</tr>
<tr>
<td>Reviews Due By Month Report</td>
<td>174</td>
</tr>
<tr>
<td>Salary As Of Report</td>
<td>176</td>
</tr>
<tr>
<td>Section</td>
<td>Page</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Statistics by Position Report</td>
<td>177</td>
</tr>
<tr>
<td><strong>Section 3 - How-To Procedures</strong></td>
<td>179</td>
</tr>
<tr>
<td>Appendix A: Override GeoCode for Employee Residence</td>
<td>180</td>
</tr>
<tr>
<td>Appendix B: Assigning School District GeoCodes</td>
<td>181</td>
</tr>
</tbody>
</table>
Introduction

The Human Resources User Guide explains the functions and features used to create and maintain employees.

- **Setup (page 21)** - The tasks and steps involves in defining and setting up codes, values, and definitions that are commonly used to maintain human resources-related features. Authorized users set up these values and definitions on the global and client level, usually before the initial use of the system. They may perform these tasks afterward, when there is a need for new values or definitions.
- **Administration (page 43)** - The tasks and steps involved in daily maintenance, administration, and use of human resources-related features.
- **How-To Procedures (page 179)** - Reference information and procedures for specific tasks.

Intended Audience

The contents are for users who are:

- Involved in human resources
- Familiar with the use of an internet browser

Most users do not have access to every form and feature.

Your organization should already have set up the initial defaults, files, and preferences required for system administration, as well as client information.

You should also have knowledge concerning human resources practices. Explaining industry-specific topics other than the use of this software product is outside the scope of this document.

Overview

Conventions

These are the formatting conventions used.

<table>
<thead>
<tr>
<th>Formatting Example</th>
<th>Indicates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Details</td>
<td>Name of the form (screen)</td>
</tr>
<tr>
<td>Notes tab</td>
<td>Name of the tab in a form</td>
</tr>
</tbody>
</table>
"Global" and "Company"

The definitions of "global" and "company" vary, according to the way your organization is using PrismHR.

- If your organization is a professional employment organization (PEO), administrative services organization (ASO), or other service provider, the term "company" refers to one of your clients, and "global" pertains to the system as a whole (all of your clients as a group).
- If your organization is a single corporation, both terms are synonymous and refer to your organization as a whole: the entity or organization using the system.
- Sometimes "system" is used in place of "global" or it refers to a feature that pertains to the system as a whole.

Navigating PrismHR

It is helpful to understand how to use basic features of PrismHR.

Dashboard

The PrismHR Dashboard provides quick access to company information and relevant features.

- The My Perspective and Employees panels reflect the selected company. If you have access to more than one company, click Client or Company at the top of the form to open the search. See Client Search on page 15.
- My Favorites is a list of pages you have flagged as favorites. See Favorites on page 15.
- My Agenda lists messages that require your attention. See “Messages” in the System Administration Guide.
• **My Perspective** gives you access to graphs of the selected company's employees.
  • If you are using PrismHR Onboarding, you can view the onboarding dashboard by selecting **Onboarding Tasks by Status**; see "Onboarding Dashboard".
  • If you are using PrismHR Benefits Enrollment, you can view the Benefits Enrollment dashboard by selecting **Benefit Enrollments by Status**; see "Benefits Enrollment Dashboard".
• **New Hire** is a list of employees at the selected company.

The top bar of the PrismHR screen gives you access to menus and other features.

• The **Search** field enables you to find forms, employees, and other items. See Search on page 16.
• The Messages icon 📩 indicates whether you have messages. Click it to access the messages; see “Messages” in the System Administration Guide.
• The Approvals icon 📊 indicates whether you have pending approvals. Click it to access the approvals; see “Approvals Pending” in the Human Resources User Guide or Approvals Guide.

Here are some other tips on using PrismHR:

• Some fields enable you to search for values. See Value Search on page 17.
• Tables enable you to enter multiple rows of data. See Tables on page 18.
• There are different ways that you can enter dates. See Dates on page 18.

---

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.

---

**Client Search**

To select a client use the Search All Companies dialog box.

**To refine the search:**

1. Enter some of the **Company ID, Company Name** (which is the “doing business as” or DBA name), **Legal Name**, or **Telephone** number and then click **Refine**.
2. To select the company, do one of the following:
   • Click anywhere in the row.
   • Enter the row number (the column on the far left) in the **Select Row** field and then press **Enter**.

**Favorites**

You can select forms in PrismHR as favorites that you access frequently. Favorites are listed on the Dashboard when you first log in to PrismHR. You can also access them from the Favorites ✨ menu.

To add a form to your Favorites, click the form's Action bar 📝 and then select **Add to Favorites**.
When a form is in your favorites, the Action bar displays **Remove from Favorites**. Select this option to remove the form from your list of Favorites.

**Search**

The **Search** field at the top of the PrismHR screen enables you to search for forms, employees, and other items. This field gives you quick access to features without needing to navigate to them in the menus.

To initiate a search, start typing to do a broad search or narrow the search using an initial letter followed by a colon:

- **A:** - Application Search (page 16) (Features/Forms)
- **C:** - Client Search (page 16)
- **E:** - Employee Search (page 16)
- **R:** - Report Search (page 17)

**Broad Search**

**To initiate a broad search:**

1. Type the text of the item you want to find. As you type, the system presents a list of suggestions.
2. Click an item to open it. If there is an arrow next to the item [ ], click it to open the form as a layer over the current page. This makes a second form available while continuing to display the main form.

**Application Search**

**To search for a feature or a form (application):**

3. Type **A:** and then type the name of the feature you want to access. As you type, the list filters to the features that match your search.
4. Click the feature's name to open the form or click the arrow to open the form in a new window and layer it over the current page.

**Client Search**

**To search for a client:**

1. Type **C:** and then type the name of the client. As you type, the list filters client records that match your search. The **Search** field lists only clients to which you have access.
2. Click the client name to open the Employee Details form.

**Employee Search**

**To search for an employee:**

1. Type **E:** and then type the name of the employee. As you type, the list filters to employee records that match your search. The **Search** field lists only employees to which you have access.
2. Click the employee name to open the Employee Details.
To see employees with an onboarding status displayed, you must be enrolled in the PrismHR Onboarding module.

**Report Search**

**To search for a report:**

1. Type R: and then type the report name. As you type, the list filters reports that match your search. The **Search** field lists only reports to which you have access.
2. Click the report name to open the report's selection criteria screen.
3. Make your selections and then run the report.

**Action Bar**

Many forms provide features in the Action bar that enable you to access features associated with the form. Many features enable you to enter data, while others are only informational.

**Reports**

Each user can have access to different reports. The Reports menu lists the reports that are available to you. The options available for each report may differ.

- Use the Selection Criteria to determine which data the report displays. Some options allow only one value.
- Use the Sort Options to determine the order in which information displays. Some reports include multiple sort options that enable you to select a primary sort, a secondary sort, and so on.

After you select the options, click **Run**. The report displays the data.

Use the **Actions** drop-down list to print, share, or save the report.

**Audit**

For security purposes, effective October 2019, Audit Log access must be manually added to any applicable user roles. If you need to add access to many roles at once, see Adding Form Access in Bulk.

The Audit Log Display lists changes made to a form. Click a **Log ID** to see the details.

Auditing is available for many forms in PrismHR.

All dates and times in PrismHR are Central Time.

The ID for changes to ESS are logged as **Web User IP**.

**Value Search**

In PrismHR, a field or column label may provide a link that enables you to search for values.
Clickable Fields

To search for positions:

1. Either press Ctrl + Enter while the cursor is in the field or click the Position link. The search window opens.
2. To move through multiple pages of values, use the Pg Up or Pg Dn keys or click Previous and Next. You can go directly to a page by entering the page number in the Select Page field and then clicking Go To Page.
3. Use the Refine Search fields to modify the search criteria. For example, enter some of the Employee ID or Sort Name.
4. To select a value, enter the row number in the Select Row field or click the value in the list. You return to the previous screen and the selected value populates the field. If you know the value, you can simply enter it in the field instead of selecting it.

Employee Search

Most employee search fields enable you to search for the employee directly from the Employee field. You can also click the field label link to use a search form.

If you choose to search from the field, type the first part of the employee’s name or ID and then select the name from the list. The list filters as you type.

Dates

The system provides several ways to enter dates.

- The date picker opens when the cursor is in the date field.
- To enter the current date, type t or T and then press Tab.
- Type the date. The final format is MM/DD/YYYY, but you need to type only some of it and then press Tab. For example,
  - When you enter M/D, the system populates the leading zeroes and the current year.
  - When you use dashes instead of slashes, the system converts them to slashes.
  - When you enter the month and day and only the last two digits of the year, the system completes the four-digit year.
- To enter a date that is a specific number of days in the past or future, use the minus or plus symbol and the number. For example,
  - If the date is 90 days in the future, enter +90 and then press Tab. On September 1, the result is November 30.
  - If the date was 10 days in the past, enter -10 and then press Tab. On September 1, the result is August 22.

Tables

You enter some information in tables.

- When a column heading is a link, populate a cell by selecting from a list of existing values.
- When a column heading is not a link, enter the appropriate value.
- To add a row to the bottom of a table, click +.
- To add a row above an existing row, click > at the existing row.
To delete a row, click x for the row.

**Data Mapping**

The **Display Data Mapping** option in the Action bar of most forms enables you to learn where information is stored in the database. This helps, for example, when you need to know the file and the field names to select tables and properties for Informer reports.

**To learn where information is stored in the database:**

1. Navigate to the appropriate form in PrismHR.
2. Open the Action bar and select **Display Data Mapping**. The Data Map form opens, listing the fields in the form and the corresponding information.
3. Make a note of the information you need.
4. In Informer, open the **Mappings** tab and then select the **Table Name** that closely matches the **File Name**.

   The PrismHR file names have a period and Informer names have an underscore. For example, `AD.CONTACTS` matches to `AD_CONTACTS`.

5. Match the attributes to find the Informer property names.

**Navigating Online Help**

The online help for PrismHR includes a table of contents, search field, and buttons that enable you to find the information you need.

<table>
<thead>
<tr>
<th>Contents</th>
<th>Use this tab to navigate through the contents of the online help. You can open books and pages.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>Enter a word or phrase and then press Enter to search the online help contents for that information.</td>
</tr>
<tr>
<td>Print</td>
<td>Print the current page on the default printer.</td>
</tr>
<tr>
<td>Expand all</td>
<td>Expand all of the items in the page, such as images.</td>
</tr>
<tr>
<td>Remove Highlight</td>
<td>If you searched the online help, the relevant words are highlighted. Click this to remove the highlights.</td>
</tr>
</tbody>
</table>

Navigation icons enable you to step through the table of contents. This is useful when working through a series of topics about a single form.

| Navigate previous (↩) | Go to the previous topic in the table of contents. |
| Navigate next (↩)     | Go to the next topic in the table of contents. |

Back and Forward icons work the same as the back and forward buttons in a web browser. This is useful when you follow links to pages that are not sequential in the table of contents.
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back (◀️)</td>
<td>Go to the previous topic you were viewing.</td>
</tr>
<tr>
<td>Forward (▶️)</td>
<td>Return to the topic you just came back from, if any.</td>
</tr>
</tbody>
</table>
Section 1 - Setup
Chapter 1: System-Level Human Resources Codes

There are codes that your organization must set up to administer human resources functions throughout the system.

EEO Ethnic Codes

Use the EEO Ethnic Codes form (Figure 1) to maintain Equal Employment Opportunity codes.

Figure 1: EEO Ethnic Codes

1. Enter the Ethnic Code for the race and ethnic identification as defined by the Equal Employment Opportunity Commission.
2. Enter the Ethnic Group description.
3. Select the EEO Report Code used on the EEO-1 report.
4. Click Save.

EEO Class Codes

Use the EEO Class Codes form (Figure 2) to maintain Equal Employment Opportunity codes.

Figure 2: EEO Class Codes

1. Enter the EEO Class Code.
2. Enter a Description for the code.
3. Click Save.

EEO Position Groups

Use the EEO Position Groups form to maintain codes that can display in the EEO-1 Report.

Figure 3: EEO Position Groups
Position Classifications

1. Enter a **Group Code**. If you are creating a new group, use something brief but descriptive, for example, EXEC or LABOR.
2. Enter a **Description** of the group, for example, Executive or Laborer.
3. Enter the **EEO Class** associated with this EEO position group.
4. Click **Save**.

Position Classifications

Use the Position Classifications form (Figure 4) to maintain position class information, which can span multiple states.

**Figure 4: Position Classifications**

![Position Classifications form](image)

1. Enter a unique **Position Classification** ID.
2. Enter a **Description** of the position classification, for example, the job title.
3. Enter the **EEO Position Group**. PrismHR automatically displays the **EEO Position Class** based on the EEO position group entered.
4. Select **Special Requirements** to indicate that this position classification involves special physical or mental requirements; the position must be closely monitored for ADA compliance when applications are accepted for any positions with this classification.

The Americans with Disabilities Act of 1990 (ADA) prohibits employers from discriminating against qualified individuals with disabilities. Not including a particular person in the applicant pool for a certain job is nondiscriminatory only if that person does not meet any physical or mental requirements that have been identified as a essential functions of the position.

5. Select **FLSA Exempt** to exempt this position from the provisions of the Fair Labor Standards Act, which defines the workers who must be paid for overtime.
6. You can select **FLSA Type** that best describes this FLSA exempt position. If the position classification is not FLSA exempt, do not select an **FLSA Type**.
   - **Standard**: The position satisfies standard duties test, or is exempt from duties test but still subject to standard salary test.
7. For each state:
   a. Enter the State abbreviation. The system ties a state-specific workers' compensation class to this position when it is performed by employees who work at a location within that state.
   b. Enter the W/C Class Code applicable to the state for this position classification. The W/C Class Description displays.

8. Click Save.

**Employee Statuses**

Use the Employee Status form (Figure 5) to maintain employee status codes and define how the employee's status affects various pay functions. Statuses indicate whether an employee is active, on leave, or terminated.

**Figure 5: Employee Statuses**

1. Enter the one- or two-character Employee Status Code, for example, A for active or L for on leave.
2. Enter a Full Description of this employee status code, for example, Active or Leave of Absence.
3. Enter an Abbreviated Description of this employee status code, for example, Act or Leave.
4. Select the Status Classification for this employee status code.
5. For the Allowed Action Codes, select each of the Allowed HR Actions. When users perform those associated human resource actions, this status is available.

   For example, if you want to allow terminated employees to be rehired, select Rehire for a Terminated employee status. Users can enter terminated employees in the Rehire form. If you do not select Rehire for Active or On Leave employee statuses, then only terminated employees can be rehired.

6. Select Suppress Auto Pay to suppress the automatic creation of time sheets or other payments for employees with this employment status.
7. Using the **Suppress Time Sheets** drop-down, indicate whether to suppress the selection of time sheets for payment for employees with this employment status, or to display a warning before allowing users to proceed.

8. Select **Suppress Other Pay** to suppress the other payments to employees with this employment status.

9. Select **Obsolete** if this employee status code is no longer used. If you do not want this status to be available in HR action forms, you must also remove the **Allowed Action Codes**.

10. Select **Selectable By Service Provider Only** to hide the Employee Status Code from Worksite Managers.

11. Click **Save**.

### Employee Types

Use the Employee Type form to establish employee types in PrismHR that are used to define employee employment type, such as full time or part time.

**Figure 6: Employee Type**

1. Enter the one- or two-character **Employee Type** that represents the employee type; for example, F for full-time or P for part-time.

2. Enter a **Full Description** of the employee type, for example, Full-Time Employee or Part-Time Seasonal.

3. Enter an **Abbreviated Description** of the employee type, for example, Full or Season.

4. Select the employee **Type Classification**.

5. For the **Allowed Action Codes**, select the **Allowed H/R Actions**, which are the human resource actions that users can take when an employee has this status. For example, you might not want to allow users to enter an extended leave of absence for part-time seasonal employees.

6. Select **Seasonal** if this is a seasonal employee type. Some states use this information for quarterly tax reporting.

If the Statutory Employee option is selected, there will be a checkmark in the Statutory Employee checkbox on Form W-2.
7. Select **Statutory Employee** if this employee type is for statutory employees as defined by the IRS.
8. Select **Eligible for Online Benefit Enrollment** if this employee type can use PrismHR Benefits Enrollment.
9. Select **Auto Term Ineligible Benefits** if the system should cancel ineligible benefits when employees of this type are terminated.
10. Select **Auto Enroll Eligible Benefits** to automatically enroll employees of this type in eligible benefit plans.
11. Select **Obsolete** if this employee type code is no longer used.
12. Enable the **Selectable By Service Provider Only** checkbox, if you want to hide the **Employee Type** field from users with the Worksite Manager or Worksite Trusted Advisor user role in any form that requires an employee type.
13. Click **Save**.

**Employee Suffix**

Use the Employee Suffix form to maintain suffixes that can follow employees' name.

Figure 7: Employee Suffix

1. Maintain the suffixes:
   - To add a new suffix, click + to add a new line to the end of the **Suffix List** and enter the suffix.
   - You can also edit an existing suffix directly in the field.
2. Click **Save**.

**Reasons**

Use the Reasons form to create codes that represent actions that Human Resources can take. When a user performs a human resources action, such as a pay rate or position change, the system prompts the user for a reason code.
Figure 8: Reasons

1. Enter the **Reason Code** for this action. If you are creating a new reason, use something brief but descriptive, such as MI or PRO.
2. Enter the **Reason** description, such as Merit Increase or Promotion.
3. Select one or more **Valid Actions** to which this reason applies. For example, Promotion could apply to both Pay Rate Change and Job Change.
4. Enter a **TPA Separation Code** if this reason code is for actions, typically terminations, used by a third-party when your organization reports the action.
5. Select **Show on Web** to display the reason code in Employee Self-Service (ESS).
6. Enter the **Obsolete On Date** when this reason code is no longer valid.
7. If this reason applies to termination, select the **Termination Type**.
8. Click **Save**.

**Relationships**

Use the Relationships form (Figure 9) to maintain the codes that represent dependents' relationships to employees.

Figure 9: Relationships
If your organization is an Aetna reporting PEO, you must use the two-digit code supplied by Aetna for the Relationship Code.

1. Enter a Relationship Code that briefly represents the dependent's relation to the employee.
2. If appropriate, enter a description of the Relationship between a dependent and an employee.
3. Specify the Relationship Type you want to use for the relationship. This field is required. PrismHR Benefits Enrollment uses this setting when selecting dependents to enroll in benefit plans that include those relationships.
4. Enter the Plan Types you want to connect to the relationship. The Type Description displays.
   The plan types connected to the relationship allow the system to show the correct cost for employees based on the dependents specified during benefits and open enrollments. (PrismHR Benefits Enrollment only.)
5. Select Obsolete if the relationship is no longer used. This hides the relationship so it cannot be selected by employees during enrollments. (PrismHR Benefits Enrollment only.)
6. Click Save.

OSHA Events

Use the OSHA Events panel (Figure 10) to establish codes that describe events that might be tracked by the Occupational Safety & Health Administration (OSHA).

To see a list of all existing OSHA events, open the Action bar and select View OSHA Event Codes.

Figure 10: OSHA Events

1. Enter an Event Code that represents an OSHA event. Use something brief but descriptive, such as PHL for permanent hearing loss.
2. Select the Type of event, either Illness or Injury.
3. Enter a short Event Description, such as Permanent Hearing Loss.
4. Select the OSHA Illness Type used for reporting purposes. If the Type is Illness, this is required.
5. Click Save.

New Hire Questions

Use the New Hire Questions form to create new hire employee questions that can be assigned to a specific work location state when using the New Hire Wizard.
Creating a New Hire Question

1. Click New Question. The field populates with NEW, and the system generates an ID when you save the new question.
2. Enter the Question Text to display in the New Hire Wizard.
3. Select the Field Type to define the format for the answer to the question.
   • If you select Dropdown, the system prompts you to enter the values for the drop-down.
   • If you select Radiobutton, the system prompts you to enter the default value (No = unselected, Yes = selected) as well as the description of the radio button. No more than one option can be set to Yes.
4. Select Mandatory if users must answer the question.
5. Click Save.

Editing a New Hire Question

1. Enter the Question ID.
2. Edit the Question Text as needed.
3. Change the Field Type as needed.
4. Click Save.

Assigning the New Hire Questions

The PrismHR administrator assigns questions to specific states using the State Rules form. The system then presents the question to new employees on the Additional State Questions page of the New Hire Wizard during the new hire process.

Related Topic

State Rules
Chapter 2: Client-Level Human Resources Codes

There are codes that your organization must set up to administer human resources functions for clients.

Client Event Types

Use the Events form (Figure 11) to establish codes for the types of events held by the client.

Figure 11: Events

1. Enter an Event code that represents a type of client event. When creating a new code, use something brief but descriptive, for example, TR.
2. Enter an Event Classification that describes the type of event, for example, Training.
3. Click Save.

Client Events

Use the Client Events form to create events that display in Employee Self-Service (ESS). The form lists existing events (Figure 12).

Figure 12: Client Events list

- You can filter the list of events:
  1. Specify the filters as desired:
     - Select the Organizer user name to view events by a specific organizer.
     - Enter the From Date and Thru Date to view events within a specific set of dates.
  2. Click Refresh to see a list of events that meet the criteria you specified.
- To maintain events:
  - Click Add to create a new event.
  - Click an Event Title to edit an existing event.

Client Event

When you create or edit an event, the Company Event form opens (Figure 13).
1. Enter the **Event Title**.
2. Enter the **Event Date**.
3. Enter the **Start Time** and **End Time**. You can enter the time by including AM or PM, or enter it in 24-hour format. For example, if you enter 10:00 or 10:00AM, the system displays 10:00AM. If you enter 14:00 or 2:00PM, the system displays 02:00PM.
4. The **Organizer** field displays the name of the user who created the event.
5. Enter the **Details** of the event.

At this time, you can only upload documents to an existing event. If you are creating a new event and want to attach a document, you need to save it and reopen it.

6. To attach documents to the event, click **Upload Documents**. See Event Documents on page 31.
7. You can limit the employees who will see the event information by specifying certain departments, divisions, shifts, locations, pay groups, and work groups. In the appropriate table, enter the **Code** for each entity that should see the event.
8. Click **Save**.

**Event Documents**

You can attach documents to a new event, or one that is already established.

1. Click **Upload Documents** in the Company Event form.
2. In the Upload a File window, click **Choose File**.
3. Navigate to the file that you want to upload, and then click **Open**.
4. Click **Submit** in the Upload a File form.
5. In the Confirm Document form, the **Document Name** field populates with file name.
6. You can enter any **Document Notes**.
7. Click **Accept**. You return to the Company Event form.

Once a document is in the Documents list:

- Click the **Document Name** to download the document.
- Click the next to a document to remove it from the event record.
- Select **ESS** to share the document on Employee Self-Service (ESS).

**Employee Event Categories**

Use the Event Categories form (Figure 14) to establish different kinds of employee events such as training, certifications, apprenticeships, and so on, that are recorded in the employee's event logs.

**Figure 14: Event Categories**

<table>
<thead>
<tr>
<th>Event Categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
</tr>
<tr>
<td>Description</td>
</tr>
</tbody>
</table>

1. Enter the **Code** for the event category.
2. Enter the **Description** of the event category.
3. Click **Save**.

**Hazardous Materials**

Use the Hazardous Materials form (Figure 15) to maintain information about hazardous materials used by the company.
1. Enter the Material Code for the hazardous material.
2. Enter the Material Name as found on the product label.
3. Enter the name of the product's Manufacturer.
4. Enter the Emergency Phone number to call in case there is an emergency involving this hazardous material.
5. Select MSDS on File if the Material Safety Data Sheet is on file.
6. Enter the Date Prepared, which is the date the Material Safety Data Sheet was prepared for this material.
7. Enter the physical location of the MSDS sheet in the MSDS Location field.
8. For each course that instructs employees in the handling of this hazardous material:
   a. Enter the Course Code for each safety course that employees must take before handling this hazardous material, the Course Name displays.
   b. If the course must be completed periodically, enter the number of days between completion in the Retake Days field.
9. Click Save.

**Ratings**

Use the Ratings form (Figure 16) to establish employee performance ratings. You can access user-defined fields from the Action bar.

Figure 16: Ratings

1. Enter the unique Rating Code.
2. Enter the Rating Description.
3. Click Save.
Skills

Use the Skills form (Figure 17) to maintain skill codes and related information.

Figure 17: Skills

1. Enter the **Skill Code**. If you are entering a new skill, use something brief but descriptive, such as CDLA for a Class A Commercial Driver's License.
2. Enter a **Description** of the skill.
3. Select the **Differential Method** used to calculate shift differentials. Leave blank if there is no differential.
4. Based on the selected **Differential Method**, enter a percentage or a fixed amount in the **Differential Amount** field.
5. For each course that applies to this skill:
   a. Enter the **Course Code** that employees can take to gain competency in this skill. The **Course Name** displays.
   b. Enter the number of skill competency **Points Earned** upon completion of the course. This value overrides points on the course record.
   c. Select **Yes** from the **Certifies** drop-down if the course provides certification for this skill.
6. Click **Save**.

**Related Topic**

Courses (page 34)

Courses

Use the Courses form (Figure 18) establish training course codes and related information.

Figure 18: Courses
1. Enter the **Course Code**.
2. Enter the **Course Name**.
3. Select **In House** if this course is offered by the company, rather than a third-party vendor.
4. Enter the **Cost Per Student**. Typically you would only use this field for courses provided by third-party vendors.
5. Enter the name of the course provider in the **Offered By** field.
6. Select **Regularly Scheduled** if the course is offered on a regular basis.
7. Enter a brief description of when the course is offered in the **Schedule** field.
8. Click **Save**.

### New Hire Optional Fields

Based on the needs of the client, use the New Hire Optional Fields form to indicate which fields in the New Hire form should be required, if any.

The form indicates whether the client uses the global or custom settings just above the table.

<table>
<thead>
<tr>
<th>Field Description</th>
<th>Required For A Standard New Hire?</th>
<th>Required For An Onboarded New Hire?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Middle_Name</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Birth_Date</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Gender</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Ethnicity</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Address</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Marital_Status</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Telephone</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Mobile_Phone</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Email_Address</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Emergency_Contact</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Contact_Phone</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Contact_Relation</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Employee_Number</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Plan_Group</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Employment_Type</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Pay_Group</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Pay_Rate</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Pay_Rate_Period</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Auto_Pay_Hours</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Project</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Work_Group</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Tax_Allowance</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Tax_Filing_Status</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>19_Citizenship_Status</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Reports_To</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Clock_Number</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

1. For each of the fields, indicate whether it is mandatory:
   - **Required for A Standard New Hire**: Indicates whether the field is required when the client enters new hire information without electronic onboarding.
   - **Required for An Onboarded New Hire**: Indicates whether the field is required when the client has their new hires onboard electronically.
2. Click **Save**.
Approval Policies

Use the Approval Policies form to override global approval policies at the client level, and maintain policies for various approval types. See also “Global Approval Policies.”

Each approval policy specifies who must approve an action before it is finalized. There are different levels of approvals. Client worksite personnel can approve actions (for example, a pay rate change entered for an employee by a departmental manager), and the internal staff of the service provider can approve actions. Approval policies can also require approval from both worksite and service provider users.

When Service Providers enter HR-related changes, those changes go through without requiring approvals. Only payroll-related processes made by Service Providers are subject to approval policies.

You can click View All Policies to view the policies defined for your organization, and select one to edit.

1. Select the Approval Type, which is the type of action that requires approval.
2. For each step, set one of the following:
   - Enter the PrismHR User ID, if the step requires that a specific user approve the action.
   - Specify the HR Role for worksite approvers.
   - Specify the A/M Role, which is the service provider account management role.
     - When you include an A/M Role, you should select the A/M Filter from the drop-down as your organization’s security policy requires:
       - All Users with designated A/M role: Any user with the account management role can see the approvals.
       - Only A/M Assigned to Client: Only service provider users assigned to the client can see the approvals; the system checks the account assignment in the Client Details Account tab for the specified A/M Role and displays the approval for only that user.

PrismHR automatically assigns a number to each approval step you select. The approvals are processed in that order.

3. Click Save.
Chapter 3: Position Codes

Use these features to define and work with the codes that pertain to employee positions.

Positions

Use the Positions form to establish position-related information for the client.

Clicking the Import button displays the Data Import Tool form, which allows you to import a Position Codes template file that contains the following fields (this file must be in .txt format):

- Position Code (Required)
- Position Title (Required)
- Position Classification (Required): An error displays if the imported code does not exist in the System | Change | Position Classifications form
- Supervisory: Accepted values are Y (True) or N (False)
- Tipped Position: Accepted values are Y (True) or N (False)
- G/L Segment Code 1
- G/L Segment Code 2
- G/L Segment Code 3

The Import button displays on the Positions form for all Service Provider user roles except the "Deny" and "Inquiry-only" roles. Imports can be performed for multiple clients at the operations level.

For more information about the Data Import Tool form, refer to the PrismHR Payroll User Guide.

Positions

The Positions panel defines the basic position information.
If the position exists in several departments, use a job code that makes it easy to identify the department in which the position is assigned.

1. Enter a unique **Position Code** that briefly describes the position; for example, OPER for vehicle operator. The code cannot contain a space or special characters.
2. Enter the official **Position Title**.
3. Enter the **Position Classification**.
   The system displays the FLSA Exempt settings, the equal employment opportunity position group, and the EEO class if they apply to this position. (**FLSA Exempt** indicates whether the selected position classification is set to be exempt from both the minimum wage and overtime provisions of the FLSA. You cannot change it here.)
4. Enter a **Position Description**.

The second panel mostly defines any requirements for the position and the pay.

5. Select **Supervisory** if this is a supervisory position. The system uses this field for statistical reports.
6. **Hierarchy Tier**: For future development. Does not currently impact the functionality of PrismHR.
7. Select the **Pay Grade** to use as a default for new hires assigned this job code, if applicable.

The Special Requirements option identifies those positions that have physical or mental requirements. The Americans with Disabilities Act prohibits employers from discriminating against qualified individuals with disabilities. Not including a particular person in the applicant pool for a certain job is only nondiscriminatory if that person does not meet any physical or mental requirements identified as essential functions of the position. Applications for these jobs must be closely monitored for ADA compliance.

8. Select **Special Requirements** if this position requires any special physical or mental requirements.
9. Enter the **Probation Days**, if applicable, which is the number of days from hire that a new employee is considered to be on probation.
10. Select **Sales Position** if this is a sales position.
11. Select **Tipped Position** if this is for a position that receives tips.
12. Select **D.O.T. Requirements** if this job code has special requirements as set forth by the U.S. Department of Transportation.

The G/L Segment Code can be used as an alternative to this position when using G/L Accounting. See the **PEO Client Company Accounting** task sheet on the Customer Resource Center for more information.

13. If applicable, enter the **G/L Segment Code 1**, **G/L Segment Code 2**, or **G/L Segment Code 3** to use as the general ledger account number segment(s) in place of the **Position Code**. These are defined in PEO client accounting wild cards as EEJB, EEJB2, and EEJB3.

The third panel mostly defines codes and other pay information for the position.

14. Select the **Union Code Override** to use for table-based union calculations. If you do not select an override, the system uses union code in Employee Details, if any.

15. Select **PR Chauffeur Tax Applies** if this position is subject to Puerto Rico chauffeur’s tax and the primary work location is Puerto Rico.

16. Select **Indirectly Tipped** if this a tipped position that receives tips indirectly; for example, a busboy, cook, or service bartender.

17. If applicable, enter the **Alaska Position Code** sent to MasterTax for quarterly tax reporting to the state of Alaska.

18. Enter the **SOC Code** (Standard Occupational Classification) if appropriate. Enter only numbers, no dashes.

   This information is included in the MasterTax RTS file and the Employer and Client LA quarterly files in place of the position’s description. If you do not define a SOC code for the position, the files include the description.

19. Enter the **Prevailing Wage** for this position. This can print on pay stubs as a pay detail field.

Only use Price Code with Bundled Billing in the rare circumstances when an employee is granted special pricing rather than using the standard bundled rate and with an employee-specific add-on unbundled rule.

20. Select the **Price Code** that overrides the Bundled Rate for any employee who has been assigned to this position.

21. Enter the **Per Diem Percent** to allocate to non-taxable per diem when paid using the percentage method.

22. Select **W/C Time Sheet Loc Based** to calculate workers’ compensation accruals for each employee’s actual work location. This overrides the setting in Client Details.

23. Select **Obsolete** if this position is no longer used.
24. Select **Suppress Work State Tax** if employees in this position are subject to taxes in their state of residence rather than state of work. During calculations, the system will use the employee’s residence for the basis of state taxes.

Use the **When hiring employees assigned to this position** panel to specify the default **Benefit Group** for employees hired in this position.

![Benefit Group Panel](image)

25. Enter the **Benefit Group** ID that employees should be assigned by default when they are hired for this position.

**Hazardous Materials Exposure**

Use the **Hazardous Material Exposure** panel to track any hazardous materials associated with this position.

![Hazardous Material Exposure Panel](image)

1. Enter each **Material Code** for the hazardous materials people in this position encounter. The **Material Code** description displays.

**ADA Position Description**

Use the **ADA Position Description** panel to maintain the American with Disabilities Act (ADA) parameters associated with this position. Under the ADA, written job descriptions can be considered evidence of essential job functions if they are accurate.

![ADA Position Description Panel](image)

1. Enter the date on which the position description was **Last Updated**.
2. Enter the **ADA Review Date** when the position was last reviewed for compliance with ADA standards.
3. Enter the **ADA Reviewer’s Name** who performed the ADA review.

**Position Code Cost/Bill Maintenance**

Use the **Position Code Cost/Bill Maintenance** panel to define the pay codes, pay rates, and bill rates associated with this position.

![Position Code Cost/Bill Maintenance Panel](image)
Required Skills

Use the **Required Skills** panel to define the skills associated with this position.

```
+------------------+
| Skill Code       |
| Competency Level |
| Recertify Days   |
```

1. Enter each **Skill Code** for the skills required for employees in this position. The **Skill Code** description displays.
2. Enter the required **Competency Level**.
3. In the **Recertify Days** field, enter the interval for recertification.

**Equivalent Hours Worked**

Use the **Equivalent Hours Worked** panel to define the hours worked for this position.

```
+------------------+
| Pay Code         |
| Autofill Hours   |
| Hours            |
```

1. In **Autofill Hours**, you can enter the default number of equivalent hours to use. Click **Autofill** to enter that value for all pay code **Hours** in the table.
2. Enter each **Pay Code** to define equivalent hours for this position. The Pay Reason for these pay codes must be set to Units.
3. Enter the equivalent number of hours worked when paying an employee for this position with the pay code.
4. Click **Save**.

**Action Bar**

You can access other information and settings using the Action bar:

- **Audit (page 17)**
- **User Fields:** Enter any information in the fields defined by your organization.
- **Employees Assigned To:** View a list of employees assigned to the location.
**Related Topics**

Position Classifications (page 23)
Pay Grades
Worksite Locations
Client Details Other Tab
Data Import Tool
Section 2 - Administration
Chapter 4: Employee Details

Use Employee Details to maintain employee information and settings.

Not all tabs and forms are available to all users.

Most of the employee information is in the tabs of the form:

- Name Tab (page 45)
- Personal Tab (page 46)
- Address Tab (page 47)
- Work Tab (page 49)
- Pay Tab (page 51)
- Tax Tab (page 54)
- Deposit Tab (page 59)
- Skills & Education Tab (page 61)
- Property Tab (page 62)
- Other Tab (page 64)

You can access other information and settings using the Action bar:

- Benefit Overview: see “Employee Benefit Overview” in the Benefit Administration User Guide
- Change User Password: see Change Password on page 66
- Check Message (page 67)
- Deduction Arrears: see "Employee Deduction Arrears" in the Payroll User Guide
- Documents (page 67)
- Employee Dependents (page 70)
- Employee Events (page 68)
- Employee Notes (page 68)
- Employee Garnishments
- Loans: see "Employee Loans" in the Payroll User Guide
- Organization Chart (page 69)
- Pay History (page 126)
- Payroll Summary: see “Employee Pay Summary” in the Payroll User Guide
- Payroll Vouchers: see “Employee Payroll Vouchers” in the Payroll User Guide
- Position History (page 126)
- Position Rates: see “Employee Position Rates” in the Payroll User Guide
- Proxy Login: see “Proxy Login” in the Benefits Enrollment User Guide
- PTO Register: see Employee PTO Register on page 127
• Recurring Deductions: see the **Payroll User Guide**
• Reprint Form W-2 (page 69)
• Retirement Loans: see “Employee Retirement Loans” in the **Benefits Administration User Guide**
• Retirement Plan Enrollment: see the **Benefits Administration User Guide**
• Scheduled Deductions: see the **Payroll User Guide**
• Scheduled Payments: see the **Payroll User Guide**
• Status Type History: see Status Type History on page 126
• User Fields: your organization’s custom fields for tracking employee information
• Display Data Mapping: see Data Mapping on page 19

Name Tab

The Employee Details **Name** tab provides employee name and contact information, as well as related read-only employment information.

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 employee’s **Name & Contact** and **Employment** information display.

2. Update the **Name & Contact** information, if needed.
3. View the information, such as the **ESS User Name** or the various details about their **Employment**.
4. The **Status Type Change** and **Position Change** fields are only available to users with correct permissions. Clicking these fields opens the following forms:
   - **Status Type Change**: Opens the form where you can change the employee status, employee hours, and effective date. Once the form opens, press **Tab** to populate the status and date. See **Status Type Change** on page 114.
• **Position Change:** Opens the form where you can change the **employee position** and **effective date**. Once the form opens, press **Tab** to populate the position. See Position Change on page 102.

5. You can include a photo of the user: mouse over the image and then click **Upload** to add an image, or **Delete** to remove an existing image.

6. Click **Save**. If you changed the employee’s **Last Name**, the system prompts you to confirm the change.

**Personal Tab**

Use the Employee Details **Personal** tab to maintain employee information.

**Personal**

The **Personal** panel lists the employee’s personal information.

1. Select the employee’s **Gender**.
2. Enter the employee’s **Date of Birth**. This field is required.
3. Select the employee’s **Marital Status**.
4. The system suppresses the **Employee SSN** for some users. Users with access permissions can click **Edit SSN** to view the whole Social Security number.
5. Select the employee’s **Citizenship** status.
6. Select the employee’s **Preferred Language**.
7. Select the employee’s **Ethnic Code**.

**Status**

The **Status** panel lists the employee’s veteran and health status information.

8. From the drop-downs, select **Yes, No, Not Selected**, or **Declined** for each or the following options. Veteran qualifications are defined by the Department of Labor VETS-4212 Report.

• **Veteran**: The employee is a United States veteran.

• **Vietnam Veteran**: The employee is a United States veteran of the Vietnam war.

• **Disabled Veteran**: The employee is a United States veteran who has a disability.

• **Service Medal Veteran**: The employee is a United States veteran who received a service medal.

• **Newly Separated Veteran**: The employee is a United States veteran who recently left the armed services.

• **Other Protected Veteran**: The employee is a United States veteran who is protected by the Department of Labor VETS-4212 Report.

• **Active Duty Badge Veteran**: The employee is a United States veteran who served on active duty in the U.S. military during a war or in a campaign for which a campaign badge has been authorized under the laws administered by the Department of Defense.

• **Tobacco User**: The employee uses tobacco products. The system uses this information to calculate life insurance premiums.

• **Disablbled**: The employee has a disability as specified by the Americans with Disabilities Act of 1990.

• **Blind**: The employee is legally blind.
• **Deceased**: The employee is deceased. The system uses this value to populate the appropriate check box on the Form W-2.

**License**

Use the License panel to maintain the employee’s driver’s license and automobile registration information.

9. Enter the employee’s **Driver’s License Number**.
10. Enter the **Driver’s License Class** designation of the license.
11. Enter the **License Expiration Date** when the driver’s license expires.
12. Enter the **State Issuing License**, which is the state that issued the driver’s license.
13. Enter the **License Plate Number** assigned to the employee’s vehicle.

**Emergency Contacts**

The Emergency Contact panel lists employee emergency contact information.

14. Enter the **Name** of the person to contact in case of an emergency involving the employee.
15. Select the **Type** of contact information, then enter the **Contact Info**. For example, select **Phone** and then enter the contact’s telephone number.
16. Enter the **Emergency Contact Relation**, which is the contact’s relationship to the employee.

**Testing**

The Testing panel lists various employee testing information.

17. If you track the employee’s physical examinations:
   a. Enter the **Next Exam** scheduled date.
   b. Enter the **Last Exam** date.
   c. Enter the **Last Exam Result** of the employee’s most recent physical examination.

18. If you track the employee’s audiograms:
   a. Enter the **Next Audio** scheduled date.
   b. Enter the **Last Audio** date.
   c. Enter the **Last Audio Result** of the employee’s most recent audiogram.

19. If you track the employee’s drug tests:
   a. Enter the **Next Drug Test** scheduled date.
   b. Enter the **Last Drug Test** date.
   c. Enter the **Last Drug Test Result** of the employee’s most recent drug test.

20. Click **Save**.

**Address Tab**

Use the Employee Details **Address** tab (Figure 19) to establish and maintain employee address information.
1. Enter the employee’s residential Address.
2. Enter the ZIP Code for the employee’s residential city or town. The employee’s City, State, and County populate automatically.

After you enter the ZIP Code, the system checks the street address to make sure that it is valid. If there are typos, missing information, or other unrecognized values, the system displays a dialog suggesting a correction to the address. Click Yes to accept the corrected address, otherwise click No to save as-is or make other edits.

If you enter something that the system cannot match to any existing address, it displays the first address in the master list for the ZIP code (such as 1 Apple Drive).

3. You can enter the ZIP+4 extension for the residential address if it was not populated by the system.
4. Enter the Vertex GeoCode for the employee’s city or town to use tax calculations for this employee.
5. Select Unincorporated Area if the employee’s city or town is not governed by its own local municipal services and is not subject to local resident taxes.
6. Enter the employee’s Home Phone number.
7. Enter the employee’s Cell Phone number.
8. Enter the employee’s Personal Email address.
9. Enter the employee’s Work Email address.
10. Select one Primary e-mail address to use to send email to this employee.
11. To deliver the employee’s check to the residential address, select Deliver Check Home.
12. Enter the Override GEO Code for this employee; the system uses this instead of the GEO Code. Refer to the Overriding the GeoCode for an Employee’s Residence task sheet in the Customer Resource Center for more information.
13. Enter the Override End Date when the GeoCode override ends.
Only enter an address in the Mailing Address or Form W-2 Address panels if the employee’s Mailing Address or Form W-2 Address are different from the Resident Address.

The ZIP Code field for the Form W-2 address allows users to enter non-US postal codes. Users can also change the City and State fields as needed for Form W-2 mailing.

14. Click Save.

Work Tab

Use the Employee Details Work tab to maintain work-related information for the employee.

Status Dates

The Status Dates panel lists the employee's hiring status information.

1. Complete the Status Date fields as available and needed:
   - The Last Hire Date is the date on which the employee was most recently hired.
   - The Original Hire Date is the date on which the employee was originally hired.
   - The Leave Return Date is the date on which the employee returned to work from leave.
   - The Employer Start Date is the date on which the employee started with your organization.
   - The Hire Report Date is the date on which the hire was reported to the state.
   - The Seniority Date is used to calculate the employee's benefits. You can adjust it to give the employee more seniority than the last hire date; this can affect benefits, paid time accrual, and so on.
   - Enter the Benefits Thru Date for this employee. This is the date through which benefit contributions have been deducted from this employee’s pay.
   - Enter the Last Day Worked to indicate the last day on which employee actually worked (if the employee left the client).
   - The Provider Notified On field indicates the date on which your organization was notified of the employee’s termination.
   - If appropriate, select the Term Reason, which is the reason the employee was terminated.
   - Use the Rehire Okay drop-down to indicate whether the employee could potentially be rehired:
     - Yes: The employee can be rehired.
     - No: The employee should not be rehired.
     - Not Specified: There is no preference specified as to whether the employee could be rehired.
Assignments

The Assignments panel lists the employee's assignment information.

2. Complete the Assignments fields as needed:
   - Enter the Worksite Location where this employee works. To specify employee updates that will occur at a future date, click Future Date, which opens the Location Change form.

   Updating the employee's Worksite Location, Division, or Department prompts you to update the current timesheet as follows:
   - Click Yes to update the employee record and the summary timesheet with the revised information. (Note: Clicking Yes does not update the detail timesheet record.)
   - Click No to update the employee record only; however, since the change is immediate, any new pay lines added to the timesheet after the change is made will reflect the updated information.
   - Enter the Division in which this employee works. To specify employee updates that will occur at a future date, click Future Date, which opens the Division Change form.
   - Enter the Department in which this employee works. To specify employee updates that will occur at a future date, click Future Date, which opens the Department Change form.
   - Enter the regularly scheduled Work Shift for this employee.
   - Enter the Project or sub-cost center to which this employee is assigned.
   - Enter the Work Group to which the employee is assigned.
   - Enter the name of the person the employee Reports To, such as a supervisor or manager. If your organization is using the paid time off (PTO) requests feature in Employee Self-Service (ESS) and you have managers set as approvers in the policy, this is the user who would approve the request. If necessary, you can enter the ID of an employee at a different client.
   - Enter the Benefit Group to which this employee belongs.
   - Enter the identifying Employee Number assigned to this employee.
   - Enter the Union Affiliation in which this employee is a member.
   - Enter the Union Start Date on which this employee started with the union.

Miscellaneous

The Miscellaneous panel (Figure 20) maintains various employee identification information.
Figure 20: Miscellaneous

3. Select the check boxes as appropriate:
   - **Business Owner**: The employee is an owner of the client.
   - **Family Member**: The employee is a family member of the business owner.
   - **Company Officer**: The employee is a client officer.

Some states require **Business Owner, Family Member, and Company Officer** information for SUTA purposes.

   - **Company W/C Officer**: The employee is the client’s workers’ compensation officer. Note that this affects workers’ compensation rates.
   - **Tax Credit Eligible**: The employee is eligible for a tax credit under a state-sponsored worker tax credit program.
   - **1099 Contractor**: The employee is a 1099 contractor. If you select **1099 Contractor**, the system suppresses:
       - Year-end Form W-2
       - Federal/State income tax withholding
       - FICA withholding
       - FUTA and SUTA withholding
   - **Agricultural Worker**: The employee is an agricultural worker and the employee’s income will be reported to the IRS on Form 943.
   - **OSHA 10 Certified**: The employee has Occupational Safety and Health Administration (OSHA) 10 Certification and will be tracked as such in the system.

4. Enter the **Clock Number**, which is the employee's ID for the time clock.
5. Click **Save**.

Pay Tab

Use the Employee Details **Pay** tab to establish and maintain employee pay information.

**Compensation**

The **Compensation** panel displays and tracks employee compensation information.
1. Select the **Pay Group** to which the employee belongs. You must assign a pay group to every employee. The system uses the employee pay group assignment and data entered in the Pay Date Control Record to determine which employees to pay on a given pay date. All employees in a pay group have the same **Pay Period**.

   If on a given pay date you need to assign an employee to a pay period other than the one assigned to the pay group, you can create a Temporary Tax Override Record for that employee.

2. Select the **Pay Method** by which the employee is paid, either hourly or salary.
3. Select **Auto Accept T/S** if the time sheet should automatically populate with a default number of hours.
4. If the system should populate the time sheet with a standard number of hours during each pay period, enter the **Default T/S Hours** to use.

   If you change the employee’s **Default T/S Hours** and the employee is salaried, the system prompts you to choose whether to update the time sheet hours that might exist in a current payroll batch to the default time sheet hours you entered. Click Yes if you want the system to make this change; the change occurs when you click Save.

   Click the **Pay Rate Change** link to open the form where you can change the pay rate; see **Pay Rate Change** on page 100. Once the form opens, press **Tab** to populate the pay rate. This feature is only available to users with correct permissions.

5. **First Pay Period Hours** indicates the number of hours the employee was paid in their first pay period. Typically, this applies to salaried employees whose start date falls in the middle of a pay period.
6. Enter a **Benefit Salary** amount to use as an override for any benefit calculations based on salary, if needed.
7. Enter the **Benefits Per Hour**, which is the cost of benefits per hour amount. The system uses this for the certified pay rate calculation.
8. Enter the **Per Diem** rate for non-taxable per diem, if needed.
9. The **Last Pay Date** indicates the most recent day on which the employee received pay.

**Performance**

Use the **Performance** panel to track the employee performance review information.
1. Enter the date of the employee's Last Performance Review.
2. Enter the employee's Last Performance Rating code. See Ratings on page 33 for more information.
3. Select Performance Agreement if this employee is subject to the terms of a performance agreement.
4. Enter the employee's Job Description Title At Last Performance Review.
5. Enter the date of the employee's Next Performance Review.
6. Enter the date of the employee's Next Pay Review. You can leave this field blank if it is the same as the Next Performance Review date.

Allocations
The Allocations panel indicates whether an employee works in more than one department. When PrismHR creates a time sheet for this employee, the departments indicated on the Allocations panel appear on the time sheet.

1. Enter the labor Allocation Template to use for this employee.
2. In the table, enter the allocation lines as needed. If you leave any fields blank, the system uses the values from the Work tab.
   a. Enter the Location code.
   b. Enter the Division code.
   c. Enter the Dept code.
   d. Enter the Project code.
   e. Enter the Job code.
   f. Enter the Percent allocation.

Alternate Rates
Use the Alternate Rates panel to establish alternate pay rates for an employee.
1. Enter each **Alternate Pay Rate** amount as required for this employee.  
2. Click **Save**.

**Tax Tab**

The Employee Details **Tax** tab establishes state and local employee tax information, employment verification, and miscellaneous tax information.

**Federal Tax Filing**

Use the **Federal Tax Filing** panel to maintain employee federal tax information.

1. Select the employee’s **Federal Filing Status**.
2. If necessary, update the following fields. These fields correspond to the 2020 version of IRS Form W-4 and can be populated when an employee is first hired:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiple Jobs</td>
<td>Select this option if the employee works multiple jobs or if they are married filing jointly and they and their spouse both work.</td>
</tr>
<tr>
<td>Dependents</td>
<td>The total amount of child tax credit and other dependents-related credit claimed by the employee. See the instructions on Form W-4 for more information.</td>
</tr>
<tr>
<td>Other Income</td>
<td>Any other income the employee expects to receive (not from any jobs they work).</td>
</tr>
<tr>
<td>Deductions</td>
<td>The amount calculated on the Form W-4 Deductions Worksheet, line 5, for this employee.</td>
</tr>
</tbody>
</table>

3. If necessary, enter or update the number of **Federal Allowances (pre 2020)** (exemptions) claimed by the employee. This applies to tax years prior to 2020.

The system calculates federal withholding amounts for taxes using rates stored in the tax tables. If appropriate, you can override the default calculation using the **Override Type** and **Override Amount** fields. For example, some employees want to increase their income tax withholding by a fixed amount. You would select Add To Withholding and then enter the amount to add to the calculated amount. (Note that the system does not add this additional amount to income tax calculated on supplemental earnings.)
4. Select the **Override Type** to use when calculating the amount to withhold for income taxes paid to the federal government.
   - **Add to Withholding**: Adds the amount to the calculated value.
   - **Fixed Amount**: Uses the amount entered in the Override Amount field as the amount to withhold.
   - **Block Withholding**: Blocks the witholding of income tax from the employee’s pay.
   - **Percentage**: Specifies a percentage of net taxable pay to withhold.

5. Enter the **Override Amount** to use in conjunction with the **Override Type**.

6. Select the **Alternate Tax Calc Method** to use to calculate this employee’s federal income tax, either Annualized or Cumulative. If you leave it blank, the system uses the Annualized method. See **Cumulative Versus Annualized Tax Calculations on page 55**.

7. Select **FICA Exempt** if the employee is exempt from FICA taxes.

8. Select **Form 4029 Filed** if the employee has filed that application.

9. Select **Railroad Employee** to calculate railroad taxes (and suppress Social Security and Medicare taxes) for the employee.

   Railroad taxes are not reported on the Form 941 and are not posted to the Employer 941 Register. These taxes are included in the MasterTax RTS file. They need to be reported on the Form CT-1 Employer’s Annual Railroad Retirement Tax Return; PrismHR and MasterTax do not currently support the Form CT-1.

10. Select **Federal W-4 Filed** if the Form W-4 is filed for the employee.

11. Enter the **Federal W-4 Year** when the form was filed.

12. Click **Save**.

**Cumulative Versus Annualized Tax Calculations**

The difference between the two calculations can be marked, especially when an employee's payment amounts are erratic.

<table>
<thead>
<tr>
<th></th>
<th>Wages</th>
<th>Cumulative Method</th>
<th>Annualized Method</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>$500.00</td>
<td>$25.82</td>
<td>$25.82</td>
</tr>
<tr>
<td>Week 2</td>
<td>500.00</td>
<td>25.81</td>
<td>25.82</td>
</tr>
<tr>
<td>Week 3</td>
<td>500.00</td>
<td>25.81</td>
<td>25.82</td>
</tr>
<tr>
<td>Week 4</td>
<td>500.00</td>
<td>25.83</td>
<td>25.82</td>
</tr>
<tr>
<td>Week 5</td>
<td>3,000.00</td>
<td>400.82</td>
<td>681.01</td>
</tr>
<tr>
<td>Subtotal</td>
<td></td>
<td>$504.09</td>
<td>$706.83</td>
</tr>
</tbody>
</table>

In the table, a salesperson receives a monthly commission check. If the amount of the commission considerably exceeds the employee's regular salary payments;

- The annualized tax rate calculation returns a tax rate based on a higher tax bracket, resulting in a larger tax deduction amount.
• The cumulative method calculates the tax rate based on a cumulative average of the month’s earnings, returning a tax deduction amount that is a more accurate representation of the employee's overall earnings.

State Tax Filings
The State Tax Filings panel establishes employee state tax information.

1. Enter the State two-character postal code.
2. Select the employee’s Filing Status for the state.
3. Enter the number of withholding Allowances (primary exemptions) for the state.
4. Enter the number of withholding Sec Allowances (secondary exemptions). Few states require this.
5. Select the Alternative Calculation Code to use to calculate income for the state. This applies only to New Jersey, Arizona, and Arkansas.
6. The Exempt and Supplemental Exemption amounts are only required for the state of Mississippi:
   a. Enter the Exempt amount claimed by the employee.
   b. Enter the Sup. Exempt amount claimed by the employee.
7. Select whether the employee has Multiple Jobs and enter their Dependents, Other Income, and Deductions values. These are entered on their state W-4 and correspond to the federal-level values in the table above (see Federal Tax Filing on page 54).
8. Select Yes from the Non-Res Cert Filed drop-down if the employee has filed a certificate of non-residency for this state. A certificate of non-residency is a document filed by an employee covered by a reciprocal agreement certifying his or her eligibility for exemption from withholding in the state in which he or she performs services. If you select No, the system does not activate reciprocity.
9. Enter the Non-Res. Cert. Year when this non-residential certification was filed.
10. Select the Override Type to use when calculating income taxes for the state, if appropriate.
    • Add to Withholding: Adds the amount to the calculated value.
    • Fixed Amount: Uses the amount entered in the Override Amount field as the amount to withhold.
    • Block Withholding: Blocks the witholding of income tax from the employee's pay.
    • Percentage: Specifies a percentage of net taxable pay to withhold.
11. Enter the Override Amount to use in conjunction with the Override Type.
12. Select Yes from the W-4 Filed drop-down if a State Employee Withholding Allowance Certificate is on file for this employee.
13. Enter the W-4 Year covered by the most recent State Employee Withholding Allowance Certificate on file.
14. Click Save.

Local Tax Filings
Use the Local Tax Filings panel (Figure 21) to establish employee local tax information, if required.
New Hire Tax Forms

Figure 21: Local Tax Filings

1. Enter the Authority ID for the locality. The Authority Name displays.
2. Enter the employee’s Filing Status code for this locality. The Local Filing Status description displays.
3. Select Yes from the Local Non-Residency Certificate drop-down if the Local Employee Withholding Allowance Certificate is on file for this employee.
4. Enter the number of primary withholding Allowances (exemptions) for this locality.
5. Enter the additional amount to be withheld each pay period for city or county income tax in the Local Additional Withholding field.
6. Click Save.

New Hire Tax Forms

The New Hire Tax Forms panel lists the forms that were not automatically processed during the onboarding process. Before users can run a payroll that includes this employee, your organization must handle all forms.

Figure 22: New Hire Tax Forms

1. Review the New Hire Tax Forms list.
2. Set up the local authority information as required in the Local Tax Filings panel (Figure 21).

If you do not enter this information, and you set all forms to Handled, Vertex calculates the default local tax authority information. The system will not use the information entered by the employee.

3. Select Handled for all forms, even if your organization does not use a local tax authority value.
4. Click Save.

Employment Verification

The Employment Verification panel (Figure 23) establishes employment eligibility information.

Figure 23: Employment Verification

1. Select Form I-9 Filed if an INS Form I-9 (Employment Eligibility Verification) has been filed for this employee.
2. Enter the **Form I-9 Renewal** date by which someone must re-certify this employee’s Form I-9.

3. Enter the Form I-9 ID document information from the primary document:
   a. Select the **Form I-9 Document** that proves the identification of this employee for compliance with IRCA (Immigration Reform and Control Act).
   b. Enter the **Form I-9 ID Document Number**.
   c. Select the **Form I-9 ID Expiry Date** when the Form I-9 identification document expires, if applicable.
   d. Enter the name of the **Form I-9 ID Authority** that issued the Form I-9 identification document.

4. Enter the Form I-9 eligibility document information from the secondary document:
   a. Select the **Form I-9 Eligibility Document** that proves the eligibility of this employee for compliance with IRCA.
   b. Enter the **Form I-9 Eligibility Document Number**.
   c. Select the **Form I-9 Eligibility Expiry Date** when the Form I-9 eligibility document expires, if applicable.
   d. Enter the name of the **Form I-9 ID Eligibility Authority** that issued the Form I-9 eligibility document.

5. Click **Save**.

**Miscellaneous**

The **Miscellaneous** panel (Figure 24) maintains other tax information for the employee.

Figure 24: Miscellaneous

1. Select **Non-Resident Alien** if the employee is a non-resident alien.

2. Enter the **Alien Registration Number** from the employee's "green card" issued by the INS. The number must start with an A followed by 9 numbers, for example, A123456789.

3. Enter the **Alien Registration Expiration Date** when the employee’s alien registration expires.

4. Select **Electronic Form W-2** if the employee receives an electronic Form W-2 rather than a paper form.

5. Select **Electronic 1095C Form** if the employee elected to participate in the early electronic Form 1095-C program. The employee will be able to log on to the ESS and find their 1095-C using the menu item before March 2. Employees who do not elect to participate in the program should receive it in the mail, and can access it online starting on March 2.

   Refer to the **ACA User Guide** for information on employee access to the form.

6. Enter the Vertex **School District** code for the applicable school district; the codes are in the **Vertex Calculation Guide**. Enter **NA** if it is not applicable.

7. Select **S-Corp Principal** if this employee is a principal officer of an S Corporation according to the IRS definition.

8. Enter the assigned **PSD Code** for the employee. If you leave this field blank, the system uses the assigned GeoCode. The system uses this to print Form W-2s for employees in particular Political Subdivision localities in Philadelphia.
9. Click **Save**.

**Deposit Tab**

Use the Employee Details **Deposit** tab to determine whether to deposit all or part of an employee’s net payment directly to one or more accounts.

**Status**

Use the **Status** panel to set the status for all direct deposits.

![Status panel](image)

1. Select the **Deposit Status**.
   - If the status is **Active**, PrismHR generates an ACH entry for the voucher.
   - If the status is **Inactive**, PrismHR produces a pay check during payroll processing for the net amount of the pay voucher.

2. Select the **Pay Types to Deposit** for which the system makes direct deposits:
   - **All**: All voucher types
   - **Regular**: Only regular checks
   - **Vacation**: Only vacation checks
   - **Supplemental**: Only supplemental checks
   - **Reg & Vac**: Regular and vacation checks
   - **Reg & Sup**: Regular and supplemental checks
   - **Sup & Vac**: Supplemental and vacation checks

3. Select **Suppress Account Number Print** to prevent the printing of the employee’s bank account number on the direct deposit advice.

**Direct Deposit Information**

The **Direct Deposit Information** panel maintains the accounts to which direct deposits are made.

![Direct Deposit Information panel](image)

1. Select the bank account **Type** for the deposit transaction:
   - **Checking**: A checking account
   - **Savings**: A savings account
   - **EE HSA to Checking**: Employee’s HSA contribution to checking account
   - **Co HSA to Checking**: Company’s HSA contribution to checking account
Direct Deposit Information

- **EE HSA to Savings**: Employee’s HSA contribution to savings account
- **Co HSA to Savings**: Company’s HSA contribution to savings account
- **Payroll Deduction**: Payroll deduction
- **Non-ACH Transmittal**: Transmittal not processed by ACH

2. Enter the nine-digit ABA **Transit Number** of the receiving bank or other financial institution. The **Bank Name** displays.

If the correct transit number is not available, you need to create it; see “Bank Routing” in the Payroll User Guide.

3. Enter the **Account Number** associated with the transit number where the money will be deposited.

4. Select the **Pay Type** for which type of ACH is active:
   - **All**: All voucher types
   - **Regular**: Only regular checks
   - **Vacation**: Only vacation checks
   - **Supplemental**: Only supplemental checks
   - **Reg & Vac**: Regular and vacation checks
   - **Reg & Sup**: Regular and supplemental checks
   - **Sup & Vac**: Supplemental and vacation checks

5. Select the **Method** used to determine the deposit **Amount**, and then enter that value:
   - **Fixed**: Enter the exact dollar **Amount** to deposit, assuming that the net pay amount available is greater than or equal to that amount.
   - **Percentage**: Enter the percentage **Amount** of net pay to deposit into the account. You can also enter the **Limit** amount, which is the maximum deposit amount.
   - **Remaining Balance**: Select this method to deposit the employee’s entire net pay amount—or the remaining balance—to this account. If the total pay voucher is split between more than one bank account, use this method for the last account in the list. Whatever amount remains after calculating the previous lines, PrismHR deposits that to the account.

   Designating one account to receive the remaining balance ensures that the total amount of the voucher will be deposited. For example, the employee splits their vouchers between two accounts, and it is set to apply 50% to each. If the voucher were for an odd amount, the system would generate a check for one penny. If one is set to 50% and the other is set to remaining balance, the half plus the penny would go to the account receiving the remaining balance.
   - **Fixed Skip**: Enter a fixed amount that will be skipped if the full amount cannot be posted.
   - **Percentage of Net After Taxes**: Enter the percentage **Amount** of net pay to deposit to the account after tax deductions.

6. Select the **Status** of the direct deposit account:
   - **Prenotification**: The system creates a direct deposit transaction for this bank account, with a deposit amount of zero.
   - **Deposit Active**: Prenotification process is complete.
• **Deposit Inactive**: Deposits are inactive.

Typically, you must put new direct deposit accounts through a prenotification process. During that process, the system makes a transaction with a deposit amount equal to zero. Once the prenotification process is complete, set the Status to Deposit Active. The **Prenote Date** populates with the date of the prenotification.

### Amounts Excluded from Direct Deposit

Use the **Amounts Excluded from Direct Deposit** panel to set exclusion amounts. If the same amount applies to all Direct Deposit exclusions, enter the amounts for each exclusion type.

**Figure 27: Amounts Excluded from Direct Deposit**

1. Select the **DD Exclude Voucher Type** against which this exclusion amount applies.
   - **Regular**: Only regular checks
   - **Vacation**: Only vacation checks
   - **Supplemental**: Only supplemental checks
2. Enter the **DD Exclude Amt** for this exclusion. This amount goes on a paper check; the system processes any net pay beyond this amount as a direct deposit.

### Skills & Education Tab

Use the Employee Details **Skills & Education** tab to track the skills and education the employee has achieved.

**Figure 28: Skills & Education**

1. Enter the employee's skills:
Property Tab

The Employee Details **Property** tab tracks any client property assigned to the employee.

**Property**

The **Property** panel *(Figure 29)* lists the employee's property.

1. Enter the **Property Code** that represents the client property assigned to the employee. The **Description** displays.
2. Enter the **Date Issued**, which is when the employee received the client property.
3. Enter the **Serial No.** of the client property.
4. Enter the estimated value of the client property in the **Property Value** field.
5. When the employee returns the property to the client, enter the **Date Returned**.
6. Enter any **Comments** specific to this client property.

**Vehicle Information**

The **Vehicle Information** panel *(Figure 30)* lists the employee’s vehicle property.
7. Enter the **Make** of the employee's vehicle.
8. Enter the **Model** of the employee's vehicle.
9. Enter the **Year** of the employee's vehicle.
10. Enter the **Date Added**, this is the date that the vehicle is starting use for company business.
11. Enter the **Date Removed**, this is the date when this vehicle is no longer used for company business.
12. Enter the **Registration Number** of the vehicle.

**License Information**

The **License Information** panel (**Figure 31**) to maintain the employee’s driver’s license information.

**Figure 31: License Information**

13. Enter the employee’s **Driver’s License Number**.
14. Enter the **Driver’s License Class** designation of the license.
15. Enter the **License Expiration Date** when the driver’s license expires.
16. Enter the **State Issuing License**, which is the state that issued the driver’s license.

**Auto Insurance Policy**

The **Auto Insurance Policy** panel (**Figure 32**) to maintain the employee’s auto insurance policy information.

**Figure 32: Auto Insurance Policy**

17. Enter the **Carrier Name** of the employee's auto insurance.
18. Enter the **Policy Number** of the employee's auto insurance.
19. Enter the **Policy Start Date**, the date the auto insurance policy started for that employee.
20. Enter the **Policy Expire Date**, the date the auto insurance policy will expire.
21. Enter the **Policyholder Name**, this is the person that holds the auto insurance for that employee.
22. Click **Save**.
Other Tab

The Employee Details **Other** tab tracks other employee information.

**Miscellaneous**

Use the **Miscellaneous** panel to maintain employee information, including tax- and health-related information for specific states.

1. For employee handbooks:
   a. Enter the date the employee handbook was sent to the employee in the **Handbook Mailed On** field.
   b. Enter the date the employee confirmed receipt of the handbook in the **Handbook Received On** field.

2. For background checks:
   a. Select **Background Test Done** if someone performed a background check on the employee.
   b. Enter the date the background test was completed in the **Background Test Date** field.

3. For electronic onboarding:
   a. **Onboarding in Progress** indicates whether this employee’s onboarding is in progress. To ensure that tax information is complete, the system will only include employees in payrolls after they finish onboarding.
   b. Select **Electronically Onboarded** if this employee completed the onboarding process through the web.
   c. If applicable, the **Electronically Onboarded Date** displays the date on which the employee completed the onboarding process through the web.
   d. **Enrollment Suspended Until** indicates the date until which an employee’s enrollment is suspended, if the enrollment is suspended; see "New Hire Suspension Process" for more information on related settings.
   e. After the employee completes the enrollment, the enrollment confirmation number displays in the **Employee Last Confirmation #** field. The **Date** of the enrollment also displays. You can click the Conformation Statement icon ![icon](image) to view the confirmation statement.

4. If available, select **Un-Enroll in Electronic Pay Stub** if the employee does not want electronic pay stubs.
For overriding the GeoCode:

a. Select **Tax GeoCode Override Option** to override standard Vertex GeoCode values:
   - **Select**: No override; the system uses the worksite location for the GeoCode. This is the default behavior.
   - **Override Work GeoCode with Resident GeoCode**: The system uses the employee's resident GeoCode, defined in the Employee Details Address tab (either GeoCode or Override GeoCode) instead of the worksite location's GeoCode. Typically, you would select this when employees work from home. *(Note: This option is aligned with the Resident State Based option on the Client | Change | Client Benefit form's Calculation Options field. See Benefits Tab.)*
   - **Override Work GeoCode with Home Location GeoCode**: The system uses the employee's "home" location assignment to supply the GeoCode for the location-based portion of taxes. This selection is not routinely used.
   - **Override T/S GeoCode with Resident GeoCode**: The system uses the employee's resident GeoCode from the Employee Details Address tab in place of the worksite location's GeoCode in the time sheet
b. Enter the employee's **Sales Tax Code** to use as an override of the standard GeoCode value sent to the Vertex tax calculation engine.

6. Select **Court Ordered Medical Coverage** if the employee pays a premium for court-ordered medical insurance. This can affect the calculation of child support garnishments.

7. Select **Supporting Another Spouse/Child** if the employee supports another spouse or child. This information is for calculating maximum child support.

8. Select **Child Support in Arrears** if the employee is late by 12 weeks or more in making obligated child support payments.

9. Select **Health Insurance Indicator (VT)** if the employee is designated as "covered" under a health care plan, per Vermont Dept of Labor guidelines. See [http://labor.vermont.gov](http://labor.vermont.gov) for instructions.

10. Select **Probation Code (MO)** if the client hired the employee on a trial basis and employed that employee for no longer than 28 consecutive days. This information is for Missouri quarterly tax reporting.

11. Select **Family Member (MI)** if the employee is a family member of the owner and works in the state of Michigan. This information is for Michigan tax reporting purposes.

12. Enter the code used for California quarterly tax reporting in the **California Wage Plan** field.

13. Select **Ohio Form C112 Filed** if the employee has filed this form with the state of Ohio.

14. Enter the **Sales Tax Code** in this field as needed.

15. Indicate how the employee replied to the **Self ID Disability Form**:
   - **No Selection**: Form has not been returned or employee did not select an option.
   - **Disabled**: Employee selected the Disabled checkbox.
   - **Not Disabled**: Employee selected Not Disabled checkbox.
   - **Decline to Answer**: Employee selected the Decline To Answer checkbox.

16. Click **Save**.

**Hawaii**

The **Hawaii** panel tracks medical waiver information for employees who are residents of that state.
1. Enter the **Hawaii Medical Waiver Year** when the waiver was received.
2. Select the **Hawaii Medical Waiver Reason** for filing a medical waiver.
3. Click **Save**.

**Termination**
The **Termination** panel displays the detailed termination explanation entered when the employee was terminated. See **Employee Termination on page 111**.

**Employee Details Action Menu**

Some of the features found in the Action menu of Employee Details are also available in other parts of PrismHR. Those listed below are available primarily through the Action menu.

**Change Password**

Use the Change Password form (Figure 33) to change an employee’s user password. It is recommended that you enter a password that you intend to be temporary, and instruct the employee to change it the next time they log in to Employee Self-Service (ESS).

Figure 33: Change Password for Employee

<table>
<thead>
<tr>
<th>Change Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username</td>
</tr>
</tbody>
</table>

1. Verify the **Username** is the correct user.
2. Enter the **New Password**. The system validates the password; if it does not pass the validation, PrismHR informs you what you need to do to create a valid password.
3. Reenter the password in the **Confirm New Password** field.
4. Click **Save**. The next time the employee logs on, he or she will use the new password.
This resets the lockout period, if any, in cases where you are changing the password because the employee was locked out of ESS due to too many failed login attempts.

**Check Message**

Use the Check Messages form (accessed from the Action bar in Employee Details) to set up a message for the employee.

![Check Messages form](image)

1. Enter the **Start Date** when the message should begin to display for the employee.
2. Enter the **End Date** when the message should stop displaying.
3. Enter the **Message Text**.
4. Click **Save**.

**Related Topics**

Check Messages in *Payroll User Guide*

**Documents**

Using the Employee Documents form, you can attach files to the employee record and open any files attached to it. To access the form, open the Action bar in Employee Details and select **Documents**.

![Employee Documents form](image)

1. To attach a document, click **Load a Document**.
2. In the Upload a File window, click **Choose File**.
3. Navigate to the file that you want to upload, and then click **Open**.
4. Click **Submit** in the Upload a File window.
5. Click **Close** in the successful upload message.
6. In the Confirm Document form, the **Document Name** field populates with file name.
7. You can enter any **Document Notes**.
8. Click **Accept**. You return to the Employee Documents form.
Once a document is in the Employee Documents list:

- Click the **Document Name** to download the document.
- Click the next to a document to remove it from the company record.
- Use the **ESS** check box to indicate whether the document is visible in Employee Self-Service (ESS).

**Employee Notes**

Use the Employee Notes form to maintain any notations or reminders associated with an employee that your organization wants to track.

Figure 36: Employee Notes

- To view or edit an existing note, click **Date Entered**.
- To create a note, click **Add**.

Either of these actions opens the note entry form (**Figure 37**).

Figure 37: Note Entry

1. Enter or edit the **Note Details**.
2. Click **Save**.

**Employee Events**

Use the Employee Events form (**Figure 38**) to review existing and add new qualifying events for the employee. These are typically training classes, certifications, and so on.

Figure 38: Employee Events

1. Enter the **Event Date**.
2. Enter the **Event Code**. The **Event Description** displays.
3. Enter the **Action Date**, which is the renewal date or date when further action should be taken.
4. Enter a **Comment** that applies to the event.
5. Click **Save**.

**Organization Chart**

The Organization Chart displays organization structure information relevant to the employee.

PrismHR builds the chart based on the values in the **Reports To** field in the Employee Details **Work** tab. In **Figure 39**, for example, the chart for the worksite manager user Jason Argonis is displayed. Each of the people listed below have his user ID in their **Reports To** field.

**Figure 39**: Organization Chart

- Click an employee to drill down to see his or her organization information. If that employee has any direct reports, that structure displays.
- If you have drilled down, click the **Back** button to return to the previous chart.

**Reprint Form W-2**

Use the Reprint Form W-2 form to print the form for an employee.

1. The system displays the **Employee ID** of the employee whose record you opened.
2. Select the **Tax Year**.
3. Click **Run**. The system downloads the PDF according to your browser settings.
Chapter 5: Dependents and FMLA Events

Use PrismHR to manage employees' dependents and FMLA (Family Medical Leave Act) events.

Employee Dependents

Use the Employee Dependents form to add new or edit existing employee dependent information.

**Employee Dependent**

Use the Employee Dependent panel (Figure 40) to select an existing dependent record or create a new one.

Figure 40: Employee Dependents

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.
2. Click New to create a new dependent record for the employee, or select an existing dependent record from the Dependent drop-down.

**Dependent Details**

Use the Dependent Details panel (Figure 41) to maintain details about the dependent.

Figure 41: Dependent Details

3. Select the Relation Type of this dependent: Dependent or Beneficiary Only.
4. Select the dependent’s Status.
5. Enter the Status Date when the status went into effect.
6. Select whether this dependent is the employee’s Spouse. A spouse must be set as a Dependent, not Beneficiary Only.
7. Enter the dependent’s Last Name, First Name, and Middle Initial. The Last Name defaults to the employee’s last name.
8. Enter the dependent’s Birth Date. The system calculates the dependent’s age automatically in years.
9. Select the dependent’s Gender.

10. Enter the dependent’s Social Security Number.

The dependent’s tobacco use affects the life insurance premium calculations.

11. Select Tobacco Use if the dependent uses tobacco.

12. Select Is Disabled if the dependent is disabled.

13. Specify the relationship information based on the dependent type:
   - For a Dependent, select the dependent’s Relation to the employee.
   - For Beneficiary Only:
     - Enter the Relation To Insured.
     - Select If Beneficiary, Is a Trust if this is a trust.

**Student Details**
Use the Student Details panel (Figure 42) to track information if the dependent is a full-time student.

Figure 42: Student Details

14. Select whether the dependent is a Full-Time Student.

15. In the FTS Verified On field, enter the date on which someone verified the dependent’s full-time student status.

16. In the F/T Student Cert Exp field, enter the date when the dependent is no longer eligible for full-time student exceptions.

**Address Details**
Use the Address Details panel (Figure 43) to maintain the dependent’s address information.

Figure 43: Address Details

- To select an existing address, select the address from the Or Use drop-down.
- To enter a new address:
a. Enter the dependent’s street **Address**.

b. Enter the **ZIP Code** and ZIP+4 extension. The system automatically displays the dependent’s **City** and **State**.

c. Enter the dependent’s **Phone** number.

d. Enter the dependent’s **Work Phone** number.

17. Click **Save**.

**Create COBRA Participant**

Use the **Create COBRA Participant** panel (**Figure 44**) to indicate whether to enroll the dependent in COBRA.

**Figure 44**: Create COBRA Participant

1. Expand the **Create COBRA Participant** panel.

2. Enter the **Qualifying event for COBRA** that made this dependent a COBRA participant or potential participant; you can either enter a description or select an existing one.

3. Enter the **Qualifying Event Date** when the participant qualified for COBRA benefits eligibility. The default is the current date.

4. Click **Create COBRA Participant**.

5. A message prompts you to confirm that you want to create the COBRA participant record.

6. Click **Yes**. A message informs you that the system created the record.

**FMLA Events**

Use the FMLA Events form (**Figure 45**) to maintain the information for an employee's Family and Medical Leave Act event.

**Figure 45**: FMLA Events

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.
2. Select the Event Number to edit an existing event, or select NEW to create a new one. PrismHR automatically generates the FMLA event numbers.

3. Enter a brief Event Description of this event. The event description should uniquely identify this event from other FMLA events for the same employee.

4. Enter the date the employee communicated the need for the leave event in the Date Notified field.

5. Select the Reason Code that best describes the reason for the event.

6. Select Intermittent/Reduced Schedule Leave if employee will take the leave as an intermittent or reduced schedule rather than full-time leave.

7. Select Medical Certification Required if this event requires medical certification to verify the health condition of the employee or an immediate family member.

8. Enter the Date Medical Certification Requested.

9. Enter the Expiration Date for the event.

10. Select the FMLA Year Basis type.

11. If FMLA Years Basis is set to Fiscal, select the Fiscal End Month in which the year ends.

12. If FMLA Years Basis is set to Fiscal, select the Fiscal End Day of the month in which the year ends.

**Hours Adjustment**

Use the Hours Adjustment panel (Figure 46) to adjust the total hours for this FMLA Event.

Figure 46: Hours Adjustment

- Enter the Effective Date of the leave.
- Enter the Pay Code to use for the leave hours.
- Enter the Leave Hours to adjust. Enter a negative amount to decrease the total number of leave hours.
- Click Post Adjustment to apply the hours.
- Click Yes to confirm that you want to create the adjustment.
- Click Save.

**Event History**

The Event History panel displays the time the employee has already used for this FMLA event.

Figure 47: Event History
Chapter 6: Job Applicants and New Hires

You can enter job applicants and new hires in PrismHR.

Job Candidate Status Codes

Use the Job Candidate Status Codes form (Figure 48) to maintain the statuses used in the Job Candidates form.

Figure 48: Job Candidate Status Codes

<table>
<thead>
<tr>
<th>Status Code</th>
<th>Description</th>
</tr>
</thead>
</table>

1. Enter the **Status Code**. If you are creating a new status, use something brief but descriptive, for example, APL.
2. Enter the status **Description**, for example, Applied.
3. Click **Save**.

Job Candidates

Use the Job Candidates form to maintain information about candidates for positions at the client.

**Job Candidates**

The **Job Candidates** panel (Figure 49) establishes information about a candidate.
1. Click **New Candidate** to create a new job candidate record, or enter the **Candidate Number** of an existing candidate.

2. Enter the job candidate’s **Last Name** and **First Name**. If known, enter the **Middle Name**, **Maiden Name**, and **Suffix Name**.

3. The system uses the **Sort Name** to sort a list of job applicants. You can also use it to search for the applicant’s record. The default is the last, first, and middle names you entered, but you can edit it.

4. Enter the applicant’s mailing **Address**, **City**, two-character **State Code**, and **ZIP Code**. Enter the ZIP+4 extension, if known.

5. Enter the applicant’s **Home Phone** and **Cell Phone** numbers.

6. Enter the applicant’s **Email** address.

7. Enter the **Referral Source** for the applicant, if any.

8. Enter the **Date of Application**.

9. Enter the applicant’s earliest **Date Available**.

10. Select the **Type of Work Desired**: Full-Time, Part-Time, or Temporary.

11. Enter the **Pay Rate Requested**.

12. Select the **Crime** checkbox if the applicant has criminal history.

13. Select the **Pay Period** for the rate, either Yearly or Hourly.

14. Enter the **Position(s) Applied For**. If the applicant did not request a specific position, enter **ANY**.

15. **Employee ID**: For future development. Does not currently impact the functionality of PrismHR.

16. Enter the applicant’s **Social Security Number** or INS number, if appropriate.
17. Enter the identifying **Employee Number** assigned to this employee.
18. Enter the candidate's **Birth Date**, if known.
19. Enter the **EEO Ethnic Code** for the candidate, or select **EEO Ethnic Code** to choose from a list.
20. Select the check boxes as appropriate:
   - **Vietnam Veteran**: The candidate is a United States veteran of the Vietnam War.
   - **Disabled Veteran**: The candidate is a United States veteran who has a disability.
   - **Disabled (ADA)**: The candidate has a handicap or disability as specified by the Americans with Disabilities Act of 1990.
21. Select the applicant's **Gender**.
22. Enter the applicant’s **Location Code**.
23. Enter the applicant's **DL Number** and **DL State** code.
24. Select the check boxes as appropriate:
   - **Over 18**: The candidate is over the age of eighteen years old.
   - **Elig USA**: The candidate is eligible for employment in the United States of America.
   - **Previously Worked For Us**: The candidate was previously employed by your company.
25. Enter the candidate's previous employment start date in **Prior Date From**.
26. Enter the candidate's last day of employment in **Prior Date From**.
27. Enter the **Military Branch** the candidate served in.
28. Enter the candidate's starting year of service in **Military From**.
29. Enter the candidates last year of service in **Military To**.
30. Enter the candidate's acquired rank in **Military Rank**.

**Current Status**

The **Current Status** panel (**Figure 50**) indicates the candidate's status for being hired.

**Figure 50**: Current Status

31. Enter the **Status** code that indicates the candidate's current status.
32. Enter a **Next Action Date** required for this candidate.
33. Enter the **Next Action Summary**, which briefly describes what happens next.
34. Select **Hired** if the company hired the candidate.
35. Enter the **Hire Date**.
36. Enter the **Employee Number**, if appropriate.
37. Enter a **Reject Reason** if the company did not hire the candidate, or click **Reject Reason** to select from a list.
38. Enter the **Interview Date**.
39. Enter the interviewer in **Interviewed By**.

**Skills**
The **Skills** panel ([Figure 51](#)) maintains the job skills the candidate possesses.

![Skills](image)

40. Enter each **Skill Code** that most closely matches the candidate's skills. The **Description** displays.

**Notes**
Use the **Notes** panel ([Figure 52](#)) to enter notes about the candidate.

![Notes](image)

41. Enter any **Notes** that apply to the job applicant, as required.

**Candidate Education History**
The **Candidate Education History** panel ([Figure 53](#)) maintains the candidate's education background.

![Candidate Education History](image)

42. Enter the **School Name** of the institution that the candidate attended.
43. Enter the type of education in **Education Type**.
44. Enter the start **Date**.
45. Enter the subject studied in **Education Subject**.
46. Enter the number of **Years** that the candidate attended the institution.
47. Indicate whether the candidate **Graduated**.
48. Enter the **Year Graduated**, if any.
49. Enter the **Degree Earned**, if any.
50. Enter the address of the institution in **Education Address**.
51. Enter the **City**.
52. Enter the **State**.

**Affirmative Action**

The **Affirmative Action** panel (Figure 54) maintains the requirements for this job candidate.

Figure 54: Affirmative Action

53. Select **Meets Education Requirements** if this candidate meets the minimum education requirements. Enter any relevant notes in **Education Requirement Notes**.
54. Select **Meets Training Requirements** if this candidate meets the minimum training requirements. Enter any relevant notes in **Training Notes**.
55. Select **Meets Experience Requirements** if this candidate meets the minimum experience requirements. Enter any relevant notes in **Experience Notes**.
56. Click **Save**.

**Prior Address**

The **Prior Address** panel (Figure 55) keeps record of the candidate's prior address, if any.

Figure 55: Prior Address

57. Enter the candidate's primary address in **Address 1**.
58. Enter the candidate's secondary address in **Address 2**, if applicable.
59. Enter the **City**.
60. Enter the **State**.
61. Enter the **ZIP code**.
62. Enter the address the candidate moved **From**.
63. Enter the address the candidate moved **To**.
Prior Name

The Prior Name panel (Figure 56) keeps record of the candidates prior name, if any.

Figure 56: Prior Name

64. Enter the candidate's Last Name.
65. Enter the candidate's Middle Name, if any.
66. Enter the candidate's First Name.
67. Enter the candidate's Suffix.

Hire

To hire the candidate, select Hire from the Action bar. The New Hire form opens, populated with the job candidate’s information. see New Hire below.

New Hire

Use the New Hire form to enter a newly hired employee’s information into PrismHR.

Depending on the system parameters and the company’s settings, different fields might be required.

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 form.

• Candidates: see Job Candidates on page 74
• New Hire Notes (page 87)

Once you save the New Hire form, you can select Employee Details from the Action bar.

New Hire

The New Hire panel (Figure 57) identifies the type of employee being hired.

Figure 57: New Hire

1. Enter the primary Work Location ID where the employee works. When there are mandatory new hire questions, a new form opens. Complete the form and click Submit Answers, then continue completing the New Hire form.
2. Select the **Employer ID**.
3. Enter the new employee’s **Social Security Number**. If required, key it in again in the second field.

   The **Social Security Number** field does not accept any values that begin with the numeral 9. If you need to enter a number that does begin with 9 (such as an ITIN), the **Hire Type** is automatically set to **Contractor (1099)**.

4. Select the employee **Hire Type**.

   The **Use Onboarding** field displays only if the company is set up to prompt for electronic onboarding.

5. From the **Use Onboarding** drop-down, indicate whether you are entering all of the employee’s information or if the employee will enter it in ESS. This affects which fields are required.

   Employee IDs are generated automatically at the creation of the employee record and they cannot be edited. Each ID consists of a letter followed by five digits.

**Personal Information**

The **Personal Information** panel (**Figure 58**) defines personal information for the new employee.

**Figure 58: Personal Information**

![Personal Information Panel]

- The **First Name**, **Last Name**, and **Middle Name** fields do not allow special characters.

6. Enter the new employee’s **First Name**.
7. Enter the employee’s **Last Name**.
8. Enter the employee’s **Middle Name**.
9. Enter the employee’s **Nickname**.
10. Enter the employee’s **Birth Date**.
11. Select the employee’s **Gender**.
12. Select the employee’s **Ethnic Code**.
13. Select the employee’s **Marital Status**.
14. For each of the following, select **Yes**, **No**, **Not Selected**, or **Declined to State**:
   - **Tobacco User**: The employee uses tobacco products. This information is used to calculate life insurance premiums.
   - **Handicapped**: The employee has a handicap or disability as defined by the Americans with Disabilities Act of 1990.
   - **Veteran**: The employee is a United States veteran.
     - **Vietnam Veteran**: The employee is a United States veteran of the Vietnam war.
     - **Disabled Veteran**: The employee is a United States veteran who has a disability as defined by the Department of Labor VETS-4212 Report.
     - **Recently Separated Veteran**: The employee is a United States veteran who has recently left the armed services.
     - **Service Medal Veteran**: The employee is a United States veteran who was presented with a service medal.
     - **Other Protected Veteran**: The employee is a United States veteran who is protected by the Department of Labor VETS-4212 Report.

**Resident Address and Emergency Contact**

The **Resident Address and Emergency Contact** panels (**Figure 59**) maintain the new employee’s address and emergency contact information.

**Figure 59: Resident Address and Emergency Contact**

15. Enter the new employee’s address information:
a. Enter the employee’s street **Address Line One** and, if appropriate, **Address Line Two**.

b. Enter the **ZIP Code** for the employee’s residence.

After you enter the **ZIP Code**, the system checks the street address to make sure that it is valid. If there are typos, missing information, or other unrecognized values, the system displays a dialog suggesting a correction to the address. Click **Yes** to accept the corrected address, otherwise click **No** to save as-is or make other edits.

If you enter something that the system cannot match to any existing address, it displays the first address in the master list for the ZIP code (such as 1 Apple Drive).

c. Select the Vertex **GeoCode**. The **City**, **State**, and **County** display.

d. Enter the employee’s **Home Phone** number.

e. Enter the employee’s **Mobile Phone** number.

f. Enter the employee’s **Personal Email Address**.

g. Enter the employee’s **Work Email Address**.

16. If you have the information or are required to do so, enter the new employee’s emergency contact information:

   a. Enter the emergency **Contact Name**.

   b. Enter the emergency **Contact Telephone** number.

   c. Enter the emergency **Contact Relation** to the employee.

**Employment Details**

The **Employment Details** panel (**Figure 60**) provides various details about when and where the new employee works. Fill in the fields as appropriate for the employee and company.

**Figure 60: Employment Details**
17. Enter the **Client Start Date** when the employee started with the client. Typically this is the same as the employer start date, except during the take-on process.

18. Enter the **Employer Start Date** when the new employee started with the employer.

19. Enter the employee’s **Position**.

20. Enter the employee’s **Employment Status**.

21. Enter the employee’s **Employment Type**.

22. Enter the employee’s **Benefit Group**. The benefit group can be used to establish eligibility, coverage, and contribution rules for benefit plans.

23. Enter the **Division** for which the employee works.

24. Enter the **Department** for which the employee works.

25. Enter the **Shift** on which the employee works.

26. Enter the employee’s **Project**.

27. Enter the employee’s **Work Group**.

28. Enter the **Union Code** for the union to which the employee belongs.

29. Enter the employee ID of the person that the employee **Reports To** upon employment.

30. If appropriate, enter the **Employee Number**. Otherwise, the field is grayed out and reads NEW; the system generates an employee number automatically when you save the employee.

31. Enter the **Benefits Thru Date**, which is the date through which benefit contributions have been deducted from this employee’s pay. Usually you would accept the default date. The only reason you would change the default date (equal to the hire date) would be if the employee had pre-paid benefit contributions for a period subsequent to the hire date.

32. Enter the **New Hire Report Date** when the new hire was reported as joining the company. Entering a date in this field prevents the new hire from being reported again.

33. Enter the **Clock Number**, which is the employee’s ID for the time clock.

**Pay Details**

The **Pay Details** panel (Figure 61) establishes the details of the new employee’s compensation.

Figure 61: Pay Details

34. Enter the **Pay Group** to which the new employee belongs.

35. Select the **Pay Method** by which the employee will be paid.
The Pay Rate and Pay Rate Basis define the new employee’s pay. For example, $250 Weekly or $3500 Monthly.

36. Enter the **Pay Rate** that corresponds with the selected **Pay Rate Basis**.
37. Select the **Pay Rate Basis** that determines the employee’s pay period.
38. Enter the **Standard Hours** worked by the employee during the pay period. The system uses this to calculate the employee’s annualized pay.
39. Select **Auto Time Sheet** if this is a salaried employee and PrismHR should automatically create and accept time sheets for the employee.
40. Enter the **Default Time Sheet Hours** to use in conjunction with the **Auto Time Sheet** option. The employee’s time sheet defaults to that number of hours.
41. If available, you can enter the **First Pay Period Hours**. This is typically used for employees with auto time sheet hours when their hire date falls in the middle of a payroll period.
   Once you enter the client and employer start dates, pay group, and standard hours, select **Auto Time Sheet**. A calendar displays the employee’s start date as well as the pay period start and end dates to help you determine the number of hours to enter for the first paycheck.
42. Enter the **Benefits Calculation Salary** to use as an override for any benefit calculations that use employee’s salary in the calculation.

The Form I-9, Direct Deposit, and Form W-4 panels display only if the system is set to have you enter all employee information. If the employee will enter the information during the onboarding process, proceed directly to saving the record; see Saving the New Hire on page 87.

**Form I-9 Details**

Use the **Form I-9 Details** panel (Figure 62) to enter identity and employment eligibility information.

Figure 62: Form I-9 Details

43. Select **Form I-9 Completed** if the employment eligibility verification form is on file for the new employee.
44. Select **I9 Originally from Onboarding** if the I-9 information was part of the electronic onboarding process.
45. Select the **Document Title** that proves the identification of this employee, for compliance with the IRCA (Immigration Reform and Control Act).
46. Select **Document Title** of the first **Identification/Eligibility Document**. If it is a B type and not an A type, the system displays a second set of fields so that you can enter the C type **Eligibility Document**.
a. Enter the Issuing Authority code for the document that establishes identity. The authority’s name displays.

b. Enter the Document Number.

c. Enter the Expiration Date of the document, if any.

47. Select Federal W4 Filed if the State Employee Withholding Allowance Certificate is on file for the employee.

48. Enter the Federal W4 Year covered by the most recent certificate on file.

49. Select Federal W5 Filed if Form W-5 is on file for the employee.

50. Enter the Federal W5 Year applicable to the most current Form W-5 on file.

I-9 Miscellaneous

Use the Form I-9 Miscellaneous panel (Figure 63) to enter the other information for the employee’s Form I-9 information.

Figure 63: Form I-9 Miscellaneous

51. Enter the new employee’s name as entered on the Form I-9.
   a. Enter the I9 First Name.
   b. Enter the I9 Middle Name.
   c. Enter the I9 Last Name.
   d. Enter the I9 Other Name Used.

52. Enter the I9 Start Date as entered on the employee’s Form I-9.

53. Enter the I9 Renew Date by which the employee must be re-certified, as entered on the employee’s Form I-9.

54. Enter the I9 SSN as entered on the employee’s Form I-9.

55. Enter the I9 Date of Birth as entered on the employee’s Form I-9.

56. Select the I9 Citizenship Status as entered on the employee’s Form I-9.

57. Enter the Alien Registration Number on the employee’s "green card".

58. Enter the Form I-94 Admission Number the employee was assigned upon entering the USA.

59. Enter the employee’s Foreign Passport Number.

60. Enter the foreign passport’s Country of Issuance.

61. Enter the Alien Reg Expiration Date that was issued by the INS.

62. Select Non-Resident Alien if appropriate.

63. Enter the Handbook Mailed On date.
64. Select **Background Test Done** to indicate there was a background check performed on the employee.
65. Enter the **Background Test Date**.
66. Select **Ohio Form C112 Signed** to indicate that the employee signed the form.

**Direct Deposit Information**

The **Direct Deposit Information** panel (**Figure 64**) establishes account information required for payroll ACH transactions.

**Figure 64: Direct Deposit Information**

67. Select the **Deposit Status**, indicating whether PrismHR should generate an entry for the new employee’s pay voucher.
68. Select the **Pay Types for Deposit** for which the system makes direct deposits.
69. For each account:
   a. Select the bank **Account Type**.
   b. Enter the ABA **Transit Number** of the receiving bank or other financial institution.
   c. Enter the employee’s **Account No**.

If you leave the Pay Type Override field blank, this deposit is not limited to any voucher types.

d. Select the **Pay Type Override** to which this line is limited. This overrides the Pay Types for Deposit value.
e. Select the **Method** that PrismHR will use to calculate the amount to be deposited into the specified bank account.
f. Enter the amount to deposit to the account, based on the Method.
g. If the **Method** is set to **Fixed**, **Percentage**, or **Fixed Skip**, enter the **Limit Amount** that represents a maximum dollar amount of the percentage.
h. Select the **Deposit Status** of this direct deposit account.

**Federal Form W-4 Details**

The **Federal Form W-4 Details** panel (**Figure 65**) establishes Federal tax filing information and allowances for the employee.
70. Select the new employee’s Federal tax **Filing Status**.
71. Enter the number of Federal withholding **Allowances** (exemptions) claimed by the employee.
72. Enter an **Additional Amount**, if any, to be withheld from each paycheck.
73. Select **Exempt** if the new employee claims or should be exempt from federal taxes. Selecting this option will block federal withholding deductions from the employee’s paycheck.

**Work and Resident State Form W-4 Details**
Based on the new employee’s work location and resident address GeoCode, these panels display Form W-4 fields for that state, if any. Complete the information as necessary.

**Saving the New Hire**
74. Click **Save**.
The results of saving the record differ, depending on the settings. For example, the employee might be immediately hired and become an active employee, or the new hire might be submitted for approval first. The system displays the ID generated for the new employee record.

If PTO plans exist for the client and there are no PTO Auto Enroll Rules set up, the system prompts you to choose whether to enroll the new employee in a plan. If you click **Yes**, the PTO Register Enrollment Form opens with the new employee ID.

**New Hire Notes**
Use the New Hire Notes form to enter notes or reminders about a newly hired employee. You can enter notes about the new hire by selecting **New Hire Notes** from the Action bar.

Figure 66: New Hire Notes
Use the **Suppress** option to restrict the display of notes by user or user role. To suppress a note immediately, use the **Stop Showing** button.

### New Hire Download Processing

Reporting new hires meets the current specifications for each U.S. state. The utilities for new hire report processing are:

- **New Hire Reporting** - Creates a *New Hire Report* that you can review for accuracy before building the download file to send to the state. See [New Hire Reporting on page 88](#).

- **Clear New Hire Reporting Dates** - Clears the previously assigned Hire Report Dates so you can run New Hire Reporting again. Currently this process is performed in the backend system for PrismHR; see [Clearing New Hire Report Dates on page 90](#).

- **Set New Hire Reporting Dates** - Sets the date for previously reported employees so they will not be included in the New Hire Reporting file. This process is also performed in the backend system for PrismHR; see [Setting New Hire Report Dates on page 91](#).

### New Hire Reporting

Use the New Hire Reporting feature to build a preview report and the download file to send to the state. The final *New Hire Report* download file can be one of two different formats:

- Tab-delimited text file (.TXT)
- Comma-separated values file (.CSV)

All states in the U.S. accept TXT files. Some states also accept CSV files.
1. Open the New Hire Reporting form (found in the Back Office menu under Operations | Action).
2. Enter the Reporting Date to display on the New Hire Report.
3. You have three options for building the file for the state:
   - Select All Employers to include the new hires for every employer in the system.
   - Select All Clients to include the new hires for every client in the system.
   - Select Enter Employer ID or Client ID to report on one employer or client’s new hires.
     - If you enter a Employer ID, the system creates the download file with the employer’s Federal Employer Identification Number (FEIN).
     - If you enter a Client ID, the system creates the download file using the client’s FEIN.
     - If you do not enter either, the system uses the employer’s FEIN.
4. Select Exclude hires over 45 days if you do not want to include employees who were hired more than 45 days ago.
5. For the Hire Date, select:
   - Use Original Hire Date to use the Client Hire Date
   - Use PEO Start Date to use the Employer Start Date instead of the Client Hire Date if it is after the date the employee started with the client.
6. Select Exclude 1099 Employees if the file should not include those employees.
7. For the Report Type, select:
   - Multi-State to report employees who have been hired in all states to the state in the Report to State field.
   - Single State to report only those employees who were hired in the Report to State.
8. Enter the **Report to State**’s two-character postal code. This is the state to which you will submit the file.

9. Select the **File Type**, either .TXT or .CSV.

10. The **Download File Name** defaults to the format specified by the stateCA. You can make changes as needed.

You can preview the report online to make sure the data looks accurate.

1. Once you have set all the options, click **Preview**.
   - The Build New Hire Reporting File window displays the process.

2. When the process completes, click **Close**. The report opens.

3. Review the information in the report. Close it when you are finished by clicking **X**.

When you have verified that the data is correct, you can build the file.

1. Click **Generate File** in the New Hire Reporting form.
   - The Build New Hire Reporting File window displays the process.

2. When the process completes, click **Close**. The file downloads based on your browser settings.

3. Close any windows that opened during the download process aside from the PrismHR window.

### Clearing New Hire Report Dates

Use the Clear New Hire Reporting Dates feature to delete the date from the **Hire Report Date** field in the **Work** tab of Employee Details. This allows users to rerun New Hire Reporting for those employees.

At this time, the utility to clear the new hire report dates is only available in the backend system for PrismHR.

---

**Figure 68:** Hire Report Date field in Employee Details

1. In the backend system, select **Operations Management > Process > New Hire and Termination Download Processing > Employee Verification and New Hire Utilities > Clear New Hire Reporting Dates**. The Clear New Hire Reporting Dates form opens (**Figure 69**).
Setting New Hire Report Dates

Figure 69: Clear New Hire Reporting Dates

2. Enter the **Starting New Hire Report Date** to clear.
3. Enter the **Ending New Hire Report Date** to clear.
4. If appropriate, enter the **Company ID** to clear dates only for employees of that client. Press **F3** for a list.
5. Click **F2-Accept**. A pop-up window opens indicating the number of records that were read and cleared.
6. Click **Continue** to complete the process.

**Setting New Hire Report Dates**

Use the Set New Hire Reporting Dates feature to set the date in the **Hire Report Date** field in the **Work** tab of Employee Details. You would do this for employees who were previously reported to ensure that they are not included in any future New Hire Reporting download files.

At this time, the utility to clear the new hire report dates is only available in the backend system for PrismHR.

1. In the backend system, select **Operations Management > Process > New Hire Download Processing > Employee Verification Service and New Hire Utilities > Set New Hire Reporting Dates**. The system displays a warning (Figure 70).

Figure 70: Previously Reported Employees Warning

2. Click **Yes** to continue. The Set New Hire Reporting Dates form opens (Figure 71).
3. Enter the **Starting New Hire Report Date** to set.
4. Enter the **Ending New Hire Report Date** to set. This is the date that will populate for the employees.
5. If necessary, enter the **Company ID** to clear dates only for employees of that client. Press F3 for a list.
6. If necessary, enter the **Employee ID** to set dates for only that employee. Press F3 for a list.
7. Click **F2-Accept**. The system displays a pop-up window indicating the number of records that were read and updated.
8. Click **Continue** to complete the process.
Chapter 7: OSHA and Workers’ Compensation Case Files

Use PrismHR to define and work with OSHA (Occupational Safety and Health Administration) and workers’ compensation case file information.

Before entering case files, your organization must define events; see OSHA Events on page 28.

OSHA Cases

Use the OSHA Cases form to create and update Occupational Safety & Health Administration (OSHA) case files for work-related injuries or illnesses.

**OSHA Case**

The **OSHA Case File** basic information panel (**Figure 72**) establishes the basic information for the OSHA case file.

**Figure 72: OSHA Case File**

1. Click **New Case** to create a new OSHA case file, or enter the **Case Number** of an existing case file.
2. 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.
3. Enter the employee's **Position**. The default comes from the Employee Details; do not enter the activity in which the employee was engaged.
4. Enter the code for home **Department** code in which the employee worked when the injury occurred or at the onset of the illness. The default comes from the Employee Details.
5. Enter the **Location** code where the injury or illness occurred. The description displays.

**Injury/Illness**

Use the **Injury/Illness** panel (**Figure 73**) to describe what happened.

**Figure 73: Injury/Illness**

6. Enter the **Date of Injury or Onset of Illness** when the employee sustained the injury or first reported the symptoms.
7. Enter the **OSHA Event Code for Injury/Illness** that best describes the injury or illness. The description displays.

8. Select **Report Incident on the 300A log** if the client recorded the injury or illness in the OSHA 300A log.

9. Enter the **Description of Injury/Illness**. Be as explicit as possible.

**Claim**

The **Claim** panel (Figure 74) provides additional OSHA claim information.

![Claim Panel](image)

10. Enter the **Date Notified** when the employee notified his/her supervisor about the injury or illness.

11. Indicate whether the injury or illness was **Fatal**, or indicate that the employee's condition is unknown.

12. If the injury or illness was fatal, enter the date on which the employee was documented as deceased in the **Expired On** field.

13. Select the workers' compensation **Claim Filed** status.

14. Enter the employee's number of **Days Away** from work as a result of the injury or illness.

15. Enter the number of days the employee has restricted work duties in the **Days Restricted** field.

16. Enter the total estimated **Medical Cost** associated with this illness or injury. Enter 0 if there is no estimate or it does not apply to this case.

17. Enter the total estimated **Labor Cost** loss due to this illness or injury. Enter 0 if there is no estimate or it does not apply to this case.

**OSHA Form 101 Detail**

Enter detailed information as required in the **OSHA Form 101 Detail** panel (Figure 75).

![OSHA Form 101 Detail Panel](image)
18. Enter the **Body Part Description** that describes what was affected by the injury or illness.

19. Describe the task in which the employee was engaged.

20. Describe in detail the events that resulted in the injury or illness.

21. Name the object or substance that affected the employee. For example:
   - The machine or other object that struck the employee, or which he or she struck
   - The vapor or poison the employee inhaled or swallowed
   - The chemical or radiation that irritated the skin
   - The object that the employee lifted or pulled

### OSHA Other Detail

Enter information in the **OSHA Other Detail** panel as required *(Figure 76).*

Figure 76: OSHA Other Detail

22. Enter the report information, which is required for OSHA Report 101.
   a. Enter the **Report Date** when the report was prepared.
   b. Enter the name of the person who prepared the report in the **Prepared By** field.
   c. Enter the **Preparer Position**.

23. Enter information about the physician who treated the employee for the injury or illness.
   a. Enter the **Physician Name**.
   b. In the **Physician Address** field, enter the street address.
   c. Enter the physician's **City, State, & ZIP Code**.

24. Enter information about the hospital where the employee received treatment for the injury or illness.
   a. Enter the **Hospital Name**.
   b. In the **Hospital Address** field, enter the street address.
   c. Enter the hospital's **City, State, & ZIP Code**.

25. Click **Save**.

### Workers' Compensation Cases

Track detailed information about a workers’ compensation case in the Workers’ Compensation Cases form.

#### Workers’ Compensation Case

Use the **Workers’ Compensation Case** panel *(Figure 77)* to review or add a new case.
1. Enter an existing **Case Number** or click **New Case** to create a new case.
2. Enter the **Employee ID**.
3. Enter the **Claim Date**, which is the day the benefit claim was made.
4. Enter the **Claim Number** assigned by the insurance company.
5. Enter the **Jurisdiction**, which is typically the postal code for the state of jurisdiction for this case.
6. Enter the **Shift Number** for the shift when the employee incurred the injury, if appropriate.
7. Enter the employee’s **Length of Service** at the time of the claim.
8. From the **Regular Job** drop-down, select **Yes** if this employee was performing their usual duties or **No** if the user was performing another job.
9. Select the **Status** that best describes the current status of the claim:
   - **Pending**: Case has been started, but no action has taken place
   - **Open**: Case is open
   - **Closed**: Case is closed
   - **Reopened**: Case is reopened
   - **Incident/Work Related**: Case is work-related incident
   - **Incident/Non-Work Related**: Case is not a work-related incident
   - **Claim Denied**: Benefit claim was denied
10. Enter the **Status Date** when the status went into effect.

**Contacts**

Use the contacts panel (Figure 78) to add insurance and attorney contact and telephone numbers to a workers’ compensation case.

![Contacts](image)

1. Enter the **Insurance Company** liable for this worker’s compensation benefit claim.
2. Enter the name of the **Insurance Contact** at the company.
3. Enter the name of the Insurance Attorney who is handling the case for the insurance company.
4. Enter the name of the Employee Attorney who is representing the employee in this case.
5. Enter the corresponding Telephone numbers.

**Reserved / Paid-to-Date Information**

Use the Reserved / Paid-to-Date Information panel (Figure 79) to add compensation, medical, and other expense amounts to the workers’ compensation case.

![Reserved / Paid-to-Date Information](image)

1. Enter the Weekly Compensation rate.
2. Enter the Compensation Reserve amount reserved by the insurance company to cover the cost of compensation in this case.
3. Enter the Medical Reserve amount set by the insurance company to handle medical claims for this case.
4. Enter the Expense Reserve amount set by the insurance company to cover the cost of expenses related to this case.
5. Enter the Company Paid Compensation to the employee.
6. Enter the Company Paid Medical.
7. Enter the Company Paid Expense.
8. Enter the Insurance Paid Compensation to the employee.
9. Enter the Insurance Paid Medical.
10. Enter the Insurance Paid Expense.
11. Click Save.

**Notes**

Use the Notes form (Figure 80) to maintain any notations or reminders associated with a workers’ compensation case that your organization wants to track. This is accessed from the Action bar in Workers’ Compensation Cases.
• To view or edit an existing note, click **Note ID**.
• To create a note, click **Add**.

Either of these actions opens the note entry form (**Figure 81**).

**Figure 81: Note Entry**

1. Enter or edit the **Note Details**.
2. Click **Save**.
Chapter 8: Other HR Actions

You can update employee records using features in the HR menu under Actions.

- For information on employment statuses, see Employee Statuses on page 24.
- For information on employment types, see Employee Types on page 25.
- For information on paid time off, refer to the PTO Plans chapter in the Client Administration User Guide.

Department Change

Use the Department Change form to change an employee's department.

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 Department for the employee.
3. Enter the Department Start Date when new department goes into effect.
4. Click Save.

Division Change

Use the Division Change form to change an employee's division.
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 Division for the employee.

3. Enter the Division Start Date when new division goes into effect.

4. Click Save.

Location Change

Use the Location Change form to change an employee’s location.

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 Worksite Location for the employee.

3. Enter the Worksite Location Start Date when new location goes into effect.

4. Click Save.

Pay Rate Change

Use the Pay Rate Change form to set a new pay rate for an employee.
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, and any history of pay rate changes displays at the bottom of the form.

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

2. Enter the **New Pay Rate**, then select the period.

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 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**, which is when the pay rate change goes into effect.
   - 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 do not 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 time sheet.
   - 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 the hours for the employee the next time they edit the payroll.
7. Select the Reason that best describes the pay rate change.
8. Click Save.

**Action Bar**

You can access related features by selecting them from the Action bar.

- Reason Codes: see Reasons on page 26
- Status Type History: see Status Type History on page 126

**Position Change**

Use the Position Change form (Figure 83) to change an employee's position when career path changes or promotions occur.

**Figure 83: 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.
3. Enter the **New Position Start Date** when new position and title 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 appropriate.
6. Click **Save**.

**Status Type History**

You can access the employee's status history by opening the Action bar and selecting **Status Type History**. See **Status Type History on page 126** for more information.

**PTO Register Enrollment**

Use the PTO Register Enrollment form (**Figure 84**) to manually enroll employees in paid time off register and set the starting hours. This is found in the **HR** menu under **HR|Action**.

Once you save the enrollment, PrismHR creates the register for the employee based on the register type and benefit plan.

---

To make changes to the employee's PTO register values, see **Employee PTO Register Adjustment on page 123**.

---

**Figure 84: Employee PTO Register Enrollment**

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.
2. Enter the **Register Type** used to track paid time off for this plan.
3. Enter the **PTO Benefit Plan** in which to enroll the employee.
PrismHR uses the **Benefit Start Date** to calculate the number of months the employee has worked for the client. The system uses this in conjunction with the rules defined for a paid time off plan to determine the number of hours the employee can earn during a given accrual period. The default is the employee’s last hire date, but you can change this.

4. Enter the **Benefit Start Date**. The system uses this date to calculate the number of months that the employee has worked for the client. The default is the employee’s last hire date, but you can edit it as needed. See About Benefit Start Dates on page 104.

5. Enter the **Carryover Hours**, which is the number of hours carried over from a previous accrual year. Typically, you would only enter this value when setting up the register for the first time.

6. Enter the **YTD Hours Calculated** (+), which is the starting balance of PTO hours accrued in the current year.

7. Enter the **YTD Hours Taken** (-), which is the number of PTO hours already used in the current year.

8. Based on the entries, the **YTD Hours Available** (=) displays.

9. Enter the **Year End Date** for the current year. The default comes from the plan’s setup.

10. Enter the **Calculated Thru Date**, the date through which PTO hours have been accrued. See Understanding the Accrued Thru Date Field on page 104 for more information on entering the correct date.

11. Enter the **Carryover Expires On** date when the available carryover hours expire, if applicable.

**About Benefit Start Dates**

The **Benefit Start Date** field dictates the calculation that the system uses.

- You can only adjust the **Benefit Start Date** for employees enrolled in fiscal year registers. You cannot change it for anniversary-based registers.
- When the eligibility for PTO benefits is based on seniority level (the number of months worked), the system uses its calculation based on this date to determine the employee’s seniority level. For more information, see "PTO Benefit Plans".
- If the client’s PTO register uses Anniversary Year End as the register type’s accrual calculation method, the system uses the date to calculate the PTO register year-end date; see "PTO Register Types".

**Understanding the Accrued Thru Date Field**

If the employee has accumulated PTO hours prior to the initialization of this PTO Register, you must enter the number of PTO hours, any carryover hours available, and the date through which the hours were accrued.

If you do not enter the correct date in the Starting Accrued Thru Date field, PrismHR may accrue excess hours for this employee.

It is critical that you enter the correct “accrued through” date. The system accrues any PTO time from this date forward, according to the terms of the absence benefit plan and register type. To determine the date correctly, it is important to understand the client’s PTO plan; that is, does it accrue increments of PTO hours throughout the year, or perhaps deposit the whole amount at one time?

For example, an employee has three vacation days available to her at the time you take on a particular client. The employee is not scheduled to accrue any more until January 1 of the following year. You must ensure the date
you enter in the Accrued Thru Date field is December 31. The next time the register is triggered, whether the it is the next pay period, end of month, or another time, PrismHR will calculate the number of days between December 31 and the trigger date.

During payroll processing, PrismHR automatically updates the employee’s PTO register with any due accruals (Figure 85).

Figure 85: Vacation Accrual Example

![Vacation Accrual Example](image)

If you are going to update PTO hours more frequently, such as when increments of time are deposited each payroll period, ensure you understand exactly what “accrued through” date the client used when they submitted the employee’s PTO hours to you. Was it through the last day of the payroll period or through the pay date?

You must determine the “accrued through” date with the client to ensure the employee's PTO register accrues correctly.

## PTO Auto Register Enrollment

The PTO automatic enrollment process tests every employee against the eligibility rules (set up for the client in PTO Auto Enroll Rules, found in the Client menu) and enrolls employees into absence benefits if they meet the eligibility criteria.

Use the PTO Auto Register Enrollment form as a quick way to build up a list of employees in a plan and assign them their first Accrued Thru Date. You would typically use this feature when you need to enroll existing employees in a new PTO plan.

Figure 86: PTO Auto Register Enrollment

![PTO Auto Register Enrollment](image)

1. If appropriate, enter the **Benefit Start Date** to override the default.
   
   The system uses this date to calculate the number of months that the employee has worked for the client. If you do not enter a date in the field, the system automatically calculates the date on which it would have begun for each employee.
2. In the **Accrued Thru Date** field, you should enter the date through which paid time off benefits would have previously been accrued.

   - When you enter a date, the system calculates each employee’s PTO benefits from that date forward.
   - If you leave the date field blank, the system calculates each employee’s benefits from their date of hire through to today’s date. This is an extremely rare situation. Be sure that this is what you need to do, as it can impact payroll.

   Read [How PrismHR Uses the Accrued Thru Date for PTO Benefits](#) to learn more.

3. Click **Run**.

   The system enrolls eligible employees in the plan, then displays a count of the employees who were enrolled. It also displays a list of any employees who were not enrolled and why.

   ![Figure 87: Example of PTO Auto Register Enrollment Results](#)

4. When you finish reviewing the information, click **Close** to exit the form or **Cancel** to clear the form and use it to run another enrollment process.

### How PrismHR Uses the Accrued Thru Date for PTO Benefits

When it is time for payroll to send out paychecks, the system calculates PTO benefits from the day after the last date through which the employee accrued benefits (the “accrued through” date) up through the period end date.

For example, employees in the ABC Company are paid semi-monthly and were last paid on May 15. When they are paid on June 1, the system knows the accrued through date is May 15, so it calculates the PTO benefits from May 16 through June 1.

If your organization added ABC Company to PrismHR on May 20, you would want to automatically enroll the ABC employees in PTO benefits. The system has never calculated payroll for these employees before, but its calculations require an “accrued through” date. You define the accrued through date as May 15, so the calculations result in a normal accrual cycle on June 1.

Therefore, you use the PTO Auto Register Enrollment form to not only automatically enroll the employees, you also define an **Accrued Thru Date** date for the system. When payroll processes the paychecks, the system determines the employees’ PTO benefits from the day after the date you entered.

### Planned Time Off Requests

You can review and (if able) make changes to employees’ time off (PTO) requests in the Planned Time Off Requests form. The form is found in the **HR** menu under **HR|Action**.
The requests in the list are those for employees at the active client who submitted them through Employee Self-Service (ESS) or Employee Portal.

Use the filters at the top of the form to specify which requests to display.

To make changes to an employee’s PTO, you can:

- Set an **Approved** request to **Cancelled**.
- Set a **Cancelled** request to **Approved**.
- Set an **Approved** or **Cancelled** request to **Paid**. If you select **Paid**, then it is removed from this list and from any payrolls.
- A yellow indicator ▲ displays next to the start date if it is before the period end date of the last completed scheduled payroll batch for the employee’s pay group. The system considers it to be a “back dated” request.

The different statuses affect the system:

- **Pending**: The PTO request has not yet been approved, cancelled, or paid by the employee’s manager.
  The request will not show up on the time sheet when it is in this status.
- **Approved**: The PTO request is approved and scheduled to be paid.
  If a manager cancels a PTO request on this form and then the request is approved later on this form, the leave request indicator in the Summary Time Sheet Entry form is restored and the employee’s ESS PTO landing page displays the approved request.
- **Cancelled**: The PTO request is cancelled.
  This removes the leave request indicator from the time sheet (regardless of whether it was approved on the time sheet) and it removes the line item from the employee’s ESS PTO landing page. It does not permanently remove the line item in either place.
- **Paid**: The PTO request was previously paid and the employee’s PTO register was updated. Only service providers can select this option.
  This removes the leave request indicator from the time sheet and removes the request from the employee’s ESS or Employee Portal PTO landing page. It also hides the request from the Planned Time Off Requests form unless you choose to Display Paid.

By default, worksite manager and trusted advisor users can only access employees who report to them, as indicated in the Employee Details Work tab. Users can be set to see all employees at the client that they are allowed to access by giving them the PTO Administrator account management role in the Users form. Note that if you want a user to be able to view requests but not approve them, the user role must have Inquiry permission for Planned Time Off Requests.

To view a planned time off request’s changes, click the **Audit Log** icon 🔄. The Audit Log Display opens, where you can click a log to display its changes. (See Audit on page 17.)

**Action Bar**

You can process approved, backdated leave requests for salaried employees by selecting **Backdated Leave Request Processing** from the Action bar 📀.
See Backdated Leave Request Processing

Employee Absence Entry

Use the Employee Absence Entry form (Figure 88) to enter employee absences from work. This is time off that will affect the employee’s PTO register. This is found in the HR menu under HR|Change.

You can:

- Enter a paid absence: Sometimes salaried employees’ absences are not paid out on a time sheet, but they need to be subtracted from the PTO register. When you use an absence code associated with a PTO register, the system applies the hours as well as any comments you enter.
- Enter an unpaid absence: Track absences for record-keeping purposes. There are reports that list unpaid absences.
- Adjust “hours taken”: Adjust the total number of hours taken on the employee’s PTO register. (To adjust the number of hours accrued or carried over, see Employee PTO Register Adjustment on page 123.)

Absence Codes must exist before you can use the Employee Absence form. See "PTO Absence Codes" for more information.

Figure 88: Employee Absence

1. Enter the Employee ID 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.
2. Select the Absence Code for this absence.
3. Enter the Date Absent, which is the day the employee was absent or the start date of the absence period if the absence spans multiple days.
4. Enter the total number of Hours Absent.
5. Enter a Comment for this absence, if applicable. For example, you can use this reference a specific voucher or event.
6. Click Save. The system generates the Journal ID when you save the absence entry.

Leave of Absence

Use the Leave of Absence form (Figure 89) to track an employee’s leave of absence while maintaining the employee's status of employment at your company. This is used for absences that are not covered by PTO registers.
Figure 89: Leave of Absence

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 employee's current status and type display.

2. Select the **Leave Employment Status** for the employee.

3. Enter the **Leave Effective Date**.

4. Select the **Reason Code** for the leave of absence.

5. Enter the **Planned Return from Leave** date when the employee plans to return to work.

6. Click **Save**.

---

**Action Bar**

You can access information about the Employee's Status history by clicking **Status Type History** in the Action bar.

- **Status Type History**: see **Status Type History** on page 126

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**Backdated Leave Request Processing**

The Backdated Leave Request Processing form, accessed from **HR|Action** or from the **HR|Action|Planned Time Off Requests** form's Action bar, allows you to process approved, backdated leave requests for salaried employees by creating a manual check adjustment.
To display on this form, an employee must be in a payroll batch with the Time Sheet Entry status. Also, the batch pay period dates must be later than the backdated leave request dates to be processed using Backdated Leave Request Processing functionality.

The manual check created from this process backs out the hours and associated dollars from the Offset Pay Code and assigns them to the Leave Pay Code using the appropriate codes on the PTO Absence Codes form. It also updates the employee’s PTO Register with the appropriate hours taken and includes other details from the Leave Request.

To process a backdated leave request, do the following:

1. Check the Select All checkbox to process all the requests or check individual requests.
2. Click Save.
3. A dialog displays stating that clicking Yes will process the approved, backdated leave request(s), then a manual check adjustment for each selected request will be created to reduce the offset pay code hours by the absence code hours. Clicking No cancels the process.
4. A confirmation dialog displays stating that the request(s) was successfully processed, and changes will be reflected in the next payroll. Click OK.
5. Click View Report to view the Backdated Leave Request Report.
6. After closing the report, successfully processed records no longer display in the form.

To enable Backdated Leave Request Processing for Worksite Managers and Trusted Advisors, set the ALLOWWSMTABDLR custom feature code at the system level. (See Custom Feature Codes.)

Reactivation

Use the Reactivation form (Figure 90) to reactivate an employee who was on a leave of absence.

Figure 90: Reactivation

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 employee’s current status and type display.
2. Select the Reactivated Employment Status.
3. Select the Reactivated Employment Type.
4. Enter the Reactivation Date.
5. Select the Reason Code the best describes the employee reactivation.
6. Click Save.
Status Type History

You can access the employee's status history by opening the Action bar and selecting Status Type History. See Status Type History on page 126 for more information.

Employee Termination

Use the Employee Termination form to terminate an employee.

When you terminate an employee, PrismHR performs the following based on your system’s global settings:

- Terminates the employee's benefits
- Removes the employee's web access login
- Disables the employee's ACH
- Refunds the client for the new hire fee, if the PEO has a policy when new hires are terminated within 30 days of being hired
- Displays a warning flag if the employee has an outstanding loan balance

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 employee’s name, Current Job Code, Current Employment Status, and Current Employment Type display.

2. Select the Termination Status Code.

4. Enter the **Termination Date**.

Benefits for employees who have been terminated end on either the 15th of the month or at the end of the month, depending on the Termination Date. If the Termination Date is on or before the 15th of the month, benefits terminate on the 15th. If the Termination Date is after 15th of the month, benefits terminate at the end of the month.

5. Use the **Okay to Rehire** drop-down to indicate whether the employee could potentially be rehired. If you select **Yes** or **Not Specified**, the employee will be available in the Rehire form’s search.
   - **Yes**: The employee can be rehired.
   - **No**: The employee should not be rehired.
   - **Not Specified**: There is no preference specified as to whether the employee could be rehired.

6. Select **If ACH, Turn Off ACH** if the employee should not receive further ACH transactions. The system sets the employee's ACH status to Inactive.

7. Enter the **Last Day Worked**, which is the last date on which the employee worked.

8. Enter the **Provider Notified On**, which is the day on which the service provider was notified that employment was terminated.

9. Enter a detailed **Termination Explanation** regarding the employee's termination.

10. If the employee has an available balance in their PTO Register, that information displays in the **Unpaid PTO Payout** panel. To apply the available hours to the employee's payout, click **Yes** in the **Add hours to current payroll?** field. The system adds the available hours to the current timesheet.

To hide this panel so Worksite Managers and Worksite Trusted Advisors cannot access it (recommended method), set the field security to **Hidden** for the form. (Setting the field security to **Disable** disables the panel on this form.)

11. If applicable, enter COBRA information:
   a. Indicate whether the system should create a COBRA participant record.
   b. Select the **COBRA Qualifying Event**.
   c. Enter the **COBRA Qualifying Event Date**.

12. Click **Save**.

**Status Type History**

You can access the employee's status history by opening the Action bar and selecting **Status Type History**. See **Status Type History** on page 126 for more information.
Rehire

Use the Rehire form to rehire an employee who was previously terminated.

You must enroll the employee into the former group benefits, PTO benefits, and so on, after rehiring them.

Once you complete the Rehire form, you can select Employee Details from the Action bar.

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 employee’s name, current employment status and type display.
   Users cannot select an employee whose Rehire OK flag is set to No in Employee Details.
2. Select the Rehired Employment Status.
3. Select the Rehired Employment Type.
4. Enter the Rehire Date when the employee returns.

   On the Employee Details form, the Employment Status field does not update to Active until the selected rehire date.

5. Select the Reason Code that best describes the rehiring of this employee.
6. Select the appropriate options:
   - Stop Previous Voluntary Deductions: Stop any voluntary deductions that were previously set up for this employee.
   - Stop Previous Direct Deposit: Stop any direct deposits that were previously set up for this employee.
   - Auto-enroll In Benefits: Automatically enroll the employee in any benefit plans for which he or she is eligible.
7. If appropriate, enter the Seniority Date to use in place of the Rehire Date when determining the employee’s eligibility for benefit plans.
8. Click Save.
After the rehire, the employee’s **Rehire OK** flag is set to **Not Specified** in Employee Details.

**Status Type History**

You can access the employee’s status history by opening the Action bar and selecting **Status Type History**. See **Status Type History** on page 126 for more information.

**Status Type Change**

Use the Status Type Change form to change:

- Employment status to one of the same class, such as Active PT to Active FT
- Employment type, such as seasonal to part-time
- Employment hours

1. Enter the **Employee** ID. The employee’s name, current employment status and type display.
2. Select the **New Employment Status**. This must be a status of the same class as the current status: either active, leave, or terminated. If you need to change the status from an on leave status to an active status, for example, you need to use the Reactivation feature.
3. Select the **New Employment Type** associated with an updated employment status.
4. Enter the **New Standard Hours** associated with an updated employment status. The **Current** column displays the employee’s current Standard Hours and Default T/S Hours (if any).
5. Enter the **New Default T/S Hours** associated with an updated employment status.

The **New Standard Hours** and **New Default T/S Hours** field values are not required, so only enter these hours if they are applicable. Also, to hide these fields so Worksite Managers and Worksite Trusted Advisors cannot access them (recommended method), set the field security to **Hidden** for the form. (Setting the
6. Enter the **Status/Type Date** when the status change goes into effect.
7. Select the **Reason** that best describes this change.
8. Click **Save**.

If the status will terminate the employee, and the employee ID is associated with a user account, then the user loses access to the client. If the user needs temporary access to the client information, the user administrator needs to adjust the Data Security. See “User Roles and Users” in the System Administration Guide.

**Action Bar**

You can access related features by selecting them from the Action bar.

- **Reason Codes**: see Reasons on page 26
- **Status Type History**: see Status Type History on page 126

**Employer Reassignment**

Use the Employer Reassignment form (Figure 91) to assign an existing employee to another employer. It must be an employer that is valid for the client.

**Figure 91: Employer Reassignment**

You cannot change the Client ID to which the employee is assigned. You can reassign only the Employer ID.

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.
2. Click the **Employer ID**. The Employer Reassignment Maintenance window opens (*Figure 92*).

![Employer Reassignment Maintenance](image)

Figure 92: Employer Reassignment Maintenance

3. Enter the **New Employer ID**.
4. Click **Save**. The new employer displays.

### Approval Process

When events take place that could potentially require an approval, such as a new hire or a payroll, PrismHR determines if there is a policy in place for the particular approval type.

- If there is no policy definition, then the system immediately updates the database with the new hire or other information.
- If there is an approval policy, then the system generates an approval event. If the first step for the approval is assigned to a particular user, then an e-mail is sent to that user. In addition, when the user logs in, the dashboard alerts the user of any pending approvals.

**Approvals Pending** is found in the **Client** menu under **Client|Action**.

### Approvals Pending

The Approvals Pending form (*Figure 93*) lists any pending approvals that are assigned or available to a user.

- An approval that is assigned to a particular user can only be acted upon by that user.
- Approvals are available to a user if one of the user's roles matches the role applicable to the current approval step.

![Approvals Pending (Assigned to You)](image)

![Approvals Pending (Available to You)](image)
Approvals

Click the **Refresh** button to remain on the same form or report while refreshing the window to display new entries.

**Approvals Pending (Assigned to You)**
You can act on approvals listed in the **Approvals Pending (Available to You)** panel.

- Standard Approvals: see Approvals below
- Payroll Approvals: see “Payroll Approval” in the Payroll User Guide

**Approvals Pending (Available to You)**
To act on an approval that is available to you, “grab” the approval. The system assigns the approval to you.

1. Within the **Approvals Pending (Available to You)** panel, click the desired **Approval Type**. The Approval form opens.
   
   You can click **Show Audit History** to display the history of users involved in processing the action.

2. Click **Grab**. The selected approval type now appears in the **Approvals Pending (Assigned to You)** panel.

You can open the pending approval in Assigned to You and click **Return to Queue**. The approval pending item is then returned to the Available to You queue for you or another user to access later.

**Approvals**
For standard approvals, click the **Approval Type** to review the information. The Approval form opens.

1. Review the information on the Approval form.
   - You can click **Show Audit History** to display the history of users involved in processing the action.
   - If relevant, you can click **Employee** to view the Employee Details.
2. After reviewing the information:
   - **Approve**: The action is approved. The system checks if there is another approver, as defined in the approval policy. If there is, the system sends the approval to that user. In the figure above, for example, we are on step 1 of 2, and approving the action would send it to users with the appropriate role for step 2. If it were the final step, then the action would go through and be finalized in the system.
   - **Deny**: After you click Deny, you must enter your reason for denying the action in the Deny Approval form and then press Tab. A checkbox displays; select it, and then click Deny. Please note that this reason will be stored in the system and might be visible to the user who submitted the request for your approval.
   - **Return to Queue**: The approval returns to the queue of the current step. **Return to Queue** does not remove prior approval steps.

**Return to Queue** displays only for approval steps that are “grabbed” from AM or HR roles.

---

### Approvals Processed

Use the Approvals Processed form to review all approvals processed for the client during a specific date range.

**Approvals Processed**

Use the Approvals Processed form to review all approvals processed for the client during a specific date range.

1. Enter the **Start Date** and **End Date**.
2. Click **Submit**.

   The system displays all approvals that occurred during that date range.
3. To view the details of an approval, click the **Approval Type**. The Approval form displays, including the history of the people who created the item that required approval action and the person or people who approved it.

---

**Approval**

- Approval Type: New Hire
- Approval Status: Approved
- Policy Type: Client
- Employee: Pedro Vasquez
- Generated By: Maxine Norman on 04/17/2018 at 08:18AM

**Approval Summary**

Please approve the New Hire for Pedro Vasquez (Wick Editing & Translation Services)

### Audit History

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<th>User</th>
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<th>Time</th>
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<td>Brad Argile</td>
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<tr>
<td>1</td>
<td>Approved</td>
<td>Brad Argile</td>
<td>04/17/2018</td>
<td>10:25:24</td>
</tr>
<tr>
<td>2</td>
<td>Grabbed</td>
<td>Katherine Grates</td>
<td>04/18/2018</td>
<td>08:26:15</td>
</tr>
<tr>
<td>2</td>
<td>Approved</td>
<td>Katherine Grates</td>
<td>04/18/2018</td>
<td>09:17:57</td>
</tr>
</tbody>
</table>
Chapter 9: HR Adjustments

When necessary, you can make adjustments to employees' historical information.

Department History Adjustment

Use the Department History Adjustment form to change the effective date of a department change for an employee, or delete the department change entirely.

Department History Adjustment

Enter an Employee ID, then click on any Effective Date to change it.

<table>
<thead>
<tr>
<th>Date Effective</th>
<th>Department Code</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/14/2019</td>
<td>22222</td>
<td>21222</td>
</tr>
<tr>
<td>06/01/2019</td>
<td>100</td>
<td>Act</td>
</tr>
<tr>
<td>07/16/2019</td>
<td>200</td>
<td>Labor</td>
</tr>
<tr>
<td>08/01/2019</td>
<td>50FGS</td>
<td>FGHF</td>
</tr>
</tbody>
</table>

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.
2. Click the Date Effective to change or delete. This is the date the department went into effect for the employee.
3. To remove the department change, click Delete Date. The department change is removed from the list. This is only available if there is more than one row. Click Yes to delete this date.
4. To modify the effective date of the department change, click Change Date. The New Effective Date field displays.
   a. Enter the New Effective Date.
   b. Click Submit. The list updates with the new effective date for the department.

Division History Adjustment

Use the Division History Adjustment form to change the effective date of a division change for an employee, or delete the division change entirely.
Location History Adjustment

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.

2. Click the **Date Effective** to change or delete. This is the date the division went into effect for the employee.

3. To remove the division change, click **Delete Date**. The division change is removed from the list. This is only available if there is more than one row. Click **Yes** to delete this date.

4. To modify the effective date of the division change, click **Change Date**. The **New Effective Date** field displays.
   a. Enter the **New Effective Date**.
   b. Click **Submit**. The list updates with the new effective date for the division.

### Location History Adjustment

Use the Location History Adjustment form to change the effective date of a location change for an employee, or delete the location change entirely.

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.

2. Click the **Date Effective** to change or delete. This is the date the location went into effect for the employee.

3. To remove the location change, click **Delete Date**. The location change is removed from the list. This is only available if there is more than one row. Click **Yes** to delete this date.

4. To modify the effective date of the location change, click **Change Date**. The **New Effective Date** field displays.
   a. Enter the **New Effective Date**.
   b. Click **Submit**. The list updates with the new effective date for the location.
Pay History Adjustment

Use the Employee Pay History Adjustment form to change the effective date of a pay rate change for an employee, or delete the pay rate change entirely.

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.
2. Click the Date Effective to change or delete. This is the date the pay rate went into effect for the employee.
   • To remove the pay rate change, click Delete Date. The pay rate change is removed from the list. This is only available if there is more than one row.
   • To modify the effective date of the pay rate change, click Change Date. The New Effective Date field displays.

   a. Enter the New Effective Date.
   b. Click Submit. The list updates with the new effective date for the pay rate.

If you modify the effective date multiple times for the same period, a warning displays stating that this action may affect any Retro Pay calculations that have been paid or are due to the employee.

Position History Adjustment

Use the Position History Adjustment form (Figure 94) to change the effective date of a position change for an employee, or delete a position change entirely.
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.

2. Click the **Date Effective** to change or delete. This is the date the position change went into effect for the employee.
   - To remove the position change, click **Delete Date**. The position change is removed from the list. This is only available if there is more than one row.
   - To modify the effective date of the position change, click **Change Date**. The **New Effective Date** field displays (Figure 95).

Figure 95: New Effective Date

```
<table>
<thead>
<tr>
<th>New Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/02/2015</td>
</tr>
</tbody>
</table>
```

a. Enter the **New Effective Date**.

b. Click **Submit**. The list updates with the new effective date for the position.

---

**Status Type History Adjustment**

Use the Employee Status Type History Adjustment form (Figure 96) to change employee statuses.

Adjustments made using this form affect only the status dates. Users must make benefit adjustments manually.

Figure 96: Employee Status Type History Adjustment

```
<table>
<thead>
<tr>
<th>Employee Status Type History Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter an Employee ID, then click on any Effective Date to change.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>V13203</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Effective</td>
<td>11/14/2018</td>
</tr>
<tr>
<td>Employee Status</td>
<td>Active</td>
</tr>
<tr>
<td>Status Description</td>
<td>F Full Time</td>
</tr>
<tr>
<td>Employee Type</td>
<td>Type Description</td>
</tr>
</tbody>
</table>
```

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. Information displays in the table.

2. Select a status row, which highlights in yellow.
3. Click either **Change Date** or **Delete Date**.
   - **Delete Date**: The system prompts you to confirm that you want to delete the date. Click **Yes** to delete the status.
   - **Change Date**: Edit the dates as appropriate ([Figure 97](#)) and then click **Submit**. After clicking this button, a warning displays informing you that adjustments made using this form do not result in benefit calculation adjustments. Click **OK** and edit the dates as appropriate ([Figure 97](#)), then click **Submit**.

![Figure 97: Employee Status Type - Change Date](image)

---

### Employee PTO Register Adjustment

Use the PTO Register Adjustment form ([Figure 98](#)) to adjust an employee's number of accrued hours or carryover hours from a previous year. You can also adjust the accrued through date. This is found in the **HR** menu under **HR|Change**.

Absence Codes must exist before you can use the PTO Register Adjustment form. See "PTO Absence Codes" for more information.

![Figure 98: PTO Register Adjustment](image)

The system automatically assigns the Journal ID.

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.
2. Select the **PTO Register Type** for this adjustment.
3. Enter the **Effective Date**, which is the day of the adjustment or the start date of the adjustment period if the adjustment spans multiple days.
4. Enter the **Calculated Hours** to add to the employee's PTO register.
5. Enter the **Carry-Over Hours** to add to the employee's PTO register.

6. Enter the **Calculated Thru Date**, which is the date through which you want to update the employee's accrued through for the register type. Further accruals occur for payrolls with a pay date after this date. If you want to adjust only the date, enter zeroes in the hours fields.

7. Enter a **Comment** about the adjustment, if applicable. For example, you can use this reference a specific voucher or event.

8. Click **Save**.
Chapter 10: Views and Inquiries

There are different ways to access employee information, typically from the HR menu under View or from the Action menu in many employee forms.

Department History

The Department History form displays the future effective date, department code, and department name or number for an employee's department change.

You can update or delete one of these future effective dates in the Department History Adjustment form.

Division History

The Division History form displays the future effective date, division code, and division name or number for an employee's division change.

You can update or delete one of these future effective dates in the Division History Adjustment form.

Location History

The Location History form displays the future effective date, location code, and location name or number for an employee's location change.
You can update or delete one of these future effective dates in the Location History Adjustment form.

Pay History

The Pay History form (Figure 99) displays an employee’s pay rate history.

Figure 99: Pay History

1. Enter the Employee ID 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 employee’s pay history displays.

2. Click Cancel when you finish reviewing the information.

Pay rate changes entered in PrismHR after the December 2018 update include the change reason.

Related Topics

Pay History Adjustment (page 121)
Pay Rate Change (page 100)

Position History

The Position History form (Figure 100) displays the positions that an employee has held.

Figure 100: Position History

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 positions that the employee has held display.

2. Click Cancel when you finish reviewing the information.

Status Type History

Use the Employee Status History form (Figure 101) to review an employee’s employment status history.
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 employment status history for the selected employee displays.

2. Click Cancel when you finish reviewing the information.

Employee PTO Register

The Employee PTO Register form displays paid time off (PTO) for an employee, including the details of time accrued and taken. This form is found in the HR menu under HR|Change.

The PTO benefit plan determines how much PTO an employee will accrue, and the PTO register type determines when the employee accues PTO. The employee’s PTO Register is where the system keeps track of the PTO. It is a record of “credit” and “debit” transactions, and shows a running balance. Each time PTO accrues, it is posted (credited) to the employee’s register; each absence is subtracted (debited) from the register.
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.

2. Select the **PTO Register Type**. The drop-down lists only the plans in which the employee is currently enrolled.

3. Enter the **PTO Benefit Plan**. Any information displays in the form.
   - The rest of the top panel summarizes the PTO benefit plan information.
   - The **Paid Hours Absent Details** panel displays each absence taken.
   - The **Hours Accrued/Carry-over Details** panel displays each accrual earned by the employee.

4. If there is no information for this PTO Register Type or PTO Benefit Plan, enter the **Benefit Start Date**. The system uses this to calculate the employee's PTO for this plan.

---

**Employee PTO Registers**

The Employee PTO Registers form ([Figure 103](#)) allows you to view an employee's accrued paid time off and a list of time taken. This form is found in the **HR** menu under **HR|View**.

This form is useful for worksite users to check employees’ accrued PTO. Users cannot make changes on this form.

---

**Figure 103: Employee PTO Registers**

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.

2. Select the **Register Type**. The selected employee PTO register information displays.

3. From the **Report View** drop-down, select the report you want to review. The relevant information displays.

4. When you are finished, click **Cancel**.
# Chapter 11: Reports

Use these reports in PrismHR to view human resources information.

<table>
<thead>
<tr>
<th>Report</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1094-C Report Download in PrismHR</td>
<td>130</td>
</tr>
<tr>
<td>1095-C Report Download in PrismHR</td>
<td>130</td>
</tr>
<tr>
<td>Benefits Billing Detail Report</td>
<td>130</td>
</tr>
<tr>
<td>Electronic 1095-C Report</td>
<td>132</td>
</tr>
<tr>
<td>Employee Reports</td>
<td>132</td>
</tr>
<tr>
<td>Employee Anniversary Report</td>
<td>146</td>
</tr>
<tr>
<td>Employee Change Report</td>
<td>147</td>
</tr>
<tr>
<td>Employee Elections Report</td>
<td>149</td>
</tr>
<tr>
<td>Employee Event Codes Report</td>
<td>150</td>
</tr>
<tr>
<td>Employee Hours by Active Weeks Report</td>
<td>151</td>
</tr>
<tr>
<td>Employee Master Report</td>
<td>152</td>
</tr>
<tr>
<td>Employee New Hire Report</td>
<td>155</td>
</tr>
<tr>
<td>Employee Pay Rate Report</td>
<td>156</td>
</tr>
<tr>
<td>Employee PTO Detail Report</td>
<td>158</td>
</tr>
<tr>
<td>Employee Ranked Service Report</td>
<td>160</td>
</tr>
<tr>
<td>Employee Retirement Loans Report</td>
<td>161</td>
</tr>
<tr>
<td>Employee Skills Report</td>
<td>161</td>
</tr>
<tr>
<td>Employee Terminations Report</td>
<td>163</td>
</tr>
<tr>
<td>Employee Test Results Report</td>
<td>164</td>
</tr>
<tr>
<td>Employee with Status as of Date Report</td>
<td>165</td>
</tr>
<tr>
<td>OSHA Report (300 or 300A)</td>
<td>165</td>
</tr>
<tr>
<td>OSHA 300A File Download</td>
<td>167</td>
</tr>
<tr>
<td>PTO Approval Report</td>
<td>168</td>
</tr>
<tr>
<td>PTO Hours Taken Report</td>
<td>170</td>
</tr>
</tbody>
</table>
1094-C Report Download in PrismHR

Use the 1094-C Report Download form to run the 1094-C Report for the client.

1. Enter the Year for the 1094-C report.
2. Click Run. The system builds the PDF and downloads it, granting you access to the report.

An error message displays for each client on the download if the MEC indicator is not set to Y for any month. This provides visibility to potential errors that could result in penalties upon submission to the Internal Revenue Service.

1095-C Report Download in PrismHR

Use the 1095-C Report Download form to run the 1095-C Report for the client.

1. Enter the Year for the 1095-C report.
2. If you want to run the report for only some of the employees, enter the From Employee ID and To Employee ID.
3. Select Mask SSN to mask Social Security numbers in output.
   When selected, the first five digits of the Social Security number are replaced with Xs and only the last four digits display. This is useful when submitting the file for troubleshooting.
4. Click Run. The system builds the report PDF and downloads it.

Benefits Billing Detail Report

1. Enter the Selection Parameters to determine what displays on the report; if left blank, all benefit plans display:
   - Enter the Pay Date On or After and the Pay Date On or Before to run this report for a date range.
   - Select the Sort Criteria for how the report displays.
   - Enter the report filters to display on the report:
     - Enter the field type. The field label displays. For example, if you enter a Location, the Location Name displays. The report displays records for that Location.

2. Click Run.

The report columns are:
- **Plan Description**: Benefits plan description
- **Plan ID**: Benefits plan ID
- **Employee Name**: Employee name displays as last name first.
- **Emp ID**: Employee ID
- **Amount Billed**: The amount billed to the client.
- **Employee Contribution**: The amount the employee contributed during that date range.
- **From Arrears**: The amount from arrears if any.
- **Net-Amount Billed**: The amount billed to the client minus the employee contribution and arrears.
Electronic 1095-C Report

This report lists employees for a selected year, their Form 1095-C register status, and who is receiving an electronic 1095-C.

1. Enter the Selection Parameters to determine what displays on the report:
   - Enter the Year for which you want to run the report.
   - Select Yes for Employees with 1095C to include employees a Form 1095-C for the year. Select No to exclude the employees a Form 1095-C for the year. Select Both to include all employees.
   - Select Yes for Employees with Electronic 1095C Form to include employees who elected early access to the Form 1095-C (Electronic 1095C Form is selected in the Employee Details Tax tab). Select No to include employee who receive paper Form 1095-C. Select Both to include all employees.

2. Click Run.

Columns in the Electronic 1095-C Report

- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID
- **1095C Register**: Y (yes) if the employee is listed on the 1095-C Register or N (no) if they are not listed on the 1095-C Register.
- **Electronic 1095C**: Y (yes) if the employee receives a electronic 1095-C or N (no) if they receive a paper 1095-C.

Employee Reports

The reports in the list are specified employee reports in the Reports menu under HR|Report.

Emergency Contact Report

This report provides a listing of employees' emergency contact information.

Figure 106: Emergency Contact Report Form
1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
   - Select the **Type Class** of the employee (for example, Full-Time or Part-Time).

2. Enter the **Sort Parameters**.
   - Select **Primary Sort** to sort by Employee Name, or Employee ID.

3. Enter the **Report Filters** to display on the report:
   - Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.

4. Click **Run**.

Figure 107: Emergency Contact Report

The report columns are:

- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID.
- **Contact Name**: The name of the employee's emergency contact.
- **Contact Relation**: The relationship between the employee and emergency contact.
- **Contact Information**: The telephone number, email, address, or other way to contact the emergency contact.
- **Type**: The type of contact information entered for the emergency contact (for example PHONE, EMAIL, or ADDRESS).

**Employee Address Report**

This report provides a listing of employees' residential and mailing addresses.

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
   - Select the **Type Class** of the employee (for example, Full-Time or Part-Time).

2. Enter the **Sort Parameters**.
   - Select **Primary Sort** to sort by Employee Name, or Employee ID.

3. Enter the **Report Filters** to display on the report:
• Enter the field type. The field label displays. For example, if you enter a Location, the Location Name displays. The report displays records for that Location.

4. Click Run.

The report columns include:

• Last Name
• First Name
• Middle Name
• Employee Id (PrismHR ID)
• Status Class
• Type Class
• Resident Address 1
• Resident Address 2
• Resident City
• Resident State
• Resident Zip
• Mailing Address 1
• Mailing Address 2
• Mailing City
• Mailing State
• Mailing Zip

**Employee Age Report**

This report provides a listing of employees' positions, dates of birth, and age.
1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
   - Select the **Type Class** of the employee (for example, Full-Time or Part-Time).

2. Enter the **Sort Parameters**.
   - Select **Primary Sort** to sort by Employee Name, or Employee ID.

3. Enter the **Report Filters** to display on the report:
   - Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.

4. Click **Run**.

The report columns are:
- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID
- **Position**: Employee's Position description
- **Date of Birth**: Employee's date of birth
- **Age**: Employee's age
Employee Birthday Report

This report provides a listing of employees' birth date information.

Figure 110: Employee Birthday Report Form

1. Enter the Selection Parameters to determine what displays on the report; if left blank, all employees display:
   - Select the Status Class of the employee (for example, Active, On Leave, or Terminated).
   - Select the Type Class of the employee (for example, Full-Time or Part-Time).

2. Enter the Sort Parameters.
   - Select Primary Sort to sort by Employee Name, Employee ID, or Birth Month/Day.

3. Enter the Report Filters to display on the report:
   - Enter the field type. The field label displays. For example, if you enter a Location, the Location Name displays. The report displays records for that Location.
   - Select Birth Month to only display those employees who have a birthday that month or select All Months to list all employees.

4. Click Run.

Figure 111: Employee Birthday Report

The report columns are:
• **Birth Month**: The employee's birth month.
• **Birth Day**: The employee's birth day of the month.
• **Employee ID**: Employee ID.
• **Employee Name**: Employee name displays as last name first.
• **Position**: Employee's Position description.
• **Department**: Employee's Department description.

**Employee Census Report**

This report provides a listing of employees' census information.

Figure 112: Employee Census Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   • Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
   • Select the **Type Class** of the employee (for example, Full-Time or Part-Time).
2. Enter the **Sort Parameters**.
   • Select **Primary Sort** to sort by Employee Name, or Employee ID.
3. Enter the **Report Filters** to display on the report:
   • Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.
4. Click **Run**.

Figure 113: Employee Census Report

The report columns are:
• **Employee Name**: Employee name displays as last name first.
• **Employee ID**: Employee ID.
• **Status**: The employee employment status (for example Active, On Leave, or Term).
• **Birth Date**: The employee's birthday.
• **Age**: The employee's age.
• **Marital Status**: The employee's marital status.
• **State**: The employee's state of residence.
• **Gender**: The employee's gender.
• **Last Hire Date**: The date the employee was last hired.
• **Orig Hire Date**: The date the employee was originally hired.
• **Term Date**: The date the employee's employment was terminated.
• **Annual Pay**: The employee's pay for one year.

**Employee Contact Information Report**

This report provides a listing of employees' contact information.

Figure 114: Employee Contact Information Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
   - Select the **Type Class** of the employee (for example, Full-Time or Part-Time).
2. Enter the **Sort Parameters**.
   - Select **Primary Sort** to sort by Employee Name, or Employee ID.
3. Enter the **Report Filters** to display on the report:
   - Enter the field type. The field label displays. For example, if you enter a Location, the Location Name displays. The report displays records for that Location.
4. Click **Run**.
The report columns are:

- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID.
- **Work Phone**: The employee's work phone number.
- **Work Extension**: The employee's work extension number.
- **Home Phone**: The employee's home phone number.
- **Cell Phone**: The employee's cell phone number.
- **Personal Email Address**: The employee's personal email address.

**Employee Department Report**

This report provides a listing of employees' department information.

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
   - Select the **Type Class** of the employee (for example, Full-Time or Part-Time).
2. Enter the **Sort Parameters**.
   - Select **Primary Sort** and **Secondary Sort** to sort by Department Code, Department Name, Employee Name, or Employee ID.
3. Enter the **Report Filters** to display on the report:
• Enter the field type. The field label displays. For example, if you enter a Location, the Location Name displays. The report displays records for that Location.

4. Click Run.

Figure 117: Employee Department Report

The report columns are:

- Dept Code: The department code.
- Department Name: The department code description.
- Location: The location name.
- Employee ID: Employee ID.
- Employee Name: Employee name displays as last name first.
- Job Title: The employee's job title.
- Status: The employee's job status (for example, Active, LR, or Term).
- Type: The employee's job type (for example, Full-Time or Part-Time).

**Employee Dependents Report**

This report provides a listing of employees' dependents contact information.

Figure 118: Employee Dependents Report Form

1. Enter the Selection Parameters to determine what displays on the report; if left blank, all employees display:
   - Select the Status Class of the employee (for example, Active, On Leave, or Terminated).
   - Select the Type Class of the employee (for example, Full-Time or Part-Time).
2. Enter the **Sort Parameters**.
   - Select **Primary Sort** to sort by Employee Name, or Employee ID.

3. Enter the **Report Filters** to display on the report:
   - Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.

4. Click **Run**.

Figure 119: Employee Dependents Report

The report columns are:

- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID.
- **Dependents**: The employee's dependents.
- **Relationship**: The relationship between the employee and dependent (for example, CHILD or SPOUSE).
- **DOB**: The dependent's date of birth.
- **Age**: The age of the dependent.
- **Gender**: The gender of the dependent.

**Employee ID Report**

This report provides a listing of employees' ID, position, location, and department.

Figure 120: Employee ID Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
1. Select the **Type Class** of the employee (for example, Full-Time or Part-Time).

2. Enter the **Sort Parameters**.
   - Select **Primary Sort** to sort by Employee Name, or Employee ID.

3. Enter the **Report Filters** to display on the report:
   - Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.

4. Click **Run**.

Figure 121: Employee ID Report

The report columns are:

- **Employee ID**: Employee ID.
- **Employee Name**: Employee name displays as last name first.
- **Position**: The employee's position title.
- **Location**: The employee's primary worksite location.
- **Department**: The department the employee is assigned to.

**Employee Name Report**

This report provides a listing of employees' work information.

Figure 122: Employee Name Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
• Select the Type Class of the employee (for example, Full-Time or Part-Time).

2. Enter the Sort Parameters.
   • Select Primary Sort to sort by Employee Name, or Employee ID.

3. Enter the Report Filters to display on the report:
   • Enter the field type. The field label displays. For example, if you enter a Location, the Location Name displays. The report displays records for that Location.

4. Click Run.

Figure 123: Employee Name Report

The report columns are:

• Employee Name: Employee name displays as last name first.
• Employee ID: Employee ID.
• Position: The employee's position title.
• Location: The employee's primary worksite location.
• Department: The department the employee is assigned to.
• Employee #: The employee's number assigned in Employee Details Work tab.
• Shift: The employee's assigned shift description.
• Last Hire: The employee's last hire date.

Employee Property Report
This report provides a listing of employees' property information.

Figure 124: Employee Property Report Form

1. Enter the Selection Parameters to determine what displays on the report; if left blank, all employees display:
• Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
• Select the **Type Class** of the employee (for example, Full-Time or Part-Time).

2. Enter the **Sort Parameters**.
• Select **Primary Sort** to sort by Employee Name, or Employee ID.

3. Enter the **Report Filters** to display on the report:
• Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.

4. Click **Run**.

Figure 125: Employee Property Report

The report columns are:

• **Employee Name**: Employee name displays as last name first.
• **Employee ID**: Employee ID.
• **Property Code**: The code assigned to the property.
• **Description**: The property description.
• **Serial Number**: The property serial number.
• **Value**: The dollar value of the property.
• **Date Issued**: The date the property was issued to the employee.
• **Date Returned**: The date the property was returned by the employee.
• **Comments**: Comments associated with the property when assigned to the employee.

**Employee Supervisor Report**
This report provides a listing of employees' supervisor information.
1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
   - Select the **Type Class** of the employee (for example, Full-Time or Part-Time).
2. Enter the **Sort Parameters**.
   - Select **Primary Sort** to sort by Employee Name or Employee ID.
3. Enter the **Report Filters** to display on the report:
   - Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.
4. Click **Run**.

The report columns are:

- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID.
- **Supervisor Name**: The employee's supervisor name displays as last name first.
- **Supervisor Position**: The employee's supervisor position.
Employee Anniversary Report

This report provides a listing of employees' employment dates.

Figure 128: Employee Anniversary Report Form

1. Enter the **Selection Criteria** to determine what displays on the report; if left blank, all employees display:
   - Select the **Status Class** of the employee (for example, Active, On Leave, or Terminated).
   - Select the **Type Class** of the employee (for example, Full-Time or Part-Time).
   - Enter the report filters to display on the report:
     - Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.

2. Click **Run**.

Figure 129: Employee Anniversary Report

The report columns are:
- **Last Month**: The month the employee was last hired.
- **Hire Day**: The day of the month the employee was last hired.
- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID
- **Hire Date**: The date the employee was last hired.
- **Seniority Date**: The date of the employee’s seniority.
• *Years Service:* The number of years the employee has served, since their last hire.

**Employee Change Report**

This report provides a listing of changes in employees' employment status.

**Figure 130: Employee Change Report Form**

1. **Enter the Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - **Enter the Employee ID.** The Employee Name displays.
   - **Select the Report Type:**
     - **HR Actions:** Displays actions related to the HR department (for example, New Hire, Pay Rate Change, or Leave of Absence).
     - **Address Changes:** Displays address changes per employee.
     - **Other Changes:** Displays any changes to the employee data.
   - **Enter a Change Entered Start Date** date to display employee changes on or after that date.
   - **Enter a Change Entered End Date** date to display employee changes on or before that date.

2. **Click Run.**

**Figure 131: Employee Change HR Action Report**

The report columns are:
• **Employee Name**: Employee name displays as last name first.
• **Employee ID**: Employee ID
• **Change Date**: The date the change was entered.
• **Effective Date**: The date the change went into effect.
• **Action Description**: An explanation of the change.

Figure 132: Employee Address Change Report

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID</th>
<th>Change Date</th>
<th>Description</th>
<th>Changed From</th>
<th>Changed To</th>
</tr>
</thead>
<tbody>
<tr>
<td>BOWMAN DAN</td>
<td>E03516</td>
<td>10/06/2016</td>
<td>Zip Code</td>
<td>72113</td>
<td></td>
</tr>
<tr>
<td>BOWMAN DAN</td>
<td>E03516</td>
<td>10/06/2016</td>
<td>City</td>
<td>72113</td>
<td></td>
</tr>
<tr>
<td>BOWMAN DAN</td>
<td>E03516</td>
<td>10/06/2016</td>
<td>State</td>
<td></td>
<td>AR</td>
</tr>
<tr>
<td>BOWMAN DAN</td>
<td>E03516</td>
<td>12/12/2015</td>
<td>Mail Address</td>
<td>2578 West 1st Street</td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>09/28/2016</td>
<td>Zip Code</td>
<td>72211</td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>09/28/2016</td>
<td>City</td>
<td>72211</td>
<td></td>
</tr>
</tbody>
</table>

The report columns are:

• **Employee Name**: Employee name displays as last name first.
• **Employee ID**: Employee ID
• **Change Date**: The date the change was entered.
• **Description**: The address description (for example, ZIP code, city, or state).
• **Changed From**: The original value.
• **Changed To**: The new value.

Figure 133: Employee Other Change Report

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Employee ID</th>
<th>Change Date</th>
<th>Description</th>
<th>Changed From</th>
<th>Changed To</th>
</tr>
</thead>
<tbody>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>09/28/2016</td>
<td>Last Pay Change Date</td>
<td>01-04-2016</td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>09/28/2016</td>
<td>Record Position 107</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>09/28/2016</td>
<td>Local Noves Cert</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Last Pay Change Date</td>
<td>01-04-2016</td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Hourly Pay</td>
<td>0.0030</td>
<td>0.0035</td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>H/R Rate of Pay</td>
<td>0.0030</td>
<td>0.0035</td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Annual Pay</td>
<td>624.00</td>
<td>728.00</td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Effective Date</td>
<td>01-04-2016</td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Last Change Percent</td>
<td>0.17</td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Last Change Amount</td>
<td>104.00</td>
<td></td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Period Base</td>
<td>1,200.00</td>
<td>1,400.00</td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Period Base</td>
<td>2,400.00</td>
<td>2,800.00</td>
</tr>
<tr>
<td>BROOKS CURTIS</td>
<td>X03509</td>
<td>10/06/2016</td>
<td>Period Base</td>
<td>2,600.00</td>
<td>3,033.33</td>
</tr>
</tbody>
</table>

The report columns are:

• **Employee Name**: Employee name displays as last name first.
Employee Elections Report

This report provides a listing of employees' retirement elections.

Figure 134: Employee Elections Report Form

1. Enter the Selection Parameters to determine what displays on the report; if left blank, all employees display:
   - Enter Age Above or Equal To to display only employees above or equal to that age.
   - Enter Extra Elective Amount Above to only display employees to have an elective amount above the amount entered.
   - Select Exclude EE Status Class to exclude that employee status on the report.

2. Click Run.

Figure 135: Employee Elections Report

The report columns are:

- Employee Name: Employee name displays as last name first.
- Emp. ID: Employee ID
- Age: Employee Age
- Pre-Tax Percent / Amount Extra: The pre-tax percentage and dollar amount elected.
- Catch-up Percent / Amount: The catch-up percentage and dollar amount elected.
- ROTH Percent / Amount Extra: The ROTH percentage and dollar amount elected.
- **ROTH Catch-up Percent / Amount**: The ROTH catch-up percentage and dollar amount elected.
- **Post-Tax Percent / Amount**: The post-tax percentage and dollar amount elected.
- **Key EE**: Indicates whether this employee a key employee.
- **High Comp**: Indicates whether this employee highly compensated.
- **Effective Date**: The date this election went into effect.
- **Enrollment Date**: The date the employee enrolled in this election.
- **Match Date**: The date the employer started matching the employee contribution.

### Employee Event Codes Report

This report provides a listing of events per employee.

**Figure 136**: Employee Event Codes Report Form

1. **Enter the Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Enter the report filters to display on the report:
     - Enter the field type. The field label displays. For example, if you enter an **Employee ID**, the **Employee Name** displays. The report displays records for that employee.
     - Select **Sort Criteria** to sort by Next Action Due, Event Code, Employee Name, or Roster.
     - Enter an **Action Date On or After** date to display events with action dates on or after that date.
     - Enter an **Action Date On or Before** date to display events with action dates on or before that date.

2. **Click Run.**

**Figure 137**: Employee Event Codes Report

The report columns are:
• Action Date: The date when the next action needs to be taken.
• Event Code: The code entered for that event.
• Event Description: The description of the event.
• Employee ID: Employee ID
• Employee Name: Employee name displays as last name first.
• Event Date: The date the event took place.
• Comment: Any comments entered for this event and employee.

Employee Hours by Active Weeks Report

The Employee Hours By Weeks Report enables you to run a report identifying employee hours worked by active days and weeks.

To run the report:

1. In the Starting Date field, enter the first date to be included in the report. This field is required.
2. In the Ending Date field, enter the last date to be included in the report. This field is required.

You can filter the report by:
• Employee ID
• Division
• Department
• Location
• Project
• Position
• Shift


Viewing the Report

The following fields display on the report:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
<td>The name of the employee.</td>
</tr>
<tr>
<td>Employee ID</td>
<td>The employee ID number.</td>
</tr>
<tr>
<td>Hire Date</td>
<td>The date the employee was hired.</td>
</tr>
<tr>
<td>Pay Method</td>
<td>The method by which the employee is paid:</td>
</tr>
<tr>
<td></td>
<td>• H—Hourly</td>
</tr>
<tr>
<td></td>
<td>• S—Salary</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>---------------------------------------------------------------</td>
</tr>
<tr>
<td>Location</td>
<td>The worksite location code.</td>
</tr>
<tr>
<td>Division</td>
<td>The division code.</td>
</tr>
<tr>
<td>Dept</td>
<td>The department code.</td>
</tr>
<tr>
<td>Position</td>
<td>The position code.</td>
</tr>
<tr>
<td>Work State</td>
<td>The employee's current work state.</td>
</tr>
<tr>
<td>Hours Worked</td>
<td>The number of hours the employee worked.</td>
</tr>
<tr>
<td>Active Days</td>
<td>The number of days within the selected date range that the employee was active.</td>
</tr>
<tr>
<td>Avg Per Week</td>
<td>The average number of hours worked per week based on active days and hours worked.</td>
</tr>
</tbody>
</table>

**Employee Master Report**

This report provides detailed information about employees. For each employee it displays: contact and personal information, employment details, compensation and tax filing information, benefit elections, paid time off, dependent, and a year-to-date summary.

Figure 138: Employee Master Report Form

1. Enter the **Selection Criteria** to determine what displays on the report; if left blank, all employees display:
   - Enter the **Employee ID**; the employee **Name** displays.
   - Select the **Status Class**.
   - Select the **Type Class**.
   - Enter the **Division**; the **Division Name** displays.
   - Enter the **Department**; the **Department Name** displays.
   - Enter the **Location**; the **Location Name** displays.
• Enter the Last Hire Date On or After to include only employees hired on or after that date.
• Enter the Last Hire Date On or Before to include only employees hired on or before that date.

2. Click Run.

Figure 139: Employee Master Report

Listed are a sample of the report columns, based on the criteria in the form:

- **Employee Name**: Employee name
- **Employee ID**: Employee ID
- **Birthdate**: The employee's birth date in MM/DD/YYYY format.
- **Pay Period**: The employee's pay period.
- **Contact and Personal Information**:
  - **Home Address**: The employee's residential address.
  - **Home Phone**: The employee's residential telephone number.
  - **Email**: The employee's personal email address.
  - **Emergency Contact(s)**: The contact(s) in case of an emergency.
  - **Emergency Relation(s)**: The relationship between the employee and emergency contact(s).
  - **Emergency Contact Type**: The telephone number, email, address or other way to contact the emergency contact(s).
• **Age**: The age of the employee.
• **Gender**: The employee's gender.
• **Marital Status**: The employee's marital status.
• **Ethnicity**: The employee's ethnicity.
• **Handicapped**: Indicates whether the employee is handicapped.
• **Veteran**: Indicates whether the employee is a veteran.
• **Vietnam Veteran**: Indicates whether the employee is a Vietnam veteran.
• **Disable Veteran**: Indicates whether the employee is a disabled veteran.

• **Employment**:
  • **Job Title**: The employee's position title.
  • **Job Start**: The date the employee started in that position, MM/DD/YYYY format.
  • **Status**: The employee's employment status (for example, Active or On Leave).
  • **Type**: The employee's employment type (for example, Full-Time or Part-Time).
  • **Hired**: The date the employee was hired in MM/DD/YYYY format.
  • **Seniority**: The seniority date in MM/DD/YYYY format.
  • **Termination**: The date employment terminated in MM/DD/YYYY format.
  • **I-9 Renewal**: The I-9 renewal date in MM/DD/YYYY format.

• **Compensation and Tax Filing**:
  • **Pay Period**: The employee's pay period.
  • **Pay Method**: The method paid.
  • **Pay Grade**: The pay grade.
  • **Standard Hours**: The standard of hours per pay period.
  • **Hourly Rate**: The hourly rate of pay.
  • **Salary**: The salary amount of pay.
  • **Annualized Pay**: The annual amount of pay.
  • **Federal Filing Status**: The federal filing status.
  • **Resident State**: The state in which the employee resides.
  • **Work State**: The state in which the employee works.
  • **Allowances**: The number of allowances.
  • **Additional**: Any additional deduction amounts applied to taxes.

• **Benefit Elections**:
  • **Plan**: The employee's benefit plans.
  • **Cover**: The coverage amount for each plan.

• **Paid Time Off**:
  • **Description**: PTO Description.
  • **Year End**: The PTO year end date in MM/DD/YYYY format.
  • **Carryover**: The number of hours carried over from the previous year.
  • **Hours Accrued**: The starting balance of PTO hours accrued in the current year.
**Employee New Hire Report**

This report provides a listing of employees based on their hire date, and includes their position, seniority, and pay information.

**Figure 140: Employee New Hire Report Form**

1. Enter the **Selection Parameters** to determine what displays on the report:
   - Enter the **Hire Date On or After** date to start the report on.
   - Enter the **Hire Date On or Before** date to end the report on.
2. Click **Run**.

**Figure 141: Employee New Hire Report**

The report columns are:

- **Hours Used**: The number of PTO hours already used in the current year.
- **Balance**: The PTO remaining balance (Hours Accrued added to Carryover hours then subtract Hours Used).
- **Dependents**:
  - **Name**: The dependent's name.
  - **Gender**: The dependent's gender.
- **Year-To-Date Summary**:
  - **Pay Description**: Pay code description.
  - **Hours**: The paid year-to-date hours.
  - **Amount**: The amount paid year-to-date.
  - **Deduction**: The deduction description.
  - **Amount**: The amount of deductions paid year-to-date.
  - **Tax**: The tax description.
  - **Amount**: The amount of tax paid year-to-date.
• **Hire Date**: The date the employee was hired. The report sorts on this column.
• **Employee ID**: Employee ID
• **Employee Name**: Employee name displays as last name first.
• **Position**: The employee's position
• **Seniority Date**: The system uses this date to calculate the employee's benefits. You can adjust this in the Employee Details Work tab to give the employee more seniority than the last hire date.
• **Pay Method**: The method in which the employee is paid
• **Hourly Rate**: The employee pay rate based on hours
• **Salary**: The employee salary pay rate based on pay period
• **Annual Pay**: The employee pay rate based on an annual basis

**Employee Pay Rate Report**

Your organization can use the *Employee Pay Rate Report* to view information about employee pay rates.

Figure 142: Employee Pay Rate Report

1. Enter the **Selection Parameters** to determine what displays on the report:
   - Enter the **Effective Date** for the employee information you want to view in the report. The report will display information as of the date entered.

2. Set the **Sort Parameters**:
   - Select the **Primary Sort** for the report.
   - You can select a **Secondary Sort** and **Tertiary Sort**.
   - Select the **Detail Sort** (Employee Name, Employee Unique ID).
3. Set the **Report Parameters**:
   - Select the **Report Type**:
     - **Detail w/Break Totals**: Includes a break and a sub-total for each of the sort options entered (except employee name), as well as a grand total for all employees.
     - **Detail Only**: Includes the detail information without sub-totals, only a grand total for all employees.
     - **Summary Only**: Does not include details, but only sub-totals for each of the sort options entered (except employee name) as well as a grand total for all employees.
   - Select **Sort on Sort Parameters Descriptions** to sort the report by the descriptions instead of the codes selected as the Sort Parameters.
   - Select **Page Break on Primary Sort** to start a new page for the selected Primary Sort items.

4. Set the **Other Parameters**:
   - Select the **Employee Unique ID** to use in the report (**Employee ID**, **Employee Number**).
   - You can select up to three work assignments to display in the report using the **Display Work Assignment 1**, **Display Work Assignment 2**, and **Display Work Assignment 3** drop-downs.
   - Select **Exclude Terminated Employees** to exclude terminated employees from the report.
   - Select **Include Hourly Employees Only** to run the report for only those employees who are paid an hourly rate.

5. Enter the **Report Filters** to display on the report:
   - Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that **Location**.

6. Click **Save**.

Figure 143: Employee Pay Rate Report

The report columns that display are based on the criteria specified in the form:

- **Employee ID**: The employee ID.
- **Employee Name**: The employee name.
- **Hire Date**: The most recent date of hire for the employee.
- **Effective Date**: The effective date of the pay rate change.
• **Hourly Rate**: The hourly pay rate for the employee.
• **Standard Hours**: The number of work hours per week for the employee.
• **Annual Wages**: The employee's annual wages.
• **Pay Method**: The pay method used for the employee.
• **Employee Count**: The number of employees included in the report.
• **Report Totals**: The totals for all amounts in the report.

Employee PTO Detail Report

This report provides information about employees' paid time off.

Figure 144: Employee PTO Detail Report Form

1. Enter the Selection Parameters to determine what displays on the report; if left blank, all employees display:
   • Enter the report filters to display on the report:
     • Enter the **Employee Status**. The **Status Description** displays.
     • Enter the **Register Type**. The **Class Description** displays.
   • Select the **Report Type** to determine what information displays in the report:
     • **PTO YTD Detail Report**: This report displays an employee's paid time off details in a year-to-date format.
     • **PTO Absence Summary Report**: This report displays a summary of absences.
     • **PTO Absence Summary Report by Department**: This report displays a summary of absences by department.
     • **PTO Absence Summary Report with Accrual Level**: This report displays a summary of absences, including accrual.
     • **PTO Absence Summary Report with Accrual Level by Location**: This report displays a summary of absences by location, including accrual.
     • **PTO Absence Summary Report with Buyback**: This report displays a summary of absences, including buyback.
     • **PTO Absence Summary Report with Buyback by Department**: This report displays a summary of absences by department, including buyback.
     • **PTO Absence Summary Report with Buyback by Location**: This report displays a summary of absences by location, including buyback.
     • **PTO Absence Summary Report with Buyback by Pay Group**: This report displays a summary of absences by pay group, including buyback.
     • **PTO YTD Absence Report by Hours Used**: This report displays year-to-date absences by hours.
- **PTO Payroll Equivalent Report For Current Year**: This report displays PTO as payroll equivalent for the current year.
- **PTO Payroll Equivalent Report For Previous Year**: This report displays PTO as payroll equivalent for a previous year.
  - Enter the **Report Year**.

2. Click **Run**.

Figure 145: Employee PTO Detail Report

The report columns that display are based on the criteria specified in the form:

- **Employee Name**: Employee name displays as last name first.
- **Employee**: Employee ID
- **Register Type**: The paid time off type.
- **Start Date**: The date the paid time off starts.
- **Accrued Thru**: The date through which the paid time off is accrued.
- **Year End Date**: The paid time off year end date.
- **Plan**: The paid time off plan description.
- **Carryover**: The amount of time carried over from a previous year.
- **Accrued**: The amount of time accrued during this plan time frame.
- **Used**: The amount of time used during this plan time frame.
- **Available**: The amount of time carryover added to accrued minus the used time.
- **Date Taken**: The date the paid time off was used.
- **Day Taken**: The day the paid time off was used.
- **Reason**: The reason given to use the paid time off.
- **Hours Used**: The amount of time used for that date.
- **Location**: The employee's location description.
- **Accrual Level**: The accrual level entered.
- **Dept**: The employee's department description.
• **Buyback Amount**: The dollar amount the remaining paid time off is worth.
• **Hourly Rate**: The employee's hourly rate.
• **Pay Group**: The employee's pay group description.

**Employee Ranked Service Report**

This report provides a listing of employees and their years of service.

Figure 146: Employee Ranked Service Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select how to sort the report, either Based on Seniority or Last Hire Date.
   - Enter the **Report Effective Date** to calculate the years of service.
   - Select the **Status Class Code** of the employee (for example, Active, On Leave, or Terminated).
   - Enter a pay amount in the **Annual Pay Above or Equal To** field to display employees whose annual pay is at or above that amount.
   - Enter a pay amount in the **Annual Pay Below or Equal To** field to display employees whose annual pay is at or below that amount.
   - Enter the report filters to display on the report:
     • Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.

2. Click **Run**.

Figure 147: Employee Ranked Service Report

The report columns are:
• **Years**: Employee's years of service based on the entered Report Effective Date.
• **Date**: Employee's last hire date.
• **Employee ID**: Employee ID.
• **Employee Name**: Employee name displays as last name first.
• **Job Title**: Employee's position description.

### Employee Retirement Loans Report

This report provides a listing of employees' retirement loans.

Click **Run**.

Figure 148: Employee Retirement Loans Report

The report columns are:

• **Employee Name**: Employee name displays as last name first.
• **Emp. ID**: Employee ID.
• **Loan Number**: The assigned loan number.
• **Loan Date**: The date the employee received the loan.
• **Loan Amount**: The dollar amount of the loan.
• **Pay-Back Amount**: The dollar amount to be paid back.
• **Deduction Start-Date**: The date the deduction starts to be taken from the pay period.
• **Payment Amount**: The dollar amount deducted each pay period.
• **Paid Amount**: The dollar amount that had been paid on the loan.
• **Balance**: The dollar amount due on the loan.

### Employee Skills Report

This report provides a listing of employee's recorded skills.
1. Use the **Report Parameters** and **Report Filters** to determine what displays on the report; if left blank, all employees display:
   - Select **Sort Criteria** to sort by Skills Codes, Employee, or Overdue.
   - Select each **Employee Status Class** to include on the report. For example, you might want to select only employees who are active or on leave so that terminated employees are excluded.
   - Enter the report filters to display on the report:
     - Enter the field type. The field label displays. For example, if you enter an **Employee ID**, the **Employee Name** displays. The report displays records for that employee.

2. Click **Run**.

The report columns are:
- **Employee ID**: Employee ID.
- **Employee Name**: Employee name displays as last name first.
- **Skills Code**: The entered skills code.
- **Skills Description**: The description on the skills code.
- **Level**: The employee's recorded level of this skill.
- **Comment**: Any comments entered for this employee skill.
Employee Terminations Report

This report provides a listing of employee terminations.

Figure 151: Employee Terminations Report Form

1. Enter the Selection Parameters to determine what displays on the report; if left blank, all employees display:
   - Select the Month to display on the report.
   - Select the Year to display on the report.
   - Enter the report filters to display on the report:
     - Enter the field type. The field label displays. For example, if you enter a Location, the Location Name displays. The report displays records for that Location.

2. Click Run.

Figure 152: Employee Terminations Report

The report columns are:

- Employee ID: Employee ID.
- Termination Date: The date the employee was last terminated.
- Employee Name: Employee name displays as last name first.
- Department/Location: The employee's assigned department and location at the time of the termination.
- Division: The employee's assigned division at the time of the termination.
- Termination Reason: The recorded reason for the employee's termination.
• **Hire Date**: The employee's last hire date.
• **Annual Pay**: The employee's annual pay.
• **Years of Service**: The numbers of years of employment based on the last hire date and termination date.

**Employee Test Results Report**

This report provides a listing of employee test results.

Figure 153: Employee Test Results Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   • Enter the report filters to display on the report:
     • Enter the field type. The field label displays. For example, if you enter an **Employee ID**, the **Employee Name** displays. The report displays records for that employee.
     • Select **Selection Criteria** to sort by Last Audio, Next Audio, Last Drug, Next Drug, Last Physical, or Next Physical Test Results.
     • Enter a **Test Results On or After** date to select employees that completed their test on or after that date.
     • Enter a **Test Results On or Before** date to select employees that completed their test on or before that date.

2. Click **Run**.

Figure 154: Employee Test Results Report

The report columns are:

• **Employee ID**: Employee ID.
• **Employee Name**: Employee name displays as last name first.
• **Height**: Employee's height.
• **Weight**: Employee's weight.
• **Last Audio Test Date**: The date of the employee's last audio test.
• **Last Audio Test Result**: The result of the last test.
• **Next Audio Test Date**: The date of the next required test.
Employee with Status as of Date Report

This report provides a listing of employees' statuses as of a specified date.

Figure 155: Employee with Status as of Date Report Form

1. Enter the **Selection Parameters** to determine what displays on the report:
   - Select the employee status class (for example, Active, On Leave, or Terminated). This field is required.
   - Enter **As Of Date** to display the employee statuses based on that date. This field is required.

2. Click **Run**.

Figure 156: Employee with Status as of Date Report

The report columns are:

- **Location**: The location code and name.
- **Employee Name**: Employee name displays as last name first.
- **Status**: The status class of the employee.
- **Type**: The type class of the employee (for example, Full-Time or Part-Time).
- **Birth Date**: The employee’s birth date.
- **Original Hire Date**: The date the employee was originally hired.
- **Annual Pay**: The employee’s annual pay.

**OSHA Report (300 or 300A)**

This form pulls data from the OSHA Cases records to complete the OSHA 300 and 300A Reports. To ensure data populates correctly, it is recommended to select the **Report Incident on the 300A Log** field on the OSHA Cases form (found under HR|Change). This report is required by the U.S. Department of Labor to maintain records of all work-related injuries and illnesses.
1. Enter the **Selection Parameters** to determine what displays on the report:
   - Select the **Year**.
   - Select the client's **Location**.
   - Select the **Report Type**, either the **OSHA 300** or **OSHA 300A**.

2. Click **Run**.

The OSHA 300 Report (Log of Work-Related Injuries and Illnesses) classifies work-related injuries and illnesses. The report also records the extent and severity of each case. If the client has more than one establishment or site, you must keep separate records for each physical location that is expected to remain in operation for one year or longer.

The OSHA 300A Report (Summary of Work-Related Injuries and Illnesses) displays the work-related injury and illness totals for the year in each category.
OSHA 300A File Download

Organizations can use the OSHA 300A File Download form to download the form OSHA 300A into a comma separated values (.csv) file to use for electronic filing.

The OSHA 300A File Download displays the work-related injury and illness totals for the year in each category for each location selected. The report includes all of the same information as in the OSHA Report with the 300A Report Type selected.

Figure 160: OSHA 300A File Download

1. Enter the Selection Parameters to determine what displays on the report:
• Select the Year.
• Select Use Company Legal Name if needed.
• Enter the client's Location. This is optional, and you can enter multiple locations as needed.
2. Enter a Change Reason if generating a file to correct a previously submitted file. This is optional.

PTO Approval Report

Use the PTO Approval Report form to run the on-demand PTO Approval Report.

The report displays a summary of all PTO requests not yet approved, planned, or already taken for a given time for the organization's employees.

Figure 161: PTO Approval Report

1. Enter the Selection Parameters to determine what displays on the report:
   • Enter a Leave Start Date and a Leave End Date to run this report for a date range. This is required.
   • Select the Status Class you want to display in the report from the drop-down (Active, On Leave, Terminated).
   • Select the Type Class you want to display in the report from the drop-down (Full-Time, Part-Time).
2. Set the Sort Parameters:
   • Select the Primary Sort for the report.
3. Set the **Report Parameters**:
   
a. Select the **Detail Sort**:
   
   • **Employee Name**: This is the default option. If used as the **Detail Sort**, the report sorts details by employee.
   
   • **Leave Type**: The report sorts details by leave type.

   b. Select the **Report Type**:
   
   • **Detail w/Break Totals**: Includes a break and a sub-total for each of the sort options entered (except employee name), as well as a grand total for all employees.
   
   • **Detail Only**: Includes the detail information without sub-totals, only a grand total for all employees.
   
   • **Summary Only**: Does not include details, but only sub-totals for each of the sort options entered (except employee name) as well as a grand total for all employees.

   c. Select the **Page Break on Primary Sort** to start a new page for the selected Primary Sort items.

4. Set the **Other Parameters**:
   
   • Select **Output File** to create an output file of the report.
   
   • Select **Display PTO Comments** if needed.

5. Enter the **Report Filters** to display on the report:
   
   • Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.

6. Click **Run**.

   Figure 162: PTO Approval Report

The report columns that display are based on the criteria specified in the form:

- **Emp ID**: Employee ID
- **Employee Name**: Employee name displays as last name first.
- **Request Date**: The date and time the PTO request was submitted.
- **Status**: The PTO status (**Approved**, **Pending**).
- **Leave Type**: The type of leave requested.
- **Leave Start Date**: The PTO start date.
- **Leave End Date**: The PTO end date.
• **Hours Requested**: the number of PTO hours requested.
• **Hours Available**: Displays as Unlimited if it is unlimited PTO. It displays the value as of last payroll if PTO is accrued.
• **Approver**: The administrator who approved the PTO.
• **Approval Date**: the time and date the PTO was approved.
• **PTO Comment**: Additional comments on the PTO (optional).

# PTO Hours Taken Report

This report provides a listing of paid time off taken per employee.

Figure 163: PTO Hours Taken Report

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   • Select the **PTO Code** to display.
   • Enter the report filter to display on the report. Enter the **Employee ID**. The **Employee Name** displays.
   • Enter the **Absent Date On or After** to include employees absent on that date or after.
   • Enter the **Absent Date On or Before** to include employees absent on that date or before.
2. Click **Run**.
The report columns are:

- **PTO Code**: The employee's available PTO codes.
- **Employee ID**: Employee ID.
- **Employee Name**: Employee name displays as last name first.
- **PTO Date**: The date of the paid time off.
- **Reason**: The reason entered for the paid time off.
- **PTO Hours**: The PTO hours taken.

**PYTD Retirement Contribution Summary**

This report provides a listing of employee's retirement contribution by year.

1. Enter the **Selection Parameters** to determine what displays on the report:
   - Enter the **Plan Year**.
2. Click **Run**.
Figure 166: PYTD Retirement Contribution Summary

The report columns are:

- **Employee Name**: Employee name displays as last name first.
- **Emp. ID**: Employee ID
- **Plan ID**: The plan ID
- **Pre-Tax Contrib**: The pre-tax contribution amount.
- **ROTH Contrib**: The ROTH contribution amount.
- **Post-Tax Contrib**: The post-tax contribution amount.
- **ER-Match Contrib**: The employer contribution.
- **ER NonElec Contrib**: The employer non-elective contribution.

Ranked Salary Report

This report provides a listing of employee's salary information.

Figure 167: Ranked Salary Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Enter the report filters to display on the report:
     - Enter the field type. The field label displays. For example, if you enter a Location, the **Location Name** displays. The report displays records for that Location.
     - Select **Sort Criteria** to sort by Annual Salary or Department.
2. Click **Run**.
The report columns are:

- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID.
- **Annual Salary**: The employee's annual salary.
- **Unit Rate**: The employee's unit rate.
- **Position**: The employee's position description.
- **Department**: The employee's department description.

**Retirement Matching Percent Report**

This report provides a listing of employee's and employer retirement information.

1. Enter the **Selection Parameters** to determine what displays on the report:
   - Enter the **Start Date** and the **End Date** to run this report for a date range.
   - Select **Last Batch** to display only the last batch on the report.
   - Select **Exclude Expense Reimbursement** to not include reimbursement on the report.
2. Click **Run**.
The report columns are:

- **Employee Name**: Employee name displays as last name first.
- **Employee ID**: Employee ID.
- **Department**: The employee's department.
- **Location**: The employee's location code.
- **Hours Worked**: The employee's hours worked for that date range.
- **Gross Wages**: The employee's gross wages (before tax) for that date range.
- **Eligible Compensation**: The amount of eligible wages that contribute to the retirement plans.
- **ROTH + Elective Percent**: The amount of eligible wages applied to the ROTH and Elective retirement plans.
- **Pre-tax + Catch-up**: The percent of wages that is applied to the pre-tax and catch-up retirement plans.
- **ROTH + Catch-up**: The amount of wages that is applied to the ROTH and catch-up retirement plans.
- **Employer Match**: The amount that the employer is matching to the employee contributed amount.
- **Current Percent**: The percent of wages the employee contributes to a retirement plan.

**Reviews Due By Month Report**

This report provides a listing of when an employee is due for a review.
Reviews Due By Month Report

Figure 171: Reviews Due by Month Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Select the **Month** to display on the report.
   - Select the **Year** to display on the report.
   - Select the **Type of Review**, either Performance or Pay Rate.
   - Select **Yes** to display Open Reviews from Previous Months.
   - Enter the report filters to display on the report:
     - Enter the field type. The field label displays. For example, if you enter a Location, the Location Name displays. The report displays records for that Location.
     - Select the **Status Class Code** of the employee (for example, Active, On Leave, or Terminated).
     - Enter a pay amount in the Annual Pay Above or Equal To field to display employees whose annual pay is at or above that amount.
     - Enter a pay amount in the Annual Pay Below or Equal To field to display employees whose annual pay is at or below that amount.

2. Click **Run**.

Figure 172: Reviews Due by Month Report

The report columns are:

- **Date**: The date the next review is due.
- **Employee ID**: Employee ID.
- **Employee Name**: Employee name displays as last name first.
- **Position**: The employee's position description.
- **Pay Period**: The employee's pay period description.
• **Pay Method**: The employee's pay method.
• **Hourly Rate**: The employee's hourly rate.
• **Salary**: The employee's salary rate.
• **Annual Pay**: The employee's annual pay.
• **Date Completed**: The date of the last review completed.

**Salary As Of Report**

This report provides a listing of employee salary information.

Figure 173: Salary As Of Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   • Enter **As Of Date** to display employees' salaries based on that date.
   • Enter the report filters to display on the report:
     • Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.
   • Select **Sort Criteria** to sort by Employee Name, Annual Salary, or Department.

2. Click **Run**.

Figure 174: Salary As Of Report

The report columns are:

• **Employee Name**: Employee name displays as last name first.
Statistics by Position Report

This report provides statistics per job positions.

Figure 175: Statistics by Position Report Form

1. Enter the **Selection Parameters** to determine what displays on the report; if left blank, all employees display:
   - Enter the report filters to display on the report:
     - Enter the field type. The field label displays. For example, if you enter a **Location**, the **Location Name** displays. The report displays records for that Location.
     - Select **Sort Criteria** to sort by Position Code or Position Title.

2. **Click Run.**

Figure 176: Statistics by Position Report

The report columns are:

- **Position Code**: The position codes entered in the client.
- **Position Title**: The description of the position code.
- **Head Count**: The total employees for that position.
- **Average Rate**: The average hourly/unit rate of that position.
• *Average Annual Salary*: The average annual salary of that position.
• *Total Annual Salary*: The total annual salary for all employees in that position.
Section 3 - How-To Procedures
Appendix A: Override GeoCode for Employee Residence

You can override the employee’s Resident Address GeoCode on the Employee Details form so that the system will calculate taxes using a different taxing municipality than the one for their residence.

1. Refer to the Vertex Calculation Guide in the Customer Resource Center to determine the GeoCode for the appropriate taxing municipality for the selected employee.
2. Open Employee Details (found in the HR menu under HR|Change).
3. Enter the Employee ID and then select Address tab (Figure 177).

Figure 177: Resident Address

4. In the Override GeoCode field, enter the GeoCode determined in step 1.
5. Enter the Override End Date on which the Override GeoCode should no longer be used.
   If there is no end date at this time, then leave this field blank. The GeoCode override remains in effect until it is changed.
6. Click Save.
Appendix B: Assigning School District GeoCodes

You can assign a School District GeoCode in Employee Details in PrismHR to ensure that the system properly calculates the employee's school district taxes.

1. Refer to the Vertex Calculation Guide in the Customer Resource Center to determine the school district GeoCode for the appropriate state, town and school district for the selected employee.
2. Open Employee Details (found in the HR menu under HR|Change).
3. Enter the Employee ID and then select the Tax tab.
4. Scroll down to the Miscellaneous panel (Figure 178) and enter the School District GeoCode determined in step 1.

Figure 178: Employee Details Tax tab - Miscellaneous Panel

5. Click Save.