ProService HAWAII

HR that powers your business

Online Services Manager Guide

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Online Client Services Summary

ProService Hawaii features a Human Resources Management System (HRMS) that allows our clients to securely access their company's HR-related information from any internet accessible personal computer. The system provides to our clients:

- **A direct link to view and edit employee information and status in real time. Manage HR functions such as address changes, certification tracking and events.**
- **Web Payroll Entry solution to securely and accurately submit hours worked.**
- **Simple integration with most other digital systems, including Time & Attendance solutions.**
- **View, print, and save company reports and documents including: payroll reports; health care benefit summaries; paid-time-off/sick leave/vacation tracking reports; employee census data.**

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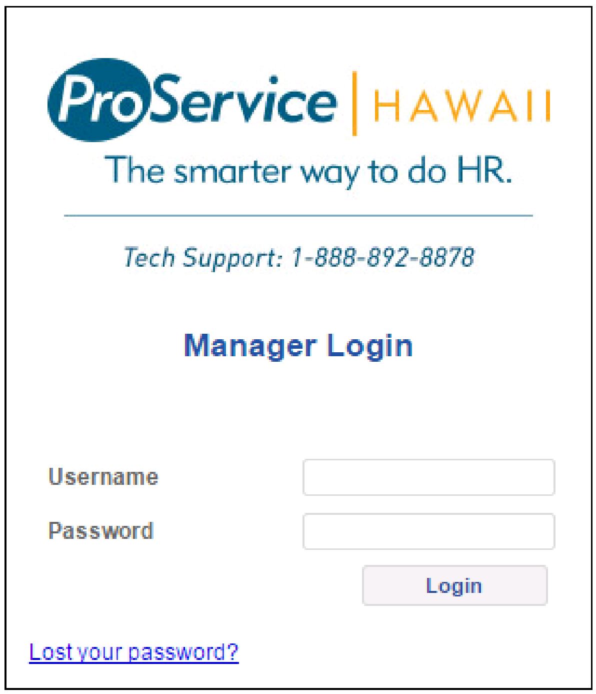
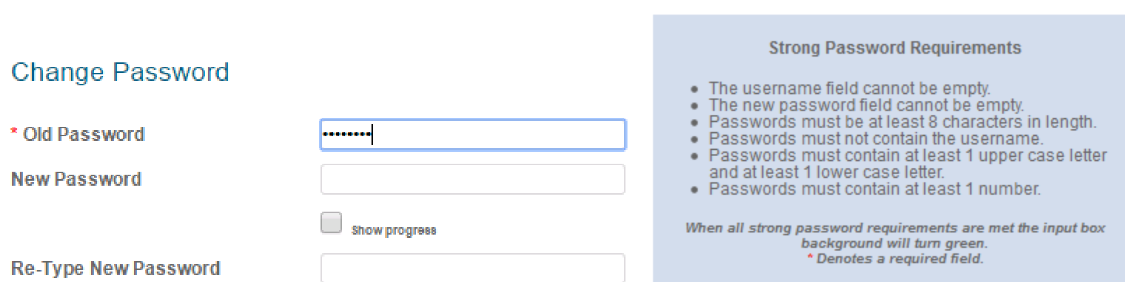
Accessing the Online Client Services Web Portal

To access the website, go to: https://login.proservice.com/hrp/ClientLogin or go to http://www.proservice.com/ and click on the CLIENT LOGIN link at the top right of the screen.

You should have been provided your login and password information. If you do not know your login information, contact your payroll specialist for assistance.



After the first login, you can change your password by going to Administration>Password Change.



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Getting Around

Moving around the website is as simple as navigating your favorite website. Most of your choices are available from the menu navigation bar on the left side of the browser. You will select items by clicking on the menu item and then clicking on the sub-menu item below.

Menu Item	Description
Employee	From the **Employee Inquiry** section, managers can access information about their employees. This includes an Employee Overview, Check Stubs, PTO, a Benefits Summary and W-2 Reprints.
Employee Maintenance	From the **Employee Maintenance** section, managers view and update information for an employee, including their address, Work Data records, Labor Allocations, Direct Deposit Accounts and Skills Records.
H/R Actions	**H/R Actions** allows managers to update information in the system such as Job and Pay rate and Status.
Documents	**Documents** is where documentation such as New Hire Packets, Benefits Summaries, Employee Management forms and client specific forms are stored and can be viewed and downloaded.
Payroll Entry	**Payroll Entry** allows managers to enter time for payroll submission, upload timesheets or calculate pay using a Net Pay calculator.
Web Reports – Payroll & Invoicing	**Web Reports – Payroll & Invoicing** contains the Batch Inquiry and Invoice Summary web reports for payroll review. The web reports also allow for managers to drill further into the batch details from the screen.
Web Reports – Employee Info	**Web Reports – Payroll & Invoicing** contains basic employee reports including Active Employee, Birthday, PTO and Census reports.
Self Service Reports	**Self Service Reports** contains several reporting sections where managers can enter prompts and generate data. This section includes Employee Info Reports, HR Reports, Benefits reports and Payroll Reports.
Code Maintenance	**Code Maintenance** allows managers to add Departments, Projects, Divisions, Locations Events and Skills to the system for assignment to employees.

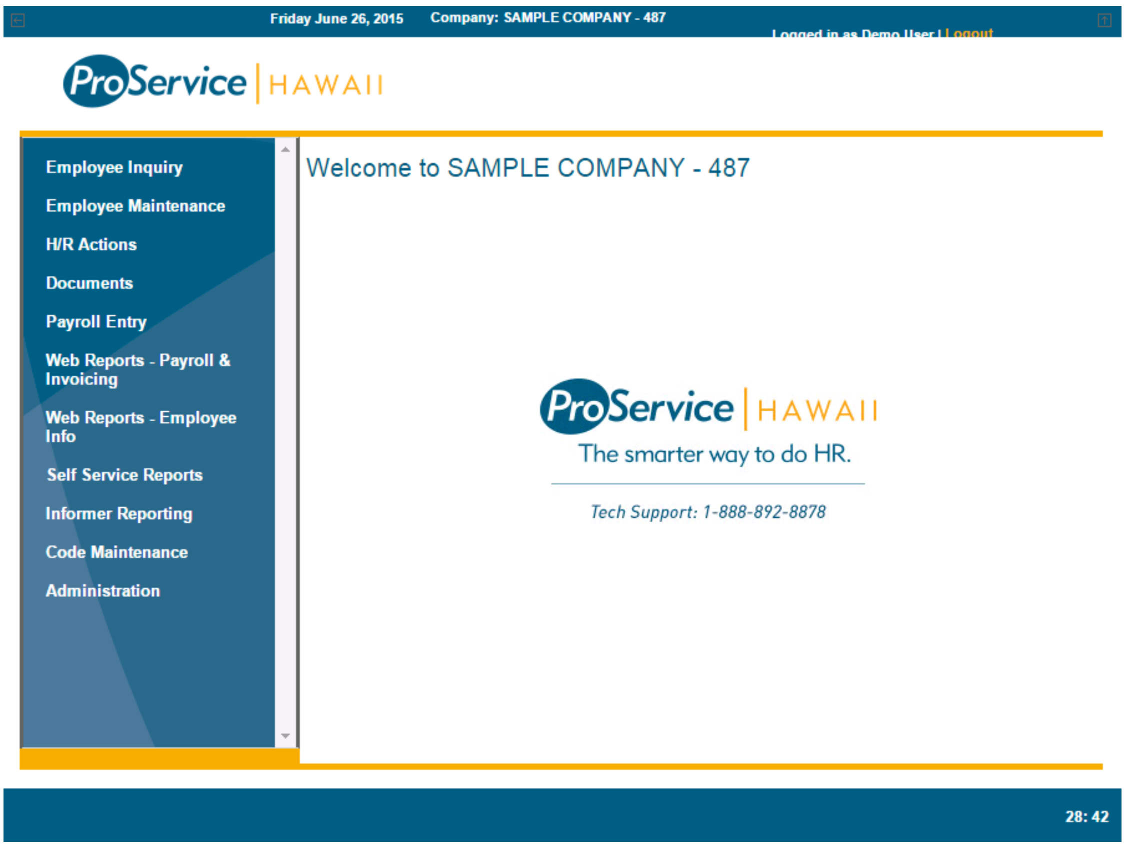
Icons and Actions

No matter where you are in the system, you will be presented with similar icons for your convenience. These icons will launch processes specific to the pages that you are browsing in at the time.

Icon	Description
Go	The Go button will take you to a screen with search results based on the selection entered. Usually Go is used after entering an Employee Name into a search box.
Continue	The Continue button takes you to the next screen of the process.
Edit OR 	The Edit button, sometimes displayed as a pencil, allows you to edit the information previously entered on the page.
SAVE Changes	The Save changes button must be used to complete any additions or changes. If this button is not used before navigating away from a window, your changes will be lost.
New	The New button allows you to add a new record, such as a new direct deposit account or skill for an employee.
Open as Spreadsheet	Open Spreadsheet is used to save a web report as an Excel document.
Print	The Print button will print a report version of the screen that you a currently working in. This print will be directed to a printer connected to your PC.
Help	The Help button will provide you contextual help for the process or screen that you are currently working in. Please be aware some of the help may include processes not activated for your company.
	A white X in a red box is a delete button. Clicking on this icon will delete the record on the line.

Home Page

After logging in, the first page you encounter is the Home Page. From here you can access other areas of the system.



Page features:

- Menu Navigation Bar (left side)– This menu allows you to access different sections of the site.
- Timeout Clock (bottom right) - The system will log you out after 30 minutes of inactivity. The clock counts down the remaining time until you are logged out. A warning will appear when 5 minutes remain on the clock. The clock will reset to 30 minutes with every action you complete including navigating to a new page or clicking on a button.
- Logout (top right) – This button will log you out of the system and take you back to the login page.
- Support – If you need support for the system, the email support button (top right) will open an email to our support team and the Tech Support number (center splash page) will allow you to reach a support rep.

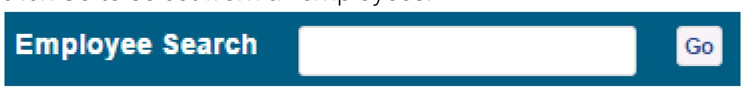
Employee Overview

Location: Employee Inquiry >Employee Overview	**Action:** Review employee demographic, employment & tax data	**Paperwork required to retain:** None

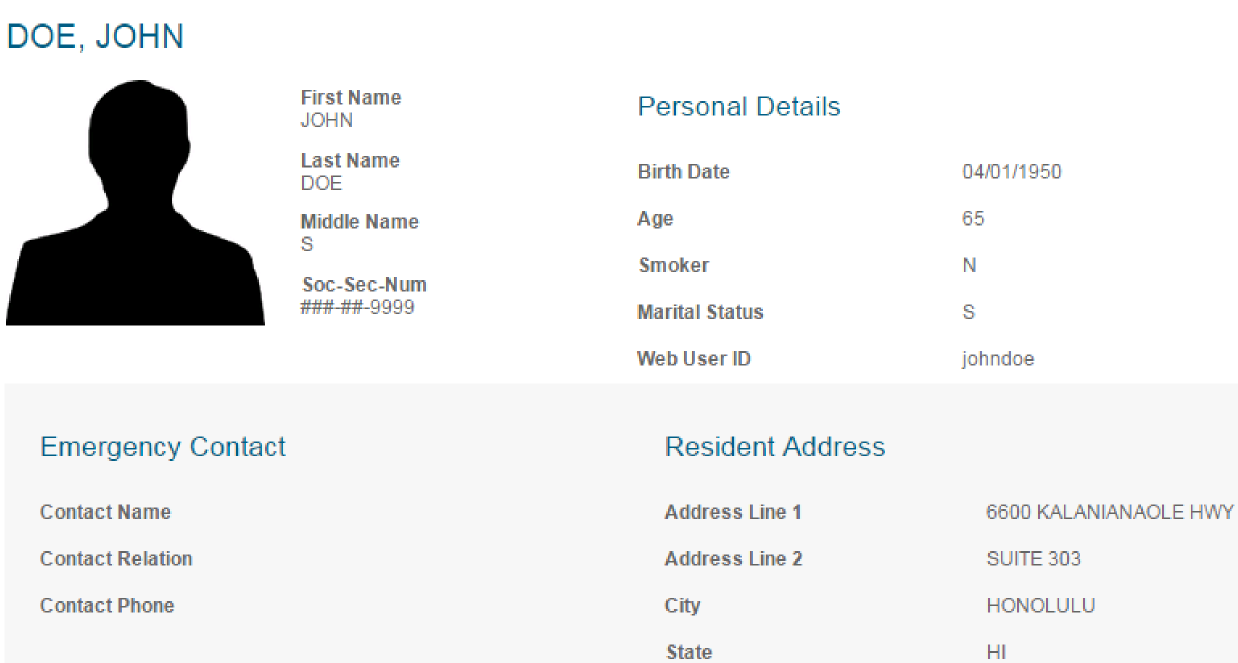
Process:

1. Click on **Employee Inquiry – Employee Overview** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.



3. The employee information will display on the screen.



Check Stub

Location: Employee Inquiry >Employee Overview	Action: Review and reprint employee check stubs	Paperwork required to retain: None

Process:

1. Click on **Employee Inquiry – Check Stub** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.

   Employee Search [ ] Go

3. Select the year and check details will display for that year.

   History Year

   Select Year 2015 ▼

Pay Date	Check Number	Gross Pay	Taxes	Deductions	Net Pay	Type
01/23/2015	1094584	2,000.00	604.88	0.00	1,395.12	C
01/09/2015	1094574	2,000.00	604.88	0.00	1,395.12	C

4. Clicking on the pay date will open the check detail screen and allow you to print the stub or details.

Earnings Detail for Doe, John S 01/23/2015

Description	Hours	Rate	Amount	Department	Location
Salary	80.00	25.0000	2,000.00	SALES	1

Deductions Detail

Description	Amount
401k Standalone	0.00
Clt 401k Cu	0.00
Clt 401k-roth	0.00
Clt 401kroth Cu	0.00

Taxes Detail

Description	Amount
FEDERAL INCOME TAX	316.11
FICA - MEDICARE	29.00
FICA - OASDI	124.00
HAWAII STATE INCOME TAX	135.77

Reprint Check Stub | Print Details

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Payroll Inquiry

Location: Employee Inquiry >Payroll Inquiry	**Action:** Review employee pay history and YTD summary	**Paperwork required to retain:** None

Process:

1. Click on **Employee Inquiry – Payroll Inquiry** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.

   Employee Search [ ] Go

3. The pay history, compensation and YTD summary will display on screen.

Pay History

Effective Date	Pay Rate	Change $	Change %
04/01/2013	$ 25.0000	$ 43,845.00	351.32%
04/23/2002	$ 520.0000	$	%
03/31/2002	$ 240.0000	$	%
07/11/2001	$ 6.0000	$	%
05/06/2001	$ 6.0000	$ -23,920.00	-65.71%
04/01/2001	$ 17.5000	$ -5,200.00	-12.50%
04/01/2000	$ 20.0000	$	%

Job History

Effective Date	Job
04/01/2000	OUTSIDE SALES

Compensation

Current Pay Rate	$ 56,325.00 per year
Effective Date	04-01-2013
Last Pay Date	01/23/2015
Last Check #	1094584
Last Check Amount	$ 1,395.12

Year To Date Summary

Select Year	2015 ▼	
Gross Earnings	$ 6,000.00	
Gross Pay	$ 6,000.00	
Reg Wk-1		$ 2,000.00
Salary-regular		$ 4,000.00
Payroll Deductions	$ 0.00	
Federal Tax Withheld	$ 948.33	

Benefits Details

Location: Employee Inquiry > Benefits Summary Employee Inquiry > 401K Summary Employee Inquiry > Flex Spending	**Action:** Review employee benefit details	**Paperwork required to retain:** None

Process:

1. Click on **Employee Inquiry – Benefits Summary** to access benefits information, **Employee Inquiry – 401K Summary** to access 401K information or **Employee Inquiry – Flex Spending** to access FSA information.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.

   Employee Search [ ] Go

3. The information will display on the screen.

Benefits:

Employee Benefits

Plan Name	Coverage Level	Pre Tax?	Coverage Start Date	Coverage End Date	Employee Contribution	Company Contribution	Monthly Premium
HDS PREVENTIVE CARE	Single	Yes	12-01-2011	None	$0.00	$27.00	$27.00
COMPMED - MED ONLY 010	Single	Yes	11-01-2011	None	$0.00	$156.00	$156.00

401K Summary:

Retirement Summary

Select Year	2015
Base Retirement Earnings	$ 0.00
Elective Contributions (Pre-Tax)	$ 0.00
Catch-Up Contributions (Pre-Tax)	$ 0.00
Employee Contributions (Post-Tax)	$ 0.00
Retirement Loan Payments	$ 0.00

Flex Spending:

Plan Year

Select Flex Spending 2015 Go

Summary | Balances | Activity

Account	Elected Amount	YTD Deduction Amount	YTD Reimbursement Amount

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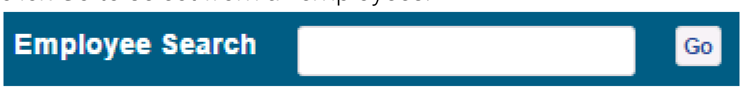
Paid Time Off

Location: Employee Inquiry >Paid Time Off	**Action:** Review an employee's PTO balances and PTO history	**Paperwork required to retain:** None

Process:

1. Click on **Employee Inquiry – Payroll Inquiry** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.



3. The PTO plans set up for the employee will display with their balances.

PTO Type	Accrued Through	Carry Over Expires	Year End	Carry Over Hours	Hours Accrued	Hours Taken	Hours Available
PTO	12-31-2014		03-31-2015	280.04	0.00	0.00	280.04

4. Clicking on the PTO Type will open details for that plan.

PTO Type	Accrued Through	Carry Over Expires	Year End	Carry Over Hours	Hours Accrued	Hours Taken	Hours Available
PTO	12-31-2014		03-31-2015	280.04	0.00	0.00	280.04

Taken | Year End | Accrued

Date	Description	Hours	Comment	Code

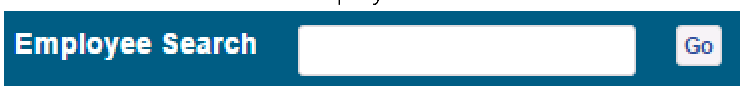
W-2 Reprint

Location: Employee Inquiry >W-2 Reprint	Action: Reprint an Employee's W-2	Paperwork required to retain: None

Process:

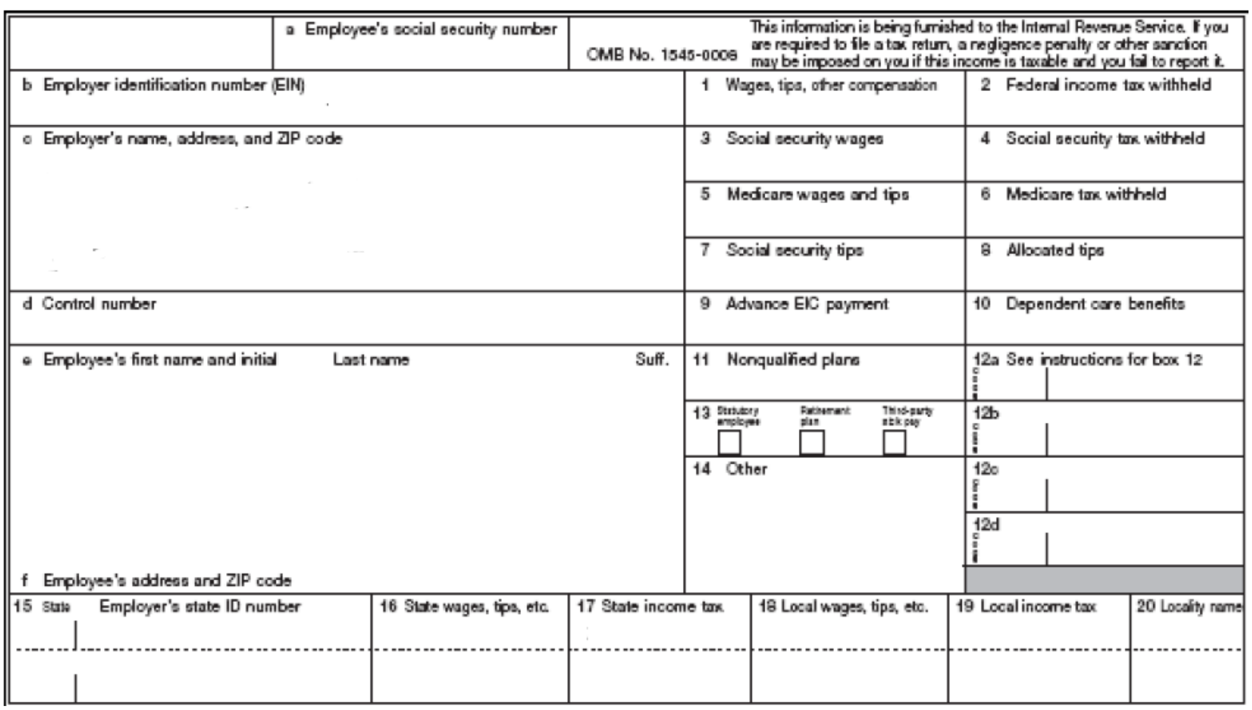
1. Click on **Employee Inquiry – W-2 Reprint** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.



3. Select the year from the drop down menu. Any W-2's issued for an employee while with ProService will be available.

4. Clicking Go will open the W-2 in a PDF document. Your browser may ask you to save it to your computer prior to opening.


a Employee's social security number
OMB No. 1545-0008
This information is being furnished to the Internal Revenue Service. If you are required to file a tax return, a negligence penalty or other sanction may be imposed on you if this income is taxable and you fail to report it.
b Employer identification number (EIN)
1 Wages, tips, other compensation
2 Federal income tax withheld
c Employer's name, address, and ZIP code
3 Social security wages
4 Social security tax withheld
5 Medicare wages and tips
6 Medicare tax withheld
7 Social security tips
8 Allocated tips
d Control number
9 Advance EIC payment
10 Dependent care benefits
e Employee's first name and initial
Last name
Suff.
11 Nonqualified plans
12a See instructions for box 12
13 Statutory employee
Retirement plan
Third-party sick pay
12b
14 Other
12c
12d
f Employee's address and ZIP code
15 State
Employer's state ID number
16 State wages, tips, etc.
17 State income tax
18 Local wages, tips, etc.
19 Local income tax
20 Locality name

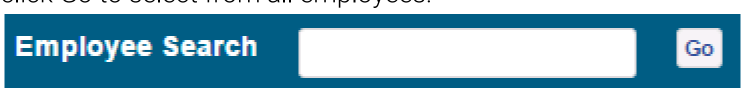
Personal Information

Location: Employee Maintenance> Personal Information	**Action:** Update employee address, personal details, name or emergency contact	**Paperwork required to retain:** Marriage certificate or legal document for name change

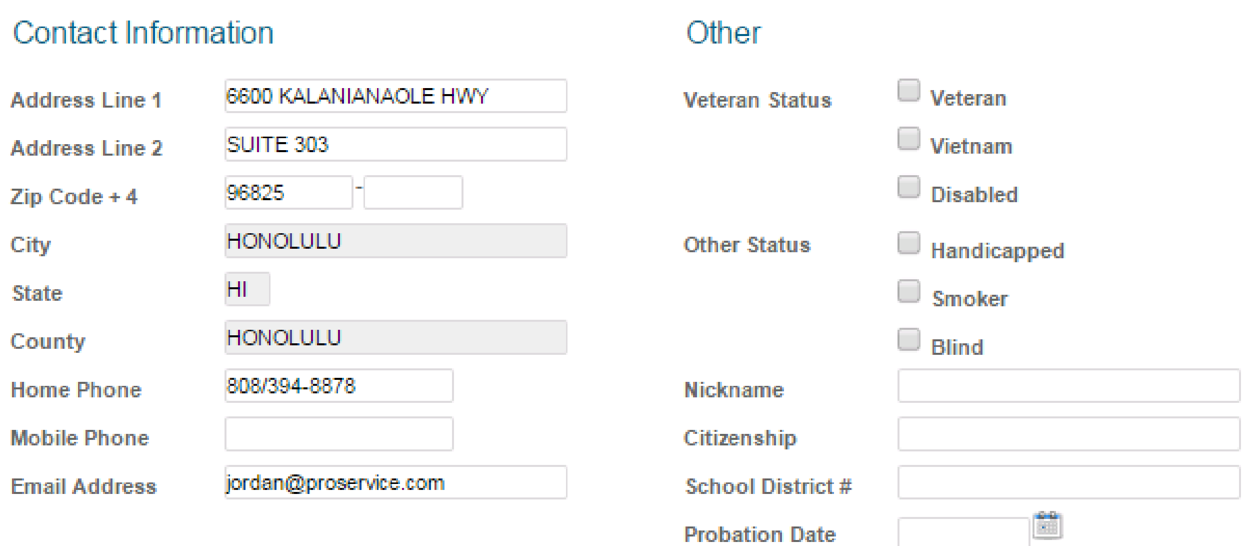
Process:

1. Click on **Employee Maintenance-Personal Information** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.



3. The employee personal data will display on the screen. Enter new or updated information into the fields you wish to update.



4. Click **Save Changes**

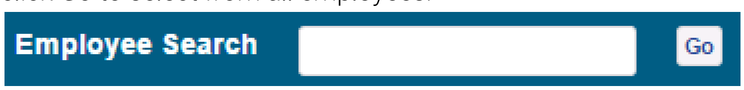
Work Data Record

Location: Employee Maintenance> Work Data Record	**Action:** Update employee 's work assignment or contact information	**Paperwork required to retain:** None

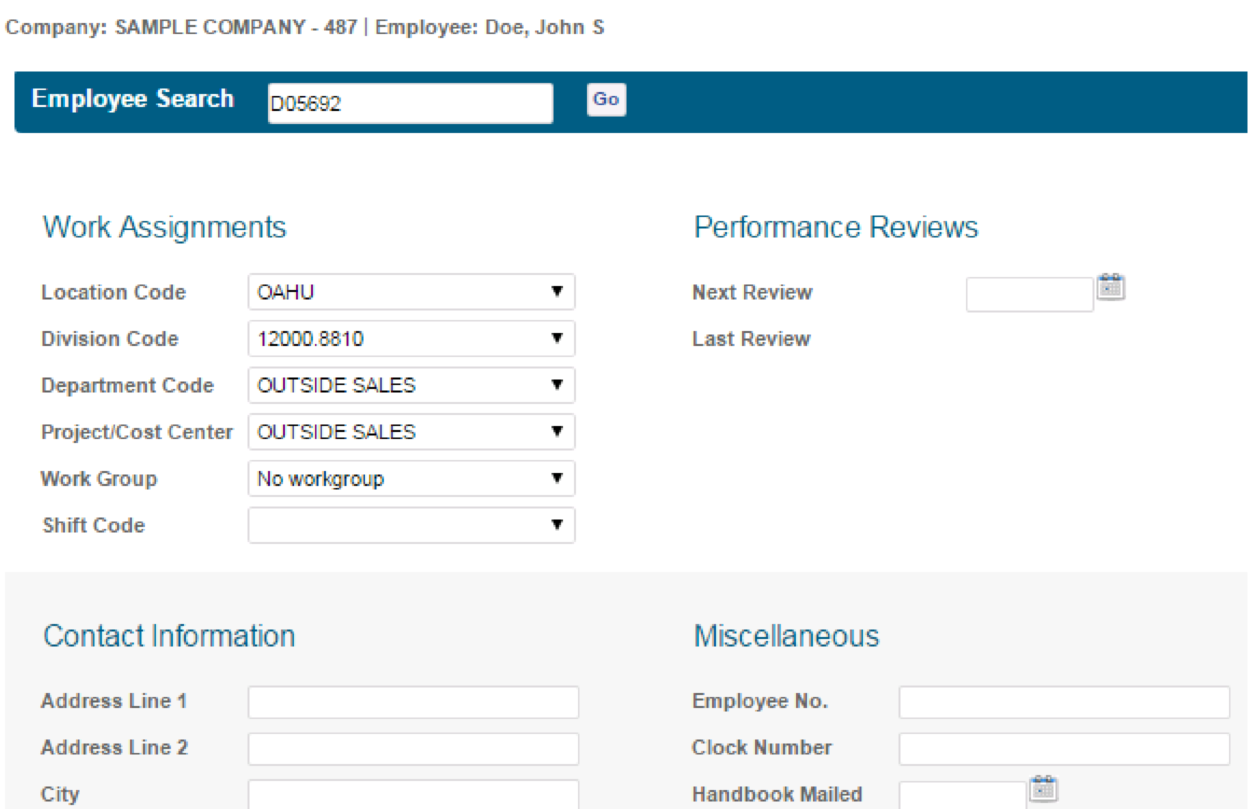
Process:

1. Click on **Employee Maintenance-Personal Information** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.



3. The employee work data will display on the screen. Enter new or updated information into the fields you wish to update.



4. Click **Save Changes**

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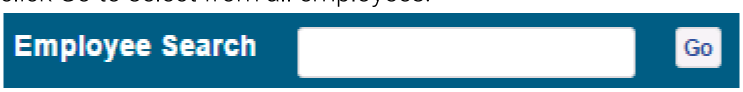
Direct Deposit

Location: Employee Maintenance> Direct Deposit Auth	**Action:** Add, update or delete an employee's direct deposit account	**Paperwork required to retain:** None

Process:

1. Click on **Employee Maintenance-Direct Deposit Auth** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.



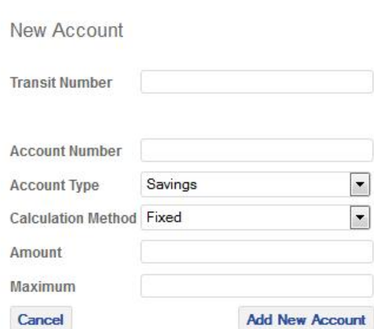
3. The employee's current account will display on the screen.

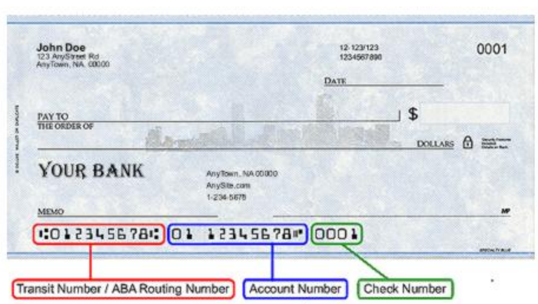
Note: Changes made in this form and any of its sub-forms will not be saved until the SAVE Changes button on this page is clicked

Transit Number	Account Number	Account Type	Calculation	Amount	Maximum	Account Status	Edit	Delete
063102152	12345678	Savings	Fixed	$200.00		Active		

Drag and drop rows to reorder accounts

   a. To edit an existing account click on the pencil
   b. To delete an account click on the red X
   c. To add a new account, click on **New** and enter the information. Click **Add New Account** when finished.





4. Click **Save Changes**

Note: All accounst will be placed in a pending status and will go through a prenote process with the bank to verify that the information entered is correct.

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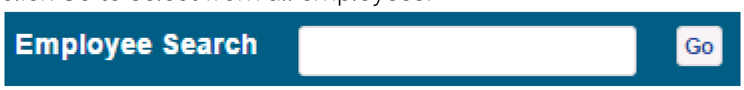
Employee Event Log

Location: Employee Maintenance> Employee Event Log	**Action:** Track any events an employee has attended such as training courses or seminars	**Paperwork required to retain:** None

Process:

1. Click on **Employee Maintenance-Employee Event Log** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.



Employee Event Log

Description	Effective Date	Action Date	Comment	Category	Number	Third Party
First Warning	11/01/2012	01/01/2013	Was tardy 3 days in a row. Follow up	Disciplinary Action	123456	
Microsoft Office Excel	08/09/2013	10/31/2013	Complete Training Course. Needs to	Training Courses		
Second Warning	04/10/2014	05/16/2014	Was tardy again. On probation for 3(	Disciplinary Action		
Employee of the Month	07/01/2014		Congrats to Kate on her award!	Award		

3. The employee's current events will display on the screen.

4. Click **New** to add an additional record. Select the description and enter in corresponding information.

   Note: New Events can be added in the Code Maintenance section of the site. See the Code Maintenance section of this guide for further instruction.

5. Click **Save Changes**

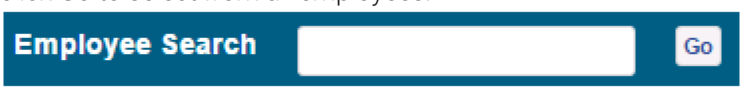
Skills Data Record

Location: Employee Maintenance> Skills Data Record	Action: Track any skills, certification and education for employees	Paperwork required to retain: Proof of certification, if required

Process:

1. Click on **Employee Maintenance-Skills Data Record** on the left of the screen.

2. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.



3. The employee's current events will display on the screen.

Skills | Education

Description	Level	Certification Date	Renewal Date	Comment	Delete
SQL DB	1	08-01-2012	08-01-2013		

a. On the Skills tab, click **New** to add an additional skill or certification record. Select the description and enter in corresponding information.

Skills | Education

Description	Level	Certification Date	Renewal Date	Comment	Delete
Select One	1				

Note: New Skills can be added in the Code Maintenance section of the site. See the Code Maintenance section of this guide for further instruction.

b. On the Educations tab, click **New** to add an additional education record. Enter all information for the employee.

Skills | Education

School	Years	Graduated	Year Graduated	Degree	Comment	Delete
THE SCHOOL	1992	✔	1995	Diploma	Passed the skool	

4. Click **Save Changes**

5. Click the red delete X to delete a line.

H/R Actions

Location: H/R Actions	Action: Employee job & pay	Paperwork required to retain: Any required paperwork for pay reductions

Process:

1. Click on **H/R Actions** on the left of the screen.

2. Select the area you would like to update for an employee. The options are**: Job Change, Pay Rate Change**

3. Enter the employee's last name or number in the employee search box or leave blank and click Go to select from all employees.

   Employee Search [ ] Go

4. The employee's current events will display on the screen. Enter the new information. Below are samples of the screens for each type of H/R Actions
   a. **Job Change**

      Job Change Entry

Current Status	Active
Current Employment Type	Full-time
Current Job Code	Amusement Park
Current Job Start Date	01/29/2013
New Job Code	Amusement Park ▼ FLSA Exempt **No**
Effective Date	
New Job Reason	PAY CHANGE WITH DEPT CH ▼

   b. Pay Change

      Edit Pay Rate

New Pay Rate	
New Per	Yearly ▼
New Standard Hours	
Effective Date	
Reason Code	PAY CHANGE WITH DEPT CH ▼

      Current Pay Information

Employee Name	Elena, Seminole
Employment Status	Active
Employment Type	Full-time
Pay Period	B
Pay Rate	50,000.0000 per Y
Annual Pay	50,000.00

      Pay Rate Change History

Effective Date	Rate	Per	Annual Pay	Standard Hours	Change Percent	Change Amount
01/29/2014	50000.0000	Y	50,000.00	86.67	20.19	8,400.00
11/01/2008	20.0000	H	41,600.00	86.67	140.38	24,294.40
07/21/2003	8.3200	H	17,305.60	80.00		

5. Click **Continue.**

6. Review the information on the screen for accuracy. If you need to make a change, click **Edit.**

7. If everything is correct, click **Save Changes.**

NOTE: There may be an approval process on H/R Action changes. Your payroll processor may review the data prior to it being updated in the system. Contact your payroll processor for details on the H/R action process.

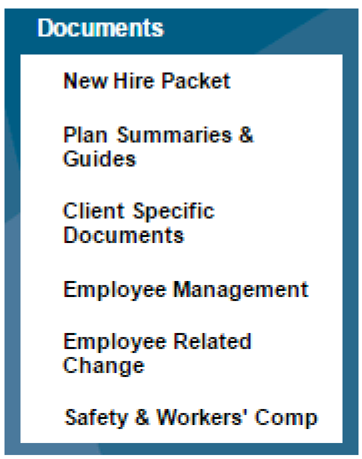
Documents

Location: Documents	Action: Access and download documents	Paperwork required to retain: None

Process:

1. Click on **Documents** on the left of the screen.

2. The sub menu items contain a set of documents for your company. Click on one of the items to view the available documents.



3. All documents in that section is display on screen. Click on a document name to open it.

Code Maintenance

Location: Code Maintenance	Action: Add codes to the system. This includes department, project and skill codes	Paperwork required to retain: None

Process:

1. Click on **Code Maintenance** on the left of the screen.

2. Select the type of code to add to the system.

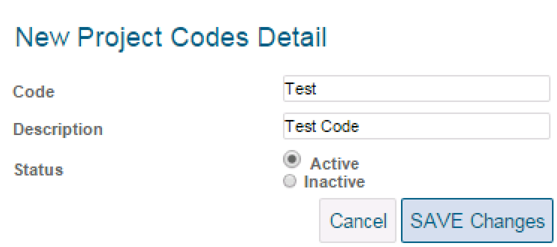
3. A list of current codes will display on the screen.

Code	Description	Inactive	Edit
BENEFITS	BENEFIT ADMIN	Active	
CODE	CODE	Active	

4. Click on the pencil to edit the details in the code or to mark it as inactive. Inactive codes are not available in drop down menus to assign to employees.

5. To add a new code, click **New Code**.

6. Enter the information in the box and click **Save Changes**. The code must be marked as active before it can be used.



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Web Reports – Payroll & Invoicing

Location: Web Report-Payroll & Invoicing	**Action:** Review payroll batch details & invoice summaries	**Paperwork required to retain:** None

Process:

1. Click on **Web Report-Payroll & Invoicing** on the left of the screen.
2. Select **Batch Inquiry** for payroll batch details or **Invoice Summary** for Invoice details.
    a. Batch inquiry Display batch History. Click on the Batch Numner to drill further into payroll information.

Batch Number	Pay Date	Post Date	Batch Type	Description
20152	01-23-2015	02/10/2015	R	01-23-15 Bi5-sat
20151	01-09-2015	02/10/2015	R	01-09-15 Bi5-sat
20144	01-02-2015	02/10/2015	R	12-26-14 Bi5-sat

    b. Invoice Summary displays invoice totals. Click on Batch No. to drill further into the invoice information.

Invoices	Date	Batch No	Batch Description	Amount	Balance
327464	01/23/2015	20152	01-23-15 BI5-SAT	20,798.81	20,798.81
327463	01/09/2015	20151	01-09-15 BI5-SAT	20,798.81	20,798.81
327462	01/02/2015	20144	12-26-14 BI5-SAT	20,939.37	20,939.37
327461	12/12/2014	20143	12-12-14 BI5-SAT	20,581.80	20,581.80
327460	10/31/2014	20142		3,195.02	3,195.02

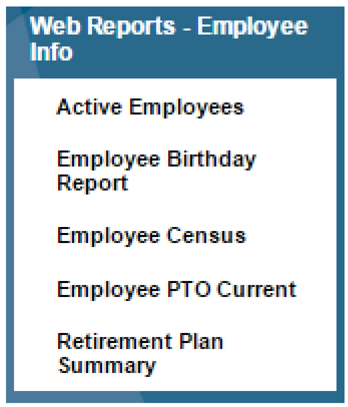
Web Reports – Employee Info

Location: Web Report-Employee Info	**Action:** Review Employee Information	**Paperwork required to retain:** None

Process:

1. Click on **Web Report-Employee Info** on the left of the screen.

2. Select the report you would like to run from the available sub menu items.



3. The report will display on the screen. Use the buttons on the bottom of the page to advance to next or previous pages. Click the **Open Spreadsheet** button on view the data in an Excel document. Click **Print Report** to print the results to your local printer.

Employee ID	Employee Name	Address	City	State	Zip	Phone
D43732	Alapai, Testc L	12345 Electric Ave.	Kaneohe	HI	96744	
B42314	Alapao, Testna L	Test	Hanamaulu	HI	96766	
D05692	Doe, John S	6600 Kalanianaole Hwy Suite 303	Honolulu	HI	96825	808/394-8878
J14962	Elena, Seminole	1100 Kokonut Lane	Honolulu	HI	96814	808/555-5555
E05693	Hookano, Kate S	401 Ena Ave.	Honolulu	HI	96825	808/394-8878
Y27671	Jefferson, Donald	100 Kalaniki Street	Waipahu	HI	96797	808/555-4444
I09417	Kaniele, Marci	1234 Aloha Lane	Honolulu	HI	96825	808/394-8878
Z27672	Kawakami, Stephanie C	1548 Wahinani Street	Wahiawa	HI	96786	808/555-4444
F05694	Kealoha, Kimo S	1234 Aloha Lane	Honolulu	HI	96825	808/394-8878
I14961	Keoni, Pilipo	321 Lunalilo Home Road	Honolulu	HI	96818	808-123-4567
I42081	Meyers, Testa M	3076-a Akala Drive	Kihei	HI	96753	
A43729	Meyers, Testb M	3076-a Akala Drive	Honolulu	HI	96825	

Showing 1 to 12 of 16 entries

Print | Open as Spreadsheet

Self Service Reports

Location: Self Service Reports	Action: Run various reports with prompts and access reports generated by ProService	Paperwork required to retain: None

Process:

1. Click on **Self Service Reports** on the left of the screen.

2. Th**e Report Status** sub menu contains the reports you have previously run. It is also where reports are available to view once they have been submitted. Clicking on the title of the report opens the report.

3. The **Report Library** is where reports generated by the ProService team are published for review.

4. The additional sub menu each contains a set of related reports. Clicking on the sub menu will display the report list.

5. To run a report, click on the name of the report.

6. Select the prompt values for the report you would like to run. Prompts can be date driven, can give you different report outputs such as PDF or Excel, and may allow for sorting.

7. Click **Save Changes.**

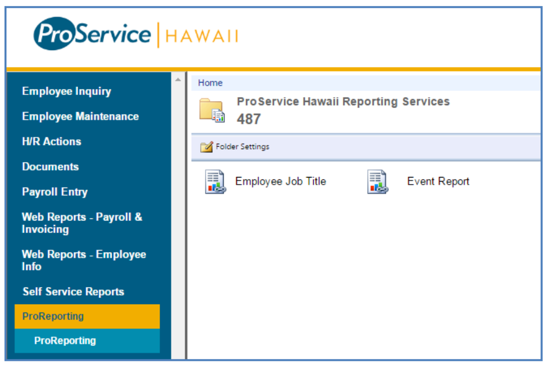
8. You will be taken to the report status screen where your report is being generated. The Mug in the status column will be flashing a P while your reporting is running. Once complete it will have a C on the mug.

9. Click on the report name to view the results. Your browser may ask you to save it to your local computer.

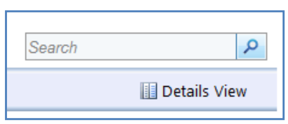
ProReporting

Location: ProReporting	Action: Run various reports with prompts and perform analytics on data	Paperwork required to retain: None

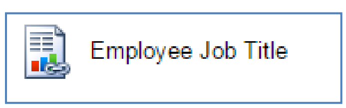
ProReporting, ProService Hawaii's reporting platform, can be accessed by selecting the ProReporting menu item from the ProService HRP Manager Portal. Once the menu item is selected, all available reports will display on the right portion of the screen.



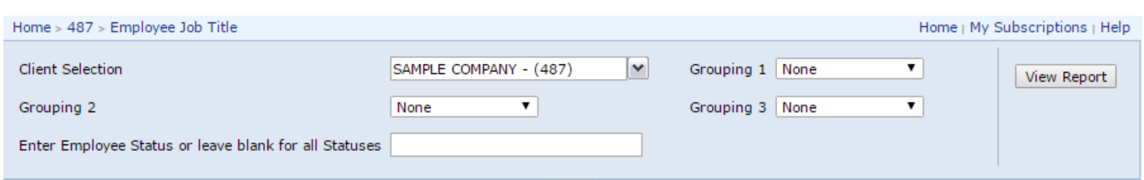
To view reports in a list format instead of icons, click on the Details View button on the top right of the screen. To search for a report, enter any report keywords into the search box and hit enter or click on the magnifying glass. This will narrow the report list.



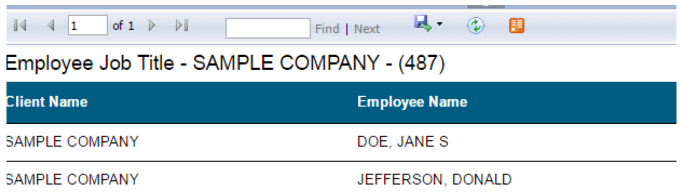
To run a report, click on the report name. The report will launch.



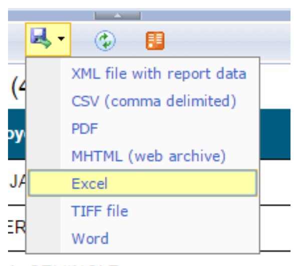
Reports may have the option to filter by parameters or group by cost centers. Select the options you will on the report and click the View Report button.



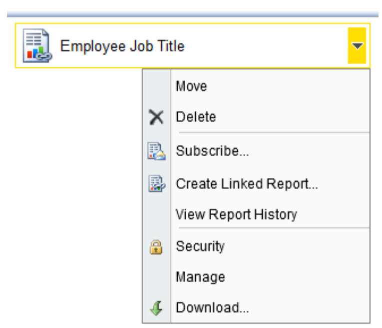
The report results will display on screen. If the report contains data on multiple pages, the arrow buttons can advance to the next screen.



Reports can be exported into multiple formats, including PDF, Excel and CSV. To save the report, click on the disk image and select the desired format.



Reports can be schedules to email on a regular basis. To schedule a report, instead of clicking on the report name, click on the arrow next to the report, and click Subscribe.



The subscription window will open and allow for schedule frequency and report recipient to be set.