



***Online Self Service***

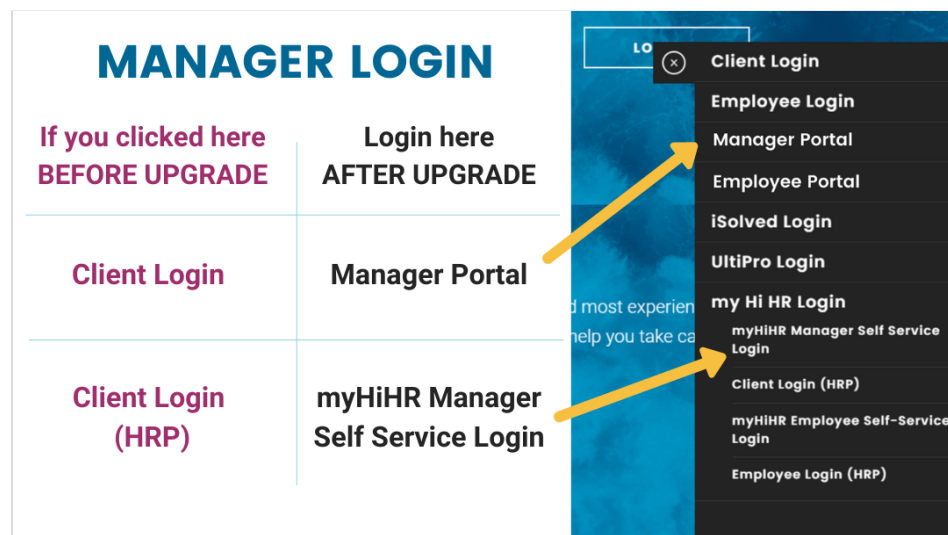
# **Manager Guide**

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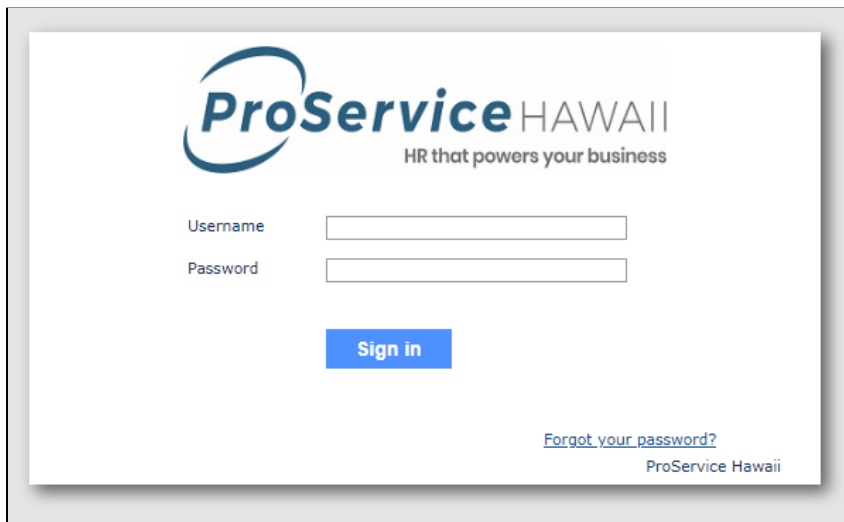
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## Accessing Online Manager Self Services

1. Go to [www.proservice.com](http://www.proservice.com).
2. From the upper right corner, click on **Login**.
3. Select the menu you should use after your upgrade **based on the chart** below.
4. A **login screen** will appear. If you have previously registered for an account, enter your **Username** and **Password**. If you have not created an account, click **Register** to create one.



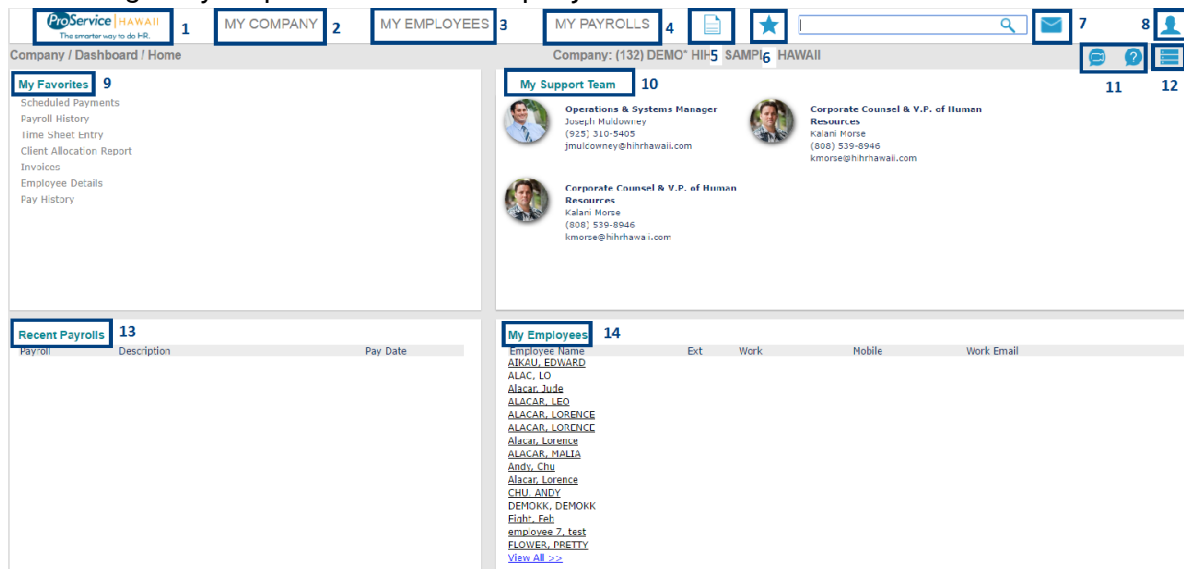
The page will redirect you to this login screen.



The login screen features the ProService HAWAII logo and tagline "HR that powers your business". It includes input fields for "Username" and "Password", a blue "Sign in" button, a link for "Forgot your password?", and the text "ProService Hawaii" at the bottom right.

## Getting Around - Dashboard

Dashboard gives you quick access to company information and relevant features.



Dashboard Item	Description
1. <b>Homepage</b>	Clicking this logo brings you back to the homepage.
2. <b>My Company</b>	A list of features related to your company.
3. <b>My Employees</b>	A list of your employees related features.
4. <b>My Payrolls</b>	This tab houses all actions regarding Payroll.
5. <b>Reports</b>	This button will bring up a list of reports you can run.
6. <b>View Favorites</b>	Clicking on this star in any view will show your favorites.
7. <b>Messages</b>	All systems notifications for you to read are shown here.
8. <b>Password Change</b>	Click on this icon to change your password or to sign out.
9. <b>My Favorites</b>	You can set forms as favorites, features that you access frequently. These are listed on the Dashboard when and you can also access them from the Favorites menu.
10. <b>View Your Support Team</b>	This lists your ProService client support team's contact information.
11. <b>Help</b>	Video tutorials or help material can be viewed here.
12. <b>Action Menu/Bar</b>	Allows a list of actions for the current screen.
13. <b>Recent Payrolls</b>	Lists all of the latest payrolls and can be clicked to view individual payroll details.
14. <b>My Employees</b>	Can be clicked to see employee information.

## Search Bar

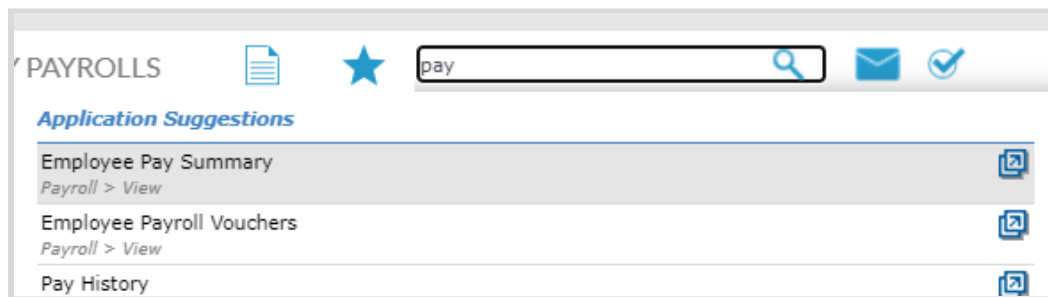


When searching in the toolbar, type in a part of a word and it will bring up the different functions and different reports that are associated with the word. You can either start typing to do a broad search, or you can narrow the search using an initial letter followed by a colon:

A: - Application Search (Features/Forms)

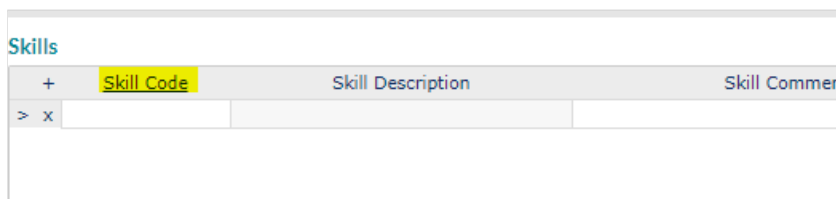
E: - Employee Search

R: - Report Search

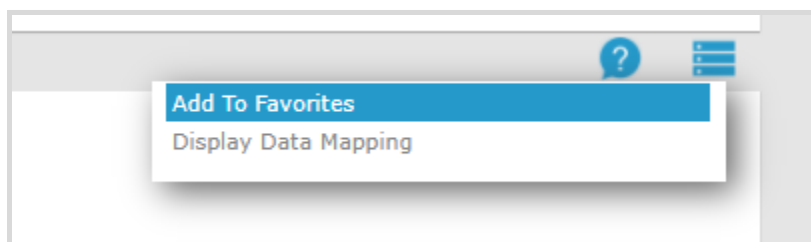


## General Navigation

Any underlined text is clickable and indicates action on the page, often opening a list of selections.



To add a page or report to your favorites, click on the action menu and click **Add To Favorites**.



## Change Password

First time signing in? First time users should change their ProService issued password.

Best Practice Tip: Users are encouraged to change their passwords every six (6) weeks.

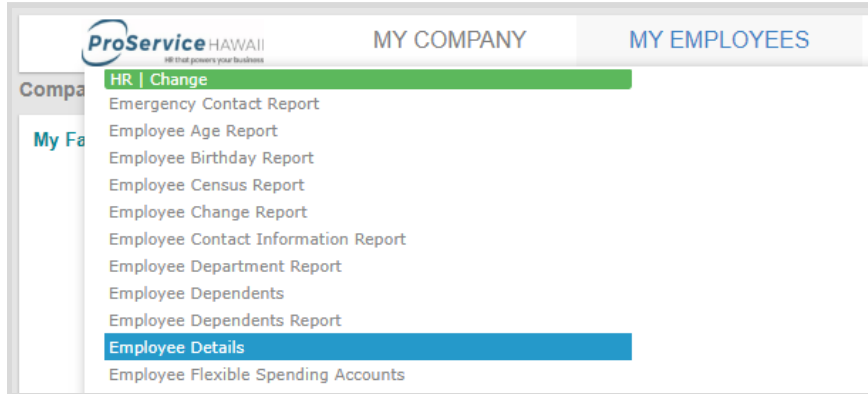
1. Enter your **Current Password**.
2. Enter your **New Password**. The system validates the password; if it does not pass the validation. The system will inform you what you need to do to create a valid password.
3. Re-enter your password in the **Confirm New Password** field.
4. Click **Save**, the next time you logon, use your new password.

The screenshot displays the ProService Hawaii user interface. At the top, there are navigation tabs: 'MY COMPANY', 'MY EMPLOYEES', and 'MY PAYROLLS'. Below these, a 'Company / Dashboard / Home' section is visible. On the left, there's a 'My Favorites' sidebar with links like 'Scheduled Payments', 'Payroll History', and 'Time Sheet Entry'. The main content area shows a 'My Support Team' section with contact details for Joseph Waldron and Helen Harte. Overlaid on this is a 'Change Password' form. The form has a title bar 'System / Change / Change Password' and a main heading 'Change Password'. It contains three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. A blue 'Save' button is located at the bottom left of the form. In the top right corner of the dashboard, there's a 'Sign Out' button.

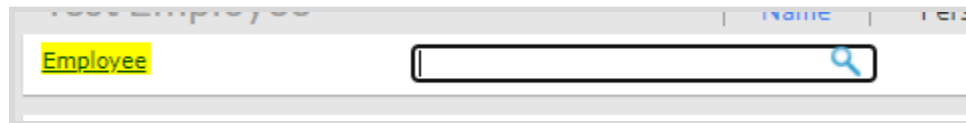
## View Employee's Profile

Obtaining detailed information about an employee is easy to do from The Dashboard.

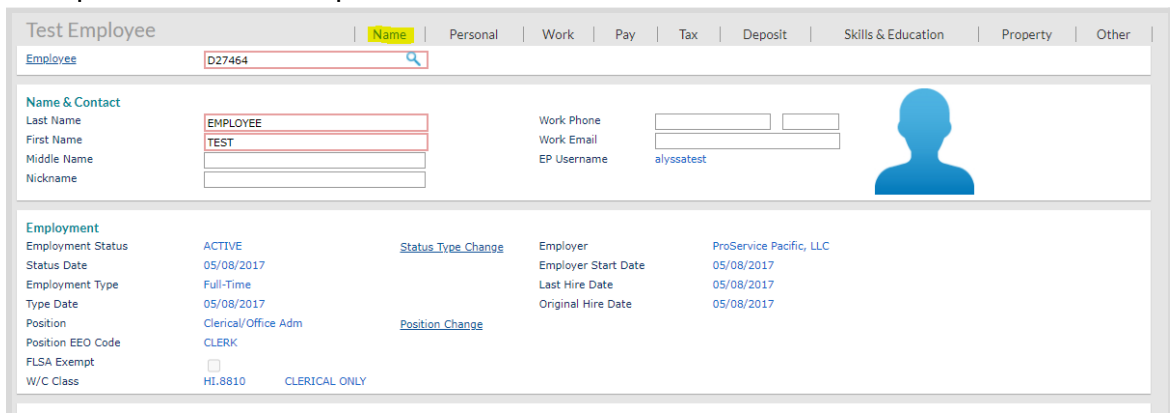
1. First, click on the **My Employees** tab then select the **Employee Details** bar.



2. Click on **Employee** in the top left section of the screen and a list of all employees will appear.



3. Click on the desired employee to view the individual's personal profile. The tabs across the top will contain data specific to that area.



4. An alternative way is to use the bottom right quadrant on your home screen. It lists all of your active employees only. Click on any employee and it will also open their Employee Details page.

My Employees				
Employee Name	Ext	Work	Mobile	Work Email
ATKAU, EDWARD				
ALAC, LO				
ALACAR, JUDE				
ALACAR, LEO				
ALACAR, LODOG				
ALACAR, LORENCE				
ALACAR, LORENCE				
ALACAR, LORENCE				

## Changing an Employee Address

1. From the employee profile, click Address.

HR / Change / Employee Details Company: (487) SAMPLE COMPAN

Test Employee

Employee

**Name & Contact**

Last Name	<input type="text" value="EMPLOYEE"/>	Work Phone	<input type="text"/>
First Name	<input type="text" value="TEST"/>	Work Email	<input type="text"/>
Middle Name	<input type="text"/>	EP Username	alyssatest
Nickname	<input type="text"/>		

2. Type in the address information that needs to be updated and click **Save**.

HR / Change / Employee Address Company: (487) SAMPLE COMPANY

Test Employee

Employee

**Resident Address**

Address	<input type="text" value="123 Sample Road"/>	Home Phone	<input type="text" value="808/222-5555"/>
ZIP Code	<input type="text" value="33037"/>	Cell Phone	<input type="text"/>
City	<input type="text" value="HONOLULU"/>	Personal Email	<input type="text"/>
State	<input type="text" value="HI"/>	Work Email	<input type="text"/>
County	<input type="text" value="HONOLULU"/>	Deliver Check Home	<input type="checkbox"/>
GEO Code	<input type="text" value="120030050"/>	Override GEO Code	<input type="text"/>
Unincorporated Area	<input type="checkbox"/>	Override End Date	<input type="text"/>
School District No.			

**Mailing Address**

Address	<input type="text"/>
ZIP Code	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>

**Form W-2 Address**

Address	<input type="text"/>
ZIP Code	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>



## Employee Position Change

- From the employee profile, **Name** tab, click **Position Change**.

HR / Change / Employee Details Company: (487) SAMPLE COMPANY

Test Employee Name | Personal | Work | Pay | Tax | Deposit

Employee

---

**Name & Contact**

Last Name	<input type="text" value="EMPLOYEE"/>	Work Phone	
First Name	<input type="text" value="TEST"/>	Work Email	
Middle Name	<input type="text"/>	EP Username	alysstest
Nickname	<input type="text"/>		

---

**Employment**

Employment Status	ACTIVE	<a href="#">Status Type Change</a>	Employer	ProService Pacific, LL
Status Date	04/30/2021		Employer Start Date	05/08/2017
Employment Type	Full-Time		Last Hire Date	05/08/2017
Type Date	04/30/2021		Original Hire Date	05/08/2017
Position	Amusement Park	<a href="#">Position Change</a>		
Position EEO Code	SERV			
FLSA Exempt	<input type="checkbox"/>			
W/C Class	HI.9016 AMUSEMENT OPERATOR			

- Click on the **New Position Code** link.

[New Position Code](#)

New Position Start Date

New Position Reason Code

Based on recent review date of

- Select the new position from the pop up window.

Select Active Positions for a Company

	Position	Position Title	Position Classification	FLSA Exempt	Obsolete
1	9016	Amusement Park	9016	N	
2	7382	BUS CO. DRIVERS	7382	N	
3	9014	Bldg Opps. by Contra	9014	N	
4	5645	Carpentry Dwellings	5645	N	
5	8810	Clerical/Office Adm	8810	N	
6	7380	Drivers/Chauffeurs	7380	N	
7	8742	OUTSIDE SALES	8742	Y	

- Enter the **Start Date** and **Reason Code**.

Current Position Start Date 04/30/2021

[New Position Code](#)  Clerical/Office Adm

New Position Start Date

New Position Reason Code

Based on recent review date of

- Click **Save**

## Other Employee Changes

Depending on your role, you may have access to change other information for employees on other tabs.

- **Pay Tab:** Click on **Pay Rate Change** to update an employees pay.

Rate Effective Date	04/25/2021	
Annual Pay Rate	52,000.00	<a href="#">Pay Rate Change</a>
Monthly Pay Rate	4,333.33	
Semi-Monthly Pay Rate	2,166.67	

HR / Action / Pay Rate Change

Company: (487) SAMPLE COMPANY

Pay Rate Change

Employee  [EMPLOYEE TEST](#)

Current Employment Status	Active
Current Employment Type	Full-Time
Current Pay Period	Weekly
Current Pay Rate	25.0000 Per Hour
Current Annualized Pay	52,000.00
New Pay Rate	<input type="text"/> Per <input type="text" value="-- Select Period --"/>
New Standard Hours	<input type="text"/> Per <input type="text" value="-- Select Period --"/>
New Annualized Pay	

- **Work Tab:** Update an employee's Department, Division or Project

HR / Change / Employee Work

Client: (487) SAMPLE COMPANY

Test Employee

[Name](#) | [Personal](#) | [Address](#) | [Work](#) | [Pay](#) | [Tax](#) | [Deposit](#) | [Skills & Education](#) | [Property](#)

Employee

Status Dates

Last Hire Date	<input type="text" value="05/08/2017"/>	Seniority Date	<input type="text" value="05/08/2017"/>	Term Reason	<input type="text"/>
Original Hire Date	<input type="text" value="05/08/2017"/>	Benefits Thru Date	<input type="text" value="05/08/2017"/>	Rehire Okay	<input type="text" value="Not Specified"/>
Leave Return Date	<input type="text"/>	Last Day Worked	<input type="text"/>		
Employer Start Date	<input type="text" value="05/08/2017"/>	Provider Notified On	<input type="text"/>		
Hire Report Date	<input type="text"/>				

Assignments

<a href="#">Workspace Location</a> <a href="#">Division</a> <a href="#">Department</a> <a href="#">Work Shift</a> <a href="#">Project</a>	<a href="#">Future Date</a> <a href="#">Future Date</a> <a href="#">Future Date</a>   	<input type="text" value="1"/> <input type="text" value="1-BBH"/> <input type="text" value="GRANT-1"/> <input type="text"/> <input type="text"/>	<a href="#">Reports To</a> Hierarchy Tier	<input type="text"/> <input type="text" value="-No Items-"/>
---	---	--	--	---

- **Deposit Tab:** Add, Delete or update an employee's direct deposit account

HR / Change / Employee Deposit Client: (487) SAMPLE COMPANY

Test Employee

Employee

Status  Pay Types to Deposit

Suppress Account Number Print ☐

Direct Deposit Information

	Type	Transit Number	Bank Name	Account Number	Pay Type	Method	Amount	Limit	Status	Prenote Date
> x	Checking	121301015	First Hawaiian Bank	12345678	--Select--	Remaining Balance			Prenotification	06/19/2019

- **Skills & Education and Property Tabs:** Track important dates for employees or company property assigned to an employee.

HR / Change / Employee Skills and Education Company: (487) SAMPLE COMPANY


Test Employee

Employee

Skills

	Skill Code	Skill Description	Skill Comment	Competency Level	Date Certified	Renewal Date
> x	CPR	CPR Certification			05/04/2021	

Education

- **Employee Documents:** An electronic filing cabinet for your digital employee documents. Access this from the **Action Menu** by clicking on  and selecting **Documents**.

HR / Change / Employee Documents

Client: (487) SAMPLE COMPANY

?

Home

Change

Print

Employee Documents

Document Name	Notes	Date Attached	ESS
<a href="#">DemoResume.pdf</a>		04/22/2021	<input type="checkbox"/>

[Load a Document](#)

Close

## Documents & Forms

Depending on your access, there are different areas to access documents.

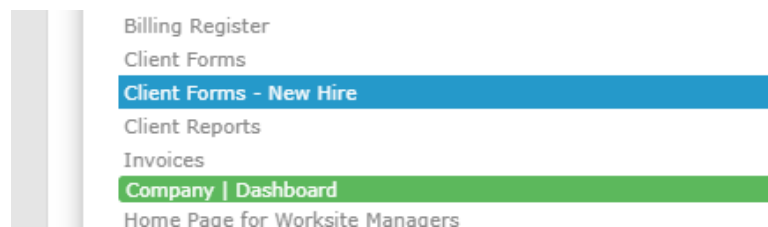
Under the **MY COMPANY** menu, **Clients Forms** provide access to change forms, safety forms and more. These also contain New Hire Forms. Forms will launch in a new window.



### File Name

[Authorization for Direct Deposit & Electronic Pay Statements.pdf](#)  
[Authorization for Movie Ticket Deductions.pdf](#)  
[Authorization for Payroll Deductions.pdf](#)  
[Authorization for Retirement Payroll Deductions \(NEW\).pdf](#)  
[Employee Handbook Acknowledgement Form.pdf](#)  
[Employee Notice of Resignation.pdf](#)  
[Employee Property Receipt Form.pdf](#)  
[Employment Application Form.pdf](#)  
[Employment Change Form.pdf](#)  
[Employment Form.pdf](#)  
[Employment Separation Form.pdf](#)  
[Group Movie Ticket Order Form.pdf](#)

You may only have access to New Hire Forms, and these can be found under the **Client Forms - New Hire**.

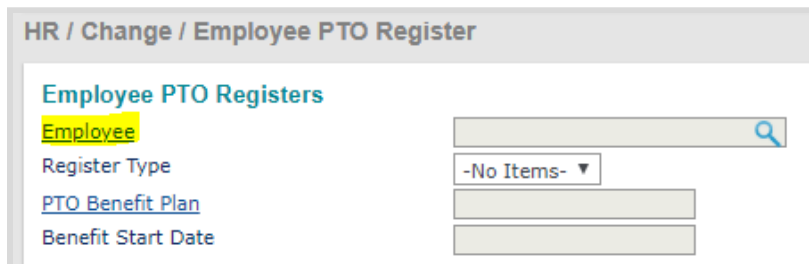


## View Paid Time Off (PTO)

1. Click on the **My Employees** tab, then select **Employee PTO Register**, listed on the HR | Change dropdown



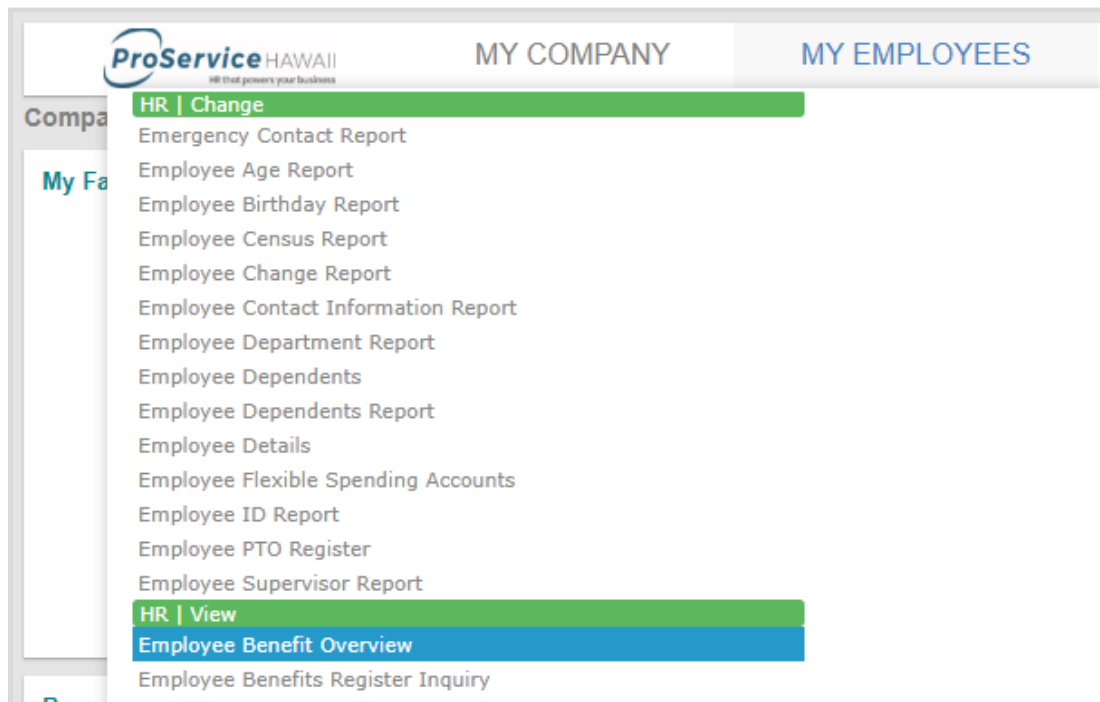
2. Click on **Employee** in the top left section of the screen and a list of all employees will appear



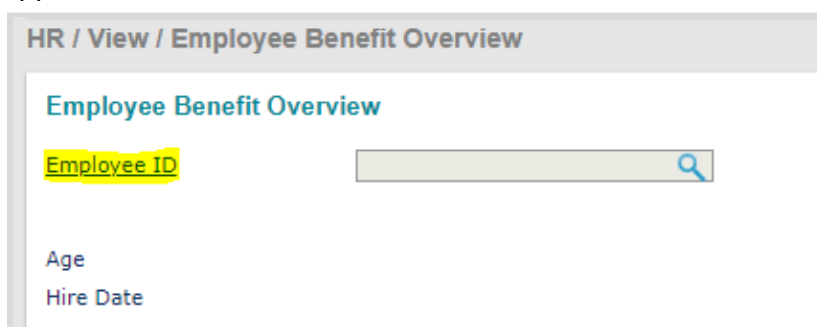
3. Choose the employee to view PTO information
4. Click on **Register Type** to choose the type of leave

## View Employee Benefits

1. Click on the **My Employees** tab, then select **Employee Benefit Overview**, listed on the HR | View dropdown



2. Select Employee ID in the top left section of the screen and a list of all employees will appear

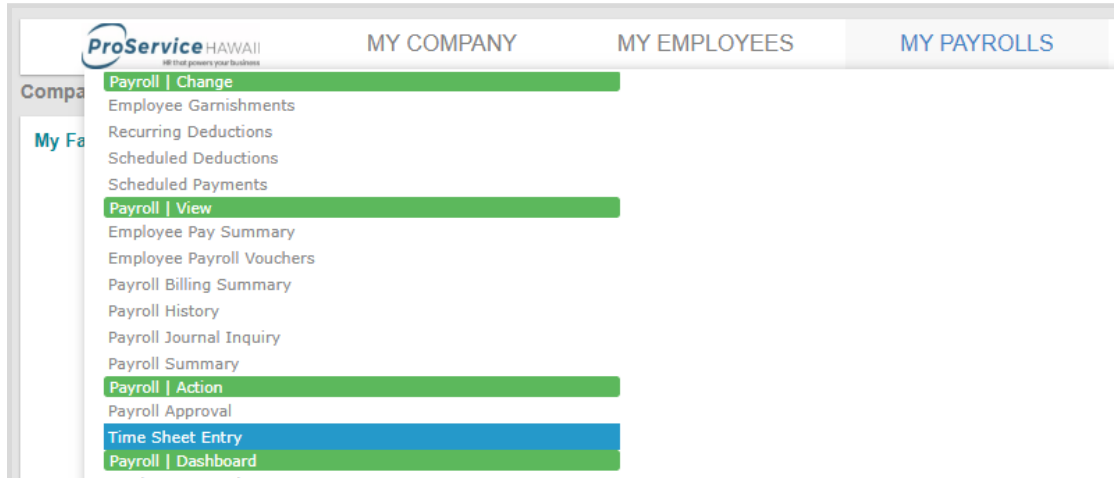


3. Choose the employee to view their benefits overview

## Time Entry

See the [Detail Guide to Time Sheet Entry](#) for more detailed information on time entry.

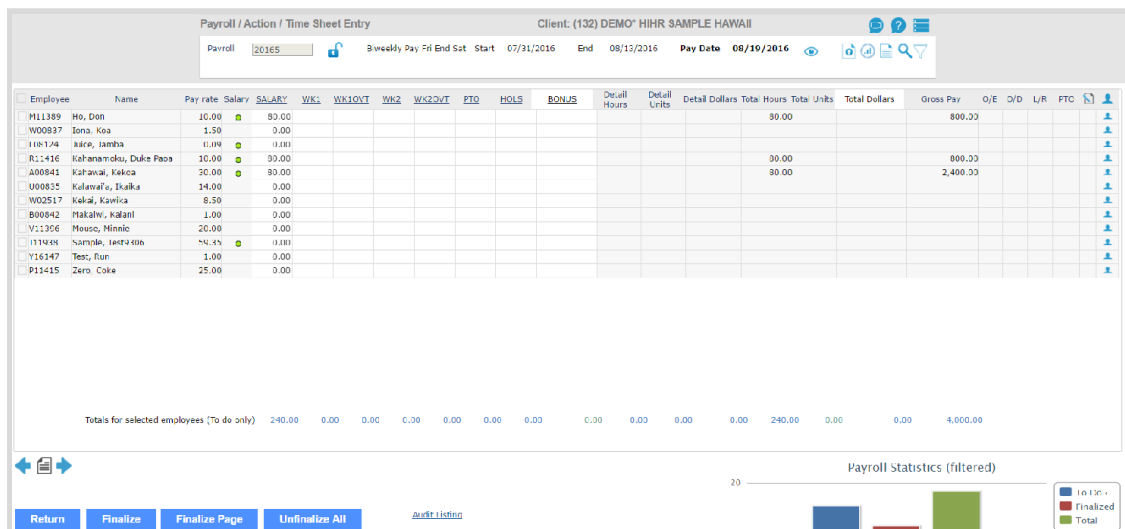
1. Click on **My Payrolls**, then select **Time Sheet Entry** under Payroll | Action



2. Click on the **Payroll number** to enter the timesheet as shown below:



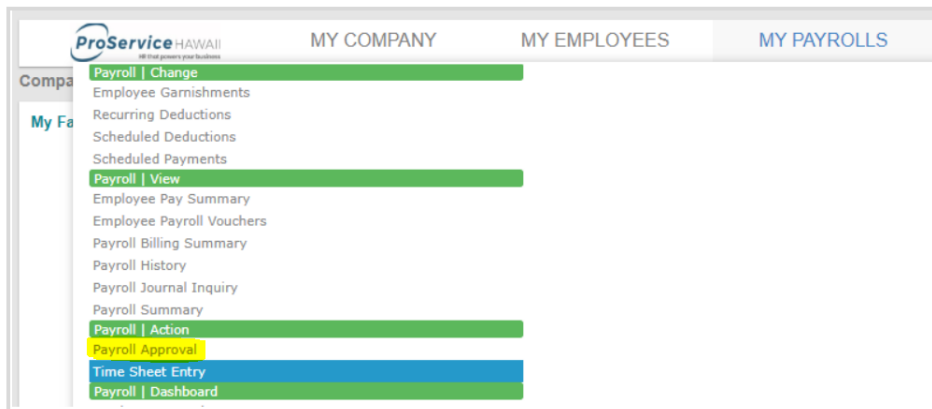
3. Enter your time and once completed, click on **Finalize**.





## Payroll Approval

- Once you receive the approval notification, click on **My Payrolls**, then select **Payroll Approval** under Payroll | Action



- Reports are available to review on the right side of the screen.

**Payroll Approval**

Payroll Number:  Approve ☐ Deny ☒

Description: 07-12-19 WKLY  
 Pay Date: 07/12/2019  
 Payroll Type: Regularly Scheduled  
 Payroll Status: Client approval pending

Pay Group: WKLY Period Start: 07/01/19 Period End: 07/07/19

**View Report/Analytic** Payroll Summary

Employee	Voucher	Check/Deposit	Gross Pay
CODE ZIPPY	000732	Deposit	1120.00
FIELD SALLY	000735	Deposit	880.00
GIBSON KIRK	000733	Check	1200.00
JACKSON BO	000736	Check	600.00
PEETEO PAMMY	000731	Check	1000.00
TESTER SAL	000737	Deposit	280.00
WAGE MINNIE	000734	Check	480.00

- If the payroll is correct, click **Approve**. If the payroll is incorrect, click **Deny** and enter comments noting the issues on the payroll.

**Payroll Approval**

Payroll Number:  Approve ☐ Deny ☒

Description: 07-12-19 WKLY  
 Pay Date: 07/12/2019  
 Payroll Type: Regularly Scheduled  
 Payroll Status: Client approval pending

Pay Group: WKLY Period Start: 07/01/19 Period End: 07/07/19

**Comments**

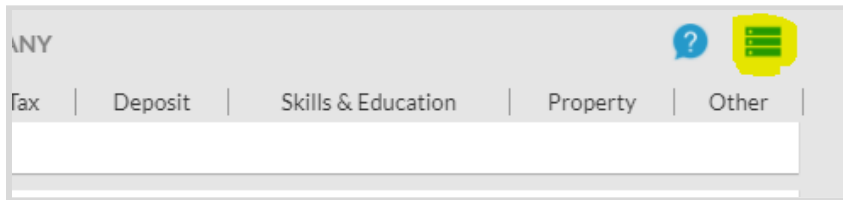
Payroll is denied due to incorrect timesheet entries

- Once finished, click **Submit**.

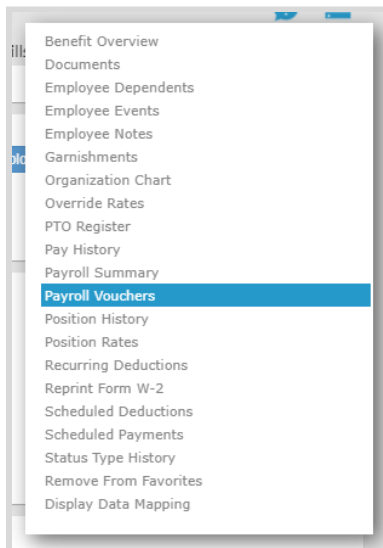
**Submit**

## Print Employee Paycheck Stub

1. Select the employee you would like to print a stub for from **My Employees** on your homepage or by searching for the employee in your search bar.
2. In the employee record, click on the Action Menu.



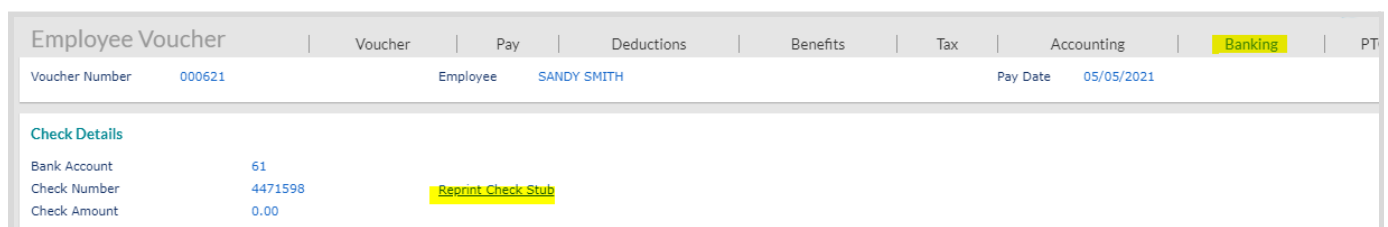
3. Select **Payroll Vouchers**.



4. Click on the Voucher number.

Voucher#	Check/Advice#
000621	4471598

5. Click on the **Banking** Tab and then click **Reprint Check Stub**. The stub will save in PDF format to your computer.



## Print Employee W-2

1. Select the employee you would like to print a stub for from **My Employees** on your homepage or by searching for the employee in your search bar.
2. In the employee record, click on the Action Menu.

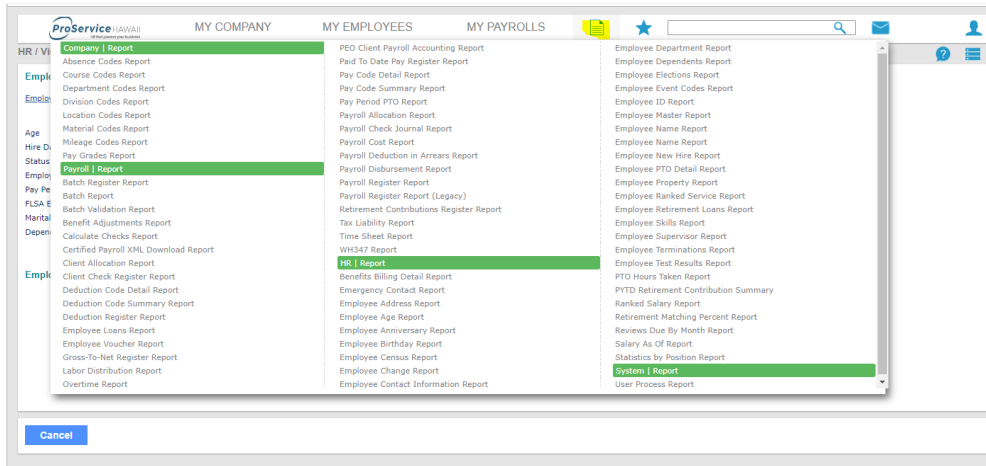
3. Select **Reprint Form W-2**.

4. Select the Tax Year and click **Run**. The W-2 will save in PDF format to your computer.

## Standard Payroll Reports List and How to Access Them

See the [Report Guide](#) for more detailed information on accessing and running reports.

1. Click on the **Report Icon** highlighted in screenshot below
2. Click on the desired report from the dropdown



3. Filter the report by adjusting various pieces of information and click **Run** to generate report.

**Employee Birthday Report**

**Selection Parameters**

Status Class: -- Select --

Type Class: -- Select --

**Sort Parameters**

Primary Sort: Employee Name

**Report Filters**

Division: Division Name

Department: Department Name

Location: Location Name

Birth Month: All Months

Position: Position Title

Project: Description

Shift: Description

**Run** **Close**

4. At the top right of the report, use the Action drop down to print or save the report in PDF or click XLS to download it to excel.

Completed Page 1 of 1 Search Search Next Actions REP~19475-53197042844058 actions XLS

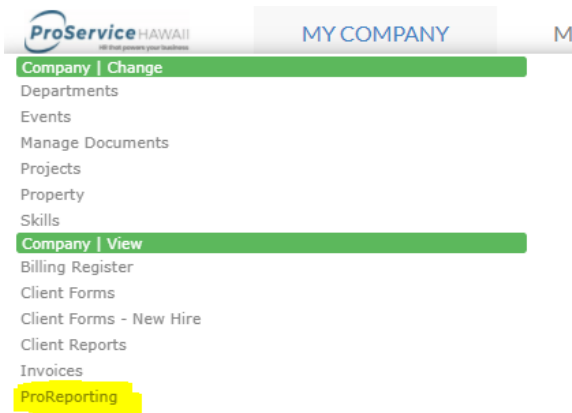
**ProService**HAWAII  
HR that powers your business

SAMPLE COMPANY  
Employee Birthday Report  
All Employees Sorted by Employee Name

Birth Month	Birth Day	Employee ID	Employee Name	Position	Department

## ProReporting

1. ProReporting can be accessed by going to **My Company**, then selecting **ProReporting** under Company | View



2. 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 want on the report and click the View Report button.

The screenshot shows the 'Employee Job Title' report configuration screen. It includes filters for Client Selection (SAMPLE COMPANY - (487)), Grouping 1 (None), Grouping 2 (None), and Grouping 3 (None). A 'View Report' button is visible.

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

Client Name	Employee Name
SAMPLE COMPANY	DOE, JANE S
SAMPLE COMPANY	JEFFERSON, DONALD

4. 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.

