



Employee Portal User Guide

Welcome to Vfficient! This guide is designed to help users register, access, and navigate the employee self-service portal (ESSP). From the portal (*dependent upon permissioned access*), users can:



Update personal information



Manage and request paid time off or vacation time



View and reprint payroll check stubs



Manage and enroll in employer-provided benefits



Adjust tax information and download W-2s

Note:

Not all options shown and/or described in this guide may be available to each user through the ESSP, as configuration is dependent on the options chosen by the employer.

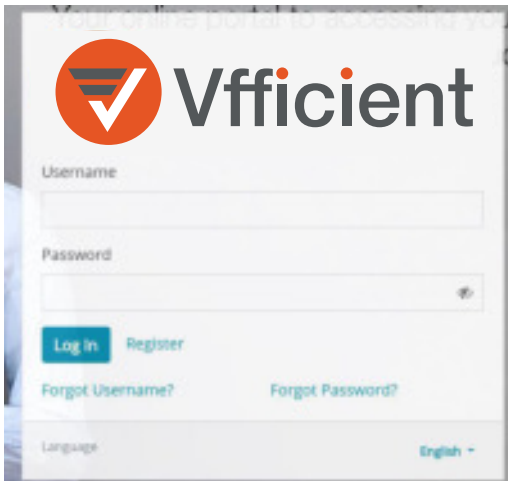


MOBILE FRIENDLY

EMPLOYEE SELF-SERVICE PORTAL LOGIN AND REGISTRATION

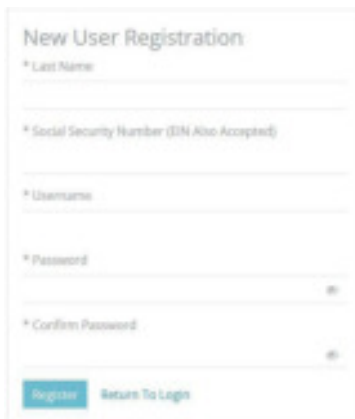
Open a new browser window or tab, and navigate to <https://vns-ep.prismhr.com/#/auth/login>

1. If the user already has a username and password, enter the appropriate information and click **'Log In'**. To register, click **'Register'**.

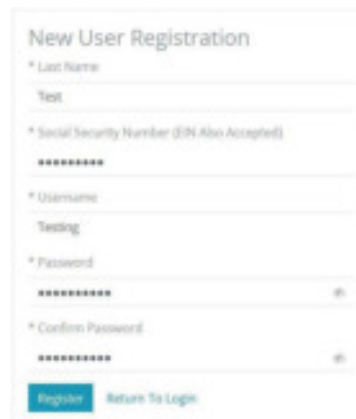


The screenshot shows the Vfficient login and registration interface. At the top left is the Vfficient logo, which consists of a red circle containing a white checkmark. To the right of the logo is the word "Vfficient" in a bold, sans-serif font. Below the logo and name are two input fields: "Username" and "Password". The "Password" field has a small eye icon to its right. Below these fields are two buttons: "Log In" (in blue) and "Register" (in grey). At the bottom of the form are two links: "Forgot Username?" and "Forgot Password?". At the very bottom, there is a "Language" dropdown menu set to "English".

a. To register, fill out all the items in the registration window, and click **'Register'**. Note the requirements when creating a password. After registering, use the newly created username and password to be taken to the **ESSP**.

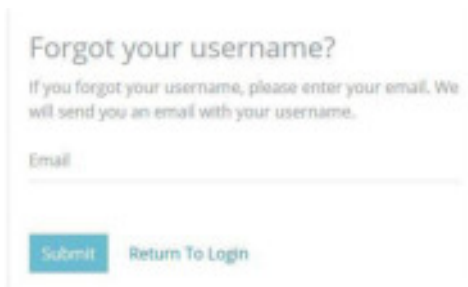


The screenshot shows the "New User Registration" form. It has five input fields: "Last Name", "Social Security Number (SSN Also Accepted)", "Username", "Password", and "Confirm Password". Each field has an asterisk indicating it is required. At the bottom of the form are two buttons: "Register" (in blue) and "Return To Login" (in grey).

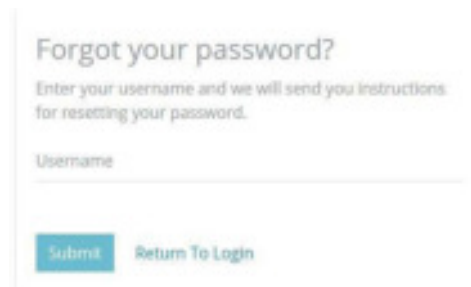


This screenshot shows the same "New User Registration" form as the previous one, but with test data entered. The "Last Name" field contains "Test", the "Social Security Number" field contains "*****", the "Username" field contains "Testing", the "Password" field contains "*****", and the "Confirm Password" field contains "*****". The "Register" and "Return To Login" buttons are still visible at the bottom.

If the user has forgotten their username or password, simply click the **'Forgot Username'** or the **'Forgot Password'** link, and follow the instructions. Please contact technical support (vfficientsupport@vensure.com) with any questions.



The screenshot shows the "Forgot your username?" form. The title is "Forgot your username?". Below the title is a short instruction: "If you forgot your username, please enter your email. We will send you an email with your username." Below this is an "Email" input field. At the bottom are two buttons: "Submit" (in blue) and "Return To Login" (in grey).



The screenshot shows the "Forgot your password?" form. The title is "Forgot your password?". Below the title is a short instruction: "Enter your username and we will send you instructions for resetting your password." Below this is a "Username" input field. At the bottom are two buttons: "Submit" (in blue) and "Return To Login" (in grey).

NAVIGATING THE EMPLOYEE SELF-SERVICE PORTAL

The screenshot shows the Vfficient Employee Self-Service Portal interface. At the top left is the Vfficient logo. A user menu is located in the top right corner, indicated by callout 1. A dashboard menu is on the left side, indicated by callout 2. The main content area is divided into several sections:

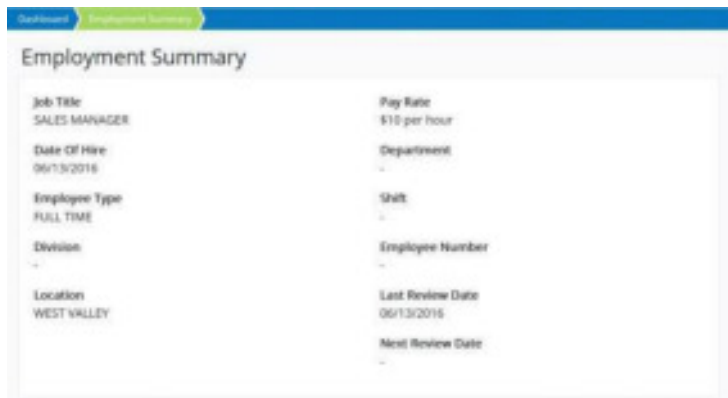
- Pay (Callout 3):** Displays 'Most Recent Pay Statements' with dates: 07/13/2018, 06/29/2018, and 06/15/2018. A 'View More' link is at the bottom.
- Paid Time Off (Callout 4):** Shows 'PAID SICK LEAVE' and 'PTO' status. For PAID SICK LEAVE: Planned 0 Hours, Taken 0 Hours, Available 18 Hours. For PTO: Planned 0 Hours, Taken 0 Hours, Available 45 Hours. Links for 'Request Time Off' and 'PTO Summary' are provided.
- Benefits (Callout 5):** Lists enrolled benefits: METLFE 25K LIFE (25,000.00, Effective 06/01/2018), NPEO DEMO MEDICAL EMPLOYEE + SPOUSE (Effective 06/01/2018), and NPEO MET LIFE DENTAL HIGH EE + SP PLAN 2 (Effective 06/01/2018). A 'View Benefits Summary' link is at the bottom.
- Events (Callout 6):** Displays a message: 'No Events Scheduled'.
- New Messages (Callout 7):** Displays a message: 'No Unread Messages'. A 'View More' link is at the bottom.

User Menu	Change password or log out
Dashboard Menu	Available portal options
Pay	View check stubs by clicking the date or 'View More'
Paid Time Off	Displays available time off. Click to request time off or view detailed information.
Benefits	Displays enrolled benefits. Click to view detailed information.
Events	Displays scheduled company events.
Messages	Displays recent messages. Click to view full listing.

PERSONAL INFORMATION

Note:

Some users may be unable to edit information displayed on these pages. Managers will be able to make these edits.



The screenshot shows the 'Employment Summary' page. It features a blue header with 'Dashboard' and 'Employment Summary' tabs. The main content area is titled 'Employment Summary' and contains a table of job details:

Job Title SALES MANAGER	Pay Rate \$10 per hour
Date Of Hire 06/13/2016	Department -
Employee Type FULL TIME	Shift -
Division -	Employee Number -
Location WEST VALLEY	Last Review Date 06/13/2016
	Next Review Date -

On the **Employment Summary** page, users can view their current employment details, including **Date of Hire, Position, and Pay Rate.**



The screenshot shows the 'Personal Info' page. It features a blue header with 'Dashboard' and 'Personal Info' tabs. The main content area is titled 'Personal Info' and contains a profile card and several form fields:

Profile Card:

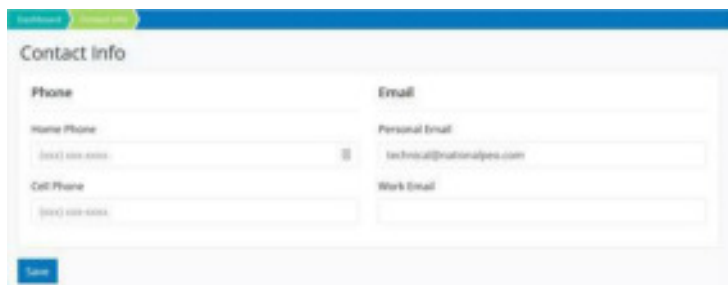
- Name: An London
- Birthdate: 01/01/1980
- Age: 38
- Gender: Male
- Ethnicity: BLACK

Form Fields:

- Nickname: [Text input]
- Date Married: MM/DD/YYYY [Text input]
- Marital Status: Select One [Dropdown menu]
- School District Number: [Text input]
- Handicapped: [Toggle switch]
- Blind: [Toggle switch]

A 'Save' button is located at the bottom left of the form area.

On the **Personal Information** page, users can view **Personal Information**, adjust marital status, or have a handicap of which the employer should be aware.



The screenshot shows the 'Contact Info' page. It features a blue header with 'Dashboard' and 'Contact Info' tabs. The main content area is titled 'Contact Info' and contains two columns of form fields:

Phone:

- Home Phone: (xxx) xxx-xxxx [Text input]
- Cell Phone: (xxx) xxx-xxxx [Text input]

Email:

- Personal Email: technical@nationalpipe.com [Text input]
- Work Email: [Text input]

A 'Save' button is located at the bottom left of the form area.

On the **Contact Information**, users can see their current **telephone/mobile** and email contact information.

Note:

The email address listed here will be used to send notifications, including password reset information.

The **Address** section allows users to edit their physical address. By default, all correspondence will go to the resident address. If the user has a separate mailing address to which they would prefer tax forms be mailed, **please click the appropriate option and make the adjustments.**

Name	Relationship	Contact
Gayle London	Spouse	505-555-5555

Viewing 1 - 1 of 1

Emergency Contacts, allows users to add, edit, and remove emergency contacts.

Indicate **Veteran Status** in this section.

If the employer requires driver license information in the user record, please enter it here. The entries will save when **'Save'** is clicked, but the screen will not change.

Dashboard > Vehicles > Add

Vehicles

Make	Model	Year	Registration Number	Date Added	Date Removed
Ford	Pickup	2003	12345678901234567	03/03/2018	

Viewing 1 - 1 Of 1

[Add](#)

If the employer requires vehicle information, click **'Add'** to enter it here. Previously entered **vehicle information** can also be edited or removed from this section.

Dashboard > Vehicles > Add

Add Vehicle

* Make Ford	* Model Pickup
* Year 2003	* Registration Number 12345678901234567
Date Added 03/03/2018	Date Removed MM/DD/YYYY

[Add](#) [Cancel](#)

Dashboard > Vehicle Insurance Policies > Add

Vehicle Insurance Policies

Carrier Name	Policy ID	Policy Holder Name	Policy Start Date	Policy End Date
InsuranceCo	12345678	Art London	01/01/2017	12/31/2017

Viewing 1 - 1 Of 1

[Add](#)

If the employer requires vehicle insurance information, click **'Add'** to enter it here. Previously entered **vehicle insurance information** can also be edited or removed from this section.

Dashboard > Vehicle Insurance Policies > Add

Add Vehicle Insurance Policy

* Carrier Name InsuranceCo	* Policy ID 12345678
* Policy Holder Name Art London	* Policy Start Date 01/01/2017
* Policy End Date 12/31/2017	

[Add](#) [Cancel](#)

PAY



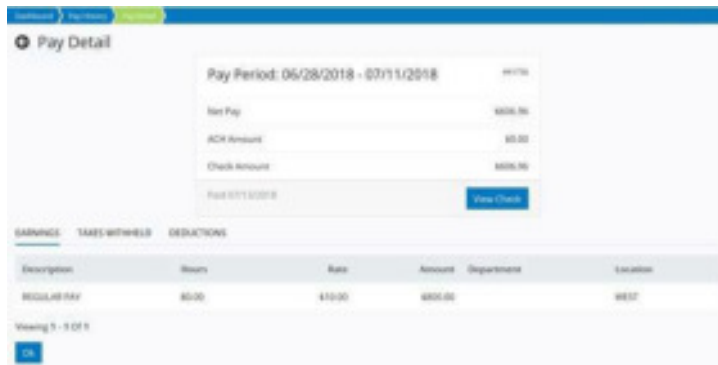
The screenshot shows the 'Pay History' screen with a 'Select Year' dropdown set to 2018. The table lists the following data:

Voucher Number	Check Number	Gross Pay	Taxes	Deductions	Net Pay	Payment Type	Pay Date
000324	41735	\$800.00	\$63.35	\$129.69	\$606.96	C	07/13/2018
000300	41729	\$950.00	\$92.47	\$0.00	\$857.53	C	06/29/2018
000278	41719	\$800.00	\$63.35	\$129.69	\$606.96	C	06/15/2018
000267	41706	\$840.00	\$67.32	\$129.69	\$643.19	C	06/01/2018
000256	41696	\$800.00	\$75.60	\$0.00	\$724.40	C	05/18/2018
000146	41687	\$1,570.00	\$213.06	\$0.00	\$1,356.94	C	05/04/2018
000126	41678	\$800.00	\$75.60	\$0.00	\$724.40	C	04/20/2018

Viewing 1 - 7 of 7

This screen shows the user's most recent checks. Navigate using the **'Select Year'** and the page indicators. To view detailed check information, click the check row.

The **Pay Detail** section gives more information, including earnings, taxes withheld, and any deductions. Click the section **name to display pay details**.



The screenshot shows the 'Pay Detail' screen for a check from the pay period 06/28/2018 - 07/11/2018. The summary information is as follows:

Net Pay	\$606.96
ACH Amount	\$0.00
Check Amount	\$606.96

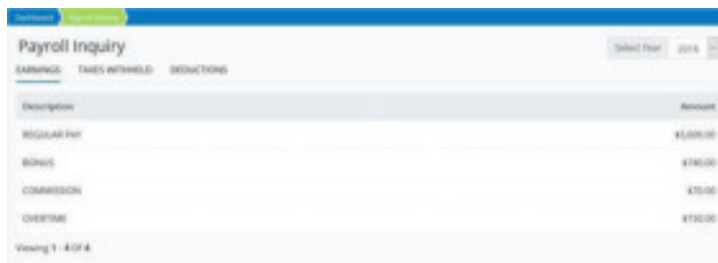
Pay 07/13/2018

EARNINGS TAXES WITHHELD DEDUCTIONS

Description	Hours	Rate	Amount	Department	Location
REGULAR PAY	80.00	410.00	\$606.96		WEST

Viewing 1 - 3 of 3

Click the **'View Check'** button to generate a PDF copy of the check.

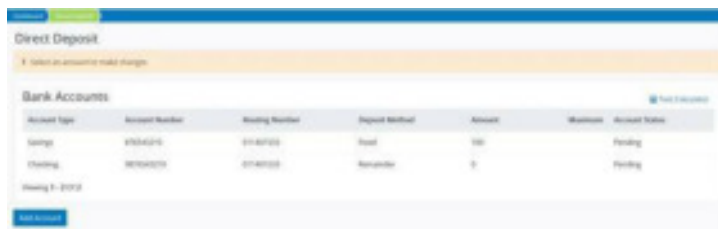


The screenshot shows the 'Payroll Inquiry' screen for the year 2018. The summary table is as follows:

Description	Amount
REGULAR PAY	\$1,000.00
BONUS	\$780.00
COMMISSION	\$70.00
OVERTIME	\$730.00

Viewing 1 - 4 of 4

In Payroll Inquiry, users can view **Year to Date** payroll, earnings, taxes withheld, and any deductions. Use the **'Select Year'** to change the reporting year.



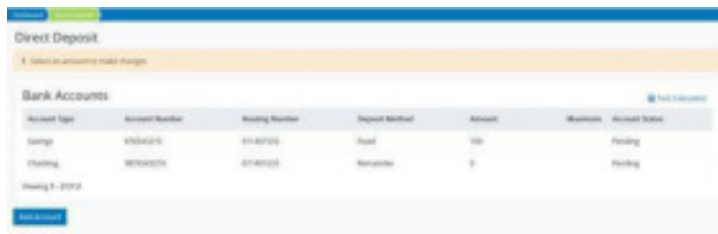
The screenshot shows the 'Direct Deposit' screen with a 'Select an account to make changes' dropdown. The 'Bank Accounts' table is as follows:

Account Type	Account Number	Routing Number	Deposit Method	Amount	Workweek	Account Status
Savings	87654321	99887766	Direct	100		Pending
Checking	98765432	87654321	Standard	0		Pending

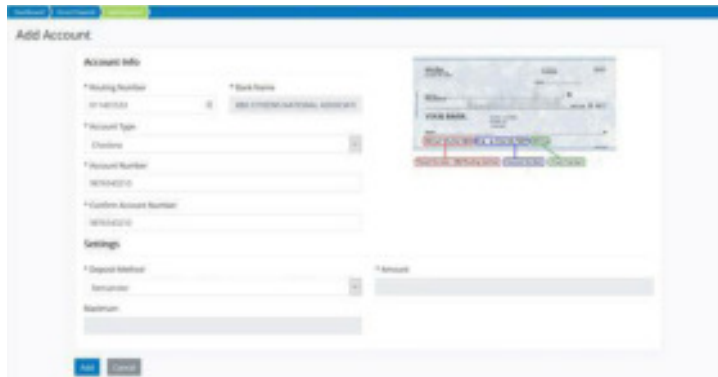
Viewing 1 - 2 of 2

In **Direct Deposit**, users can add, edit, and remove Direct Deposit accounts. See the Section **"Direct Deposit Accounts"** for further information.

ADDING DIRECT DEPOSIT



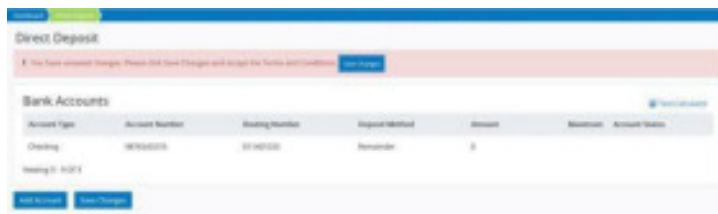
In Direct Deposit, click the **'Add Account'** button.



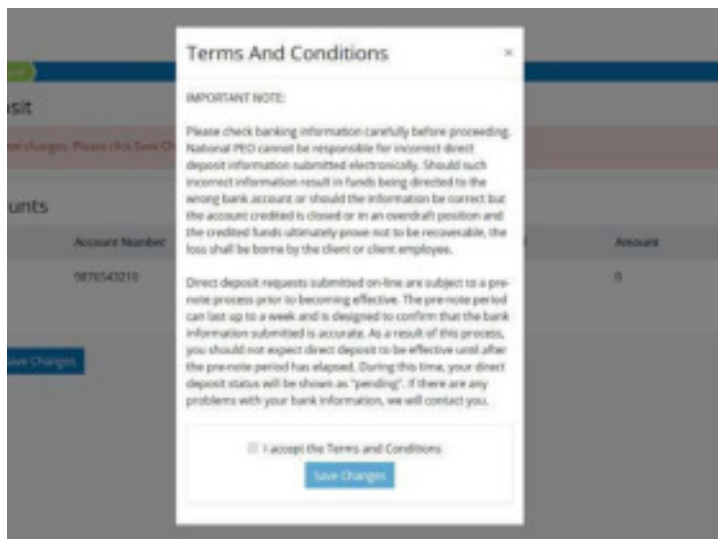
In the **Add Account** window, enter account information, the account type, and the deposit amount. Click **'Add'**.

Note:

For a single account, pick **'Remainder'**. For multiple accounts, be sure to have one account set as **'Remainder'** so the paycheck balance is deposited properly.



Click **'Save Changes'**.

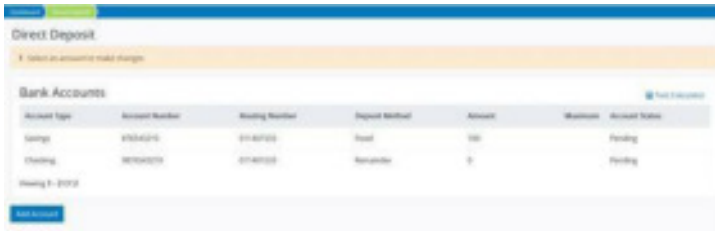


Check the box to accept the Terms and Conditions, then click **'Save Changes'**.

Note:

Once an account is entered, it will go to **'Pending'** status. It may take up to one full pay cycle before the account is set to active.

REMOVING DIRECT DEPOSIT



Direct Deposit

Select an account to edit changes

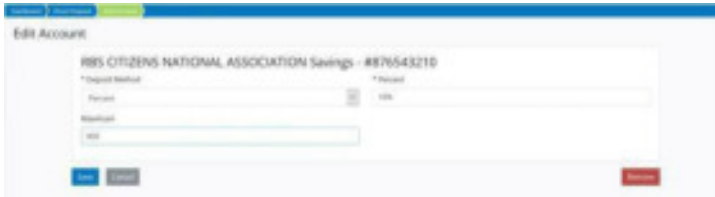
Bank Accounts

Account Type	Account Number	Routing Number	Deposit Method	Amount	Maximum	Account Status
Savings	876543210	010001234	Fixed	100		Pending
Checking	987654321	078901234	Variable	0		Pending

Showing 1 - 2 of 2

Add Account

In **Direct Deposit**, click the account to be removed.



Edit Account

RBS CITIZENS NATIONAL ASSOCIATION Savings - #876543210

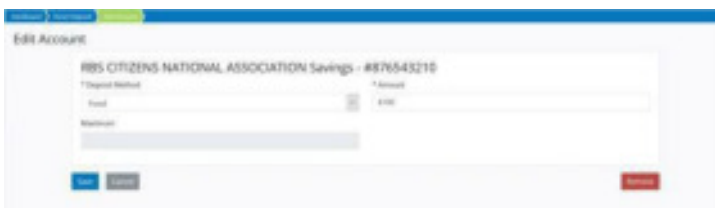
*Deposit Method: Percent

*Amount: 100

Maximum: 0

Save Cancel Remove

In the **Edit Account window**, click **'Remove'**, then **'Remove'** again in the confirmation window.



Edit Account

RBS CITIZENS NATIONAL ASSOCIATION Savings - #876543210

*Deposit Method: Fixed

*Amount: 100

Maximum: 0

Save Cancel Remove

To edit, change the type of account, and the amount **(for Fixed)**, or the percent and maximum amount **(for Percent)**. Click **'Save'**, then **'Save Changes'** in the **Direct Deposit** window.

TAXES

Tax Withholding

Federal Tax

Additional Withholding

Allowance

Filing Status

AZ State Tax - Resident

Withholding Percent (Default: 5.0%)

Type of State Taxable Income

Additional Amount Withheld

Save

View and adjust federal and state withholding information. After adjusting the values, click **'Save'**.

Note:

The employer may have this section set to **view-only**. Consult a manager in the instance edits are necessary.

W-2

You are not currently enrolled to receive an early Electronic W-2. Please see the Early W-2 Election section below to enroll.

Download Your W-2

Select a year/employer from your available W-2's and click the download button.

Select One

Early W-2 Election

Early W-2 allows you to obtain your Form W-2 directly from our Web Self Service site as soon as it is available. Obtaining your W-2 in this fashion can be 2-3 weeks faster than receiving a printed copy! Why enroll in Early W-2? Faster - as much as 2-3 weeks faster than traditional mailed copies. More secure - no more getting lost in the mail, delivered to the wrong address, accidentally discarded, etc. More convenient - download and print at your convenience, when you need it. Unlimited requests! Easy - just a couple mouse clicks to obtain your W-2.

Terms And Conditions

- If you elect to participate in the Early W-2 (E-W2) Program you will not receive a printed copy of your W-2 in the mail. If you do not elect participation in the E-W2 program, a printed copy will be mailed to the address we have on file in the system.
- This election will remain in effect until revoked in writing.

I hereby provide my consent to National PEO to deliver my Form W-2 electronically subject to the terms and conditions stated above.

Enroll

To download a copy of the **current/past** year's W-2 form, use the dropdown menu to select the year of the W-2 and click the **'Download'** button. The W-2 can then be viewed in the **pop-up** window, or downloaded.

Users who have not yet opted-in to the Early W-2 program can do so now by checking the box at the bottom of the page and clicking **'Enroll'**.

Note:

It is not required to enroll in the Early W-2 program to download the W-2 forms.

W-2

You signed up for the E-W2 program on 08/02/2018.

Download Your W-2

Select a year/employer from your available W-2's and click the download button.

Select One

Users who have already signed up for Early W-2 will see their original election date here. **Follow the same process as mentioned above to download the W-2.**

1095-C

Download Your 1095-C

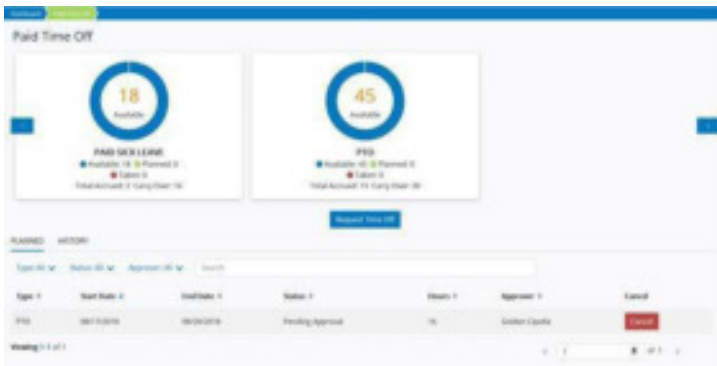
Select the year of the 1095-C you would like to download and click the download button.

Select One

Download a copy of the current/past year's **1095-C** form, use the dropdown box to select the year of the 1095-C, and click the **'download'** button.

The 1095-C will either be downloaded or display in a pop-up window.

PAID TIME OFF



On the **Paid Time Off (PTO)** dashboard users can view their PTO balance provided by the employer. The graphs at the top of the page will show available, planned, approved, and used hours.

Both pending and approved PTO displays below the graphs. Click **'History'** to see previous requests.

Request Hours	Remove
08/11/2019: 8 - 16	Remove
08/20/2019: 8 - 16	Remove

To request time off, clicking the **'Request Time Off'** button and select the type of time off being requested. Select the start and end date of the request period. If the period includes weekends worked, check the **'Includes Weekends'** box.

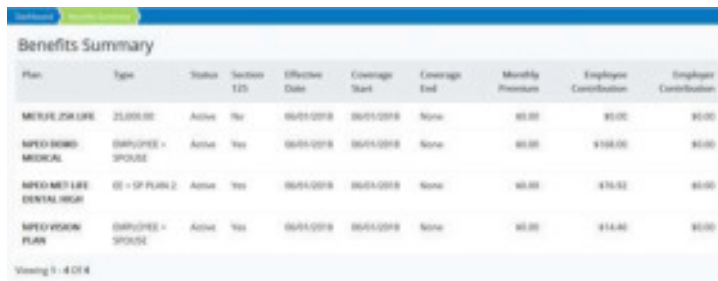
Add a comment (optional). Then, for each day, select the number of hours to be used. Remove a day by clicking the red **'remove'** button.

Once complete, click the **'Submit'** button. The request will be sent to the PTO approver and will be marked as **"pending"** on the dashboard.

BENEFITS, DEPENDENTS, AND BENEFICIARIES

Note:

Values indicated below are strictly for demonstration purposes. Each employee's individual values and plans will differ. Reach out to the benefits department with any questions or issues.



The screenshot shows a 'Benefits Summary' table with columns for Plan, Type, Status, Section ID, Effective Date, Coverage Start, Coverage End, Monthly Premium, Employee Contribution, and Employer Contribution. The table lists four plans: MEDICAL LIFE, MEDICAL, MEDICAL DENTAL, and VISION PLAN, all with active status and monthly premiums.

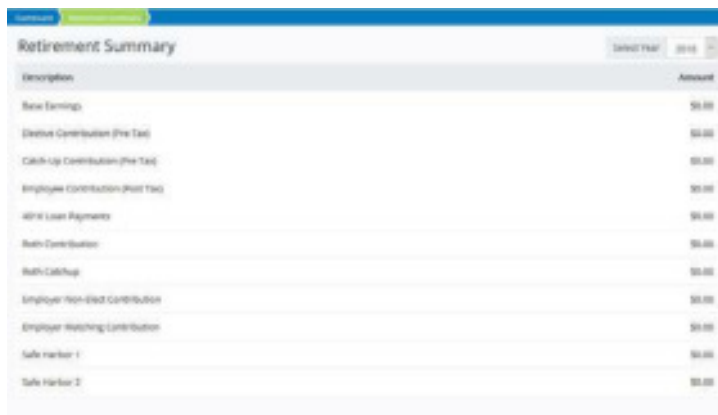
Plan	Type	Status	Section ID	Effective Date	Coverage Start	Coverage End	Monthly Premium	Employee Contribution	Employer Contribution
MEDICAL LIFE	21001.00	Active	No	06/01/2018	06/01/2018	None	\$0.00	\$0.00	\$0.00
MEDICAL	EMPLOYEE + SPOUSE	Active	Yes	06/01/2018	06/01/2018	None	\$0.00	\$168.00	\$0.00
MEDICAL DENTAL	EE + SP PLAN 2	Active	Yes	06/01/2018	06/01/2018	None	\$0.00	\$76.52	\$0.00
VISION PLAN	EMPLOYEE + SPOUSE	Active	Yes	06/01/2018	06/01/2018	None	\$0.00	\$14.00	\$0.00

This page will **show the user's currently enrolled benefits**, along with coverage dates and contribution amounts.



The screenshot shows the 'Flexible Spending' page with a 'No data to show' message. A dropdown menu in the top right corner is set to the year '2018'.

If the user is enrolled in a flexible spending account (**FSA**) the account information and activity can be viewed here. Ensure the proper year is selected in the upper-right corner.



The screenshot shows a 'Retirement Summary' table with columns for Description and Amount. The table lists various retirement-related items such as Base Earnings, Deductible Contributions, and Employer Contributions, all with amounts of \$0.00.

Description	Amount
Base Earnings	\$0.00
Deductible Contributions (Pre Tax)	\$0.00
Catch-Up Contributions (Pre Tax)	\$0.00
Employee Contributions (After Tax)	\$0.00
401(k) Loan Payments	\$0.00
Roth Contributions	\$0.00
Roth Catch-Up	\$0.00
Employer Non-Elect Contribution	\$0.00
Employer Matching Contribution	\$0.00
Safe Harbor 1	\$0.00
Safe Harbor 2	\$0.00

If the user is enrolled in a retirement, **401(k)**, or **Roth** the account information can be viewed here. **Ensure the proper year is selected in the upper-right corner.**



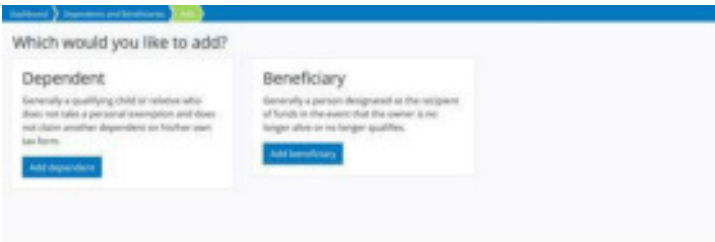
The screenshot shows a 'Dependents and Beneficiaries' table with columns for Name, Type, Relationship, Age, Gender, and Student. The table lists one dependent, Jane London, who is 32 years old, female, and not a student.

Name	Type	Relationship	Age	Gender	Student
Jane London	Dependent		32	F	No

View currently configured **Dependents and/or Beneficiaries** here. To make changes to one of the individuals listed, click their name. To add a beneficiary, click the **'Add'** button.

Note:

This is only a listing of dependents and/or beneficiaries currently in the system. It does not imply coverage under newly elected benefit plans.



After clicking on **'Add'**, choose whether to add a new dependent or beneficiary. On the next screen, enter in the dependent or beneficiary information. Any field marked with an asterisk (*) is required and must be completed before continuing.



Once the information has been entered, click **'Add'**.

Note:

Entering a new dependent or beneficiary does not enroll the individual in any benefit plans or make them a beneficiary immediately. This must be set up during benefits enrollment.

BENEFITS ENROLLMENT

In the benefits enrollment system users are able to select dependents and/or beneficiaries, and enroll in the benefits programs selected by the employer. Please see the **Benefits Enrollment Guide** for additional information.



In the Documents window, users can access files and documentation made available regarding **employment, such as employee handbooks, legal documentation, and copies of completed forms. Availability will vary.**



In the window, users can check for any scheduled company events. **Click on the event name or the (+) icon to view event details.**