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To access the PrismHR Manager Self-Service (MSS) Portal:

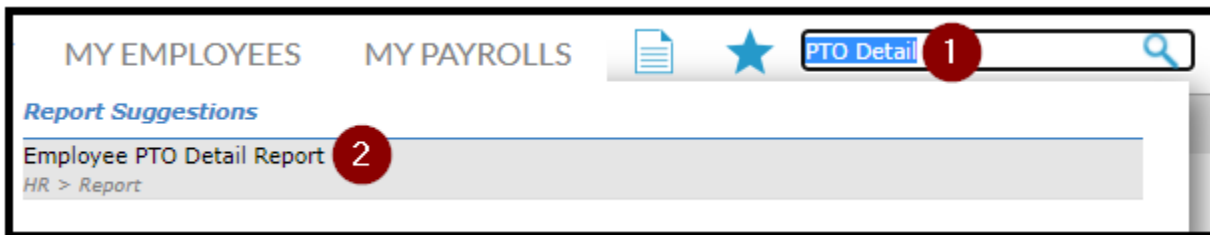
Click on **PrismHR Payroll Software** under Quick Links for Single Sign On Access to PrismHR.



To View All Employees:

Step 1: Type "PTO Detail" in the search bar.

Step 2: Click on **Employee PTO Detail Report** from the list.



Step 3: Select **PTO Absence Summary Report with Accrual Level** in the Report Type.

Step 4: Remove the auto-generated **Year-End Date**.

Step 5: Click **Run**.

HR / Report / Employee PTO Detail Report Company: (000100) Demo Client

Employee PTO Detail Report

+ Employee Status Status Description
> x

+ Register Type Class Description
> x

Report Type: PTO Absence Summary Report with Accrual Level by Location 3
Year-End Date: 4 will report on all registers

Run 5 Close

To View Individual Employees:

Go to: helpside.com -> Employer -> Manager (MSS) Portal

Step 1: Type in "PTO Register" in the search bar.

Step 2: Select **Employee PTO Register** from the list.

MY EMPLOYEES MY PAYROLLS

PTO Register 1

Application Suggestions

Employee PTO Register 2
HR > Change

Step 3: Click **Employee**.

Step 4: Select the employee's name.

HR / Change / Employee PTO Register Company: (000100) Demo Client

Employee PTO Registers

Employees 3
Register Type: -No Items-

Employee Search Results

Employee ID	First Name	Last Name	Position	Status	Type	Pay Group	
1	N28646	Joseph2	Customer Service Rep	Term	FT	BW	
2	M50629	Cow	President	Act	FT	BW	
3	H28640	XXX10ion	Vice President	Act	FT	BW	
4	E42869	Skyler	Plumber	Act	FT	BW	
5	W43221	Chris	Customer Service Rep	Act	FT	BW	
6	I28641	Patricia	Account Representative	Act	FT	BW	
7	S50273	Johnathan	Account Representative	Act	FT	BW	
8	W43437	Lee	Customer Service Rep	Act	FT	BW	
9	M46597	TestUser	President	Act	FT	BW	
10	W58196	August	Effective	Receptionist	Act	FT	BW
11	W58197	September	Effective	President	Act	FT	BW
12	N00110	Alejandro	Garcia	Vice President	Act	FT	BW
13	P43575	Dave	Gonzalez	Office Manager	Act	FT	BW
14	P43383	Samuel	Hagar	Plumber	Act	FT	BW

Step 5: In the **Register Type** drop-down box, select the desired plan to view balance, hours taken, and hours accrued.

HR / Change / Employee PTO Register Company: (000100) Demo Client

Employee PTO Registers

Employee Alejandro Garcia

Register Type Paid Time Off

PTO Benefit Plan Paid Time Off

Benefit Start Date

Carryover Hours (+)

YTD Hours Calculated (+)

YTD Hours Taken (-)

YTD Hours Available (=) 149.99

Max Use Limit

Max Use Available 149.99

Year End Date

Calculated Thru Date

Carryover Expires On

Stop PTO Accruals

Paid Hours Absent Details

PTO Date	Code	Reason	Hours	Annotation	Leave Request ID	Comment
03/21/2020	PTO	Paid Time O	-8.00	VOUCHER# 000394		

Hours Calculated/Carry-over Details

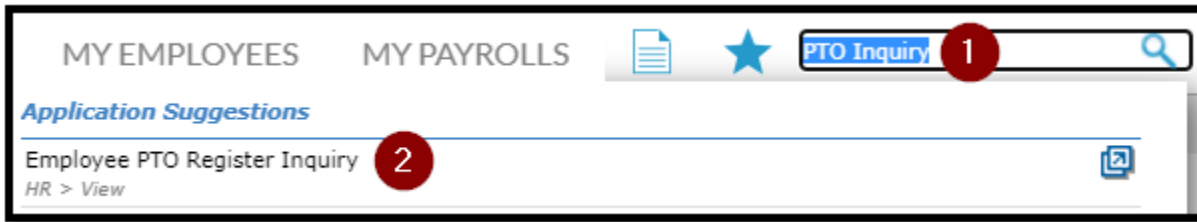
Date	Hours Calculated	Carry-over	Annotation
01/01/2021	120.00		Yearly accrual
03/27/2020	4.61		CALCULATED THRU 03-21-20
03/13/2020	4.61		CALCULATED THRU 03-07-20
01/31/2020		28.77	CARRYOVER 01-31-20
05/01/2019	4.61		CALCULATED THRU 04-06-19
01/31/2019		24.16	CARRYOVER 01-31-19

To View Lost PTO Carryover:

Go to: helpside.com -> Employer -> Manager (MSS) Portal

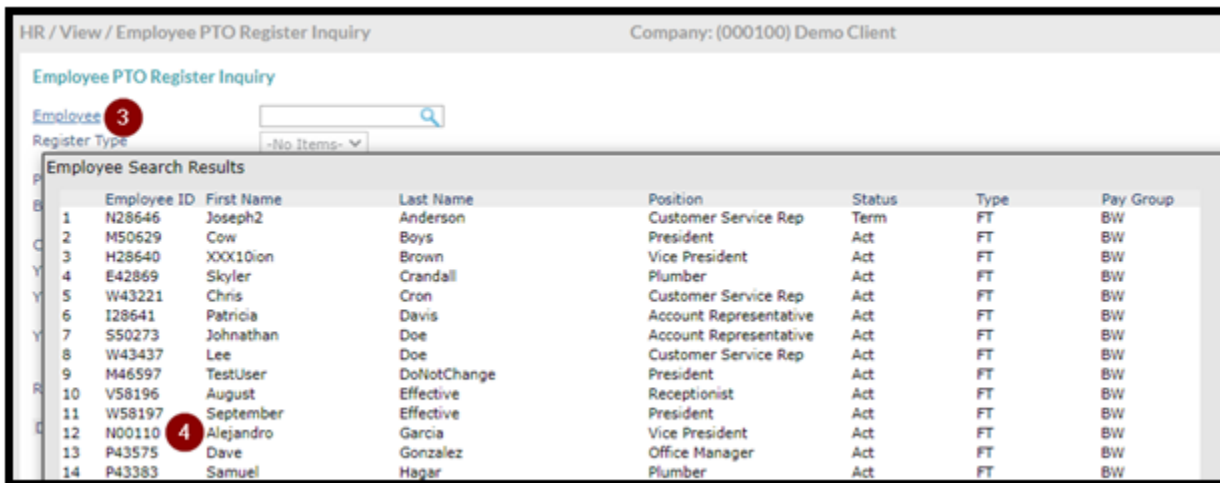
Step 1: Type in "PTO Inquiry" in the search bar.

Step 2: Select **Employee PTO Register Inquiry** from the list.



Step 3: Click **Employee**.

Step 4: Select the employee's name.



Step 5: In the **Register Type** drop-down box, select the desired plan.

Step 6: In the **Report View** drop-down box, select **Year End History**. Compare "Carryover Hours" to "Year End Balance". The difference is the amount lost at year end.

HR / View / Employee PTO Register Inquiry Company: (000100) Demo Client

Employee PTO Register Inquiry

Employee **GARCIA ALEJANDRO**

Register Type **Paid Time Off**

PTO Benefit Plan **PTO** **Paid Time Off**

Benefit Start Date **02/01/2015**

Carryover Hours (+) **28.77** **Year End Date** **01/31/2021**

YTD Hours Calculated (+) **129.22** **Calculated Thru Date** **03/21/2020**

YTD Hours Taken (-) **8.00** **Carryover Expires On**

YTD Hours Available (=) **149.99**

Report View

Year End Date	Carry-over	Hours Calculated	Hours Used	Year End Balance
01/31/2017	20.00	11.08	10.00	21.08
01/31/2019	21.08	3.08	0.00	24.16
01/31/2020	24.16	4.61	0.00	28.77