



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



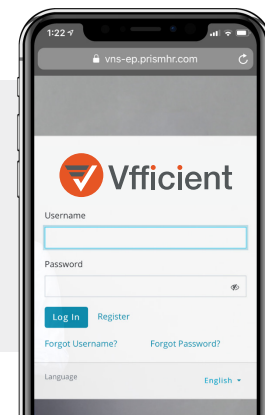
Manage and enroll in employer-provided benefits



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.

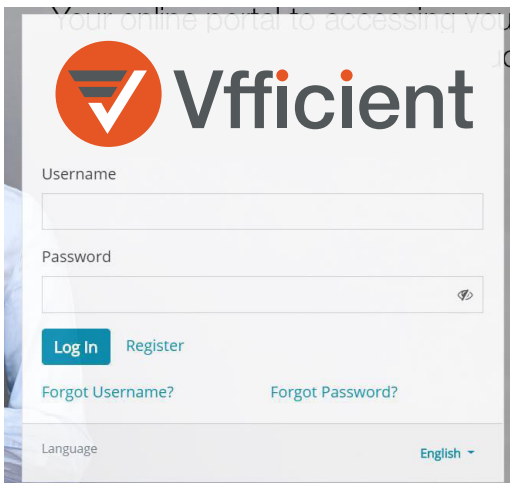


MOBILE FRIENDLY

EMPLOYEE SELF-SERVICE PORTAL LOGIN AND REGISTRATION

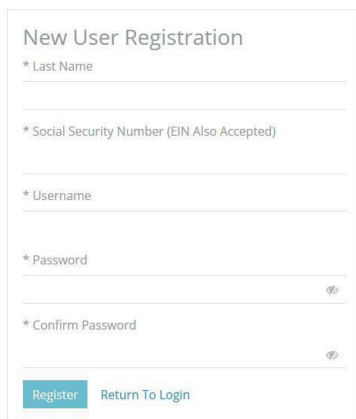
Open a new browser window or tab, and navigate to <https://vns-ep.prismhr.com/#/auth/login>

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

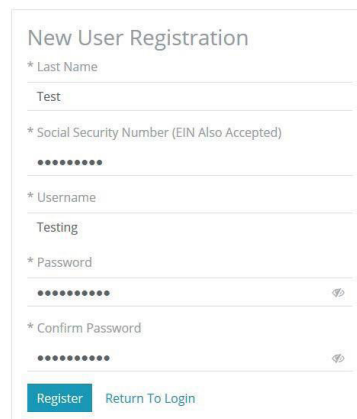


The screenshot shows the Vfficient login and registration interface. At the top left is the Vfficient logo, which consists of a red circle containing a white checkmark. To the right of the logo is the text "Vfficient". Below the logo and name are two input fields: "Username" and "Password". The "Password"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

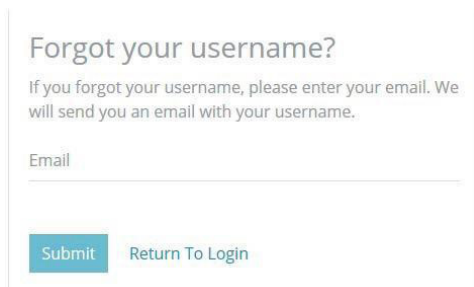


This is a "New User Registration" form. It contains the following fields: "* Last Name", "* Social Security Number (EIN Also Accepted)", "* Username", "* Password", and "* Confirm Password". Each field has a small eye icon to its right. At the bottom of the form are two buttons: "Register" (in a blue box) and "Return To Login".

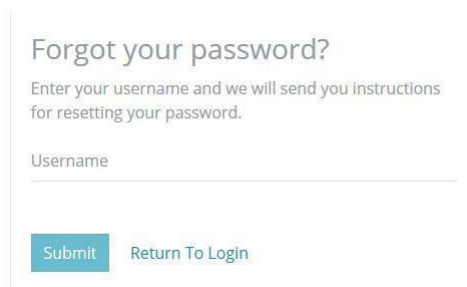


This is a "New User Registration" form, identical to the one above, but with test data entered. The "Last Name" field contains "Test". The "Social Security Number" field contains "*****". The "Username" field contains "Testing". The "Password" and "Confirm Password" fields both contain "*****". At the bottom are the "Register" and "Return To Login" buttons.

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.



This is a "Forgot your username?" form. It has the heading "Forgot your username?" and the text "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 a blue box) and "Return To Login".



This is a "Forgot your password?" form. It has the heading "Forgot your password?" and the text "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 a blue box) and "Return To Login".

NAVIGATING THE EMPLOYEE SELF-SERVICE PORTAL

The screenshot shows the Vfficient Employee Self-Service Portal dashboard. The interface includes a top navigation bar with the Vfficient logo and a user profile icon (1). A left-hand navigation menu (2) lists various portal options: Personal, Pay, Taxes, Paid Time Off, Benefits, NPEO Time, Documents, Events, Onboarding, NPEO Perks, and Zaytoon. The main content area is divided into several sections:

- Pay (3):** Displays 'Most Recent Pay Statements' with dates: 07/13/2018, 06/29/2018, and 06/15/2018. A 'View More' link is present.
- Paid Time Off (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 (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 (6):** Displays a message: 'No Events Scheduled'.
- New Messages (7):** Displays a message: 'No Unread Messages'. A 'View More' link is at the bottom.

 The footer of the dashboard includes links for 'About | Privacy | Lang: English'.

| | |
|-----------------------|---|
| 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:

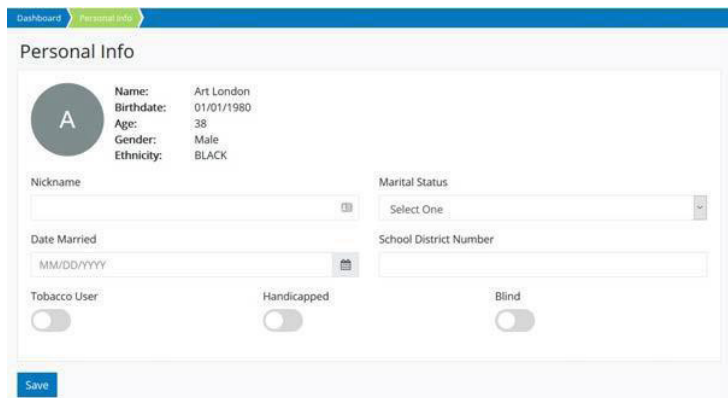
Some users may be unable to edit information displayed on these pages. Managers will be able to make these edits.



The screenshot shows the 'Employment Summary' page. At the top, there is a navigation bar with 'Dashboard' and 'Employment Summary'. Below the title, there is a table of employment 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. At the top, there is a navigation bar with 'Dashboard' and 'Personal Info'. Below the title, there is a profile card with a circular avatar containing the letter 'A' and the following details:

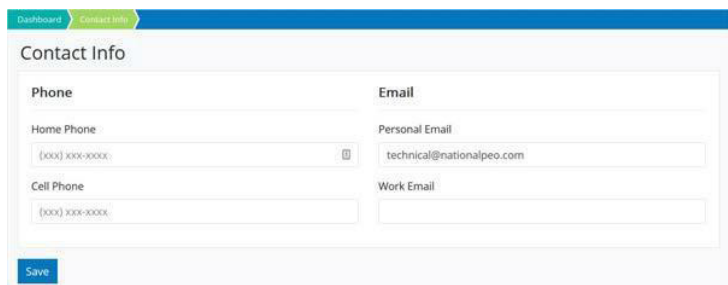
- Name: Art London
- Birthdate: 01/01/1980
- Age: 38
- Gender: Male
- Ethnicity: BLACK

Below the profile card, there are several input fields and toggle switches:

- Nickname: [text input]
- Marital Status: [dropdown menu with 'Select One']
- Date Married: [calendar icon]
- School District Number: [text input]
- Tobacco User: [toggle switch]
- Handicapped: [toggle switch]
- Blind: [toggle switch]

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

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. At the top, there is a navigation bar with 'Dashboard' and 'Contact Info'. Below the title, there are two columns of input fields:

- Phone:**
 - Home Phone: [text input with mask (xxx) xxx-xxxx]
 - Cell Phone: [text input with mask (xxx) xxx-xxxx]
- Email:**
 - Personal Email: [text input with value technical@nationalpeo.com]
 - Work Email: [text input]

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

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.

Dashboard Address

Address

RESIDENT MAILING W-2

* Address Line 1
4800 N Scottsdale

Address Line 2

* Zip
85251

* City
SCOTTSDALE

* County
MARICOPA

* State
AZ

Save

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.**

Dashboard Emergency Contacts

Emergency Contacts

| Name | Relationship | Contact |
|--------------|--------------|--------------|
| Gayle London | Spouse | 555-555-5555 |

Viewing 1 - 1 Of 1

Add

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

Dashboard Emergency Contacts Add

Add Emergency Contact

* Name

* Relationship

* Type

* Info

Add Cancel

Indicate **Veteran Status** in this section.

Dashboard Veteran Status

Veteran Status

Veteran

Vietnam Veteran

Disabled

Newly Separated

Other Protected

Service Medal Veteran

Save

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 Driver's License

Driver's License

License Number
D12345678

Expiration Date
01/01/2054

License State
Arizona

Save

Dashboard > Vehicles

Vehicles

| Make | Model | Year | Registration Number | Date Added | Date Removed |
|------|--------|------|---------------------|------------|--------------|
| Ford | Pickup | 2003 | 12345678901234567 | 02/05/2018 | |

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 02/03/2018 | Date Removed MM/DD/YYYY |

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

Dashboard > Vehicle Insurance Policies

Vehicle Insurance Policies

| Carrier Name | Policy ID | Policy Holder Name | Policy State 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 State Date 01/01/2017 |
| * Policy End Date 12/31/2017 | |

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

PAY

Dashboard > Pay History

Pay History Select Year 2018

| Voucher Number | Check Number | Gross Pay | Taxes | Deductions | Net Pay | Payment Type | Pay Date |
|----------------|--------------|------------|----------|------------|------------|--------------|------------|
| 000324 | 41736 | \$800.00 | \$63.35 | \$129.69 | \$606.96 | C | 07/13/2018 |
| 000300 | 41726 | \$950.00 | \$92.47 | \$0.00 | \$857.53 | C | 06/29/2018 |
| 000278 | 41716 | \$800.00 | \$63.35 | \$129.69 | \$606.96 | C | 06/15/2018 |
| 000267 | 41706 | \$840.00 | \$67.12 | \$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**.

Dashboard > Pay History > Pay Detail

Pay Detail

Pay Period: 06/28/2018 - 07/11/2018 #41736

Net Pay \$606.96

ACH Amount \$0.00

Check Amount \$606.96

Paid 07/13/2018 View Check

EARNINGS TAXES WITHHELD DEDUCTIONS

| Description | Hours | Rate | Amount | Department | Location |
|-------------|-------|---------|----------|------------|----------|
| REGULAR PAY | 80.00 | \$10.00 | \$800.00 | | WEST |

Viewing 1 - 1 Of 1

Ok

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

Dashboard > Payroll Inquiry

Payroll Inquiry Select Year 2018

EARNINGS TAXES WITHHELD DEDUCTIONS

| Description | Amount |
|-------------|------------|
| REGULAR PAY | \$5,600.00 |
| BONUS | \$740.00 |
| COMMISSION | \$70.00 |
| OVERTIME | \$150.00 |

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.

Dashboard > Direct Deposit

Direct Deposit

Select an account to make changes

Bank Accounts Test Calculator

| Account Type | Account Number | Routing Number | Deposit Method | Amount | Maximum | Account Status |
|--------------|----------------|----------------|----------------|--------|---------|----------------|
| Savings | 876543210 | 011401533 | Fixed | 100 | | Pending |
| Checking | 9876543210 | 011401533 | Remainder | 0 | | Pending |

Viewing 1 - 2 Of 2

Add Account

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

ADDING DIRECT DEPOSIT

Direct Deposit

1 Select an account to make changes

| Account Type | Account Number | Routing Number | Deposit Method | Amount | Maximum | Account Status |
|--------------|----------------|----------------|----------------|--------|---------|----------------|
| Savings | 876543210 | 011401533 | Fixed | 100 | | Pending |
| Checking | 9876543210 | 011401533 | Remainder | 0 | | Pending |

Viewing 1 - 2 of 2

Add Account

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

Direct Deposit

Add Account

Account Info

* Routing Number: 011401533 * Bank Name: 885 CITIZENS NATIONAL ASSOCIATI

* Account Type: Checking

* Account Number: 9876543210

* Confirm Account Number: 9876543210

Settings

* Deposit Method: Remainder * Amount: [input field]

Maximum: [input field]

Add Cancel

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.

Direct Deposit

1 You have unsaved changes. Please click Save Changes and accept the Terms and Conditions

| Account Type | Account Number | Routing Number | Deposit Method | Amount | Maximum | Account Status |
|--------------|----------------|----------------|----------------|--------|---------|----------------|
| Checking | 9876543210 | 011401533 | Remainder | 0 | | Pending |

Viewing 1 - 1 of 1

Add Account Save Changes

Click **'Save Changes'**.

Terms And Conditions

IMPORTANT NOTE:

Please check banking information carefully before proceeding. National PEO cannot be responsible for incorrect direct deposit information submitted electronically. Should such incorrect information result in funds being directed to the wrong bank account or should the information be correct but the account credited is closed or in an overdraft position and the credited funds ultimately prove not to be recoverable, the loss shall be borne by the client or client employee.

Direct deposit requests submitted on-line are subject to a pre-note process prior to becoming effective. The pre-note period can last up to a week and is designed to confirm that the bank information submitted is accurate. As a result of this process, you should not expect direct deposit to be effective until after the pre-note period has elapsed. During this time, your direct deposit status will be shown as "pending". If there are any problems with your bank information, we will contact you.

I accept the Terms and Conditions

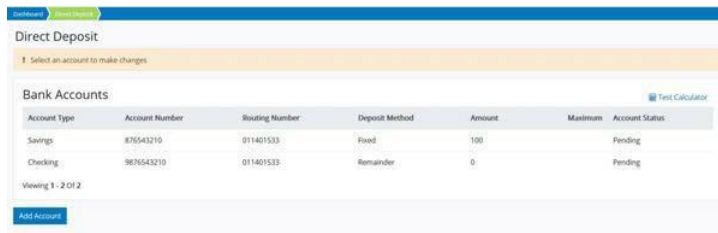
Save Changes

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



Dashboard > Direct Deposit > Edit Account

Direct Deposit

1. Select an account to make changes

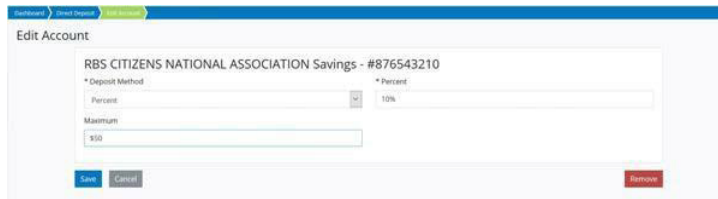
Bank Accounts Test Calculator

| Account Type | Account Number | Routing Number | Deposit Method | Amount | Maximum | Account Status |
|--------------|----------------|----------------|----------------|--------|---------|----------------|
| Savings | 876543210 | 011401533 | Fixed | 100 | | Pending |
| Checking | 9876543210 | 011401533 | Remainder | 0 | | Pending |

Viewing 1 - 2 of 2

[Add Account](#)

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



Dashboard > Direct Deposit > Edit Account

Edit Account

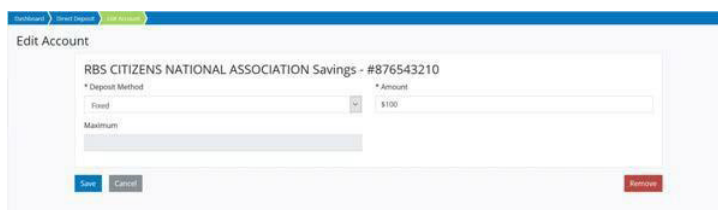
RBS CITIZENS NATIONAL ASSOCIATION Savings - #876543210

* Deposit Method: Percent * Amount: 10%

Maximum: \$10

[Save](#) [Cancel](#) [Remove](#)

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



Dashboard > Direct Deposit > Edit Account

Edit Account

RBS CITIZENS NATIONAL ASSOCIATION Savings - #876543210

* Deposit Method: Fixed * Amount: \$100

Maximum:

[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 Election Option

1.8% of Gross Taxable Wages

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 reprints! 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

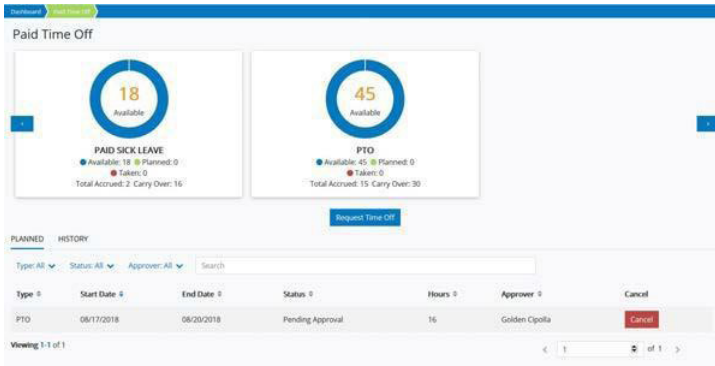
Select the year of the 1095-C you would like to download and click the download button.

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.

The form allows users to request time off. It includes a dropdown for PTO Type (PTO), an 'Include Weekends' checkbox, and fields for Start Date (08/17/2018) and End Date (08/29/2018). A comment field contains 'Vacation Request'. Below is a 'Review Hours' section with a table for selecting hours per day. A 'Request Total: 16 Hours' is displayed at the bottom.

| Review Hours | Remove |
|---------------------|--------|
| 08/17/2018 8 h m | Remove |
| 08/29/2018 8 h m | 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.

| Plan | Type | Status | Section 125 | Effective Date | Coverage Start | Coverage End | Monthly Premium | Employee Contribution | Employer Contribution |
|---------------------------|-------------------|--------|-------------|----------------|----------------|--------------|-----------------|-----------------------|-----------------------|
| METLIFE 25K LIFE | 25,000.00 | Active | No | 06/01/2018 | 06/01/2018 | None | \$0.00 | \$0.00 | \$0.00 |
| NPEO DEMO MEDICAL | EMPLOYEE + SPOUSE | Active | Yes | 06/01/2018 | 06/01/2018 | None | \$0.00 | \$168.00 | \$0.00 |
| NPEO MET LIFE DENTAL HIGH | EE + SP PLAN 2 | Active | Yes | 06/01/2018 | 06/01/2018 | None | \$0.00 | \$76.92 | \$0.00 |
| NPEO VISION PLAN | EMPLOYEE + SPOUSE | Active | Yes | 06/01/2018 | 06/01/2018 | None | \$0.00 | \$14.46 | \$0.00 |

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

Select Year: 2018

ACCOUNTS ACTIVITY

No data to show

Viewing 0 - 0 Of 0

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.

Select Year: 2018

| Description | Amount |
|----------------------------------|--------|
| Base Earnings | \$0.00 |
| Elective Contribution (Pre-Tax) | \$0.00 |
| Catch-Up Contribution (Pre-Tax) | \$0.00 |
| Employee Contribution (Post Tax) | \$0.00 |
| 401K Loan Payments | \$0.00 |
| Roth Contribution | \$0.00 |
| Roth Catchup | \$0.00 |
| Employer Non-Elect Contribution | \$0.00 |
| Employer Matching Contribution | \$0.00 |
| Safe Harbor 1 | \$0.00 |
| Safe Harbor 2 | \$0.00 |

Viewing 0 - 0 Of 0

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.**

| Name | Type | Relationship | Age | Gender | Student |
|-------------|-----------|--------------|-----|--------|---------|
| June London | Dependent | | 32 | F | No |

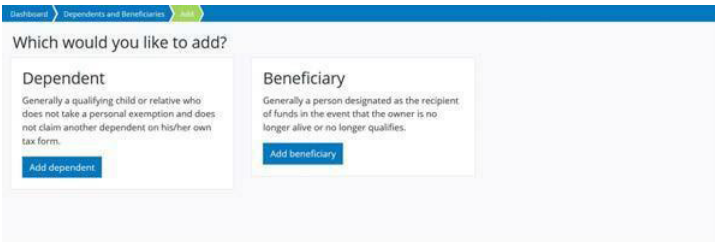
Viewing 1 - 1 Of 1

Add

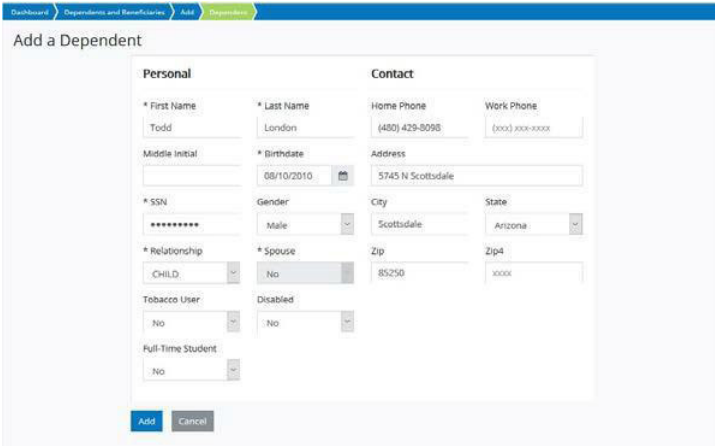
View currently configured **Dependents and/or Beneficiaries** here. To make changes to one of the individuals listed, click their name. To add a beneficiary, click the **'Add'** button.

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.



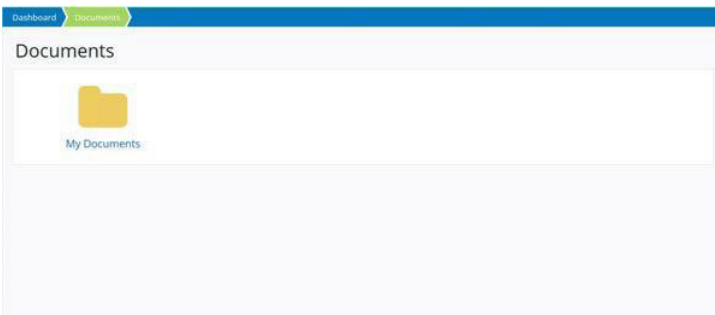
Once the information has been entered, click **'Add'**.

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.**