GMS Connect

Client User Guide

V1.0

March 8, 2018

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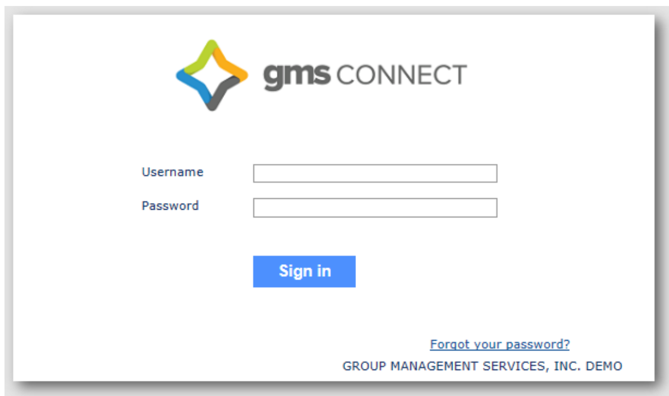
Welcome to GMS Connect! This workbook is meant to be a guide to the new GMS Connect platform. The instructions coupled with screen-shots will help you to get comfortable in the GMS Connect system, but it is not comprehensive. Should you have any questions or need assistance, you are always welcome to reach out to your Payroll Specialist or Account Manager.

Getting Started

Navigate to https://gms.prismhr.com/gms and enter your credentials:



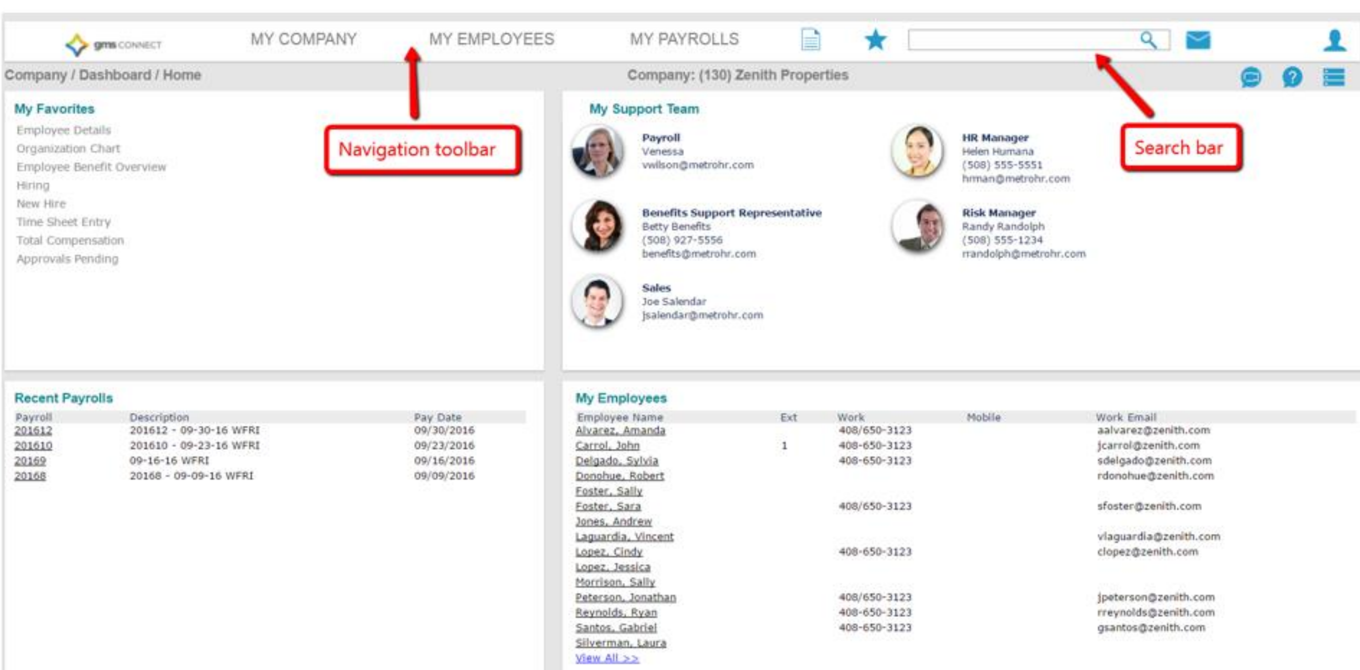
Navigation

Upon logging in, you'll find the navigation toolbar across the top of the home screen.

"My Company" is where you'll find all the information that pertains to your organization and allows you to manage your company's basic structure.

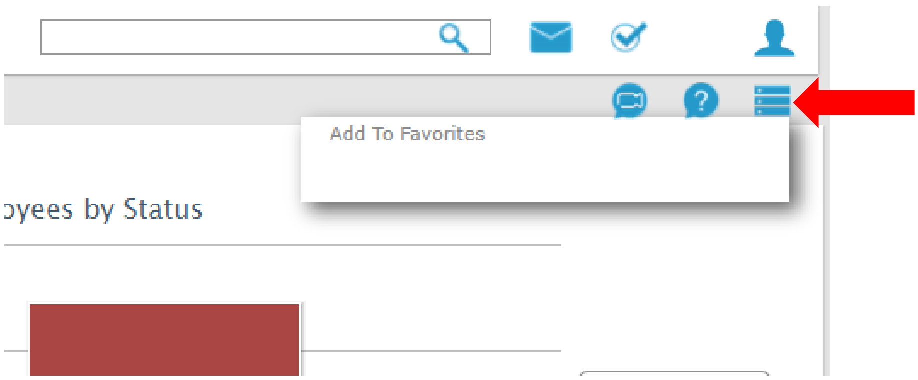
"My Employees" allows you to maintain your employees' HR records.

"My Payrolls" allows you to enter payroll, view employee payroll history and invoices as well as manage voluntary deductions for your employees.



The paper icon gives you access to various reports, and the star icon allows you to access your favorites from any screen. The search bar allows you to search for employees, reports, and menus all in one spot. When searching for an employee, enter "e:" before the employee name to narrow the results only to employee names.

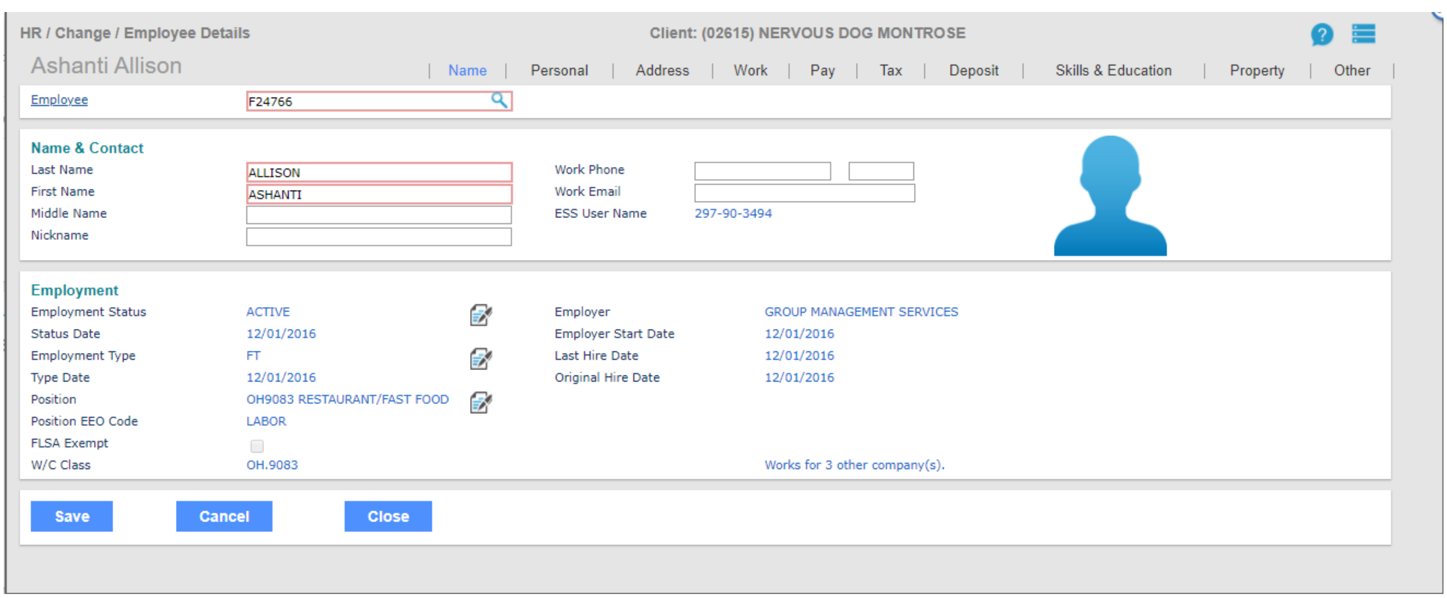
Your account will have a set list of favorites preloaded for you, but you can edit these at any time by navigating to the screen you would like to add/remove from favorites, clicking on the "Action Menu," and selecting "add to favorites" or "remove from favorites."



The "question mark" icon is a valuable tool that provides help if you get stuck, and any time the video icon is displayed there are helpful how-to videos as well.

Employee Details

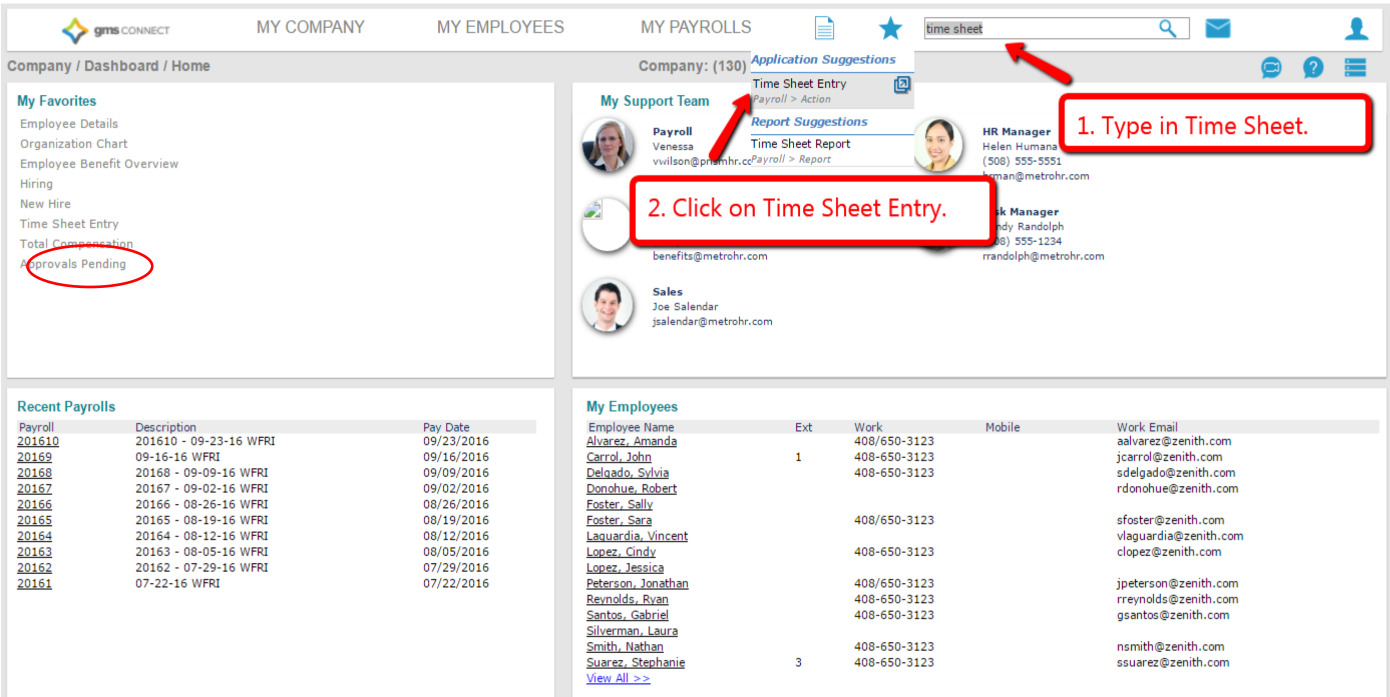
You can click on an employee's name to access the Employee Details screen:



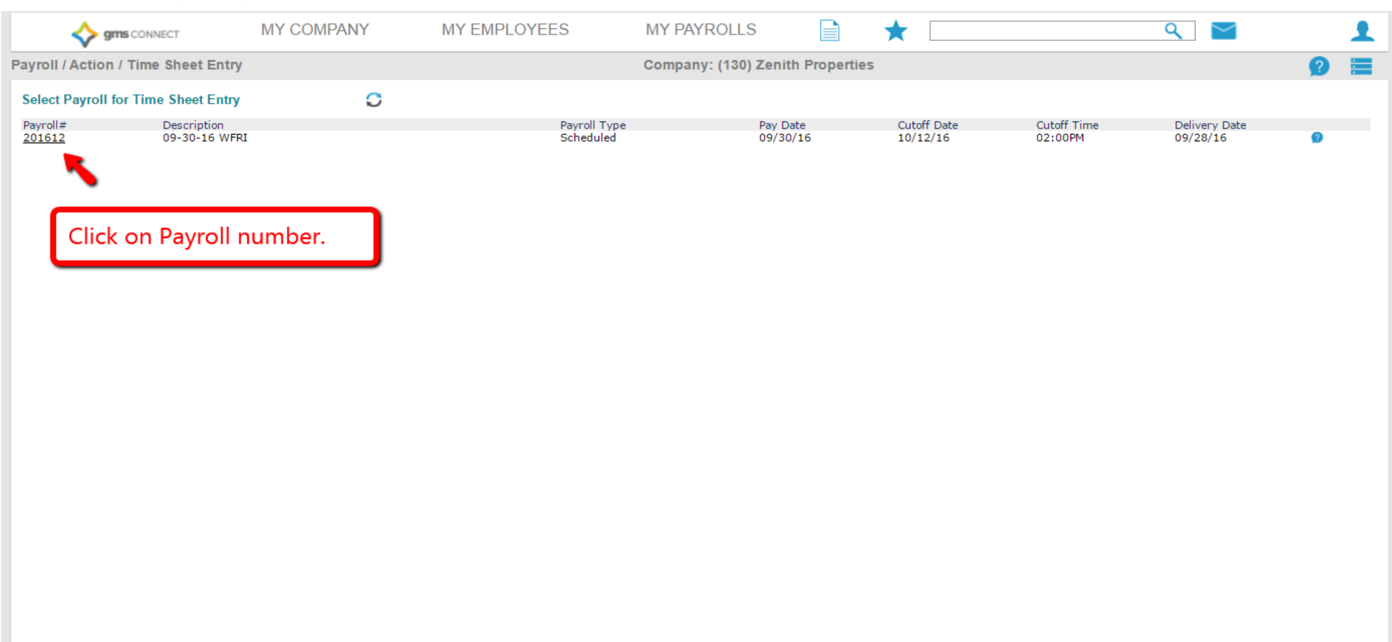
This screen allows you to view and update employees' personal data, including taxes, direct deposit, etc.

Payroll

You can utilize the search bar to navigate to Time Sheet Entry, or you may select it in your "Favorites."



Select the payroll you would like to edit:



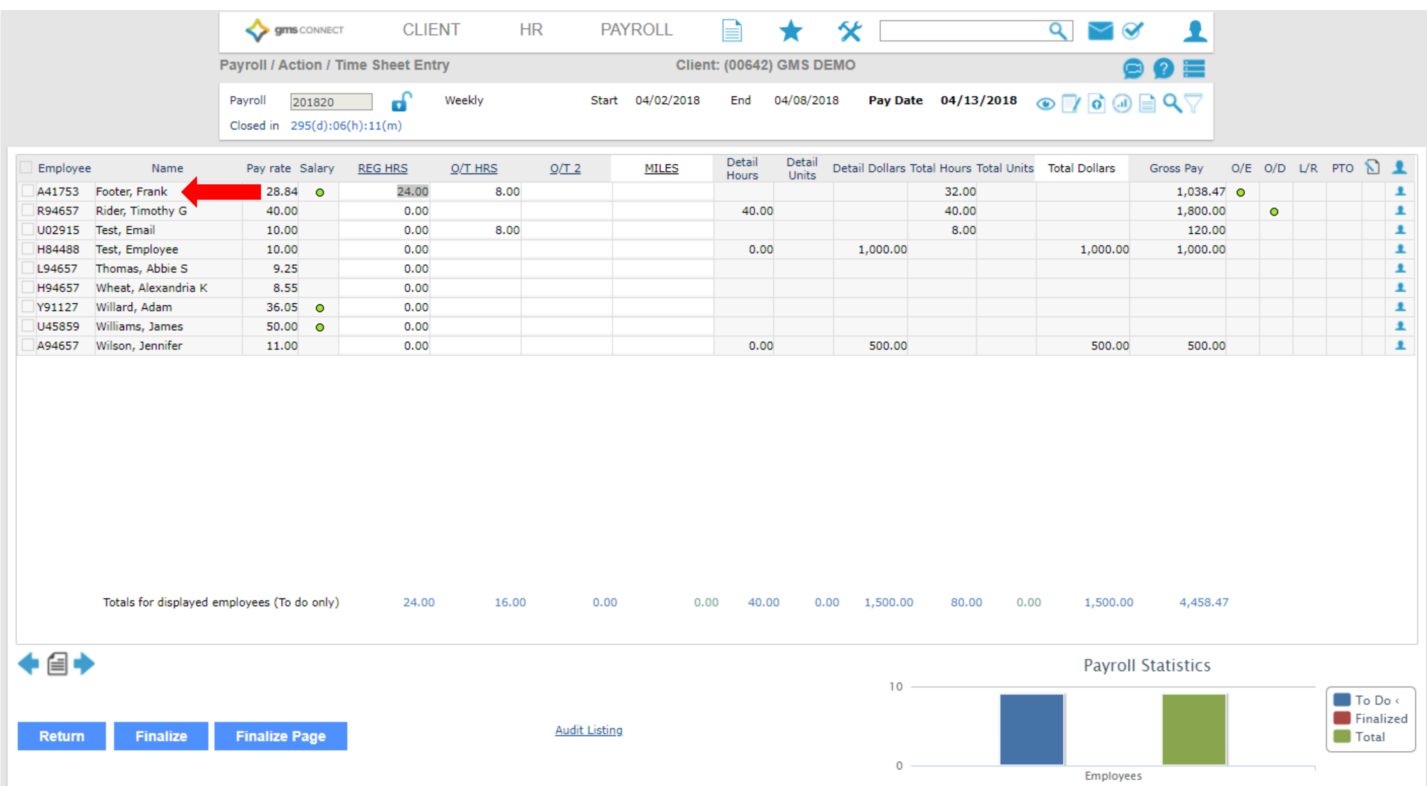
Time Sheet

You can to the following key to assist you in navigating your timesheet:

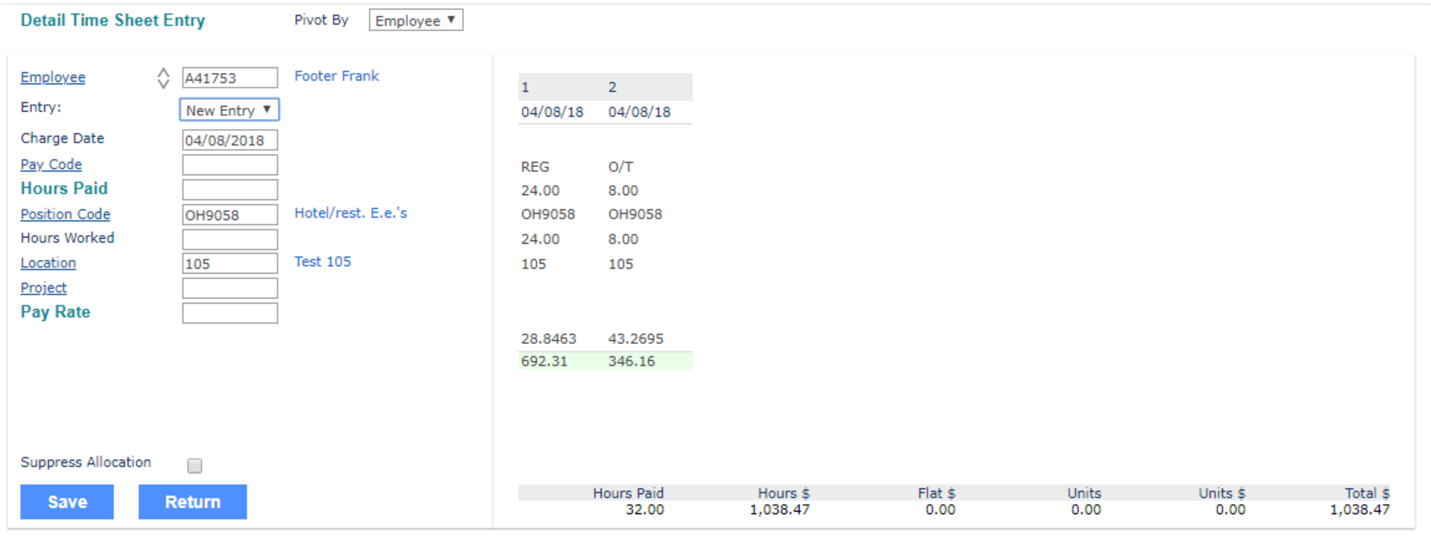
Icon Key:

- Import pay data from a file
- Statistics – Compares the current payroll to prior payrolls
- Timesheet entry detail report
- Search for a specific employee name or ID number
- Filter the timesheet to display by department, location, etc.
- Use this function to hide columns

Inside your timesheet, salaried employees' data has been prepopulated for you. You may make edits to each column the same way you did before. If you need a pay code not listed, you may click on the Employee's name to pull up detailed time entry:

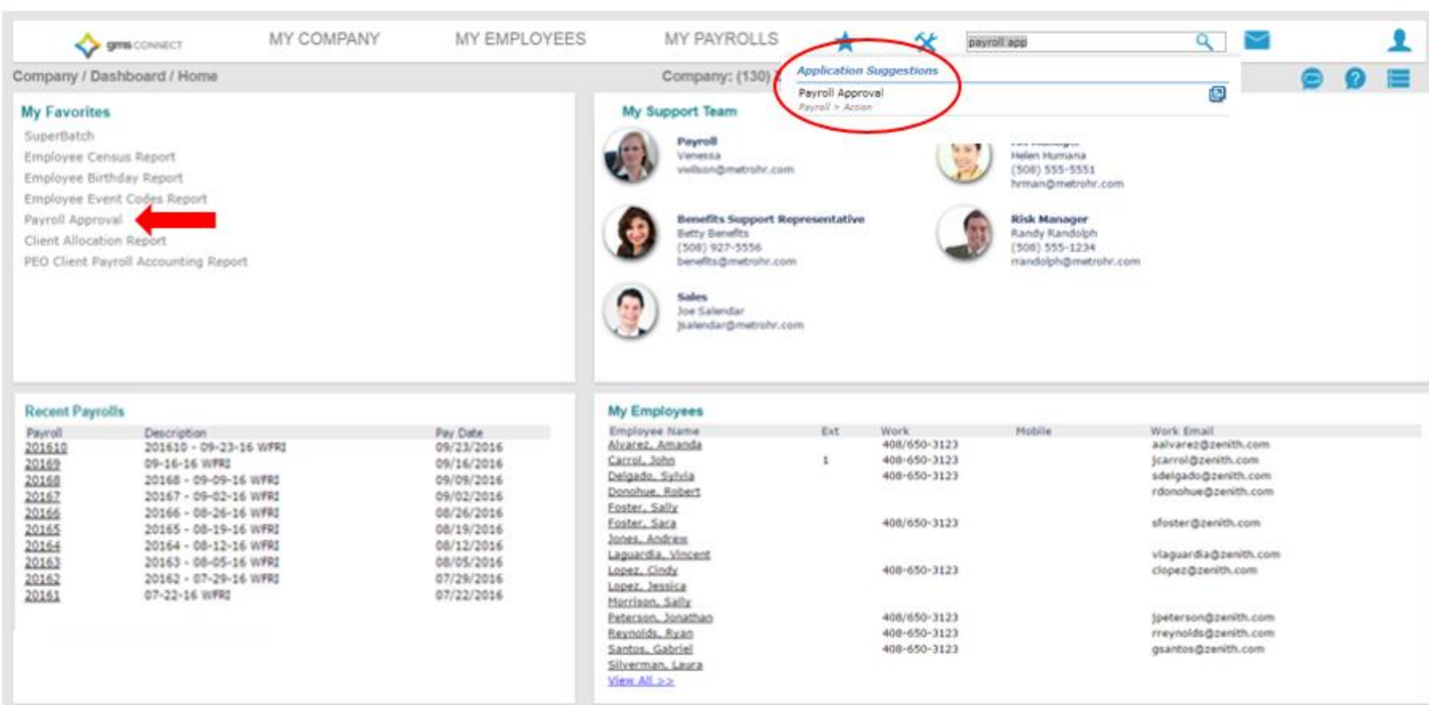


Columns may be selected and edited, and new ones can be added on this screen. You may also allocate hours by project, location, etc. on this screen. Totals are then displayed at the bottom:

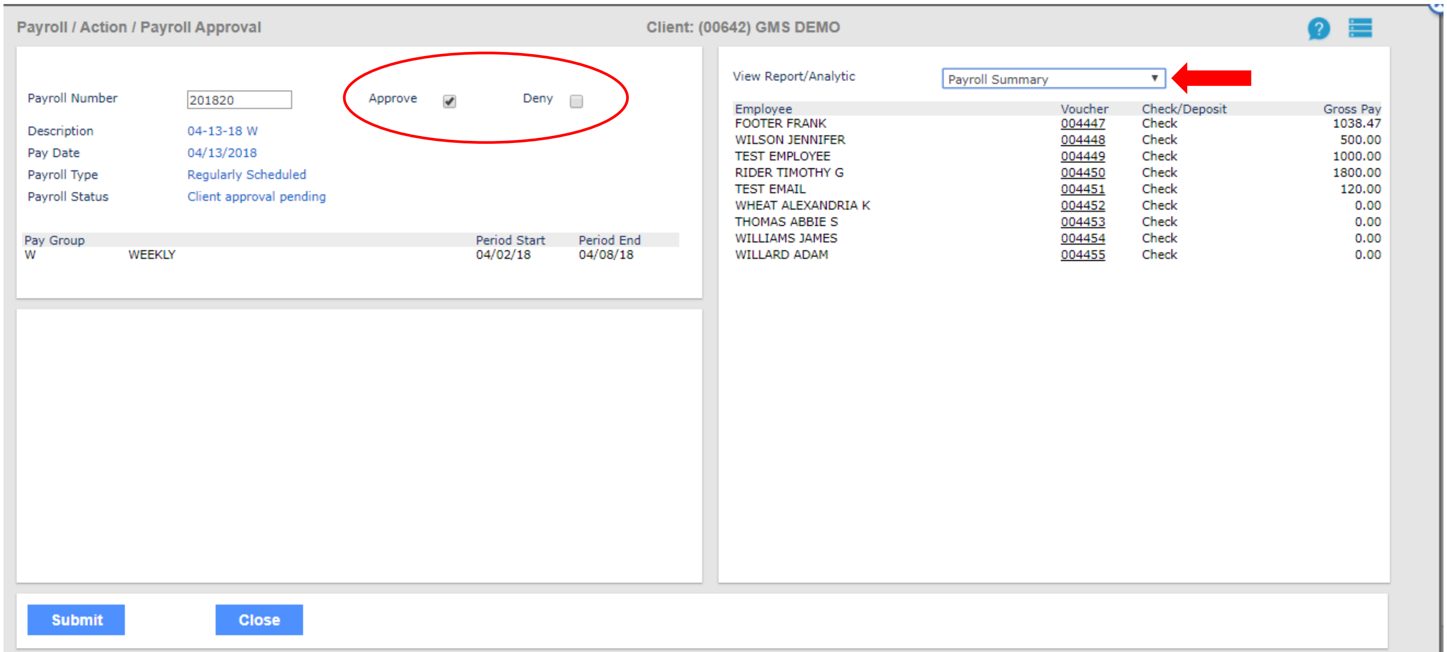


Approving Payroll

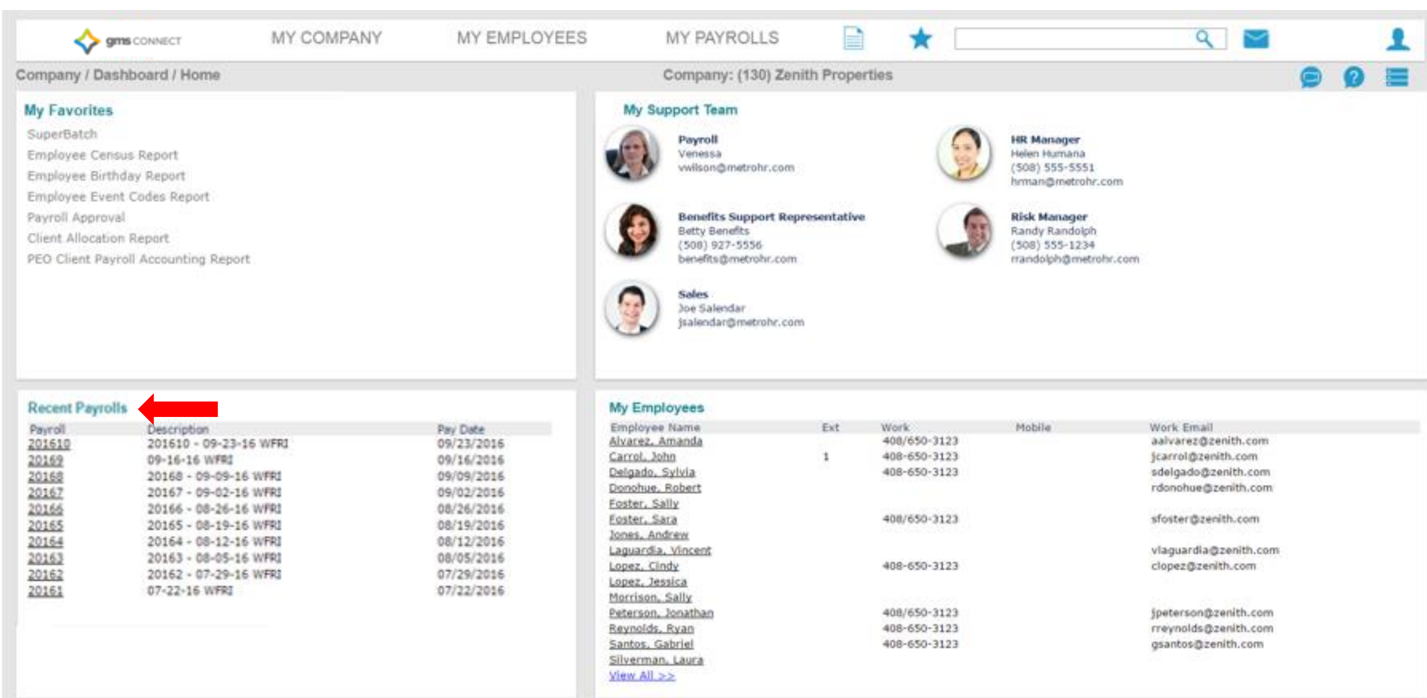
When you're happy with the way the time sheet looks, you will hit "finalize" and the batch will be sent to GMS for processing. When your preview is available, you will receive an email notification. Navigate to "Payroll Approval" on your "Favorites" menu or by using the search bar:



On the "Payroll Approval" screen, you may review all of your reports by using the drop-down menu. You can then deny the batch if you need to make changes, or approve it. Click "Submit" when you're done and we will finalize your payroll.

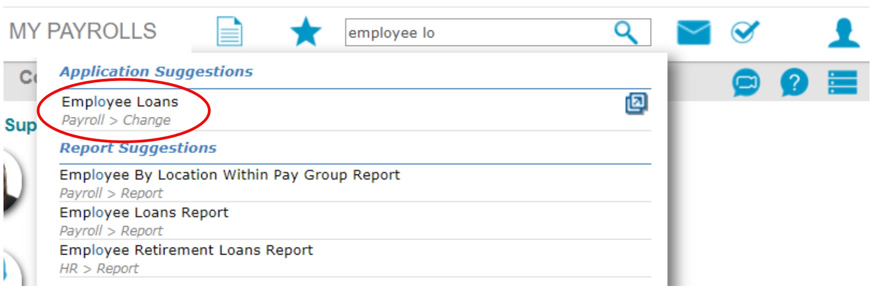


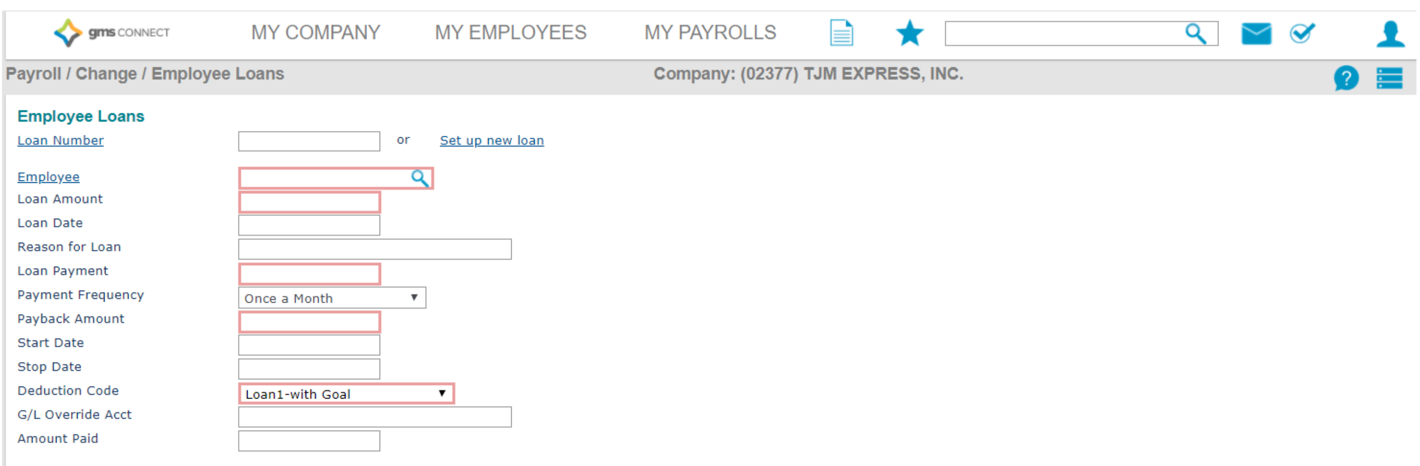
Once the payroll has been completed, your final reports are available under "Recent Payrolls":



Employee Loans

In GMS Connect, you can establish employee loan information, track the payment of the loan, and view loan payments that were deducted from employee paychecks. Use the search bar to bring up the “Employee Loan” screen:



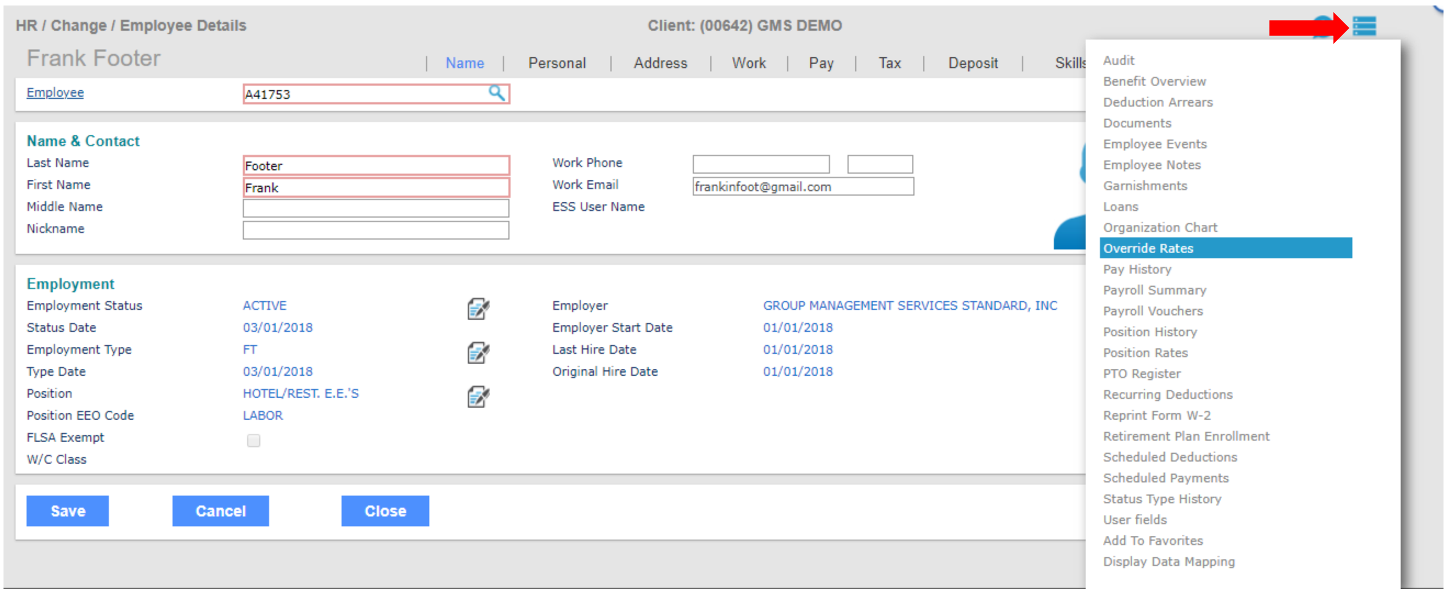


1. Select an existing *Loan Number* or click **Set up a new loan**.
2. Enter the *Employee* by clicking the “Employee” field label to open the search window.
3. Enter the *Loan Amount* granted to the employee.
4. Enter the *Loan Date* on which this loan was granted.
5. Enter the *Reason for Loan*.
6. Enter the *Loan Payment* to automatically deduct from each paycheck to repay the loan.
7. Select the *Payment Frequency* for the payroll deduction.
8. Enter the *Payback Amount* required to consider the loan paid in full, which is the amount of this loan plus interest.
9. Enter the *Start Date* on which payroll deductions will begin to pay back the loan.
10. Enter the *Stop Date* on which payroll deductions will cease. *If you do not enter a Stop Date, GMS Connect continues to deduct loan payments until the Payback Amount has been satisfied.*
11. Enter the *Deduction Code* used for the employee loan.
12. The *Amount Paid* field displays the amount that the employee has paid back on this loan to date.

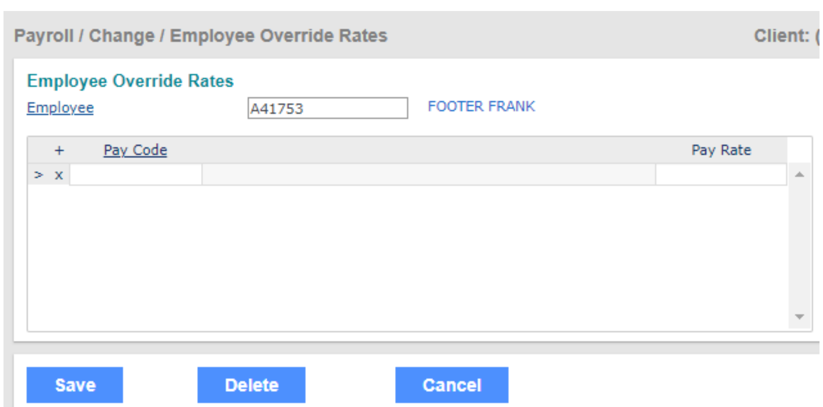
If you are entering information a loan where the employee has already made some payments, enter the total paid to date in this field.

Override Rates

In the Employee Override Rates form you can define a different pay rate for each pay code used to pay the employee. For all other pay codes, the system defaults to the employee's standard pay rate. Access this form from the Employee Details Action menu:



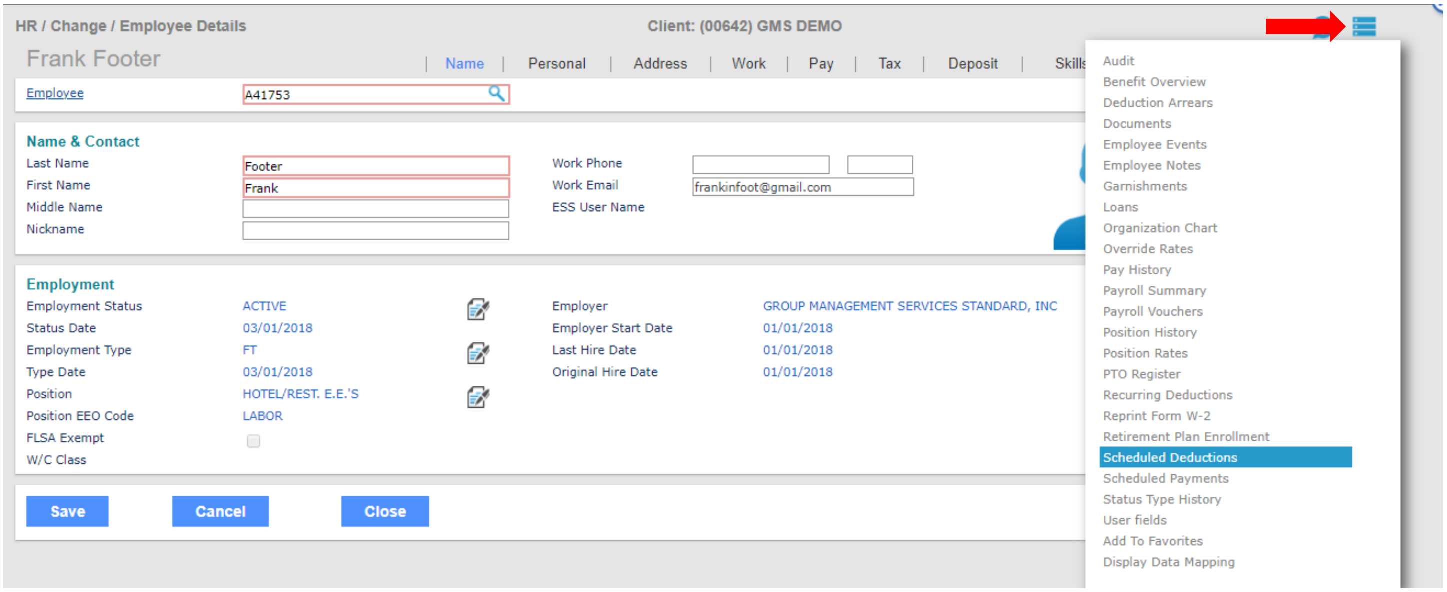
For example, an employee regularly works as a server but occasionally tends bar. Because the hours worked in each position vary from one week to the next, you should have pay codes for each position. The pay voucher would display the amount earned as a server and as a bartender.

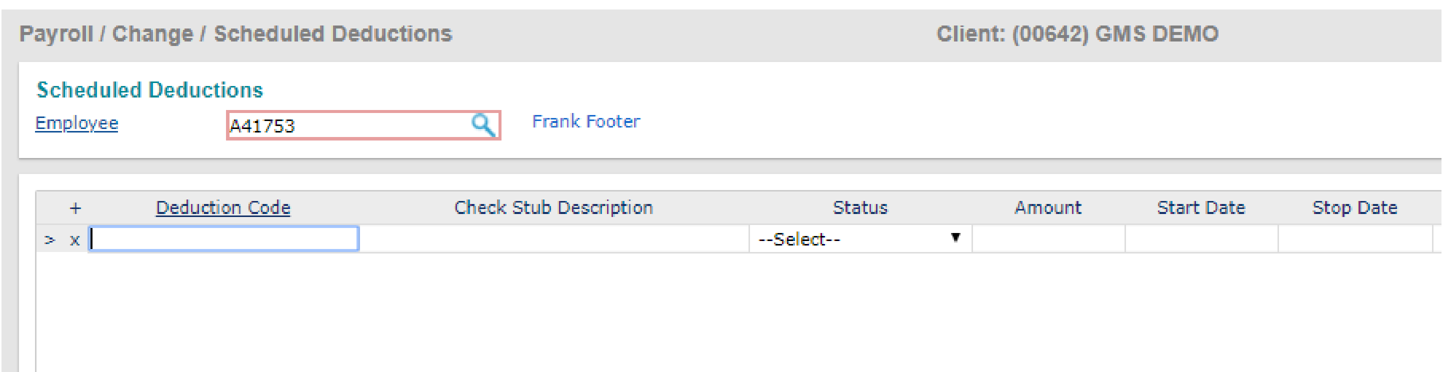


1. The *Employee ID* defaults from the Employee Details form.
2. For each pay code:
   a. Enter the *Pay Code* that represents the pay to override.
   b. Enter the *Pay Rate* for that pay code.
3. Click **Save**.

Scheduled Deductions

A Scheduled Deduction establishes either a one-time or ongoing deduction for an employee.

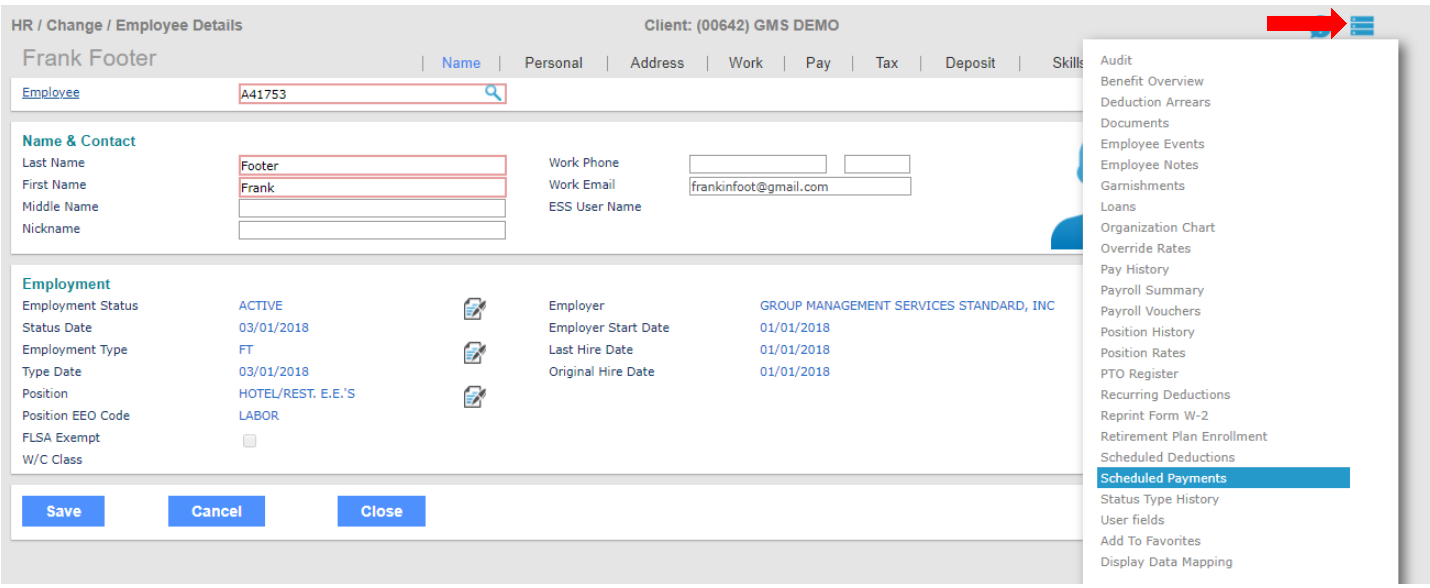


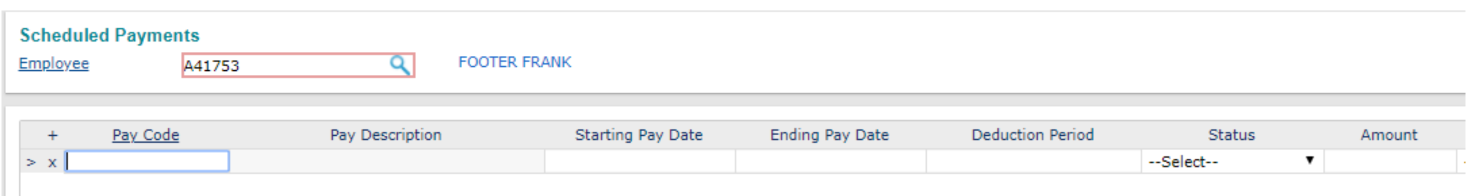


1. Enter the *Deduction Code*.
2. Select the deduction *Status* to specify when the deduction occurs:
    - **One Time**: The system takes the deduction once during the specified pay range and then sets it to **Inactive**.
    - **Active**: The system takes the deduction each pay period during the date range.
    - **Inactive**: The system has stopped taking the deduction.
3. Enter the *Amount* to deduct from the employee's net earnings (after taxes).
4. Enter the *Start Date*; the system begins processing the deduction on or after this date.
5. Enter the *Stop Date*; the system stops processing this deduction on or after this date.
6. Click **Save**.

Scheduled Payments

A Scheduled Payment establishes payments for a specific date in the future, or a repeated payment each pay date during a specified time period.

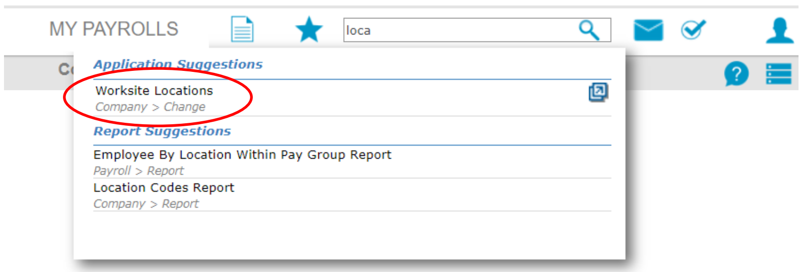




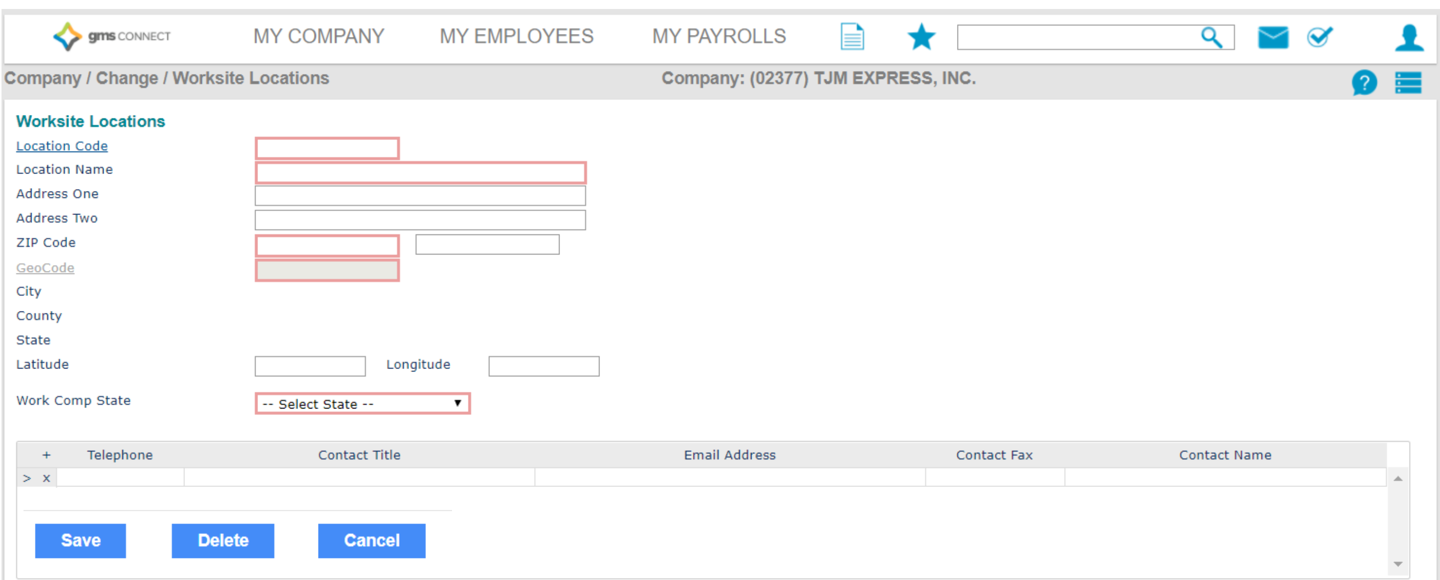
1. Enter the *Pay Code* for this payment. The *Pay Description* displays.
2. Enter the *Starting Pay Date* and *Ending Pay Date* when the payment is in effect.
3. Enter the *Deduction Period* to make this payment on certain periods within the date range. For example, if you enter 2, GMS Connect makes the payment in the second pay period of the month.
4. Select the *Status* to specify when the scheduled payment occurs:
    - **One Time**: The payment is made once during the specified pay range and then set to **Inactive**.
    - **Active**: The payment is made each pay period during the date range.
    - **Inactive**: No payment will be made.
5. Enter the *Amount* to pay the employee.
6. Click **Save**.

Locations

You can manage worksite locations by navigating to My Company/Worksite Locations or using the search bar:

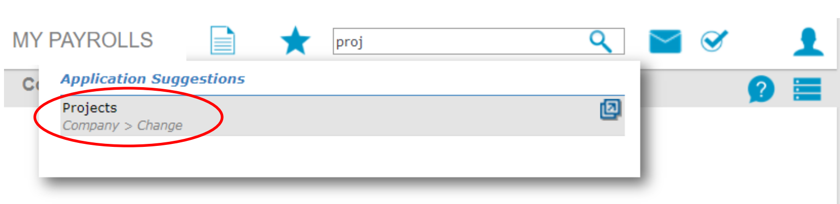


1. Select an existing location by clicking "Location Code," or enter a new one.
2. Enter the zip code for the location. You will be prompted to select the proper geocode, which will prompt the system to withhold the proper taxes for the location.
3. Select the Worker's Comp State under which the location is covered by worker's comp insurance.
4. Click **Save** and your location will be available for use.

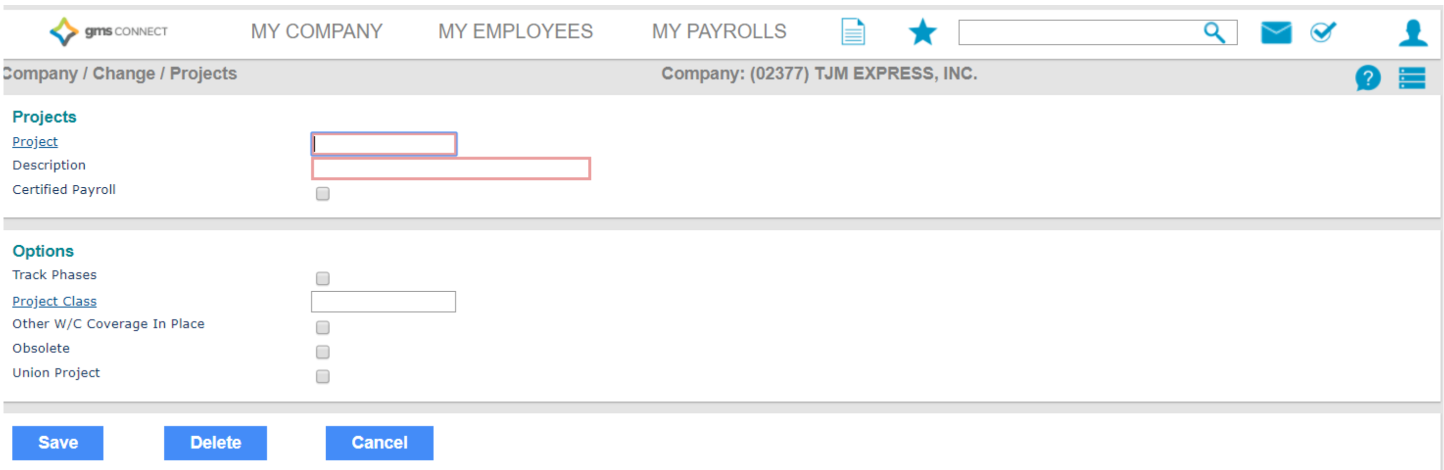


Projects

You can manage projects by navigating to My Company/Projects or using the search bar:

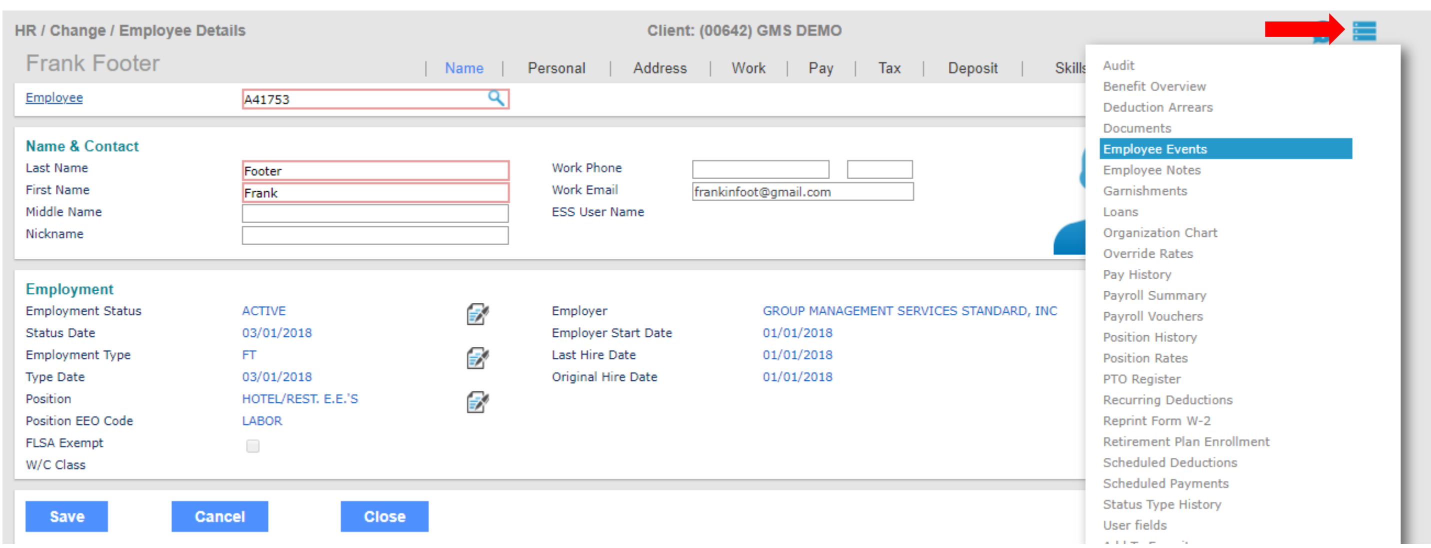


1. Select an existing project by clicking "Project," or enter a new one.
2. If your project is a certified project, select the "Certified Payroll" box and more options will appear. If you have any questions about these fields, contact your Payroll Specialist.
3. Click **Save** and your project will be available for use.

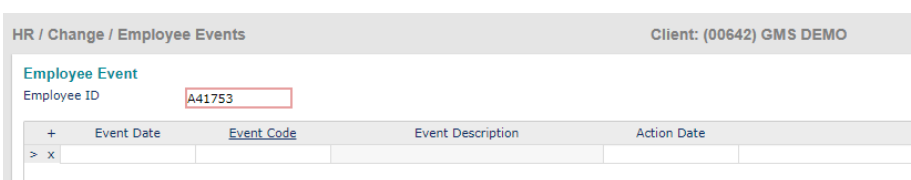


Event Codes

Employee events can be tracked under Employee Details/Employee Events:

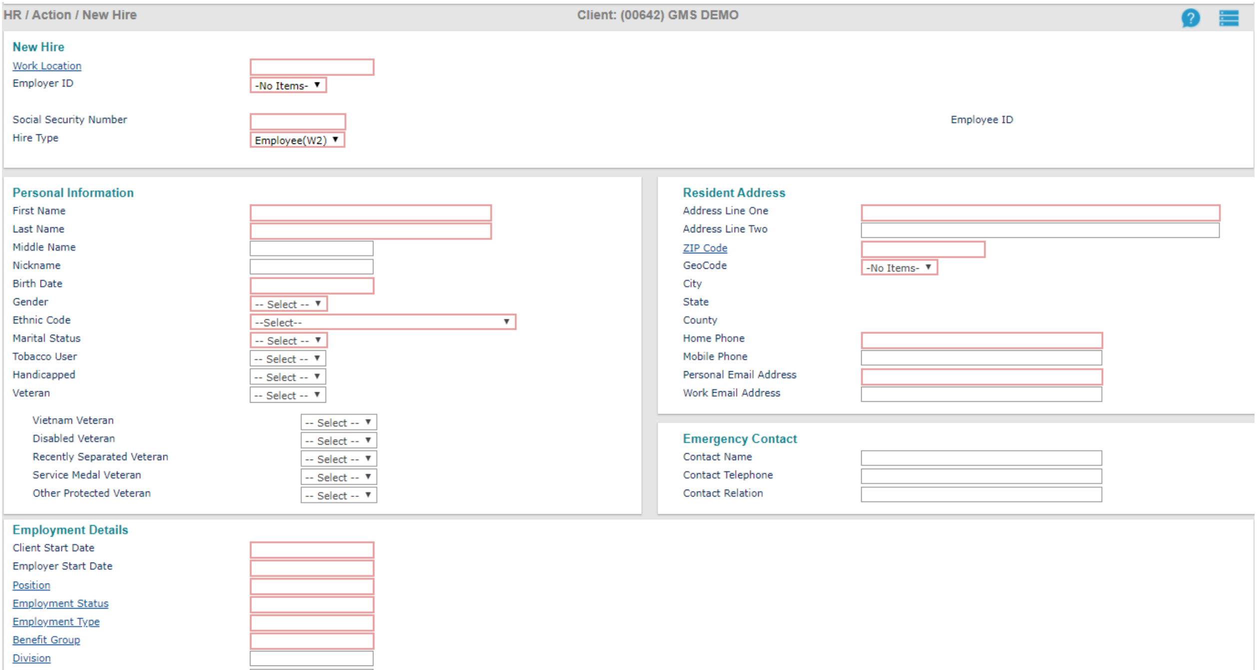


Enter the *event date* and the *event code,* and save.



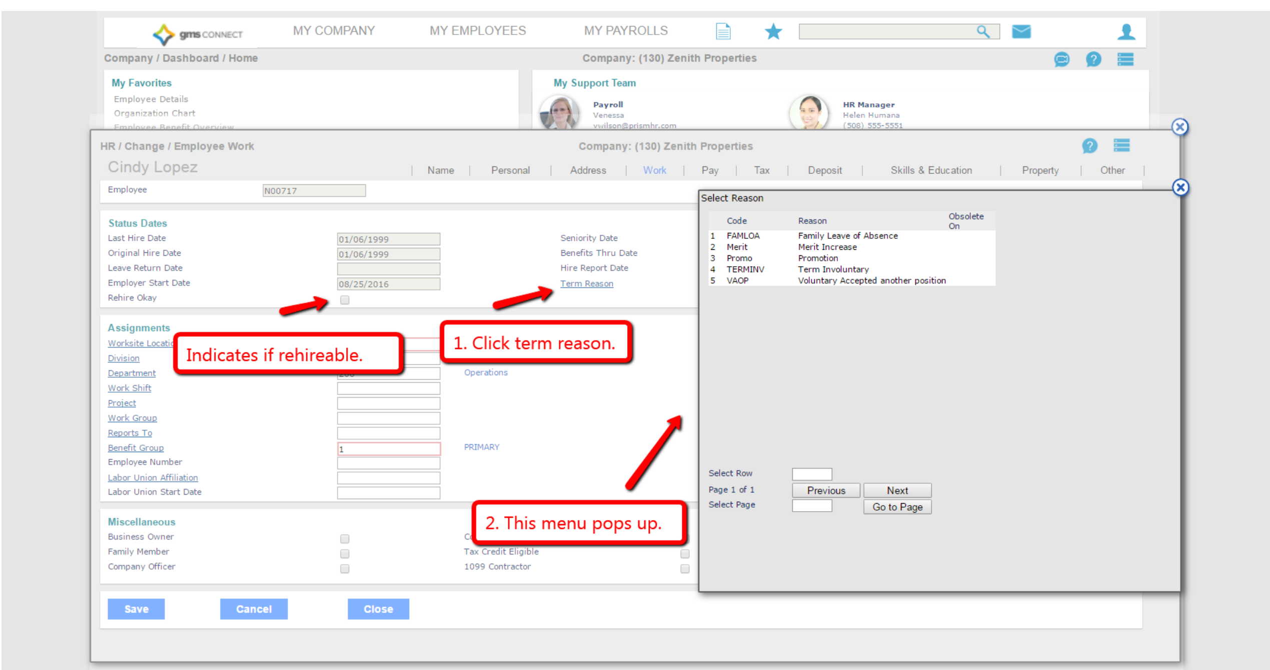
New Hire

Navigate to HR/Action/New Hire and enter the appropriate fields. Required fields are in **RED**.



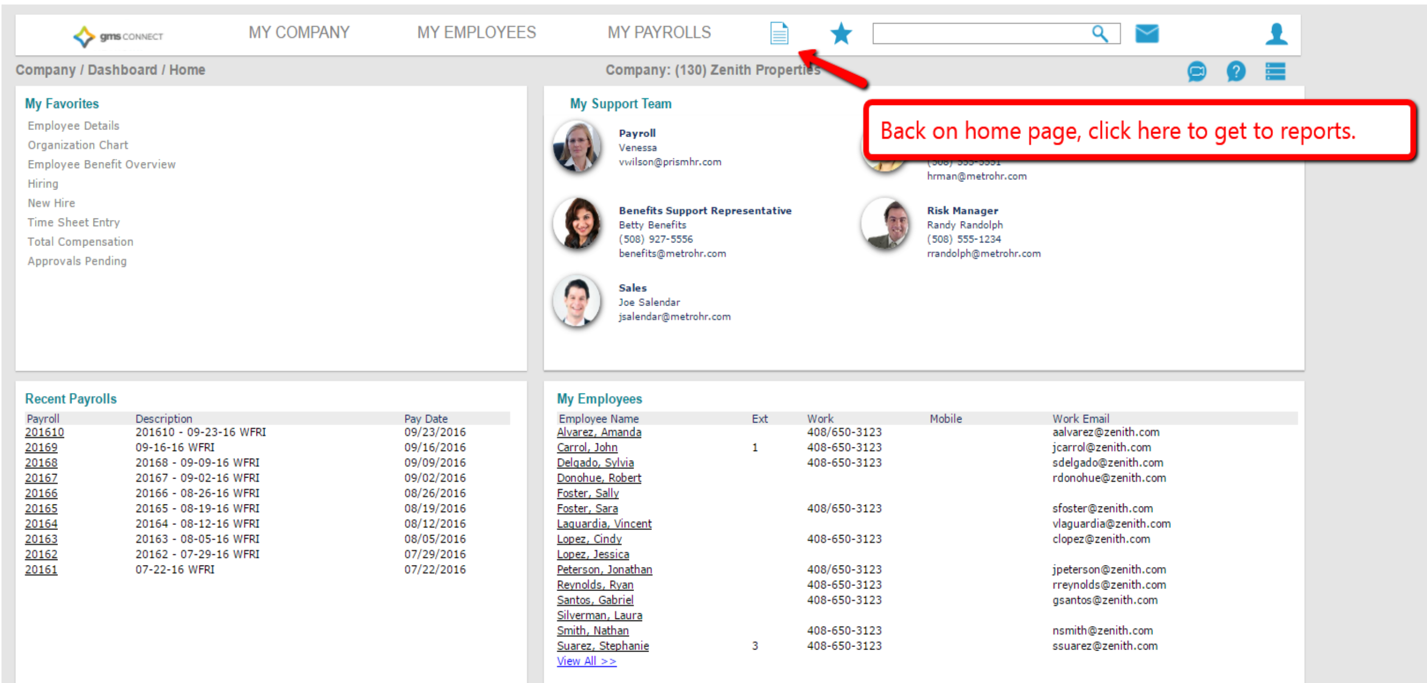
Termination

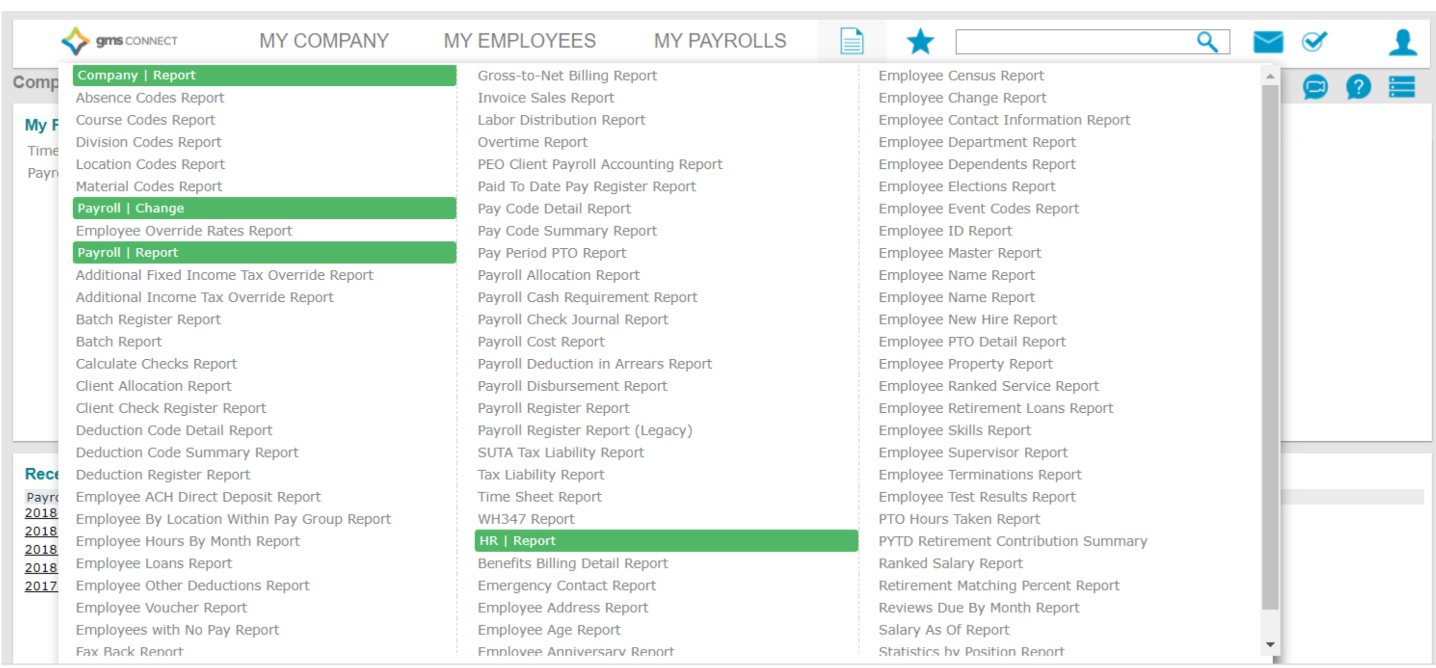
Navigate to HR/Action/Termination and enter the appropriate fields. Required fields in **RED**. Be sure to check the indicator that the employee is eligible for rehire, if applicable.



Reports

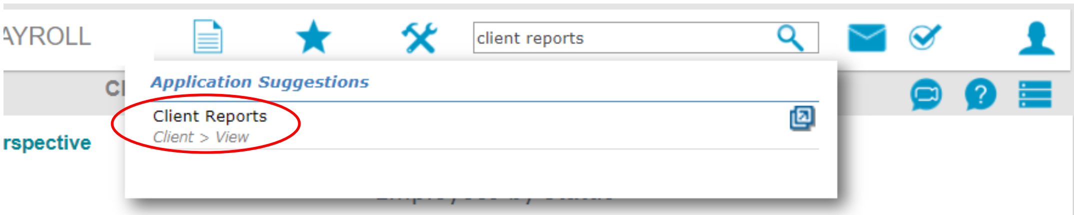
Click the "reports" button on the Navigation Toolbar to access the various reports available in GMS Connect. These can all be generated and exported to excel, pdf, or csv. format. You can drill down by location, department, position type, etc. to get a clear picture of your employee data with the exact information you are looking for.



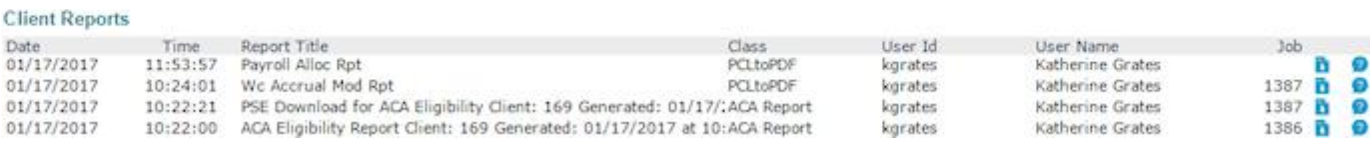


Company Reports

A library of reports is available by navigating to My Company/Client Reports or by using the search bar. This is where you will find reports processed by your Payroll Specialist.



Click the icon to the right of the report to download a copy.

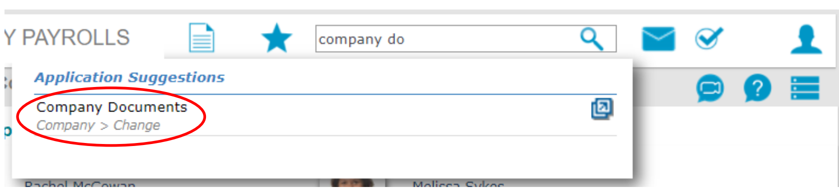


Client Reports

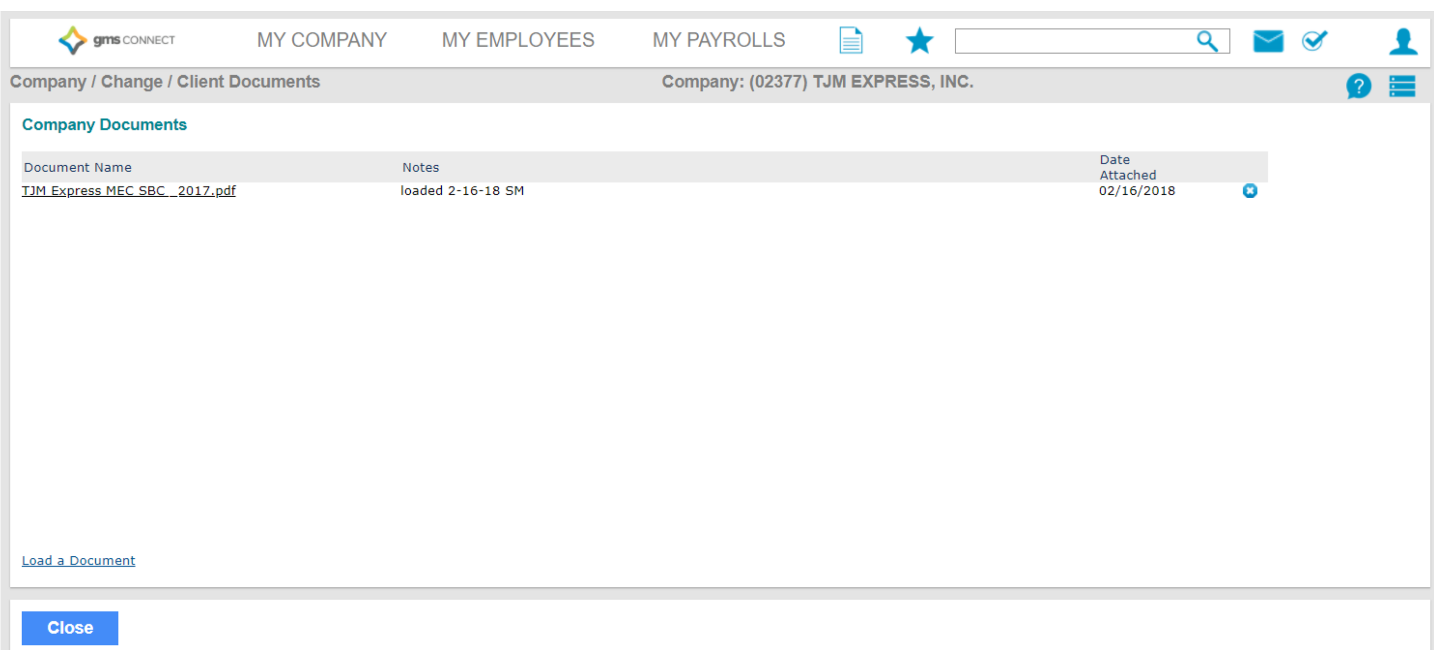
Date	Time	Report Title	Class	User Id	User Name	Job
01/17/2017	11:53:57	Payroll Alloc Rpt	PCLtoPDF	kgrates	Katherine Grates	
01/17/2017	10:24:01	Wc Accrual Mod Rpt	PCLtoPDF	kgrates	Katherine Grates	1387
01/17/2017	10:22:21	PSE Download for ACA Eligibility Client: 169 Generated: 01/17/:	ACA Report	kgrates	Katherine Grates	1387
01/17/2017	10:22:00	ACA Eligibility Report Client: 169 Generated: 01/17/2017 at 10:	ACA Report	kgrates	Katherine Grates	1386

Company Documents

A library of reports is available by navigating to My Company/Client Documents or by using the search bar.

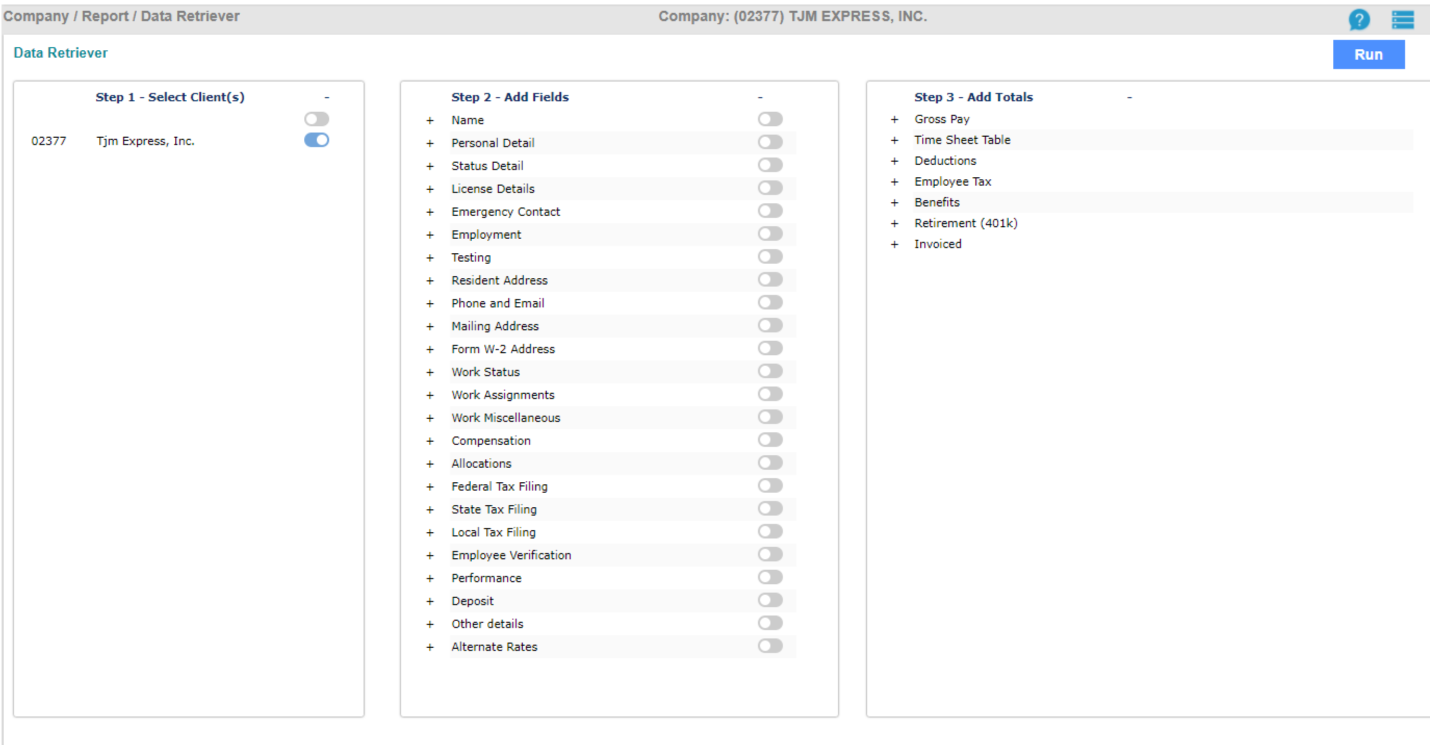


You can upload important documents to have on hand whenever you need them.

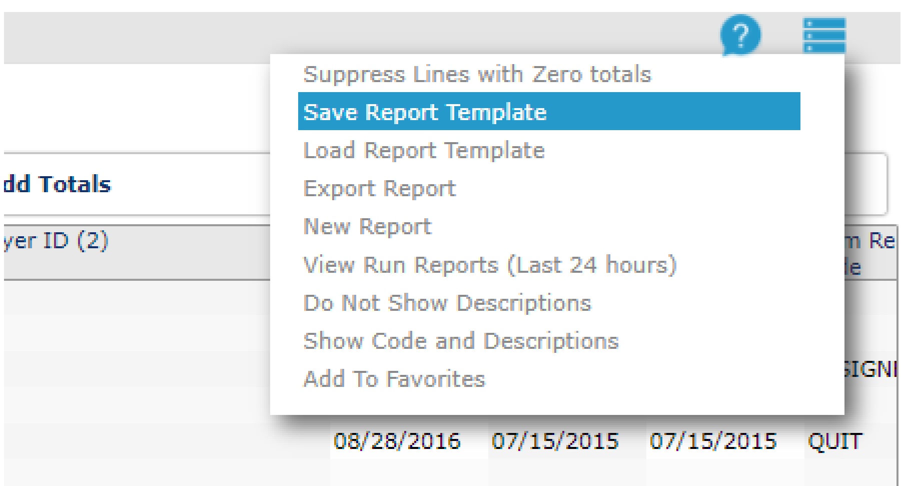


Data Retriever – Custom Reporting

Search for “Data Retriever” in the search menu. The following screen displays:



You can select any parameters you would like to build your own custom reports! The setup can then be saved for future use:



We hope that this guide has been helpful in getting started with GMS Connect – should you require assistance, feel free to call us at (330) 659-0100.