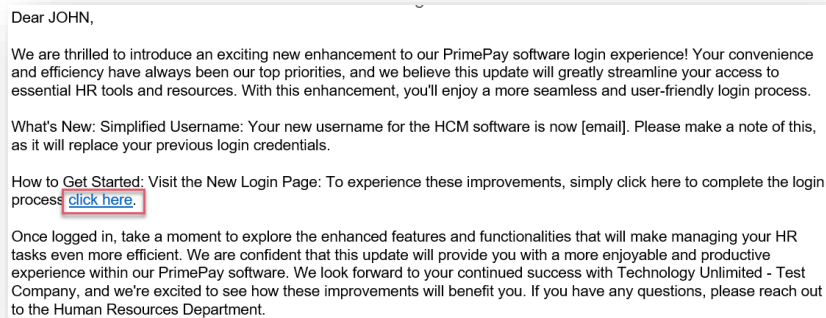# Employee Self Service User Guide

Overview

This document describes the main functionalities of the enhancements to the Employee Self-Service portal, including performing various actions such as, manage personal information, update settings and preferences, panel visibility filters using the mobile app or web browser.

Accessing Portal

You will receive a welcome email providing your Username with instructions on how to reset your password and start using the enhanced employee self-service experience. From the email body click here to get started. (Sample Below)

Dear JOHN,

We are thrilled to introduce an exciting new enhancement to our PrimePay software login experience! Your convenience and efficiency have always been our top priorities, and we believe this update will greatly streamline your access to essential HR tools and resources. With this enhancement, you'll enjoy a more seamless and user-friendly login process.

What's New: Simplified Username: Your new username for the HCM software is now [email]. Please make a note of this, as it will replace your previous login credentials.

How to Get Started: Visit the New Login Page: To experience these improvements, simply click here to complete the login process click here.

Once logged in, take a moment to explore the enhanced features and functionalities that will make managing your HR tasks even more efficient. We are confident that this update will provide you with a more enjoyable and productive experience within our PrimePay software. We look forward to your continued success with Technology Unlimited - Test Company, and we're excited to see how these improvements will benefit you. If you have any questions, please reach out to the Human Resources Department.

OR login by visiting: https://clients.synchr.com/ add Username and click **Forgot Password** to get started.
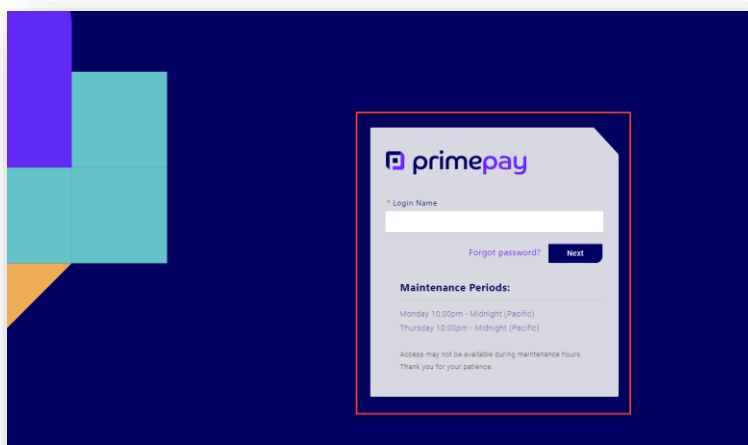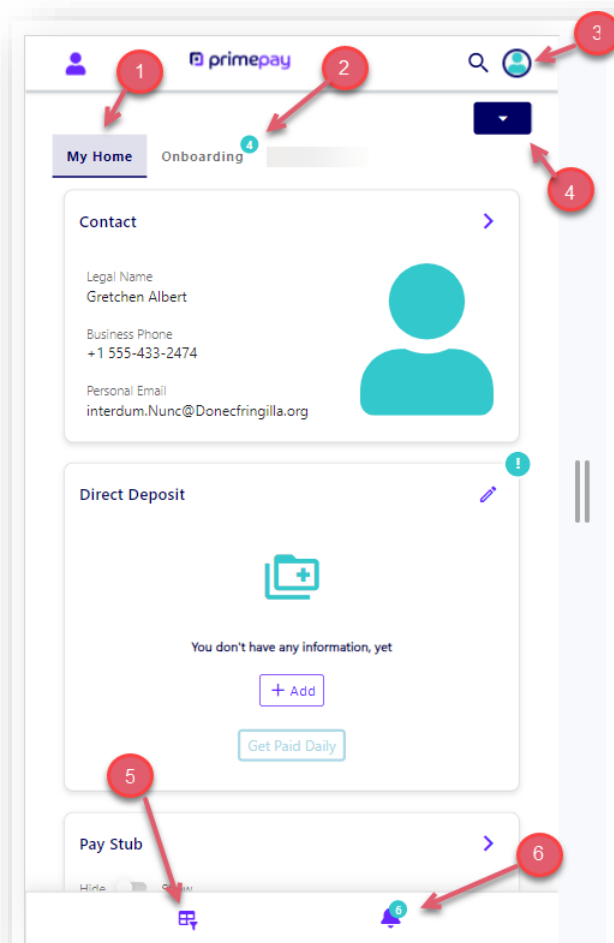
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Employee Dashboard

Upon logging into the Myself page, users will be directed to the Onboarding Menu if there are any incomplete or missing tasks that need attention.

1. **My Home:** Provides panels such as Contact & Personal Information, Direct Deposit details, Dependents & Beneficiaries, and Company Documents.
2. **Onboarding:** Access a list of outstanding onboarding tasks.
3. **User Profile:** Access Account and Notification Settings such as add/update profile picture, updating password, and language and notification preference.
4. **Shortcut:** Redirects employees to any added features such as Time & Attendance and Reporting a Benefit Life Event.
5. **Panel Filters:** Access to re-sort panels and disable visibility to panels.
6. **Personal Task Center:** View any action needed items assigned to employees such as Performance Management, Benefit Events and License & Certification Renewal Reminder.
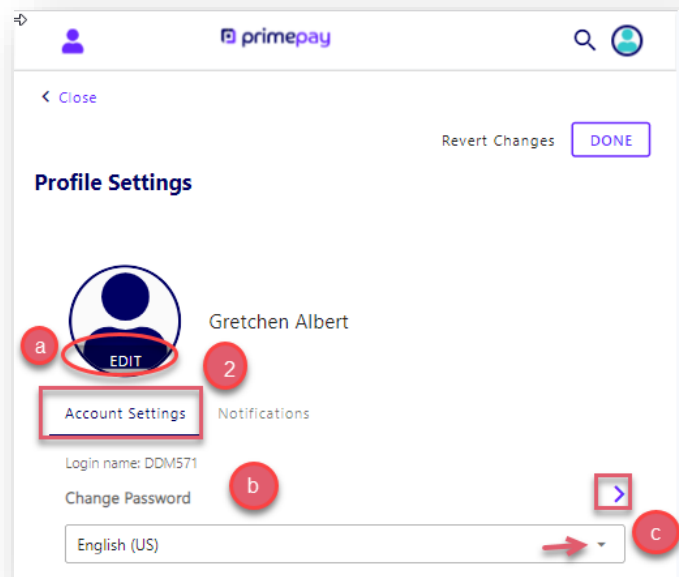
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User Profile Settings
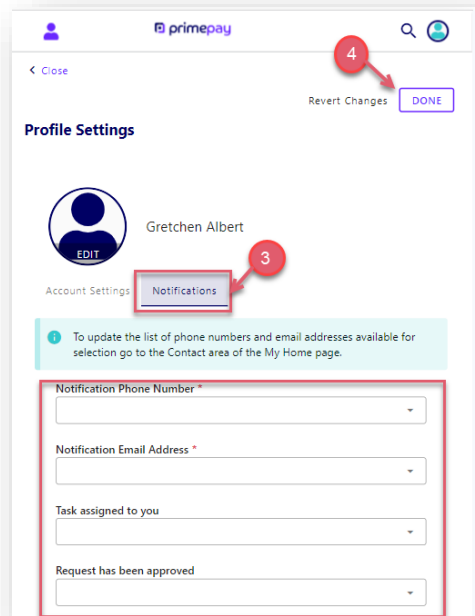
1. Click on User Profile icon, then select **Settings.**
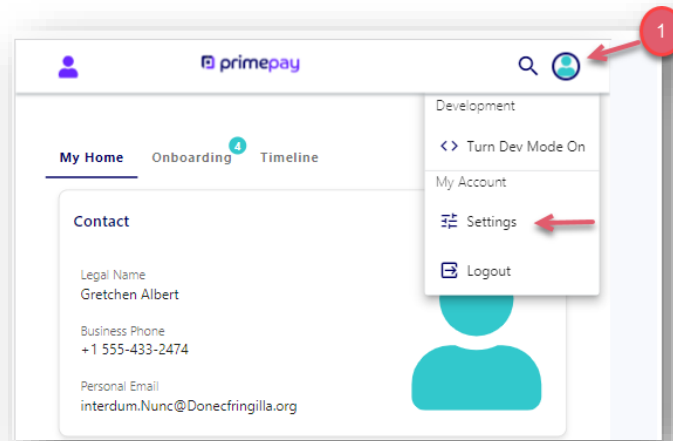
2. Under **Account Settings:**
   a. Upload Profile Picture
   b. Change Password
   c. Change Language Preference
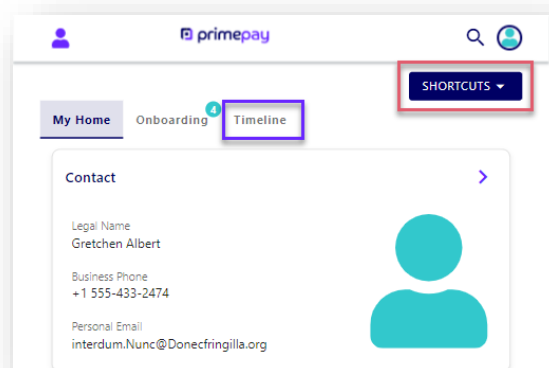
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3. Under **Notifications,** employees can configure notification settings for various tasks.
4. Click **Done** to save changes.

Short-cuts & Timeline

The **Short-Cut** menu redirects employees to any added features configured by their employer such as Time & Attendance, Benefit Enrollment or Get Paid Daily.

The **Timeline** menu provides access to employment timeline related information such as dates of employment, positions, and compensation history.
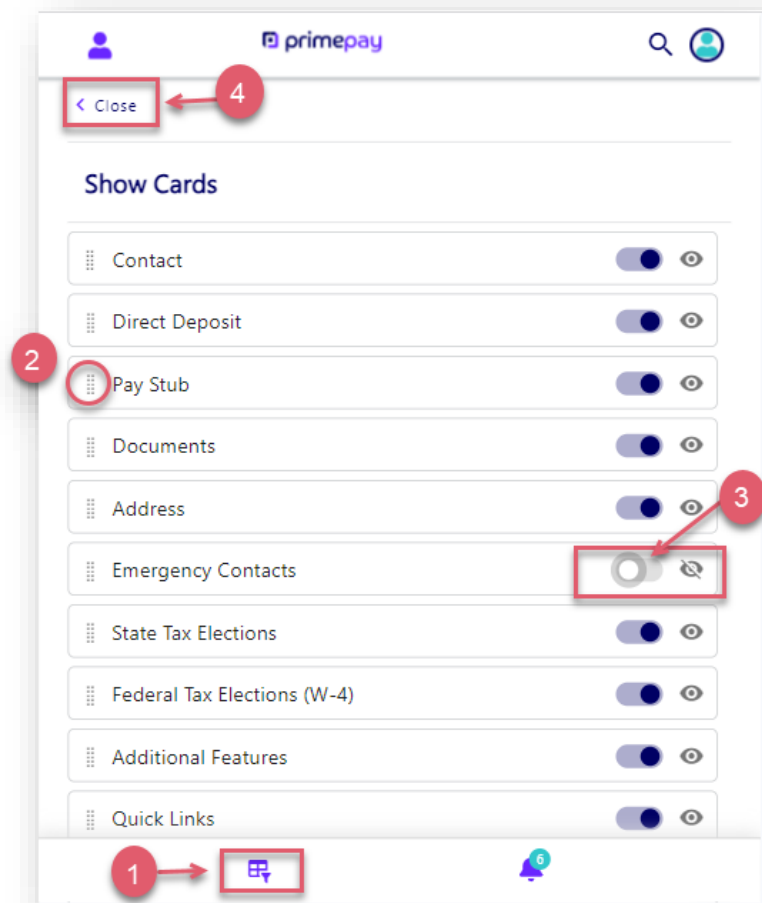
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Panel Filters

From the user menu, employees may re-sort the order or disable panels.

1. Click Panel Filter from the My Home Page.
2. Drag and drop the panels in the order desired.
3. Disable panels by switching visibility panel menu on the right.
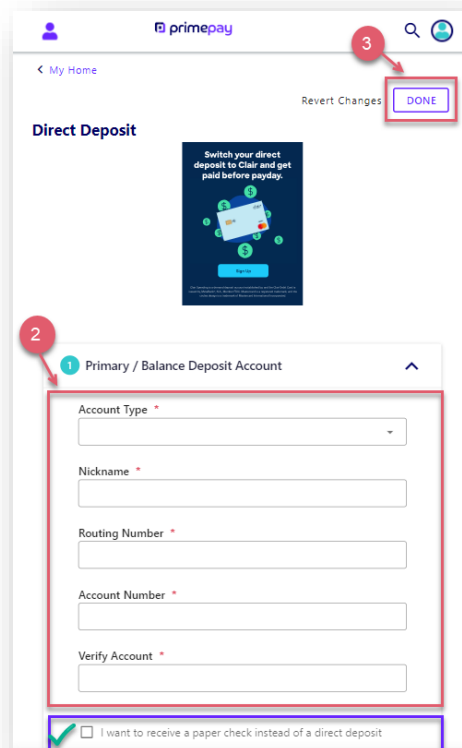4. Once panel preferences click, **Close.**

Add or Update Direct Deposit

1. From the **My Home,** scroll down to **Direct Deposit** panel and click **Edit** (pencil icon) or **+Add**.

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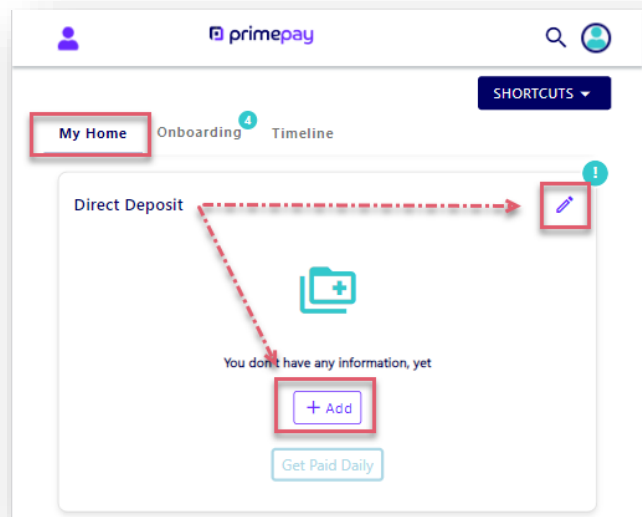
2. Users can either add **Primary / Balance Account** information **or** elect to receive a paper check instead of direct deposit by activating box.
3. Click **Done** to save.

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4. Add additional deposit by amount or percentage by clicking arrow down next to field.
5. **Summary** provides a breakdown of all assigned deposits.
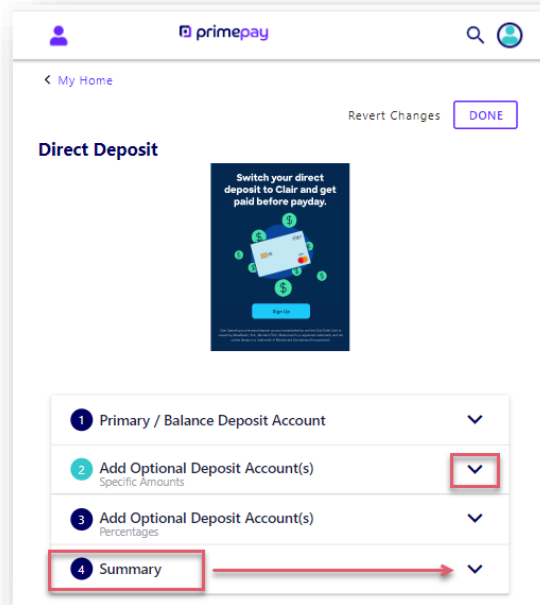
Personal Task Center

1. Access your personal task center by clicking on the **Bell** icon.
2. A detailed list of tasks will be displayed.
3. Click on the Task to complete and close.