

PrismHR Payroll Specialist Certification

Study Guide

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This study guide will help you prepare for the PrismHR Payroll Specialist Certification exam. To achieve the best score, ensure you understand the functionality and processes in each of the following areas. Good luck!

Introduction to PrismHR Payroll

General Payroll Specialist Concepts in PrismHR

- *Navigation:* Know how to utilize global search, code lookups, and menu structure in the PrismHR interface.
- *Key Terminology:* Familiarize yourself with terms such as gross pay, net pay, deductions, and payroll vouchers.

Employee Management

Transferring Employees

Items Excluded in Transfer: Understand which items are not transferred when using the Transfer Employee to New Client utility.

Creating and Managing Employee Records

Forms and Modules: Use the forms and modules in PrismHR that allow you to create and update employee records.

Payroll Processing

Payroll Calculation and Approval

Configuring Approvals	Configure and troubleshoot system-generated payroll calculation approvals for both standard and multi-step approvals.
Form I-9	Follow best practices for setting up I-9 approvals.
Reviewing Calculations	Verify payroll calculations for accuracy using standard and blended overtime rules, reports, and other criteria.
Payroll Control	Understand the purpose, functionality, and availability of the Payroll Control Form items and options.
SuperBatch	Know the SuperBatch form, options, and functionality.
Timesheet Entry	Understand the Timesheet Entry form, available options, and best practices.
Pay Data Imports	Understand the Pay Data Import definitions form, and how to configure and use Pay Data Imports.
Handling Payroll Errors	Common Errors: Recognize and correct common payroll errors such as missing filing status, payroll concurrency conflicts, worker's compensation and benefit plan errors, and incorrect deductions.

Payroll Reports and Forms

Generating and Retrieving Reports

- *Key Reports:* Understand the contents and uses of important reports, including Accounting G/L Detail Download, Gross-to-Net, Payroll Allocation, Client Allocation, Payroll Billing Summary, Payroll Variance Reports, Time Sheet Report, ACH History Report, and standard payroll reports generated during payroll processing. Also, know how to locate these reports in PrismHR.
- *Importance of Payroll Reports:* Understand the importance of payroll reports in managing employee compensation, ensuring compliance with tax laws, and maintaining accurate financial records.

Payroll Vouchers and Payroll Calculation

- *Reviewing Vouchers:* Review and troubleshoot initialized payroll vouchers after calculating payroll, including taxes and benefit deductions.
- *Voiding and Reversing Vouchers:* Follow procedures for voiding and reversing payroll vouchers.
- *Setting Voucher Amount Limits:* Establish minimum and maximum limits for pay amounts on payroll vouchers.
- *Check Signatures:* Verify that a check signature is configured for a client or bank account.
- *Manual Checks:* Follow procedures for recording manual checks issued by clients.

Payroll Deductions and Benefit Adjustments

Managing Deductions

- *Garnishments*: Configure and troubleshoot garnishment deductions.
- *Section 125 Deductions*: Set up and manage Section 125 deductions.
- *Worker's Compensation*: Understand the purpose of workers' compensation as it relates to payroll, and how it is configured in PrismHR.
- *Benefit Adjustments*: Know how to enter and view Benefit Adjustments.

Retirement Plans

- *Setting Up Matches*: Configure retirement match rules and validate matches.
- *Handling Adjustments*: Adjust retirement plan enrollments.

Paid Time Off

- *PTO Forms and Registers*: Know the different forms and registers used to calculate PTO accruals.
- *Troubleshooting PTO Issues*: Understand how to troubleshoot PTO issues.
- *Global PTO Setup*: Know how to set up Global PTO.

Time Sheet Management

Importing and Managing Time Sheets

Importing Data	Import time sheet data and troubleshoot import issues.
Pay Data Imports	Configure Pay Data Imports.
Managing Entries	Add and update time sheet entries and manage default hours.

Time Sheet Entries

Adding Entries	Add employees to time sheets and update entries
Managing Pay Codes	Configure and manage pay codes available for use on time sheets
Reported Tips	Understand how <i>Reported Tips</i> work and the <i>Minimum Wage Adjustment</i> functionality.

Advanced Payroll Topics

Off-Cycle Payroll Batches

- *Creating Batches:* Create manual and special payroll batches.
- *Handling Off-Cycle Payrolls:* Manage off-cycle payrolls for bonuses or other special payments.

Multi-Factor Authentication (MFA)

- *Importance:* Understand the importance of MFA for online security.
- *Setup:* Set up MFA in PrismHR.

Accounting and Billing

Miscellaneous Invoices	Understand how to issue miscellaneous invoices, how they differ from standard payroll invoices, and how to correct errors on posted invoices.
Invoice Detail and Formatting	Know the contents of invoices and how they can be modified to display items differently.
Billing	Understand the setup of Bundled and Unbundled billing, how payroll generates billing amounts and credits to admin fees, and how to refund billed items. Know event-driven fees and understand Cash Receipts and their relation to invoices.
ACH and Wire Transfers	Set up Employee Direct Deposits and the available options. Understand how to handle Wire Transfers and set up Client ACH billing. Know how to set up Pre-ACH, locate and use the ACH History Report, and understand Positive Pay and its configuration.
Payroll Taxes	Understand the purpose of the Vertex Tax Calculation Guide and how it can be used to troubleshoot tax deductions. Know how worksite and resident locations affect taxation.
Unhandled Tax Forms	Understand Unhandled Tax Forms and the effect on payroll calculations. Know the options available to change the severity level of notifications.

Support and Customer Experience

Customer Service: Demonstrate an understanding of best practices for issue resolution and responding to customer requests.

Additional Study Resources

- **PrismHR Learning Management System:** Complete the [PrismHR Foundations learning modules](#).
- **[Customer Resource Center](#):** Review user guides and payroll-related articles.
- **PrismHR In-App Help:** Review the payroll section and the troubleshooting payroll error section.

Please contact certifications@prismhr.com with any questions.



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