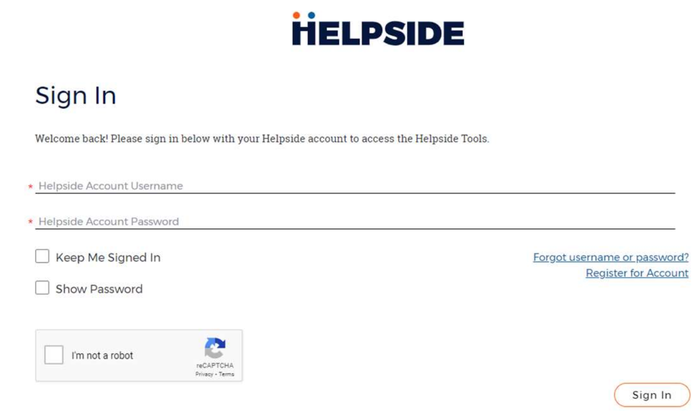
HELPSIDE TOOLS USER ROLES

The Helpside Tools gives you access to information and allows you to make changes to employee and company information at your convenience. Many companies have the need for different levels of access across company contacts to ensure privacy and security.

Here is how you can customize the user roles for your company contacts:

Go to: tools.helpside.com



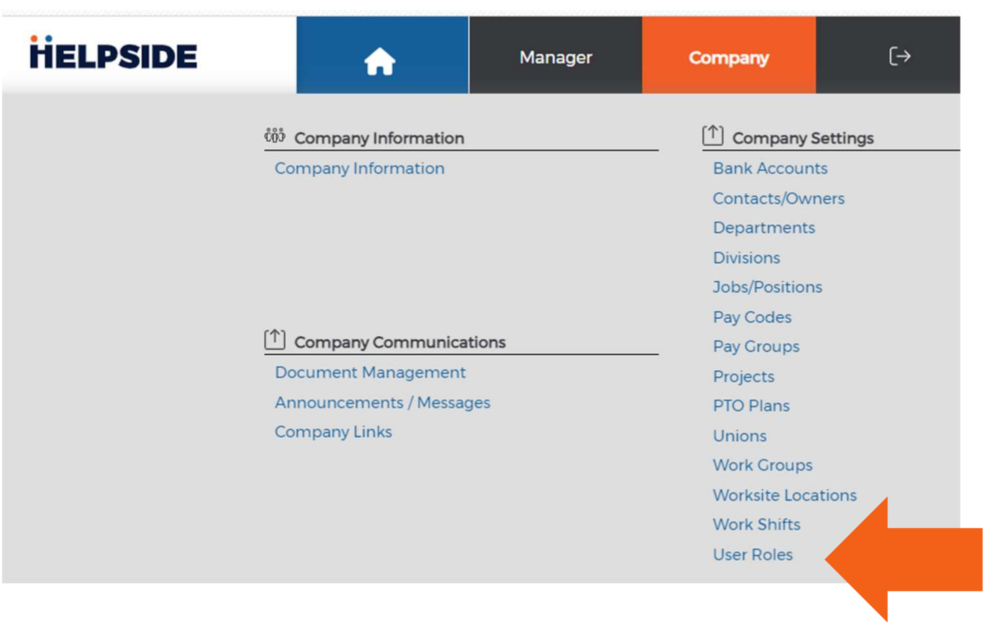
Sign in using your Helpside Account Username and Password.

Click on **Sign In.**

After logging into Helpside Tools, you will find a menu option along the top of the screen that says Company. This is where you will find **User Roles.**

Managers with one of the three levels of access will be able to add/edit User Roles for other users.

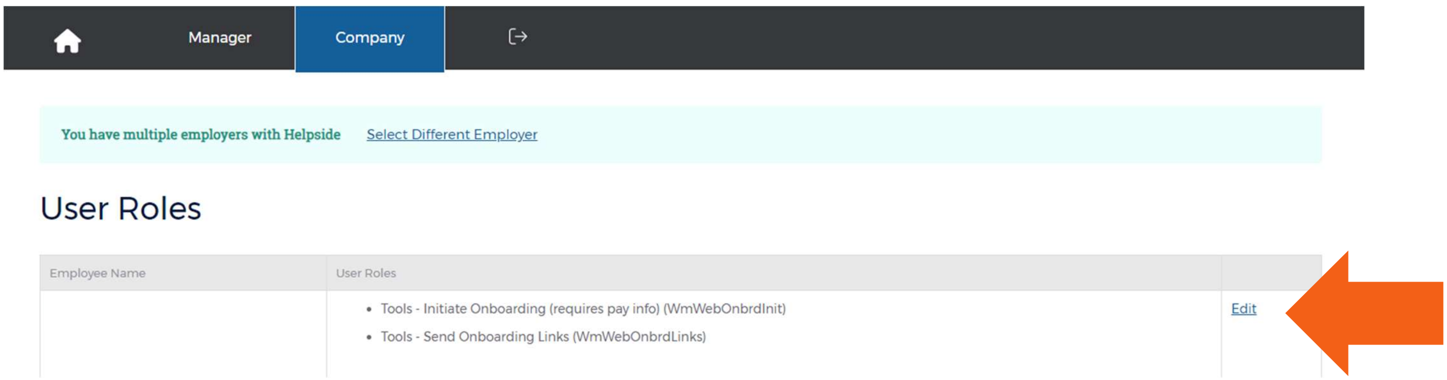
- Tools - Standard Access (WmWebStandard)
- Tools - Company Admin (WmWebCoAdmin)
- Tools - Manage User Roles (WmWebCoUserRole)



Multiple user roles can be added to a single manager to get to the desired level of access.

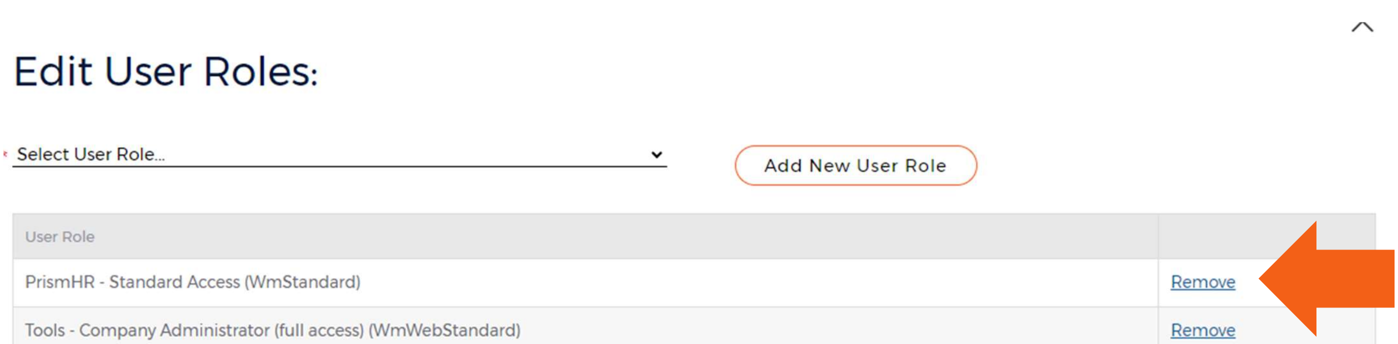
In the example below, this manager would have access to initiate employee onboarding and resend onboarding links. But they will not have access to edit or delete employee onboarding in progress.

Click **Edit** next to the manager to change their access.



Choose the User Role you would like to add from the dropdown menu and then click **Add New User Role**.

To remove a User Role from an existing manager, click **Remove**.



The chart below explains each User Role and what they have access to.

User Role Title	Access and Explanation
Tools - Standard Access	Full access user, no restrictions, includes all company and employee information including pay rates.
Tools - Company Menu Access	Access to everything under Company Menu.
Tools – Manage Company Messages, Docs, Links	Access to everything under Company Communications Sub Menu. • Announcements / Messages • Document Management • Company Links
Tools- Manage Company Announcement/Messages	Access to Announcements/Messages under Company Communications Sub Menu.
Tools – Manage Company Documents	Access to Document Management under Company Communications Sub Menu.
Tools – Manage Company Links	Access to Company Links under Company Communications Sub Menu.
Tools - Manage Company Information	Access to Company Information under Company Menu.
Tools – Manage Company Settings	Access to Company Settings under Company Menu.
Tools - Manage User Roles	Access to User Roles under Company Menu.
Tools - Employee Onboarding (full onboarding access)	Full access to anything related to employee onboarding, including I-9s and bulk I-9 downloads, and employee pay rates. • User must set a pay rate and can view and change employee pay rates during onboarding.
Tools – Initiate Onboarding (requires pay info)	Access to initiate employee onboarding, including initiate Rehire Onboarding, viewing and resending onboarding links and accessing pay rates. • User must set pay rate for the initial onboarding but cannot change pay rate after initial onboarding.

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User Role Title	Access and Explanation
Tools - Onboarding Edit (contains pay info)	Access to edit and delete existing employee onboarding. Cannot initiate onboarding. Can view and resend onboarding links. • User can see and edit pay rate during onboarding.
Tools - Onboarding Download (contains pay info)	Access to download and view employee onboarding details. Cannot initiate, edit or delete Onboarding. Can view and resend onboarding links. • User can see and edit pay rate during onboarding.
Tools – Send Onboarding Links	Access to view and resend onboarding links. Cannot initiate, edit or delete onboarding.
Tools – Manage Form I-9	Access to anything related to I-9 including: • Send Section 1 request • Submit Section 2 • Submit Supplement B • Delete, archive, and download I-9
Tools - Form I-9 View/Download Only	Access to view and download completed I-9s,
Tools - Proxy Sign-in (access all employee data)	Access to Proxy Sign In link under Employee Management in the Manager Menu. • User can view/edit all proxied employee's data include pay rates, direct deposit, etc.
Tools - Employment Info Change (contains pay info)	Access to Change Employee Information link under Employee Management in the Manager Menu. • User can view/edit pay rates
Tools – Manage Employee Hire Dates	Access to Hire Date Change link under Employee Management in the Manager Menu.
Tools - Employee Documents (contains sensitive info)	Access to Manage Documents link under Employee Management in the Manager Menu. • May contain sensitive information depending on the documents. May contain pay information.

User Role Title	Access and Explanation
Tools - Bulk download 1099 or W2 for all employees	Access to Download W2s For All Employees link under Employee Management in the Manager Menu. • Can view annual earnings on W-2s and 1099s.
Tools - Manage Employee Assignments	Access to Employee Assignments under Employee Management in the Manager Menu.
Tools – Manage Employee Offboarding	Access to Offboarding Request under Employee Management in the Manager Menu.
Tools – Manage Payroll Deductions Authorization	Access to Deductions Authorizations under Employee Management in the Manager Menu.
Tools - Accounting Export	Access to Manage Accounting Export under Employee Management in the Manager Menu. Can see employee earnings per payroll.

If you have any questions about the expanded user roles, please contact a member of the Client Success team at Helpside at 1-800-748-5102 or service@helpside.com.